LUCAS
POS User Manual

LUCAS
POS User Manual
Software Development / Technical Documentation
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Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.
An Overview on LUCAS POS

LUCAS POS is the universal retail management system for all sectors of the retail industry. With LUCAS POS, we have assembled a suite of applications that will reliably manage and control all business-critical processes in addition to providing valuable information about customers and employees.

LUCAS POS is programmed in Pure Java and runs on Microsoft Windows as well as Linux. Based on the ARTS data model, LUCAS POS employs XML interfaces to ensure easy integration with third party retail management, merchandising and stock solutions.

The following applications are part of the LUCAS POS Suite:
The Point of Service (POS) application offers a range of functions including till-oriented or operator-oriented operations, a convenient customer service system, the ability to process EFT payments and perform settlements during store opening hours, a sophisticated period concept, and secure operation based on user rights. The way buttons are arranged and the design of the configurable interface allow for quick and easy operation and reduce training to a minimum. The LUCAS POS application can be operated through a keyboard (MF2 or POS) and a two-line display instead of using a touchscreen.

In addition, the Customer Module for maintaining customer information may be integrated with the till. This allows for new customer profiles to be created at the till as well and for existing customer profiles to be viewed and edited. For each purchase a registered customer makes LUCAS POS links all items to the customer ID registered. Any discounts for specific customers or groups of customers defined using Mix&Match are applied. If the system is used at the head office, any data will immediately be available throughout the company.

Other benefits of centralized deployment include maintaining sales and voucher histories for each customer.

The (Central) Store Management System (SMS/CSMS) allows for centralized administration of all stores directly from the head office. It can be employed in stores (SMS) as well as at the head office (CSMS) and allows you to configure any workstation equipped with LUCAS POS. Moreover, it provides functions to execute daily or periodic closings, a comprehensive report function, safe administration, and closing procedures. Transactions can be analysed employing a variety of criteria (e.g. receipt totals, operators, tills), which simplifies store management and allows for improved customer service. In addition, the SMS/CSMS provides a downgraded version of warehouse management functions required on-site (maintenance of items, tax rates, and promotions), suitable for smaller maintenance tasks directly at the store.

The Transaction Pool (T-Pool) is an SQL database which runs in the head office. All company-related transactions (sales, closures, deposits, gift voucher redemptions, etc.) will be exported as XML data and will be sent from the stores to be automatically imported into the main database. Consequently all data generated in the stores will be contained in the T-Pool. This data is vital the Gift Certificate Server. However, it is possible to use this SQL database to configure and customise other analyses, or to transfer sales data from the T-Pool to the warehouse management system.

The Gift Certificate Verification Server (GCVS) is used in the head office and runs on a centralized database (T-Pool). It is employed if selling and redeeming gift vouchers is enabled across the entire company. Using the server simplifies the process of handling vouchers and reduces any occurring processing costs. The risk of multiple voucher redemptions is eliminated and therefore fraud is reduced significantly.
About this User Manual

This user manual outlines and explains the functions and operation of LUCAS POS. For an overview on components and functions, read An Overview on LUCAS POS.

Chapter 1 Launching will explain how to launch LUCAS POS.

In order to operate LUCAS POS, you must sign on. Chapter 2 Signing On will provide you with any information necessary for sign-on.

Chapter 3 User Interface will explain the LUCAS POS user interface. It will provide you with useful information on the touchscreen and on general control elements, such as input fields, list boxes and buttons.

The most important control functions within LUCAS POS executed in the Transaction and Financing windows, will be explained in chapters 4 The Transaction Window, 5 Initiate Financing (The [ Total ] Button) and 6 Financing a Transaction (The Financing Window).

Chapters 7 The Position Closed Window and 8 Exiting the Till will explain how to call up the Position Closed window and how to exit the till.

Chapter 9 Sales Functions will explain all sales functions available. Here you will learn how to return or discount items, how to reset a transaction, or carry out a settlement.

Chapter 10 Financing Functions will explain all financing functions available, e.g. financing a receipt in cash or in foreign currency, or through vouchers and coupons.

Frequently occurring keywords will be explained in chapter 11 Glossary. You can also refer to chapter 12 Index as well as the Contents to quickly access required information in this user’s manual.

The range of functions available depends on the individual customising of your LUCAS POS and the individual user rights. This could mean that some functions described in this user manual may not be available when you sign on to LUCAS POS.

The graphical user interface in the screenshots contained in this user manual may differ from the user interface at your till.
The Layout of this User Manual

Buttons, Notations und Cross References

Buttons and Notations
Terms and labelling which appear on the POS' interface are highlighted in bold. The buttons visible on the screen are either displayed in graphic form or as follows:

[ Button ]

Functions which are directly dependent on the previous execution of another function may occupy the same button as is the case in Suspend Sale and Resume Sale. The [ Resume Sale ] button will only be active and visible once a Suspend Sale function has been executed. The [ Resume Sale ] button will occupy the same position as the [ Suspend Sale ] button.

Cross References
Cross references to any chapter in this user manual are displayed in italics. Hold CTRL and click on a cross reference to jump to the desired section within the user manual. From chapter 9 Sales Functions on you will find that all chapters introducing a new menu within LUCAS POS possess an additional cross reference tool for easy navigation between chapters. For an example of this tool, please refer to chapter 9.1 The Sale Menu.

Terms used in the manual
Whenever the term “select” is used (e.g. "Select a position…", "Select a reason…" etc.), press the designated position, reason etc. on the touchscreen. The position, reason etc. is selected and highlighted in colour.

Options and Instructions

Options
Options are displayed with a bullet in front.

- Option 1
- Option 2
- Option 3

Whenever an option is displayed you may choose whether or not you would like to follow the instruction or set the preference described. There may be several options to choose from. Pick the one(s) which best suit your need at the point being. If none of the options described are needed skip the option and proceed with the following step or paragraph.

Instructions
Instructions consist of at least one or more action steps. They need to be executed in the order described.

1) Action step one.
   This paragraph may be an explanation or description regarding the first action step. It may also describe a change of state introduced by executing the action step.

2) Action step two.
   a) Action step a) which is dependend on action step 2.
   b) Action step b) which is dependent on the execution of action steps 2 and a).
      Exception: equated and non-dependent action steps are marked by the word “or”.

3) Action step three.
Optional action step following action step 3.
In some cases instructions may have additional options. The operator may decide which of the options described is relevant to them or whether or not they would like to carry out or skip the option.
   a) Options may have depending action steps as well.

**Additional information**
Additional information is displayed as follows.

<table>
<thead>
<tr>
<th>Box with additional information</th>
</tr>
</thead>
</table>

An icon to the left of the box indicates the type of information displayed.

- **NOTICE**
  This icon introduces information critical to a function's execution and therefore strongly recommended to follow.

- **Information**
  This icon introduces useful information which you may decide to follow.
1 Launching LUCAS POS

Click once (using a Linux system) or twice (using a Windows system) onto the icon at the screen to launch LUCAS POS.
The system is launched and the Sign On window opens (see 2 Signing On).
2 Signing On

After launching LUCAS POS, the Sign On window opens. You need to sign on in order to work the till.

Sign On window

Sign on with Operator Cards

1) When using operator cards, simply scan the code.
No further entries required.

Sign on with Operator Number and Password

1) If you do not have an operator card enter your operator number into the Operator field and your password into the Password field.
2) Press [OK].

You are signed onto the system and the Transaction window opens. LUCAS POS will be executed in the language set within your user profile and all functions you are authorised to perform are provided. Depending on the specific configuration of the system ("Customising"), the till drawer may open so that you can put your cash tray inside.

If you are not authorised to sign on or if the details you entered were incorrect, a corresponding dialogue box will appear. Correct your entry or cancel the login procedure.

Once you have signed on, a receipt labeled “Sign On” is printed (if configured by default). It contains information on the sign on process.

An information message may also be displayed after signing on to the till (e.g. to inform you of a promotion). Confirm any information messages and sign the receipt printed.
3 **User Interface**

Your till is equipped with a touchscreen displaying the LUCAS POS user interface. The interface can be customised and displays a variety of control elements, depending on the function selected.

In addition to providing instructions on how to use the touchscreen, this chapter describes the structure of the user interface and explains the general control elements, such as input fields, output fields, and list boxes.

### 3.1 Touchscreen

Your till is equipped with a touchscreen to operate LUCAS POS.

1) Touch a control element (e.g. buttons, entry fields, etc.) displayed on the screen using your finger or a blunt object.

The control element is activated and the function requested is executed.

#### 3.1.1 Cleaning the Touchscreen Surface

The touchscreen surface needs to be cleaned on a regular basis.

If you need to clean the touchscreen while the till is still operating, call the cleaning mode. In cleaning mode, most of the touchscreen’s control elements are hidden to prevent you from accidentally operating the till while you are cleaning the display. The cleaning mode also provides you with important instructions on how to clean the touchscreen.

1) Press [Cancel] within the **Sign On** window.
   
The **Position Closed** window opens (see 7 The Position Closed Window).

2) Press [Clean Display].

The **Clean Display** window is displayed along with a set of cleaning instructions.

3) Clean the screen following the instructions displayed.
4) Press [Finish] within the **Clean Display** window to exit the cleaning mode.

![Clean Display window with [Finish] button](image)

The **Clean Display** window closes and the **Position Closed** window re-opens.

3.1.2 **Inaccuracies when using the Touchscreen**

If the touchscreen is not correctly calibrated, inaccuracies such as the following may occur while working the till.

- The selected element on the user interface (e.g. a button) does not activate when touching the touchscreen, or only activates after repeated attempts.
- Instead of the selected element (e.g. a row in a table), the element above or below is activated.

If you observe any of these inaccuracies, ask the person in charge to contact Micros for a solution.

---

**NOTICE**

Follow the cleaning instructions displayed onscreen. Disregarding the cleaning instructions may result in damage to the screen surface!

- Use soft, lint-free cloths and commercial glass cleaners only.
- Spray glass cleaner onto the cloth, not directly onto the touchscreen.
- Ensure that the screen is completely dry before working with it again.

---

Use soft, lint-free cloths and commercial glass cleaners only. Spray glass cleaner onto the cloth, not directly onto the touchscreen. Ensure that the screen is completely dry before working with it again!
3.2 General Display and Control Elements

The general elements described below will appear frequently within LUCAS POS operations. They provide you with transaction details and allow you to enter information or select functions or positions displayed.

The window's function name

Header

General information on the current transaction

The header displays information about the system's name (LUCAS POS), the program's version and the company structure (Company ID, Store ID and POS ID). In addition, the header may display a salesperson ID and a customer ID if activated for the current transaction.

If asked for the program version by a service technician or a member of the Micros hotline team simply quote it from the header.
The version number displayed in the image provided in this user manual may differ from the version you are using.

On the right hand side of the header two icons are displayed.
When this icon’s signal lamp is flashing red, the till’s cash limit is reached. Execute a safe drop before continuing working the till.
No safe drop is necessary while the signal lamp is green.
When the signal lamp is yellow, the till is disconnected from LUCAS services at the back office. It is therefore not possible to determine whether or not a safe drop is necessary.

When this icon’s signal lamp is flashing red the connection to LUCAS services at the back office is interrupted.
When a green light is displayed, a connection to LUCAS services at the back office is established.

<table>
<thead>
<tr>
<th>Name of Program</th>
<th>Version</th>
<th>Company-ID – Store-ID – POS-ID</th>
<th>Salesperson (optional)</th>
<th>Customer (optional)</th>
<th>Icons</th>
</tr>
</thead>
<tbody>
<tr>
<td>LUCAS POS V.2.3.3.229</td>
<td>on 1-1</td>
<td>Salesperson: 6</td>
<td>Customer: 54006100510490336</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**A Window’s Function Name**

Each window in LUCAS POS displays its function name informing you about the function or operation executed.

When registering items at the till, the window will be displaying **Transaction** as its function name. When financing a transaction, it will be named the **Financing** window. When carrying out a validated refund, the window’s function name will be **Validated Refund**.

### 3.2.1 General Information on the Current Transaction

The **Transaction** and **Financing** windows display the number of the current transaction along with the number of items contained on this receipt.

In the case of no items being registered yet for the current transaction the **Transaction** window displays the number of the last transaction.

### 3.2.2 Buttons

On touching a button the operator will be expected to make an entry or execute an action: when opening another window (e.g. by pressing the [Return] button), cancelling a function (by pressing the [Cancel] button) or deleting contents of an input field (by pressing the [Delete] button).

If a button appears greyed out it is deactivated and cannot be activated on touch. The action implemented through this button cannot be executed at that time.

As soon as the prerequisites for calling this action are met, the button will appear active again.
3.2.2.1 Frequently used Buttons

This chapter will introduce a range of buttons which you will frequently encounter working the till.

The Virtual Keyboard

Any entries you will need to make working the till may be made using a computer keyboard. If a computer keyboard is not available at the till you are working you may use the virtual keyboard provided in LUCAS POS.

For this purpose you will find the button next to any input field requiring input other than numeric entries (for which you may use the numerical keypad).

Input fields with virtual keyboard button

1) On pressing , the virtual keyboard appears.

Virtual Keyboard

2) Make the entry required using the virtual keyboard. The button in this case is equal with the Shift key in any ordinary computer keyboard.

3) Press [OK] to confirm your entry and return to the previous window.

In the case of several input fields each requiring an entry, repeat steps 1) through 3).

Arrow Keys

Whenever there is a list of positions or entries you will find arrow keys to navigate. This is especially useful if a list is extending beyond available space. You may therefore need to navigate up and down the list using the arrow keys.

Use to navigate downwards step by step.

Use to navigate upwards step by step.

Use to scroll downwards page by page.
Use ▲ to scroll upwards page by page.
Use ▼ to jump to the end of the list.
Use ▲ to jump to the top of the list.

View Details
Some functions will give you the opportunity to view further details to positions listed (see 3.2.5 List Boxes).

On pressing , additional information to the position selected will be shown.
On pressing , you will return to the previous window.

To view detailed information about an item, select the item from the list of positions registered and press .

![Article Information window](image)

This window displays information such as merchandise groups, VAT groups, additional attributes, and the department where the item is listed and sold.

On pressing [ Image ], an image of the item is displayed.
If the [ Image ] button appears greyed out, there is no image available for this item.

Transaction Search
Any function requiring a receipt number will provide a transaction search function.

Transaction Search
In the case the receipt required is not available to you, you may search for it. Any information found is transferred to the function executed prior to the transaction search.
1) Press [ Search ].
The Transaction Search window opens.
2) Determine the period of time the transaction has been concluded using the input fields From and Until.

3) Enter the workstation’s number where the particular receipt has been issued into the Workstation field and enter the operator’s number into the Operator field. Skip these entries if the information is unknown.

In the Store field the store number is automatically displayed and cannot be changed.

4) Enter up to three keywords into the Search Criteria input fields.

If your till is not equipped with a computer keyboard use the virtual keyboard pressing .

5) Once you have made all entries required, press [ Search ].

All receipts which meet the search criteria entered will be displayed consecutively.

In the upper section of the window you will find information on the receipt being displayed out of all receipts found (in this case it is 1/30). Additional information on the Store, Workstation (WS), and the Operator (OP) is stated as well as the Receipt number.

6) Search for the particular receipt using the arrow keys.

For further Information on how to use the arrow keys please refer to the section on arrow keys in 3.2.2.1 Frequently used Buttons.
7) Once the receipt required is displayed, press [OK].
   a) On pressing [OK] the information required from the receipt displayed will be
      transferred back to be used by the function executed prior to the transaction
      search.

You will be directed back to the function previously executed and may proceed executing
the particular function.
Example: In the case of having called the transaction search while executing a Postvoid
function the desired postvoid will be executed on pressing [OK] in the Transaction
Search window.

**Denomination and Denomination Fields**

Any function used to determine the cash holdings at a till will be equipped with an
integrated denomination function to simplify the counting process.

1) Call the denomination function by pressing

The following example is stated using the Settlement function but is valid for any function
providing the denomination button.

![Settlement window with Denominations button and currencies available](image)

2) Choose a currency from the list box and press [Denominations].

Use the arrow buttons below the list for navigation.

For further Information on how to use the arrow keys please refer to the section on arrow
keys in chapter 3.2.2.1 Frequently used Buttons.

The list box will be displaying a range of denomination fields.

3) Touch a denomination field and enter the amount counted.

4) Touch another denomination field and enter the amount counted.

Enter all notes and coins in your drawer in the way described above. The total amount of all
cash entered will be displayed in the Total field.
Settlement window – denomination fields with amounts entered and total amount under Total

5) Once you have entered all notes and coins press [OK]. The window will be displaying the list box with denomination fields. The total of all denominations entered is automatically transferred to the corresponding field in the list box. Repeat steps 2) through 5) for all currencies available in your till drawer.
Sales functions equipped with an integrated denomination function are e.g. Settlement and Cash Up.

3.2.3 Input Fields and Keypad
Input fields accept entries (e.g. amounts of money, item numbers or quantities).
- When touching an input field, the field is activated. A cursor will be displayed.
- Entries can be made using a scanner, a card-reading device or the Keypad.

Enter numbers using the numerical keypad.

Press [Delete] to delete an entry from an input field.
Press this button to delete characters in an input field from right to left.
Press this button to jump back and forth between different input fields.
Press [OK] to confirm an entry.
Press [Cancel] to close the current window and go back to the previous window without executing a function.
3.2.4 Output Fields

Output fields do not accept entries, they only display character strings, such as amounts, values and item numbers.

When touching an output field, it does not activate and no cursor will be displayed.

Examples for output fields

<table>
<thead>
<tr>
<th>Total</th>
<th>EUR 50.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid</td>
<td>EUR 20.00</td>
</tr>
<tr>
<td>To Pay</td>
<td>EUR 30.00</td>
</tr>
</tbody>
</table>

| Discountable Amount | 50.00 |

3.2.5 List Boxes

List boxes allow for an entry to be selected from a preset selection. To select an entry or an item, you may either select it by touching it or by using the buttons below the list box.

3.2.6 Check Boxes

Click a check box to activate or deactivate functions and properties.

- The property/function is deactivated.
- The property is activated, the function can be executed.

3.2.7 Buttons for additional information

The button may be located next to buttons and input fields. On pressing it, additional information on the desired input or selection is displayed.

3.2.8 Information and Error Messages

Information and error messages in LUCAS POS are displayed in dialogue boxes. An information or error message may open at any time while working the till.

Always read any message displayed before confirming it through pressing [OK].

**Error Messages**

Press [OK] to confirm an error message. The window closes and you may continue working the till.

If you are not able to solve the error, refer to your system administrator for help.
Other Messages

Windows containing messages may provide you with additional information, point to an operating error or to a particular action step to be completed, or may contain a warning prior to executing a particular function.

Whenever a message is pointing to an operating error or to a particular action step to be completed…

- make an entry and press [OK], or
- press [OK] to close the message and execute the action step described.

If a warning message is displayed, you may be able to decide whether or not you would like to further execute the function desired. Press [Ignore] to further execute the function regardless or press [Cancel] if you do not wish to proceed further. (Whether or not you are able to execute the function despite the warning is depending on the configuration of LUCAS POS and any user rights issued to the operator.)
4 The Transaction Window

Sales transactions are performed as follows.
1) Registering items, see 4.1 Registering Items.
2) Initiate financing by pressing [Total] after having registered all items in the Transaction window.
3) Financing the transaction, see 6 Financing a Transaction (The Financing Window).

This chapter will introduce you to control functions required to register items with LUCAS POS in various ways, it will explain how to cancel or post-void a receipt, and how to call up sales functions in general.

Please refer to chapter 9 Sales Functions for detailed information on individual sales functions.

Design of the Transaction Window

The Transaction window opens after sign on or after a transaction has been financed. Items and other positions are registered, such as gift vouchers or downpayments. You may also execute numerous sales functions and create a sales receipt.

The Transaction window consists of the following sections.

- List of positions registered
- Total
- General information on the current transaction
- Sales functions
- Input fields/Keypad

Design of the Transaction window
List of positions registered: All positions registered are listed here in the order of their registering, the topmost position being the first one registered. Here, you may cancel or duplicate registered items or obtain additional information. Use the arrow buttons below to navigate within the list.

For further Information on frequently used buttons please refer to chapter 3.2.2.1 Frequently used Buttons.

Total: Displays the current subtotal of all positions registered.

General information about the current transaction: The number of the current transaction along with the number of items registered on this receipt is displayed here. If there are no positions registered yet, the number of the previous receipt will be displayed.

Sales Functions: Press [ Quick Pick ] to open the quick pick menu to register frequently sold items. To open the sales functions menu, press [ Menu ]. You may also execute frequently used functions from here without having to open the sales functions menu. For further information on available sales functions, see 9 Sales Functions.

Input Field and Keypad: Using the keypad, you may enter numbers into the input field. This section also displays the [ Postvoid/Void All ] button, which is used to cancel or abort a receipt, as well as the [ Total ] button which calls up the Financing window (see 6 Financing a Transaction (The Financing Window)).

4.1 Registering Items

Items may be registered in various ways.

- Scanning the barcode (see 4.1.1 Scanning a Barcode)
- Using the quick pick menu (see 4.1.2 Registering Items from the Quick pick menu)
- Manually entering the barcode/item number (see 4.1.3 Enter Barcode/Item Number manually)

You may have to enter additional details after registering an item (e.g. colour, size, quantity, serial number, weight of item) or LUCAS POS may request that you perform certain actions when registering a specific item (e.g. presenting customers with advertising material or inquiring whether they would like to purchase an additional item related to the one being purchased).

4.1.1 Scanning a Barcode

When scanning the barcode or entering the item number the item is registered along with any saved item information.

The item appears in the list of positions registered in the Transaction window.
4.1.2 Registering Items from the Quick pick menu

If an item does not qualify for scanning, add it to the quick pick menu as a fast and easy way to register this item.

**NOTICE**

Any item must have been previously imported as a quick pick into LUCAS POS for them to be selected from the quick pick menu. If this is not the case, scan the barcode or manually enter the item number.


The Quick Pick window opens.

On the right hand side of the window you will find the Top 10 list. It consists of ten centrally defined buttons which are occupied by items frequently sold or by items which do not carry barcodes (e.g. carrier bags). These items can be registered by simply pressing the corresponding button within the Top 10 list.
On the left hand side of the window you will find a menu with items divided into several menus. On pressing a menu all items contained are displayed. Some may be grouped further into submenus. Register an item from a menu by pressing the corresponding button.

![Quick Pick window showing items of the category Drugstore](image)

2) Now press an item button from the Quick Pick or from any of the menus or press [ Cancel ] to abort.

The Transaction window is displayed again.

The selected item appears as a position in the list of positions registered.

### 4.1.3 Enter Barcode/Item Number manually

Another way to register an item is to manually enter the barcode or item number.

1) Press [ PLU ] within the Transaction window.

![Sell Item window](image)

2) Enter the barcode or item number into the input field.

3) Press [ OK ].

The Transaction window reappears and the item will be registered.
4.2 List of positions registered

All positions registered on a receipt are displayed in the order of their registering in the Transaction window in the list of positions registered.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Quantity</th>
<th>Price per Unit</th>
<th>Position’s Total (Price x Quantity)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dress 1</td>
<td>1</td>
<td>50.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Dress 2</td>
<td>2</td>
<td>45.00</td>
<td>90.00</td>
</tr>
<tr>
<td>Skirt</td>
<td>1</td>
<td>29.00</td>
<td>29.00</td>
</tr>
</tbody>
</table>

Use the arrow keys displayed below the list to scroll through the list and select a position.

For further information on how to use the arrow keys please refer to the section on arrow keys in chapter 3.2.2.1 Frequently used Buttons.

Under Total you will find the current subtotal of all positions registered.

4.3 Line Cancellation (Cancelling a Previously Registered Item)

You may cancel an item from the list of positions registered before financing the transaction (e.g. if the customer changes his mind, or if you have entered the wrong item).

1) Select the item you would like to cancel from the list of positions registered in the Transaction window.

Use the arrow keys below the list for navigation if necessary.
2) Press \( \text{ } \)

The item is cancelled and displayed as follows in the list of positions registered.

<table>
<thead>
<tr>
<th>Product Text</th>
<th>( x )</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dress</td>
<td>1</td>
<td>49.95</td>
<td>49.95</td>
</tr>
<tr>
<td>Shirt</td>
<td>1</td>
<td>19.90</td>
<td>19.90</td>
</tr>
<tr>
<td>Trousers</td>
<td>1</td>
<td>58.69</td>
<td>58.69</td>
</tr>
<tr>
<td>Trousers</td>
<td>-1</td>
<td>58.69</td>
<td>-58.69</td>
</tr>
</tbody>
</table>

List of positions registered showing a cancelled item

**NOTICE**

Note that only sales positions and refunded positions can be cancelled. Individual discounts cannot be cancelled. If you need to cancel a discount issued for an item, you need to cancel the entire position and register it again (without a discount).

Depending on the specific configuration of LUCAS POS, it may not be possible to cancel a line for a receipt containing only a single item.

**4.4 Duplicating Items on the Sales Receipt**

Items which have already been registered may be duplicated.

**NOTICE**

Items subject to an item duplication ban cannot be duplicated (you may change this setting in the (Central) Store Management System ((C)SMS) under **Item Maintenance → Item Options**).

Depending on the customising of LUCAS POS, duplication of items may be limited to an amount specified in the (C)SMS.

1) Select the item you would like to duplicate from the list of positions registered in the **Transaction** window.

Use the arrow keys for navigation below the list of positions registered if necessary.

For further Information on how to use the arrow keys please refer to the section on **arrow keys in chapter 3.2.2.1 Frequently used Buttons**.

2) Press \(+\).

The item is duplicated and registered a second time.

**4.5 Cancelling a Transaction**

Any transaction which has not been financed yet may be cancelled if necessary (e.g. in the case a customer discovers they have forgotten their wallet).

1) Press \([ Void all ]\) to abort a transaction that has not been financed yet.

The **Cancel receipt** window opens.
Cancel receipt window

2) Select the reason for the cancellation from the list box to the left.
3) Press [OK] to confirm your choice.

The transaction is cancelled. The Transaction window opens without the sale being concluded. A receipt labelled "Cancel receipt" is printed, containing all positions registered till the point of cancellation.

### 4.6 Postvoiding a Transaction

A transaction which has been concluded may be post-voided afterwards.

**NOTICE**

Note that you can only execute a receipt cancellation when you have not yet registered any items on the current transaction. You may only postvoid a receipt in the store the receipt was originally printed at.

When a transaction has been financed using EFT tender, cancellation of the payment may only be possible manually at the EFT terminal. In this case an error message will be displayed.

If you need to postvoid a receipt, proceed as follows.

1) If the particular receipt is at hand, press [Postvoid].

The Receipt Cancellation window opens.
2) Select the reason for the receipt cancellation from the list box to the left.
3) Scan the barcode of the receipt to be cancelled.

You may also enter any information required manually.
In this case ensure any information within the Business Day field (meaning the day the receipt was created) and in the Workstation field (the particular workstation the receipt was created at) is matching the information on the receipt. If necessary, correct the entries.

Information on the store is displayed by default in the Store field and cannot be changed.

- Enter the receipt number into the Receipt Number field.

The transaction is postvoided and the Transaction window opens. A receipt labelled "Receipt Cancellation" is printed.

### 4.7 Sales Functions – The [ Menu ] Button

Please refer to chapter 9 Sales Functions for an overview on all sales functions available.

Whether or not a sales function can be executed at a particular time depends on the status of the sales process (e.g. whether or not items have been registered yet). If a sales function is currently not available, its button appears greyed out.

The range of sales functions available to an operator may also depend on the customising of LUCAS POS and on the operator’s user rights.

Some functions can be executed even though the operator does not possess the user rights necessary. In this case you will be asked to call a number which will connect you to a staff member who will then generate an access code for you. This access code (valid only for one entry or over a limited period of time) will enable you to execute the function.

All sales functions available within LUCAS POS may be called up from the Transaction window. These functions are needed for different purposes when registering items, e.g. when entering quantities, modifying a price or refunding particular items.

1) Press [ Menu ] to open the Operations window, which displays menus for all sales functions.
Operations window with all sales functions currently available

You may also use the assorted buttons in the Transaction window to quickly access frequently used sales functions without having to open the menu.

Transaction window – buttons with frequently used sales functions
5 Initiate Financing (The [ Total ] Button)

Once all positions from a customer's trolley have been registered, financing is initialised.

1) Press [Total] at the bottom right of the Transaction window.

Transaction window – [Total] button

The Financing window opens.

All previously registered positions can now be financed (see 6 Financing a Transaction (The Financing Window)). The transaction will be concluded.

If the transaction's total equals zero, the Financing window does not appear. The receipt is printed on pressing [Total].
6 Financing a Transaction (The Financing Window)

Sales transactions are performed as follows.
1) Registering items, see 4.1 Registering Items.
2) Initiate financing by pressing [Total] after having registered all items in the Transaction window.
3) Financing the transaction, see 6 Financing a Transaction (The Financing Window).

This chapter will introduce you to some of the main control functions used in LUCAS POS to finance a transaction in the Financing window. It will explain the main payment options (payment in cash and local currencies), how to partially or completely cancel financing and how to call financing functions in general.

Information

Please refer to chapter 10 Financing Functions for detailed information on individual financing functions.
Layout of the *Financing* window

On pressing [Total] in the *Transaction* window (after having registered all positions) the *Financing* window opens.

A transaction is being concluded by accepting (in the case of a sale) and issuing (in the case of a return) means of payment of all kinds (e.g. cash, credit cards, vouchers or debit cards), possibly even combining different payment methods.

During the financing process you may call various financing functions, add reductions and discounts, or enter gift vouchers, etc.

The *Financing* window consists of the following components:

- **List of Payment Methods used**
- **Overview on Financing**
- **General information on the current transaction**
- **Financing Functions**
- **Input Fields/Keypad**

### Design of *Financing* window

#### List of payment methods used:
This section lists all payment methods used to finance the current transaction.

Below the list, you will find a range of buttons to navigate within the list.

For further Information on how to use the arrow keys please refer to the section on *arrow keys* in 3.2.2.1 *Frequently used Buttons*.

#### Overview on Financing:
The total amount due and the amount already paid by the customer are displayed in this section.

#### General Information on the Current transaction:
The number of the current transaction is displayed along with the number of items contained on this receipt.
Financing Functions: This section contains the [Menu] button which opens to another set of menus containing financing functions. A number of buttons with frequently used financing functions are displayed, which enables the operator to call them up without having to open the menu. Please refer to chapter 10 Financing Functions for detailed information.

Input Field and Keypad: Use the keypad to enter numbers into the input field (e.g. cash or voucher numbers). This section also contains the [Cancel] button, which ultimately aborts a financing process.

6.1 Financing a Transaction in Cash and Local Currency

Follow the steps listed below to finance a transaction in cash and in local currency.

1) Press the corresponding button for local currency in the Local Currencies menu or press in the financing window.

The Cash payment window opens.

You may also enter the amount due into the input field within the Financing window first, then press [Local Currencies] or press after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The amount due is displayed in the Amount Due field.

2) Enter the amount you have received in cash from the customer into the Amount field. The amount due will already be entered by default. However, you may change the entry using the key pad.

3) Now press [OK].

LUCAS POS will register the amount entered.

- If the exact amount due is paid, a receipt is printed and the till drawer opens. Place any amount of cash inside.

The Transaction window opens.

- If the amount due is overpaid, the customer will receive change.

The Financing window will appear. The amount entered appears in the list of payment methods used and the amount of the change to be paid to the customer is displayed under Change.

The till drawer opens. Place any amount of cash inside and take out the change.
Once the till drawer is closed or a financing function is called to pay the change using another payment method, a receipt is printed and the Transaction window opens.

The change is usually paid in local currency, but may also be paid using other currencies. In the case of returning change in currencies other than the local currency, call the corresponding financing function from the menu.

- If the amount due has not been fully paid yet, the Cash payment window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may choose to pay the outstanding balance using another payment method.

**Denomination buttons**

1) In the Financing window, press the denomination button equivalent to the amount paid by the customer:

![Denomination buttons](image)

If a customer pays with a 10, 20, 50 or 100 note in local currency, you may simply use the denomination buttons instead of manually entering the amount into LUCAS POS.

- If the exact amount due was paid, a receipt is printed and the till drawer opens. Place any amount of cash inside.

The Transaction window opens.

- If the amount due was overpaid, the customer will receive change. The Financing window opens. The amount entered appears in the list of payment methods used and the amount of the change to be paid to the customer is displayed under Change.

The till drawer opens. Place any amount of cash inside and take out the change.

The change is usually paid out in local currency, but may also be paid using other currencies. In the case of returning change in currencies other than the local currency, call the corresponding financing function from the menu.

Once the till drawer is closed or a financing function is called to pay the change using another payment method, a receipt is printed and the Transaction window opens.

- If the amount due has not been fully paid, the Cash payment window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may choose to pay the outstanding balance using another payment method.

If the total amount due is a negative sum the customer will receive change. In this case proceed by calling the financing function corresponding to the payment method desired by the customer.

If the customer wishes a cash payout, press ![cash payout](image) and pay the amount displayed to the customer.
6.2 List of Payment Methods (Tender) Used

In the Financing window, all payment methods used to finance the current transaction are listed to the left.

The Financing window

<table>
<thead>
<tr>
<th>Payment method</th>
<th>Comment</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VISA</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>GBP</td>
<td>100.00</td>
<td>146.35</td>
</tr>
<tr>
<td>EUR</td>
<td></td>
<td>30.00</td>
</tr>
</tbody>
</table>

List of payment methods used

You may use the arrow keys below to navigate within the list.

For further Information on how to use the arrow keys please refer to the section on *arrow keys* in chapter 3.2.2.1 Frequently *used* Buttons.
6.3 Overview on Financing

Below the list of payment methods used you will find the Financing Overview section. Depending on the amount due and on how much of it has been financed – the following information may be displayed.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Total value (in local currency) of the current transaction</td>
</tr>
<tr>
<td>Paid</td>
<td>Value (in local currency) already paid by the customer</td>
</tr>
<tr>
<td>Amount Due</td>
<td>Outstanding balance to be paid by the customer</td>
</tr>
<tr>
<td>Change</td>
<td>The change to be paid out to the customer</td>
</tr>
<tr>
<td>Paid back</td>
<td>Change already paid out to the customer</td>
</tr>
</tbody>
</table>

6.4 Abort Financing

Financing can be aborted at any time, e.g. to register additional items or in the case of a customer discovering they are missing their wallet.

1) To abort financing, press [Cancel].

The Transaction window opens again. You may now register additional items, cancel items from the receipt or cancel the receipt, etc.

NOTICE

Please note that financing cannot be aborted when a customer has paid and the purchase has therefore been concluded, even though the transaction might not be complete yet (e.g. the customer is expecting change).

If you need to abort financing while the purchase has already been partially concluded, a warning message may be displayed (depending on the configuration of LUCASPOS). The message will recommend cancelling abortion due to administration charges that may occur when cancelling certain payment methods (e.g. credit cards).

6.5 Cancel Partial Financing

To cancel a partial financing (e.g. if a customer has already paid part of the amount due in cash, and would like to finance the remaining balance by credit card) carry out the following steps.

1) Select the position to be removed from the financing process from the list of payment methods used in the Financing window.

You may use the arrow keys below to navigate within the list.

Information

For further Information on how to use the arrow keys please refer to the section on arrow keys in chapter 3.2.2.1 Frequently used Buttons.

2) Press .

The amount is cancelled, deducted from the total amount and will be listed as a negative amount.
List of payment methods used showing the cancelled amount

3) If you have already collected the cancelled amount, return the money to the customer.

6.6 Financing Functions – The [Menu] Button

You may call numerous financing functions from the Financing window.

1) Press [Menu] to open the Operations window.

All financing functions you may call are displayed here.

A number of frequently used financing functions is available within the Financing window. You may call them without having to open the menu.

Financing window – the [Menu] button

Operations window with all financing functions currently available
Financing window – frequently used financing functions

The number of financing functions displayed in the Financing window depends on the customising and may therefore be different for each LUCAS POS.

Please refer to chapter 10 Financing Functions for detailed information on all financing functions available when working the till.

Note that only financing functions that may be executed at the time being can be activated. Whether or not a particular financing function may be executed is dependent on the status of the sales process (e. g. whether or not a financing position has been registered). If a financing function is currently not available, its button is greyed out.

The range of financing functions which may be called also depends on the specific configuration of your LUCAS POS (“customising”) and on your user rights.
7 The Position Closed Window

The Position Closed window indicates that no operator is currently working the till. Although no sales-related entries can be made you may execute a number of other functions from this window.

Note that any transaction needs to be concluded and no items must be registered on the current transaction.

1) Press [Sign Off] in the Transaction window (see 9.2.3 Sign Off).
   You are signed off from the till. The Sign On window opens.
2) Press [Cancel].
   The Position Closed window opens.

![Position Closed window]

No operator is signed on at the till and no entries can be made. In the Position Closed window, you have a range of options:

- To sign on again, press [Sign On] (see 2 Signing On).
- Press [POS exit] to exit LUCAS POS (see 8 Exiting the Till).
- Press [Clean Display] to call the Display Clean window (see 3.1.1 Cleaning the Touchscreen Surface).
- Press [Info receipt] to print an Info receipt (see 9.5.12 Info Receipt)
8 Exiting the Till

If you need to exit LUCAS POS execute the following steps.

Note that any transaction needs to be concluded and no items must be registered on the current transaction.
It also requires special user rights to exit LUCAS POS.

1) Press [Sign Off] in the Transaction window (see 9.2.3 Sign Off).
You are signed off from the till and the Sign On window opens.
2) Press [Cancel].
The Position Closed window opens (see 7 The Position Closed Window).
3) Press [POS exit].
The Exit window opens.

4) Enter your information into the Operator and Password fields.
5) Press [OK].
You are now exiting LUCAS POS.
If you are not authorised to exit the till or if you entered incorrect details, an error message will appear. Correct your entries or cancel exiting LUCAS POS.
9 Sales Functions

Sales functions refer to all business processes that take place between retailer/salesperson and the customer. Therefore, these menus contain all functions needed to conduct sales at the till.

These are functions for registering or refunding items (e.g. price reductions, validated refunds, post-select quantities), printing special receipts (e.g. tax free receipts), operating and clearing the till (e.g. pause, settlement), for making financial transactions (e.g. payments), for tender control (e.g. safe drops), for general service purposes (e.g. viewing exchange rates, reprinting receipts, turnover reports), for customer administration, stock control, and language settings.

All sales functions are called from the Transaction window before financing.

The following chapters explain sales functions available in LUCAS POS. They will be described in the same order they appear within the LUCAS POS menu.

Calling Sales Functions

You may call sales functions in several different ways and from different levels.

**NOTICE**

Note that only those sales functions you can actually execute at a particular time can be activated. Which sales functions are currently available depends on the status of the sales process (e.g. on whether or not items have been registered). If a sales function is currently not available, its button is greyed out.

The range of sales functions you can call also depends on the customising of your LUCAS POS and on your user rights.

**Level 1**

The Transaction window contains buttons with frequently used sales functions (e.g. [ Pre-Select Quantity ], [ Pause ], [ Item Return ] etc.). You can execute these functions easily by pressing the relevant button.
**Level 2**


To the right you will find ten centrally defined buttons ("Top 10") for frequently used sales functions, which you can execute directly by pressing the relevant buttons.

![Operations window – Top 10 sales functions](image)

**Level 3**

To the left you will find a menu divided into several categories holding the complete range of sales functions available, sometimes even grouped into additional sub-categories.

![Operations window with buttons for the Top 10 - sales functions](image)

On pressing a category, all of its containing sales functions are displayed. Execute any by pressing the corresponding button.
Operations menu with open menu Sale

If the range of menus cannot be displayed on one page, use \( \uparrow \) and \( \downarrow \) to scroll up or down the list of menus.
9.1 The Sale Menu

The Sale menu contains all sales functions needed for registering and returning items at the till.

Along with individual sales functions, this menu also contains three submenus: **Price Modification**, **Return & Sale** and **Transactions**, which also contain several sales functions.

![Operations window – Sale menu](image)

You will find the following sales functions within the Sales menu.

<table>
<thead>
<tr>
<th>The Price Modification Submenu</th>
<th>The Return &amp; Sale Submenu</th>
<th>The Transactions Submenu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Select Quantity/ Pre-Select Quantity</td>
<td>Salesperson</td>
<td>Remove Salesperson</td>
</tr>
<tr>
<td>Collect Miles</td>
<td>Book Miles</td>
<td>Send Sales</td>
</tr>
<tr>
<td>Clear</td>
<td>Order</td>
<td></td>
</tr>
</tbody>
</table>

For detailed information on individual sales functions refer to the corresponding chapters.
9.1.1 The Price Modification Submenu

The Price Modification submenu contains all sales functions needed to change the original price of an item.

You may use these, e.g. to reduce the price of slightly damaged items, to hand a complimentary gift to a customer, or to issue an employee discount.

The Operations window – Price Modification submenu

You will find the following sales functions within the Price Modification submenu (Sales menu).

<table>
<thead>
<tr>
<th>Post-Select Discount % (Percent)</th>
<th>Post-Select Discount Value</th>
<th>Pre-Select Discount % (Percent)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Pre-Select Discount</td>
<td>Pre-Select Price Change</td>
<td>Modify Price</td>
</tr>
<tr>
<td>Clear Price Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove Free Item</td>
<td>Employee Discount</td>
<td>Deselect Employee</td>
</tr>
<tr>
<td>Increase in Price</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For detailed information on individual sales functions refer to the corresponding chapters.

Post-Select Discount % (Percent)

Grant a discount on a registered item.

**NOTICE**

You need to have registered the item you wish to discount. The item needs to be eligible for a discount (settings can be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance → Item Options).

Please note that it is not possible to discount an item below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

1) Select the item you would like to discount from the list of positions registered in the Transaction window.

2) Press [Post-Select Discount %] within the Price Modification submenu (Sales Menu).
You may also enter the percentage into the input field within the Transaction window first, then press [Post-Select Discount %] within the Price Modification submenu (Sales Menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Post-Select Discount % window opens.

The discountable price of the item is displayed in the Discountable Amount field.

3) Select a description for the line discount from the list box to the left.
4) Enter the desired percentage rate for the discount (e.g. 5.00) into the Percent field.
5) Press [OK] to confirm your entries.

The Transaction window opens.

The discount is added to the list of positions registered as a negative amount and deducted from the transaction’s total.
Post-Select Discount Value
Grant a fixed (absolute) price reduction on a registered item.

You need to have registered the item you wish to discount. The item needs to be eligible for a discount (settings can be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).
Please note that it is not possible to discount an item below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

1) Select the item you would like to discount from the list of positions registered in the Transaction window.
2) Press [ Post-Select Discount Value ] within the Price Modification submenu (Sales menu).

You may also enter the percentage into the input field within the Transaction window first, then press [ Post-Select Discount Value ] within the Price Modification submenu (Sales menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Post-Select Discount Value window opens.

Post-Select Discount Value window

The discountable amount (the amount allowed to be deducted from the original price without going below the price minimum) is displayed in the Discountable Amount field.

3) Select the type of price reduction from the list box to the left.
4) Enter the desired amount of the discount into the Price Reduction field.
5) Press [ OK ] to confirm your entries.

An information message appears asking whether you would like to proceed with a discount of x%.

a) Select [ No ] if you would like to correct your entry.
Correct your entry within the Post-Select Discount Value window.

b) Select [ Yes ] if you wish to proceed.

The Transaction window opens.
The reduction is added to the list of positions registered as a negative amount and deducted from the transaction’s total.

**Pre-Select Discount % (Percent)**

Grant a discount on all items registered after calling this function.

1) Press [Pre-Select Discount %] within the Price Modification submenu (Sales menu).

You may call this sales function at any point before financing is initialised. All items need to be eligible for a discount (settings can be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance  Item Options).

Please note that it is not possible to discount an item below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

You can call multiple pre-select discount percentages within one transaction.

You may also enter the percentage into the input field within the Transaction window first, then press [Pre-Select Discount %] within the Price Modification submenu (Sales menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Pre-Select-Discount Percent window opens.
Pre-Select-Discount Percent window

2) Select a description for the pre-select discount percent from the list box to the left.

3) Enter a percentage for all items registered afterwards which are eligible for a discount into the Percentage field.

Note that any percentage needs to be entered with two decimal places.

4) Press [OK] to confirm your entries.

The Transaction window opens.

For all eligible items registered from now on, the discount will automatically be added to the list of positions registered as a negative amount, and will be deducted from the transaction’s total.

The Transaction window – list of positions registered with a pre-select discount percent of 10%

Information

Call Clear Pre-Select Discount to cancel the discounting of items. All items registered afterwards will be registered with the original price.
Clear Pre-Select Discount

If you have assigned a Pre-Select Discount % on the current transaction, you can deactivate it through the Clear Pre-Select Discount function.

A prerequisite for executing this function is that you have called a Pre-Select Discount % in the current transaction.

Please note, that this function cancels any Pre-Select Discount % for items that will be registered afterwards. Discounts on already registered items remain.

1) Press [Clear Pre-Select Discount] within the Price Modification submenu (Sales menu).
   a) If only one pre-select discount percentage is assigned to the transaction the discount is cancelled.

No discount will be issued to any of the items registered afterwards.
   b) If you have assigned multiple pre-select discount percentages to the current transaction, a window displaying all current pre-select discount percentages will appear.

2) Select the discount you would like to cancel from the list box to the left.
3) Press [OK] to confirm your selection.

The Transaction window opens. The discount selected is cancelled for all items registered afterwards.

Pre-Select Price Change

Execute this function before registering an item to determine a new price for the item.

Note that this sales function allows for price reductions as well as price increases.

It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

Pre-select a price change as follows.

1) Press [Pre-Select Price Change] within the Price Modification submenu (Sales menu).
You may also enter the price change into the input field within the **Transaction** window first, then press [ **Pre-Select Price Change** ] within the **Price Modification** submenu (Sales Menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

### The Pre-Select Price Change window opens.

#### Pre-Select Price Change window

2) Select the reason for the price change from the list box to the left.
3) Enter a new price for the item into the **Price** field.
4) Press [ **OK** ] to confirm your entries.

### The Transaction window opens.

The changed price is added to the list of positions registered in the **Transaction** window.

#### Transaction window – list of positions registered with pre-selected price change

5) Register the particular item.

The item is added to the position displaying the changed price within the list of positions registered. The position will be highlighted in colour.

---

**Information**

Call **Clear Price Change** to cancel a pre-selected price change.
**Modify Price**

Execute this function before registering an item to determine a new price for this item.

---

**NOTICE**

You need to have registered the item before you call the **Modify Price** function. Note that this sales function allows for price reductions as well as price increases. It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System (C)SMS.

1) Select the particular item within the **Transaction** window from the list box to the left.
2) Press [Modify Price] within the **Price Modification** submenu (**Sales** menu).

---

**Information**

You may also enter the price change into the input field within the **Transaction** window first, then press [Modify Price] within the **Price Modification** submenu (**Sales** menu) after that. Note that any amount needs to be entered with two decimal places. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

---

The **Modify Price** window opens.

The item’s original price is displayed under **Original Price**.

3) Select the reason for the price change from the list box to the left.
4) Enter a new price for the item into the **Price** field.
5) Press [OK] to confirm your entries.

The **Transaction** window opens. The changed price is registered and assigned to the selected item. The position appears highlighted in colour within the list of positions registered.

---

**Information**

Call the **Clear Price Change** sales function to cancel a modified price.
Clear Price Change
Cancel various price changes already implemented (e.g. Mark Down, Pre-Select Price Change, and Modify Price).

A prerequisite for executing this function is that you have performed a price change on an item in the current transaction.

1) Select an item with a previously changed price from the list of positions registered within the Transaction window.
2) Press [Clear Price Change] within the Price Modification submenu (Sales menu).

The price change for the selected item is cancelled. The original price is registered and included within the transaction’s total. The position no longer appears highlighted in colour within the list of positions registered.

Pre-Select Free Item
After calling this function the next item will be registered as a free gift complimentary to a customer’s regular purchase. However, it is important to register the item as such to ensure the inventory is kept up-to-date.

In order to execute this function the particular item must not be registered yet.

1) Press [Pre-Select Free Item] within the Price Modification submenu (Sales menu).
2) Register the item you would like to define as a free gift.

Note that only valid items can be registered as a free gift (this setting may be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

The item is registered within the list of positions registered along with the comment “Free Gift”. The original price for this item will not be considered in the transaction’s total.

Transaction window – list of positions registered with free gift
Post-Select Free Item
On executing this function an item already registered and selected will be registered as a free gift complimentary to a customer’s regular purchase. However, it is important to register a free gift to ensure the inventory is kept up-to-date.

**NOTICE**
Note that only valid items can be registered as a free gift (this setting may be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

**NOTICE**
In order to execute this function you need to have registered the particular item.

1) Select the item you would like to hand out as a free gift from the list box to the left in the Transaction window.
2) Press [Post-Select Free Item] within the Price Modification submenu (Sales menu).

The item appears within the list of positions registered along with the comment “Free Gift”. The original price for this item will not be considered in the transaction’s total.

![Transaction window - list of positions registered with free gift](image)

Remove Free Item
Remove a designated but not yet registered free item from the current transaction as follows.

**Information**
You need to have assigned a Free Item to the current transaction without actually having registered the particular item.

1) Press [Remove Free Item] within the Price Modification submenu (Sales menu).

The previously activated sales function Free Item is cancelled from the current transaction.

Employee Discount
If an employee from the same company would like to make a purchase at your till, you can assign the transaction to the particular employee. If an employee discount is linked to their employee ID it will automatically be deducted from all eligible items registered.
1) Press [Employee Discount] within the Price Modification submenu (Sales menu). The Employee Discount window opens.

2) Enter the employee’s number into the Employee field.

3) Press [OK]. An information message opens requesting verification of the employee’s ID.

4) After having verified the employee’s ID, press [OK].

The Transaction window opens. If the employee is eligible to an employee discount the discount will automatically be applied to all registered and valid items. The discount(s) will be listed within the list of positions registered.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

Any items you would like to assign an employee discount to must be eligible (change settings in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

Note that a discount can be assigned to an employee in different ways. If the employee is assigned to a specific discount group, the discount is applied to their purchase. However, an employee discount can also be granted through Mix & Match. In this case, a set of different rules apply (e.g. discounts are granted only on specific items).
**Deselect Employee**
Cancel an employee discount assigned to the current transaction.

Note that any transaction needs to be concluded and no items must be registered on the current transaction. You need to have called the Employee Discount function.

1) Press [Deselect Employee] within the Price Modification submenu (Sales menu). The employee discount assigned to the transaction is cancelled again.

**Increase in Price**
Assign a price to an item already registered which is above the original price.

You need to have registered the particular item before executing this function.

1) Select an item from the list of positions registered to the left in the Transaction window.
2) Press [Increase in Price] within the Price Modification submenu (Sales menu).

You may also enter the price change into the input field within the Transaction window first, then press [Increase in Price] within the Price Modification submenu (Sales menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Increase in Price window opens.

The original price is displayed in the Original Price field.

3) Select the reason for the increase in price from the list box to the left.
4) Enter a new price into the Price field.

The new price needs to be above the original price.
5) Press [OK] to confirm your entries.

The Transaction window opens. The increased price is assigned to the previously selected item and is highlighted in colour.

Call Clear Price Change to cancel the assigned price change.

Mark Down
Assign a price to an item already registered which is below its original price.

NOTICE
You need to have registered the item you would like to assign a lower price to before executing this function.

It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System (C)SMS.

1) Select the particular item from the list of positions registered in the Transaction window.

2) Press [Mark Down] within the Price Modification submenu (Sales menu).

You may also enter the price change into the input field within the Transaction window first, then press [Mark down] within the Price Modification submenu (Sales menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Mark Down window opens.

The item’s original price is displayed in the Original Price field.

3) Select the reason for the mark down from the list box to the left.

4) Enter a new price for the item into the Price field.

The new price must be below the original price.

5) Press [OK] to confirm your entries.

The Transaction window opens. The changed price is registered and assigned to the selected item. The new price is highlighted in colour.
To cancel a marked down price, call the Clear Price Change sales function.
9.1.2 **The Return & Sale Submenu**

The Return & Sale submenu provides all the sales functions needed in order to return and sell items.

You will find the following sales functions within the Return & Sale submenu *(Sales menu)*.

| Item Return/Remove Item Return | Validated Refund | Return Empties |
| Item Search | Voucher Sales | Downpayment Sales |
| Hierarchy Search | Voucher Return | Downpayment Return |

For detailed information on individual sales functions refer to the corresponding chapters.

**Item Return**

Refund a previously sold but now returned item by entering the relevant item information.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

In addition, the particular item must not be subject to a return ban (change this in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

1) Press [**Item Return**] within the submenu Return & Sale *(Sales menu)*.

The window Return – Reason for Refund appears.

**Return window – Reason for Refund**

2) Select the reason for the return from the list box to the left.

3) Press [**OK**] to confirm your selection.

The Transaction window opens. A position with the quantity "-1" is added to the list of positions registered.

<table>
<thead>
<tr>
<th>Product Text</th>
<th>X</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>-1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List of positions registered – returned position (item not yet registered)

4) Register the item you would like to return.
The Return - Enter Price window opens.

The Price field will display the original price of the registered item. Check the price displayed against the price originally paid (e.g. if the item was marked down or discounted when it was originally sold).

5) Press [OK] to confirm your entry.

The Transaction window opens. The particular item is added to the list of positions registered as a negative amount.

If you need to return multiple identical items, the number of items can be determined

- before calling the Item Return sales function by calling the Pre-Select Quantity sales function, or
- after registering the items to be returned by calling the Post-Select Quantity sales function.

Remove Item Return

Execute this function to remove a Return called in the current transaction.

A prerequisite for executing this function is that you have called a Return in the current transaction. However, the particular item must not be registered yet.

1) Press [Remove Item Return] within the Return & Sale submenu (Sales menu).

The Item Return assigned to the receipt is removed. The position with the quantity "-1" is removed from the list of positions registered.

Validated Refund

Refund an item previously sold, or all items on the entire receipt. The original receipt is recalled from the head office to ensure that only items which have been registered on the receipt are refunded.
Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

In addition, an online connection to the head office or to the back office must be established for a validated refund (if no connection is available, execute the Item Return sales function instead to refund items).

The particular item must not be subject to a return ban (change this in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

If the validated refund is executed for a customer who is registered in the customer database, you will be asked whether the current transaction is a Customer Purchase. In this case any transaction (returning as well as purchasing) will be saved within the customer’s profile.

1) Press [ Validated Refund ] within the Return & Sale submenu (Sales menu).

The Validated Refund – Receipt Data window opens.

2) Check for the correct information being displayed in the fields Store, Business Day (business day the receipt was created) and Workstation (numbers of store and workstation the receipt was printed at).

Correct any information if necessary.

3) Enter the receipt number on which the particular item has been registered into the Receipt Number field or scan the barcode on the receipt.

If the receipt’s number is not available to you, you may execute a transaction search, see 3.2.2.1 Frequently used Buttons.

4) Press [ OK ] to confirm your entries.

The Validated Refund – Refund Data window opens.
Validated Refund – Refund Data window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described steps. Choose between…

- refunding one or more items from the receipt without acquiring or searching for customer information, see paragraph refunding one or more items.
- refunding all items on the receipt, see paragraph refund the entire receipt.
- acquiring customer information before the refund is executed (optional), see paragraph Acquire Customer Information.
- searching for customer information before the refund is executed (optional), see paragraph Search for Customer Information.

Refunding one or more Item(s)

When refunding one or more items from the receipt, proceed as follows.

If you need to refund the entire Receipt, proceed as described in the paragraph refund the entire receipt.

1) Press [ OK ].

The Transaction window opens.

The list of positions registered will display all items contained on this receipt which are not subject to a refund ban. Item prices will not be displayed.

Transaction window with items eligible for a Validated Refund
2) Select the item which is refunded from the list box to the left.


![Validated Refund window – Quantity and Reason](image)

4) Select the reason for the Validated Refund from the list box to the left.

5) If you are refunding more than one identical item, state the quantity to be refunded into the Quantity field.

6) Press [OK] to confirm your entries. The Transaction window opens. The returned item is registered with a negative amount.

Information: Maximum Quantity displays how many identical items may be refunded from the receipt.

Information: If items on the receipt have been discounted, the transaction’s total will be recalculated.

You may select and refund more items from the receipt, finance the transaction (i.e. refund the total from the Validated Refund to the customer) or register further items the customer may wish to purchase.

Refunding the entire receipt

If you need to refund the entire receipt:

1) Activate the Refund All check box.

2) Press [OK].

The Validated Refund – Select Reason window opens.
Validated Refund – Select Reason window

3) Select the reason for the refund
4) Press [ OK ].

The Transaction window opens. All Items from the receipt which are not subject to a return ban are listed with negative amounts.

Transaction window with negative amounts for refunded items

You may select and refund more items from the receipt, finance the transaction (i.e. pay the total from the **Validated Refund** to the customer) or register further items the customer may wish to purchase.

**Acquire Customer Information**

You may acquire the customer's information before proceeding with the **Validated Refund** (optional).

1) Press [ Enter Address ]:
   a) If the customer’s information has not yet been saved in the database and the customer would like his information to be entered, or
   b) If the current transaction has been assigned to the customer prior to executing the validated refund and if the customer's information does not require an update.

The **Validated Refund – Address Entry** window opens.
Validated Refund – Address Entry

2) Enter the customer’s name, address and phone number.

If your till is not equipped with a keyboard use the virtual keyboard after pressing . If the current transaction has been assigned to the customer prior to executing the validated refund all customer information contained in the database will be displayed and may be edited for the purpose of the validated refund if necessary. However, changes made will not be saved within the database.

3) Press [ OK ].

The Validated Refund – Refund Data window opens.

Validated Refund – Refund Data

If the entries made are incorrect, press [ Enter Address ] again and correct them.

- If only one item is refunded proceed as described in paragraph “refunding one or more items”.
- If you would like to refund the entire receipt proceed as described in paragraph “refund the entire receipt”.

Search for Customer Information

You may search for customer information within the customer database.

1) Press [ Search Address ] when:
   a) The customer would like to have his information entered into the database, or
   b) The customer’s information has already been saved in the database, but the information has changed or there are several addresses at choice.
The **Validated Refund – Customer Address** window opens.

![Validated Refund – Customer Address](image)

**Validated Refund – Customer Address** window

2) Select an address for this customer out of all addresses displayed. Alternatively you may choose between the following options:

- If the customer’s information has not yet been entered and saved within the database you may create a new entry for this customer on pressing [Create Customer] (see 9.6.2 New Customer).
- You may change any existing customer information by pressing [Change Customer] (see 9.6.3 Modify Customer).
- If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing [Search Customer] (see 9.6.1 Customer View).

3) After selecting the address, press [OK].

The **Validated Refund – Refund Data** window opens.

![Validated Refund – Refund Data](image)

**Validated Refund – Refund Data** window

4) Verify that the information displayed is correct. You may change the information on pressing [Search Address].

- If only one item is refunded proceed as described in paragraph “refunding one or more items”.
- If you would like to refund the entire receipt proceed as described in paragraph “refund the entire receipt”.
Return Empties
Register any empties returned by the customer calling the Return Empties sales function.
1) Press [Return Empties] within the Return & Sale submenu (Sales menu).

The Return Empties window opens.

2) Scan the item’s barcode or manually enter the item number/barcode.

3) Press [OK] if you have entered the information manually (when scanning the item’s barcode this is not necessary!).

The Transaction window opens. The empties are registered with a negative amount within the list of positions registered.

Item Search
You can use this function to search for an item and access more detailed information about it, e.g. its merchandise group. Any item found can be registered in the current transaction.
1) Press [Item Search] within the Return & Sale submenu (Sales menu).

The Item Search window opens.

2) Scan or enter the item you are looking for manually.

If your till is not equipped with a keyboard use the virtual keyboard after pressing.
a) From the **Search mode** drop-down list select **Item ID**. Scan the item number of the item which you are requiring more detailed information. Alternatively, you may manually enter the item number under **Search Criteria**.

b) From the **Search mode** drop-down list select **Item Barcode**. Scan the item number of the item which you are requiring more detailed information. Alternatively, you may manually enter the item number under **Search Criteria**.

c) From the **Search mode** drop-down list select **Item Description** and enter a description of the item under **Search Criteria** (e.g. the name of the item).

d) From the **Search mode** drop-down list select **Serial Number** and enter the serial number of the item under **Search Criteria**.

e) Enter one or more item attributes under **Colour**, **Style**, **Size**, and **Material** (e.g. "blue" under **Colour**).

3) Press [ **OK** ] if you have entered the information manually.

The search criteria entered will be transferred to the input field in the **Transaction** window.

4) Press [ **OK** ] to confirm the item search.

Depending on the number of items found, proceed as follows.

- Only one item met the search criteria, see paragraph *Only one item found*.
- Several items met the search criteria, see paragraph *Several items found*.

### Only one item found

If only one item has met your search criteria the **Article Information** window will appear and display all information saved for this particular item.

![Article Information window](image)

1) Press [ **Sell** ].

The **Transaction** window opens. The item is now registered and listed to the left.

- On pressing [ **Back** ] in the **Article Information** window you will return to the **Item Search** window and may conduct a new item search.
- On pressing [ **Image** ] an image of the item will be displayed.

**No item image is available in the case of [ **Image** ] being greyed out.**

### Several items found

If several items are found, the **Item Search − Results** window opens and displays all items matching the description entered.
Item Search − Results window

1) Select an item.
2) Press [Sell].

The Transaction window opens. The item is now registered and listed to the left.

- On pressing [Back] in the Item Search - Results window you will return to the Item Search window and may conduct a new item search.
- On pressing [Details] in the Item Search – Results window an items saved details will be displayed.

The Article Information window opens.

Voucher Sales

Execute this function to sell a voucher. The voucher can be used as a method of payment in a later purchase.

A connection between the till and the central gift certificate server needs to be established in order to sell vouchers which require validation from the gift certificate server. If the connection is not established a warning message is displayed. Decide whether or not you would like to continue selling the voucher despite missing validation.

1) Press [Voucher Sale] within the Return & Sale submenu (Sales menu).

The Voucher Sales window opens.
2) Select a voucher description from the list box to the left.

The voucher descriptions depend on the specific voucher type. It further specifies the voucher’s conditions e. g. minimum and maximum amount, validity, or whether the voucher number is automatically assigned. Voucher types can be created and configured in the (Central) Store Management System ((C)SMS).

Depending on the type of voucher selected, the entry fields **Valid Till** and **Number** may already contain entries. Minimum or maximum amounts may have to be considered when entering the voucher’s amount.

3) If there is no information displayed in the **Valid Till** field, enter the particular date in the format of "MM/YY".

4) If there is no information displayed in the **Number** field, enter the voucher number. In some cases the voucher number is printed on the voucher.

5) Enter the voucher’s amount into the **Amount** field.

If the amount entered is incorrect a message will be displayed. Correct the entry.

6) Press `[ OK ]` to confirm your entries.

The **Transaction** window opens. The voucher is added to the list of positions registered and a receipt is printed after the transaction is financed.

**Downpayment Sales**

Instead of paying the full price immediately the customer may choose to make a down payment first.

1) Press `[ Downpayment Sales ]` within the **Return & Sale** submenu (**Sales** menu).

You may also enter the amount of the downpayment into the input field within the **Transaction** window first, then press `[ Downpayment Sales ]` within the **Return & Sale** submenu (**Sales** menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Downpayment Sales** window opens.
- You may enter the first name and surname of the customer making a downpayment to the left. You may also enter an additional comment (e.g. state the item for which the downpayment is made).

Any information entered will be printed on the receipt along with the downpayment ID and the amount after financing.

If your till is not equipped with a keyboard use the virtual keyboard after pressing 🎨.

- If the customer has made a downpayment before and now wishes to increase the amount, activate the Add to existing downpayment checkbox.

The Downpayment ID input field is activated.

  a) Enter ID of the previous downpayment.

2) Enter the amount of the downpayment into the Price field.

3) Press [ OK ] to confirm your entries.

The Transaction window opens. The downpayment is registered within the list of positions registered.

- You may register any additional items the customer wishes to purchase.

After financing the transaction, a receipt is printed. The downpayment ID and the amount of the downpayment appear as a sales position on the receipt.

### Hierarchy Search

Search within merchandise groups for items and item information. Any item found can be registered directly from the hierarchy search and will be listed within the current transaction.

1) Press [ Hierarchy Search ] within the Return & Sale submenu (Sales menu).

The Hierarchy Search window opens.

![Hierarchy Search window](image)

This window displays all merchandise categories of the highest hierarchy level. In addition, the Hierarchy Level list box to the right shows the hierarchy level and the merchandise group currently selected.

2) Select the merchandise group you would like to search to the left.

3) Press [ Select ].

If the selected merchandise group contains sub-categories, they will now be displayed.
a) Press [New Search] to return to the first hierarchy level and start a new search.

b) Press [Back] to move up one hierarchy level.

- If the selected category does not contain any sub-categories, all items within the merchandise category selected are listed (in this case skip the following action steps and proceed with action step 6).

4) Select the merchandise category you would like to search.

5) Press [Select] to open the merchandise category.

6) Repeat these steps until the lowest level ("Item Level") of a merchandise group has been reached. All items contained will be displayed.

7) Select the item you would like to obtain further information on or which you would like to register in the current transaction.

The [Detail] and [Sell] buttons are displayed.
Hierarchy Search window – the lowest hierarchy level (item level) with [Detail] and [Sell] buttons

8) Press [Detail] to obtain more detailed information on the selected item. The Article Information window opens.

Any information available on the item selected is displayed here.

- On pressing [Back] in the Article Information window you will return to the Hierarchy Search window, where you can search for another item, or display information on another item.
- On pressing [Image] an image of the item is displayed.

If [Image] is greyed out no image is available.

- On pressing [Sell], the Transaction window opens. The item is registered within the list of positions registered.

9) Press [Sell] to sell the item to the customer.

Voucher Return

If a customer wishes to return a voucher in exchange for a refund, you can use this function to accept the voucher and pay out the relevant amount to the customer.
1) Press [Voucher Return] within the Return & Sale submenu (Sales menu).

The Voucher Return window opens.

![Voucher Return window](image)

2) Select the voucher type from the list box to the left.

The input fields Company and Store will already carry information. Check any information displayed here against the information on the customer's receipt and make corrections if necessary.

a) Scan the barcode on the voucher or the voucher's receipt, or
b) Manually enter the voucher number.

The Transaction window opens. The voucher's value will be registered with a negative amount within the list of positions registered and will be deducted from the transaction's total.

**Downpayment Return**

You may refund a downpayment previously made by a customer (e.g. if the customer took home an item he made a downpayment for but no longer wishes to purchase the item).

1) Press [Downpayment Return] within the Return & Sale submenu (Sales menu).

You may also enter the number of the downpayment into the input field within the Transaction window first, then press [Downpayment Return] within the Return & Sale submenu (Sales menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Downpayment Return window opens.
2) Enter the number of the downpayment you would like to refund into the **Downpayment ID** field.

The **Downpayment ID** is located on the receipt.

3) Press [OK] to confirm your entry.

The **Downpayment** input field will display the amount of the downpayment.

4) Press [OK].

The **Transaction** window opens. The downpayment is registered with a negative amount and a comment reading “Downpayment Refund” within the list of positions registered.

**Complaint No Receipt**

Proceed as follows if items are being returned in the form of a complaint and the receipt is not at hand:

1) Press [Complaint No Receipt] within the Return & Sale submenu (Sales menu). The **Complaint No Receipt** window opens.

2) Enter your staff ID (six-digit number) and press [OK].

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing [OK].
4) Enter your salesperson ID and press [OK].

5) Select the search mode from the drop-down menu.

6) Enter the information required into the Item/Barcode field (depending on your selection from the drop-down menu).

7) Enter the item price.
   You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing [OK].
   A list box with all items matching your search criteria will be displayed within the Complaint No Receipt window.

9) Select the particular item from the list box.
   You may use the arrow keys to navigate within the list box.
10) Confirm your selection through [ OK ].

11) Select the reason for the complaint and confirm your selection through [ OK ].

The Transaction window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The Transaction window will open.

**Complaint With Receipt**

If a customer is returning an item in the form of a complaint and the receipt is at hand proceed as follows.

1) Press [ Complaint With Receipt ] within the Return & Sale submenu (Sales menu).

   The Complaint With Receipt window opens.

2) Enter your staff ID (six-digit number) and press [ OK ].

   The Complaint With Receipt – Enter Data window opens.

3) Enter the STID (four-digit number).
4) Enter the business day, the workstation ID (two-digit number) and the transaction number, then confirm your entries by pressing [OK].
You will find the information required on the receipt.

5) Enter your salesperson ID and press [OK].

![Complaint with Receipt window](image1)

6) Select the search mode from the drop-down menu.

![Drop-down menu](image2)

7) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

8) Enter the item price.
You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

9) Confirm your entry by pressing [OK].
A list box with all items matching your search criteria will be displayed within the **Complaint With Receipt** window.

![Complaint with receipt window](image3)

10) Select the particular item from the list box.
You may use the arrow keys to navigate within the listbox.

Refer to 3.2.2.1 Frequently used Buttons for detailed information on arrow keys and other buttons.

11) Confirm your selection through [ OK ].

![Complaint with Receipt window]

12) Select the reason for the complaint and confirm your selection through [ OK ].

The Transaction window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

13) Initiate financing and conclude the transaction.

The Transaction window will open.

**Void Complaint**

If you need to void a complaint, proceed as follows.

1) Press [ Void Complaint ] within the Return & Sale submenu (Sales menu).

The Void Complaint – staff ID window opens.

2) Enter your staff ID (six-digit number) and press [ OK ].

The Void Complaint – Enter Data window opens.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing [ OK ].

4) Enter your salesperson ID and press [ OK ].

The Void Complaint – Enter Data window opens.
5) Select the search mode from the drop-down menu.

![Void Complaint window]

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

   You may skip this step. However, if you skip this step you will be asked to confirm the item’s price at a later point.

8) Confirm your entry by pressing `[OK]`.

   A list box with all items matching your search criteria will be displayed within the **Void Complaint window**.

![Void Complaint window]

9) Select the particular item from the list box.

   You may use the arrow keys to navigate within the list box.

---

Refer to **3.2.2.1 Frequently used Buttons** for detailed information on arrow keys and other buttons.
10) Confirm your selection through [OK].
The Transaction window opens. The item will be listed within the list of positions registered.
- You may register more items.
11) Initiate financing and conclude the transaction.
The Transaction window will open.

Return No Receipt
If a customer wishes to return an item without the receipt at hand proceed as follows.
1) Press [Return No Receipt] within the Return & Sale submenu (Sales menu). The Return No Receipt – Staff ID window opens.
2) Enter your staff ID (six-digit number) and press [OK].
3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing [OK].
4) Enter your salesperson ID and press [OK].
The Return No Receipt window opens.

5) Select the search mode from the drop-down menu.

6) Enter the information required into the Item/Barcode field (depending on your selection from the drop-down menu).
7) Enter the item price.
   You may skip this step. However, if you skip this step you will be asked to confirm the item’s price at a later point.
8) Confirm your entry by pressing [OK].
   A list box with all items matching your search criteria will be displayed within the Return No Receipt window.
9) Select the particular item from the list box. You may use the arrow keys to navigate within the list box.

Refer to 3.2.2.1 Frequently used Buttons for detailed information on arrow keys and other buttons.

10) Confirm your selection through [OK].

11) Select the reason for the complaint and confirm your selection through [OK]. The Transaction window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The Transaction window will open.

Return With Receipt
If a customer is returning an item and the receipt is at hand proceed as follows.

1) Press [Return With Receipt] within the Return & Sale submenu (Sales menu).

The Return With Receipt window opens.

2) Enter your staff ID (six-digit number) and press [OK].
The **Return With Receipt – Enter Data** window opens.

![Return with Receipt window](image)

3) Enter the STID (four-digit number).

4) Enter the business day, the workstation ID (two-digit number) and the transaction number, then confirm your entries by pressing [**OK**].

You will find the information required on the receipt.

5) Enter your salesperson ID and press [**OK**].

![Return with Receipt window](image)

6) Select the search mode from the drop-down menu.

![Drop-down menu](image)

7) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

8) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item’s price at a later point.

9) Confirm your entry by pressing [**OK**].
A list box with all items matching your search criteria will be displayed within the **Return With Receipt** window.

10) Select the particular item from the list box. You may use the arrow keys to navigate within the list box.

Refer to **3.2.2.1 Frequently used Buttons** for detailed information on arrow keys and other buttons.

11) Confirm your selection through [ **OK** ].

12) Select the reason for the complaint and confirm your selection through [ **OK** ].

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

13) Initiate financing and conclude the transaction.

The **Transaction** window will open.

**Void Return**

If you need to void a return, proceed as follows.

1) Press [ **Void Return** ] within the **Return & Sale** submenu (Sales menu).
The **Void Return – staff ID** window opens.

2) Enter your staff ID (six-digit number) and press [OK].

The **Void Return – Enter Data** window opens.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing [OK].

4) Enter your salesperson ID and press [OK].

The **Void Return – Enter Data** window opens.

5) Select the search mode from the drop-down menu.

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item’s price at a later point.

8) Confirm your entry by pressing [OK].

A list box with all items matching your search criteria will be displayed within the **Void Return** window.

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the listbox.

10) Confirm your selection through [OK].

The **Transaction** window opens. The item will be listed within the list of positions registered.

- You may register more items.

11) Initiate financing and conclude the transaction.
The Transaction window will open.

Return External Shop
Proceed as follows to return goods sold through another store.
1) Press [Return External Shop] within the Return & Sale submenu (Sales menu).
   The Return External Shop – staff ID window opens.
2) Enter your staff ID (six-digit number) and press [OK].
   The Return External Shop – Enter Data window opens.
3) Enter the order number (14-digit number) and the position number (two-digit number) and confirm through [OK].
   You will find the information required on the receipt of the external store.
4) Enter your salesperson ID and press [OK].

![Return external Shop window]

5) Select the search mode from the drop-down menu.

![Drop-down menu]

6) Enter the information required into the Item/Barcode field (depending on your selection from the drop-down menu).
7) Enter the item price.
   You may skip this step. However, if you skip this step you will be asked to confirm the item’s price at a later point.
8) Confirm your entry by pressing [OK].
   A list box with all items matching your search criteria will be displayed within the Return with Receipt window.
Return with receipt window

9) Select the particular item from the list box. You may use the arrow keys to navigate within the list box.

Refer to 3.2.2.1 Frequently used Buttons for detailed information on arrow keys and other buttons.

10) Confirm your selection through [OK].
11) Select the reason for the complaint and confirm your selection through [OK].
The Transaction window opens. The item will be listed within the list of positions registered as a negative position.
  • You may register more items.
12) Initiate financing and conclude the transaction.
The Transaction window will open.

Complaint External Shop
Proceed as follows to return goods in the form of a complaint, sold through another store.
1) Press [Complaint External Shop] within the Return & Sale submenu (Sales menu).
The Complaint External Shop – staff ID window opens.
2) Enter your staff ID (six-digit number) and press [OK].
The Complaint External Shop – Enter Data window opens.
3) Enter the order number (14-digit number) and the position number (two-digit number) and confirm through [OK].
You will find the information required on the receipt of the external store.
4) Enter your salesperson ID and press [OK].
5) Select the search mode from the drop-down menu.

6) Enter the information required into the Item/Barcode field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing [OK].

A list box with all items matching your search criteria will be displayed within the Complaint with Receipt window.

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Refer to 3.2.2.1 Frequently used Buttons for detailed information on arrow keys and other buttons.
10) Confirm your selection through [OK].

11) Select the reason for the complaint and confirm your selection through [OK].

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The **Transaction** window will open.
9.1.3 The Transactions Submenu

This submenu contains sales functions you can use to suspend or resume a transaction.

You will find the following sales functions within the Transactions submenu (Sales menu).

Suspend Sale/
Resume Sale

For detailed information on individual sales functions refer to the corresponding chapters.

Suspend Sale

The Suspend Sale function allows for the registering process to be interrupted without cancelling the receipt. The transaction will be put on hold and can be resumed at a later point to register additional items or for financing purposes.

You must have registered at least one item on the current transaction and the transaction must not be within the financing stages yet in order to execute this sales function.

1) Press [Suspend Sale] within the Transactions submenu (Sales menu). The transaction will be stored. A receipt labelled “Suspend Receipt” is printed. It will be used to identify the suspended transaction. Scan the barcode printed on the receipt when resuming the transaction.

Call the Resume Sale sales function to resume a previously suspended receipt.
Resume Sale
Resume a previously suspended transaction by calling the Resume Sale sales function.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
There must be a receipt previously suspended within the system to call Resume Sale.

1) Press [Resume Sale] within the Transactions submenu (Sales menu).
The Resume Sale window opens.

![Resume Sale window]

All suspended transactions are displayed here along with the workstation number, business day and time.
   a) Scan the barcode of the transaction’s receipt you wish to resume, or
   b) Select the suspended transaction from the list of transactions.

If you scan the receipt the Transaction window will open. The transaction is resumed and the items already registered are displayed within the list of positions registered.

2) Select a particular transaction from the list, then press [OK].
The Transaction window opens. The selected transaction is resumed and the items already registered on this receipt are transferred to the list of positions registered.

9.1.4 Pre-Select Quantity
Before registering an item you can determine the item’s quantity.

This sales function can only be called in advance to registering the particular item. Items which are weighed to determine the price (e.g. fruit and vegetables) as well as items subject to a select-quantity-ban are excluded (change settings in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

1) Press [Pre-Select Quantity] within the Sales menu.

You may also enter the quantity into the input field within the Transaction window first, then press [Pre-Select Quantity] within the Sales menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Select Quantity window opens.
2) Enter the quantity you would like to register for the next item into the **Quantity** field.

3) Press [ OK ] to confirm your entry.

The **Transaction** window opens. The quantity is added to the list of positions registered.

4) Register the item.

The item is registered and listed within the list of positions registered. The price for one item is displayed under **Price**; the total amount of the position according to the quantity previously entered appears under **Amount**.

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**Information**

You may change the quantity for an item by selecting the relevant item, executing the **Post-Select Quantity** sales function and entering a different quantity.
9.1.5 Post-Select Quantity

This sales function is adding a quantity to an item already registered. This way several items with the same item number or the same barcode do not have to be scanned or entered separately.

This sales function can only be called after registering the particular item. Items which are weighed to determine the price (e.g. fruit and vegetables) as well as items subject to a select-quantity-ban are excluded (change settings in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

1) From the list of positions registered in the Transaction window, select the item of which the customer wishes to purchase several.

2) Press [Post-Select Quantity] within the Sales menu.

You may also enter the quantity into the input field within the Transaction window first, then press [Post-Select Quantity] within the Sales menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Select Quantity window opens.

3) Enter the quantity you would like to register for the previously registered or selected item into the Quantity field.

4) Press [OK] to confirm your entry.

The item is registered and listed within the list of positions registered. The price for one item is displayed in the Price field; the total amount of the position according to the quantity entered appears in the Amount field.
9.1.6 Salesperson

Assign a transaction or individual positions to a specific salesperson (e.g. if this salesperson provided advice which has ultimately lead to the customer making a purchase and is therefore entitled to a commission).

All items registered after calling this sales function will be assigned to the particular salesperson. The salesperson ID will be printed on the receipt. Therefore, if only part of the sold items should be assigned to a salesperson, the other items need to be registered before calling the Salesperson sales function.

When an entire receipt should be assigned to one salesperson no items must be registered yet on the current transaction before calling the sales function.

If there are several items which need to be assigned to different salespersons, call the Salesperson function for each salesperson one after the other, then registering the items assigned to them.

Depending on the customising of your LUCAS POS, an operator with salesperson rights may be assigned automatically for the first transaction after they sign on.

1) Press [Salesperson] within the Sales menu.

You may also enter the Salesperson ID into the input field within the Transaction window first, then press [Salesperson] within the Sales menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Salesperson window opens.
2) Enter the salesperson’s number into the Salesperson ID field.
3) Press [ OK ] to confirm your entry.

The Transaction window opens. All items registered after this will be assigned to the salesperson specified. The salesperson ID is displayed in the window’s header.

**NOTICE**

Note that a salesperson can only be assigned to the current transaction. After the transaction is concluded the assignment is revoked.

### 9.1.7 Remove Salesperson

Call the Remove Salesperson sales function in order to remove a previously assigned salesperson from the current transaction.

**Information**

Note that a salesperson has to be assigned to the current transaction in order to call this sales function.

1) Press [ Remove Salesperson ] within the Sales menu.

The Remove Salesperson window opens.
2) Select the salesperson you would like to remove from the current transaction from the list box to the left.

3) Press [OK] to confirm your selection.

The Transaction window opens. The salesperson is removed from the current transaction and the header no longer displays a salesperson ID.

9.1.8 Collect Miles

Register miles for the Lufthansa Miles & More bonus programme.

**NOTICE**

A prerequisite for collecting miles is an online connection between the till at which the miles are being collected and the central Miles & More database.

1) Press [Collect Miles] within the Sales menu.

The Collect Miles window opens.

2) Enter the customer’s Miles & More card number into the Card Number field or swipe the card through the card reader.

3) Press [OK] to confirm your entry.

The Transaction window opens. Miles & More miles are credited for the current transaction. The receipt displays the amount of miles collected for this purchase.
9.1.9 Book Miles

If booking miles from the Miles & More programme could not be executed during the transaction (e.g. due to a missing Miles & More card or because the connection between LUCAS POS and the Miles & More database was not established), you may credit miles for the particular purchase at a later point.

NOTICE

A connection between LUCAS POS and the Miles & More database has to be established in order to book miles.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Book Miles] within the Sales menu.

The Book Miles window opens.

2) Scan the receipt and enter the transaction’s total into the Amount field.

- Instead of scanning the receipt you may enter the information manually. Note that the date the receipt was created needs to be entered in the format of DD/MM/YY.

3) Press [OK] to confirm your entries.

The Book Miles window closes and the Miles & More window opens.

4) Enter the customer’s Miles & More card number into the Card Number field or swipe the card through the card reader.

5) Press [OK] to confirm your entry.
An information message opens to inform you about the successful booking.

In the case of the rebooking not being successful an error message is displayed. It will provide you with information on the type of error and on possible troubleshooting.

6) Press [ OK ] in the information window.

The Transaction window opens. Miles & More miles are credited. A receipt of the booking is printed.

### 9.1.10 Send Sales

The current transaction can be defined as a shipping order. The delivery address is stated and printed on the receipt for delivery purposes. A delivery fee is automatically charged. Items may be registered on the current transaction already but financing must not be initialised yet.

1) Press [ Send Sales ] within the Sales menu.

![Send Sales window](image)

Send Sales window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described step.

Choose between…

- acquiring customer information (optional), see paragraph *Enter Address*.
- searching for customer information (optional), see paragraph *Search Address*.

#### Enter Address

Press [ Enter Address ]:

- a) If the customer information has not yet been saved in the database and the customer would like his information to be entered, or
- b) If the current transaction has been assigned to the customer prior to executing the Send Sales function and if the customer information does not require an update.

The Send Sales – Address Entry window opens.
Enter the customer's name and the destination address.

If your till is not equipped with a keyboard use the virtual keyboard after pressing .

If the current transaction has been assigned to the customer previously to executing the Send Sales sales function all customer information contained in the database will be displayed and may be changed if necessary.

Changes made will not be saved within the database.

Search Address

1) Press [ Search Address ] when:
   a) The customer would like to have their information entered into the database, or
   b) The customer’s information has already been saved in the database, but the information has changed or when there are several addresses at choice.

The Send Sales – Customer Address window opens.

If the current transaction has been assigned to the customer prior to executing the Send Sales sales function all customer’s information contained in the database will be displayed and may be changed if necessary.

2) Select an address out of all addresses displayed for this customer.

Alternatively you may choose between the following options:

- If the customer’s information has not yet been entered and saved within the database you may create a new entry for this customer on pressing [ Create Customer ] (see 9.6.2 New Customer).
You may change any existing customer information by pressing [Change Customer] (see 9.6.3 Modify Customer).

If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing [Search Customer] (see 9.6.1 Customer View).

3) After selecting the address, press [OK].

The Transaction window opens.

The shipping fee will be displayed within the list of positions registered. A shipping order with the customer’s address is printed.

9.1.11 Clear

Cancel all entries which will affect the item registered next (e.g. if you entered a quantity for the next item).

Clear does not cancel items previously registered, but entries made for the item to be registered next (e.g. a barcode, a pre-select quantity, or an item return). Sales functions influencing the whole receipt cannot be cancelled on pressing [Clear].

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. You must have called a sales function or made an entry for an item.

1) Press [Clear] within the Sales menu.

All entries made affecting an item registered afterwards will be cancelled. Any position entered into the input field or created within the list of positions registered (e.g. quantities) will be removed.

9.1.12 Order

Register goods ordered through the sales function Order.


2) Enter the order number.
3) Confirm your entry through [OK].

The Transaction window opens. The goods contained within the order entered will be listed within the list of positions.

4) Press [Total] to conclude the transaction.
9.2 The Control Menu

The Control menu provides functions for controlling purposes (e.g. preventing unauthorised access to the till), as opposed to the functions directly involved in sales and financing tasks.

![Control Menu Interface]

You will find the following sales functions within the Control menu.

- *No Sale*
- *Pause*
- *Sign Off*
- *Settlement*
- *Preliminary Settlement*
- *Reconciliation*
- *EFT Period Close*
- *Till State Report*

For detailed information on individual sales functions refer to the corresponding chapters.

9.2.1 No Sale

Employ this sales function if you need to open the till drawer without monetary or goods movement.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press *[No Sale]* within the Control menu.

The No Sale window opens.

![No Sale Window]

**Number**  **Reason**
---  ---
1  return
2  drawer shut
3  invoice exchange
4  key removal

Press **OK** to exit the No Sale window.
No Sale window

2) Select the reason from the list box to the left.
3) Press [OK].

The Transaction window appears and the till drawer opens. Depending on the specific configuration of your system ("Customising"), a receipt labelled “No Sale” will be printed.

NOTICE
The till drawer must be closed again immediately after you are finished with the task you needed to perform.

9.2.2 Pause

Whenever you need to leave the till unattended for only a short period of time you may call the Pause function. It prevents unauthorised access to the till while no operator is present. After calling the function, you will remain signed on to the till, however no entries can be made without entering the correct password.

The Pause mode activates automatically if a defined period of time passes without tasks being performed at the till.

NOTICE
Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
Only the operator calling the Pause sales function will be able to end it with the entry of their password.

1) Press [Pause] within the Control menu.
The Pause window opens and LUCAS POS will switch into Pause mode.

Pause window

This mode does not allow entries being made at the till.
The Operator field contains the number of the operator calling the pause mode. This number cannot be altered.
In order to exit the pause mode and resume working the till, the operator who called the pause mode must enter their password under Password.
2) After having entered the password, press [OK].
The Transaction window opens. Pause mode is now terminated. You may resume working the till.
9.2.3 Sign Off
After finishing your shift at the till sign off from LUCAS POS to prevent unauthorised access to the till and to allow for another operator to sign on.

**NOTICE**
Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Sign Off] within the Control menu.
You are signed off from the till. The Sign On window opens. Another operator may now sign on entering their operator ID and password.

![Sign On window](image)

9.2.4 Settlement
The Settlement function will assist in calculating any cash contained in the till drawer as part of a one-stage settlement (a settlement is usually carried out shortly before closing time).

The data of all monetary value registered is transferred to the back office for further analysis. You are signed off from the till, but may sign on again at any time and continue working the till.

**NOTICE**
Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
If multiple settlements are performed on a single day, the combined value of all settlements is registered in the back office after the daily closing.

1) Press [Settlement] within the Control menu.
The till drawer opens and the Settlement window appears.
Settlement window

2) Select a currency (e.g. EUR) from the list box to the left and enter the corresponding cash.

The total of all amounts entered is displayed in the Total field to the right.

Settlement window – showing the total and amounts entered under EUR and Gift Voucher

Any balances of electronic payments (and – depending on your customising – those of payment methods other than cash) do not have to be entered manually as they are submitted automatically.

You may employ the denomination function for the Settlement sales function (for further information on denomination fields, please refer to 3.2.2.1 Frequently used Buttons, paragraph Denomination and Denomination Fields). The total amount of all denominations will be registered automatically for the currency selected.

3) Once you have entered all cash contained in the till drawer, press [ OK ].

LUCAS POS will verify whether the actual holdings within the drawer are compliant with the value from all receipts.

  a) If the settlement is verified and therefore the holdings within the drawer equate with the daily receipts, a settlement receipt is printed, showing all payment methods along with the supposed and actual receipts.

The Settlement window closes, the operator is signed off, and the Sign On window opens. If the operator wishes to continue working the till, they may sign on again (see Chapter 2 Signing On).
b) If LUCAS POS detects an imbalance between the holdings within the drawer and the daily receipts a warning message appears, informing you of the imbalance.

4) Close the till drawer.

*In the case of an imbalance...*

**NOTICE**

You may not possess the authorisation necessary to execute a settlement regardless of an imbalance. In this case the warning message will only contain the [ Next ] button. On pressing [ Next ] you will be lead to the Settlement window again. Correct your entries or sign off to allow for an operator with the authorisation required (e.g. the store manager) to sign on and execute the settlement despite the imbalance.

- Press [ Cancel ] to return to the Settlement window, where you can verify and correct your entries.
- Press [ Ignore ] to ignore the warning message and complete the settlement despite the imbalance.

The Settlement window closes, the operator is signed off and the Sign On window opens. A settlement receipt is printed, showing the holdings within the drawer compared to the daily receipts along with any imbalance. If an operator wishes to continue working the till, they may sign on again (see 2 Signing On).

### 9.2.5 Preliminary Settlement

This function is used to settle the till’s actual holdings as a preliminary settlement of a two-stage settlement. All data is sent to the back office for further analysis and the operator is signed off.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

After calling the Preliminary Settlement sales function, you may work the till again only after a manager till settlement has been executed in the back office.

1) Press [ Preliminary Settlement ] within the Control menu.

The till drawer opens and the Preliminary Settlement window appears.

2) Select a currency (e.g. EUR) from the list box to the left and enter the corresponding cash.
The total of all amounts entered is displayed under **Total** to the right.

Preliminary Settlement window – amounts entered for EUR and CHF

Any balances of electronic payments (and – depending on your customising – those of payment methods other than cash) do not have to be entered manually as they are submitted automatically.

You may employ the denomination function for the **Preliminary Settlement** sales function (for further information on denomination fields, please refer to **3.2.2.1 Frequently used Buttons, paragraph Denomination and Denomination Fields**). The total amount of all denominations will be calculated and registered for the currency selected.

3) Once you have entered all cash contained in the till drawer, press **[ OK ]** to confirm your entries.

LUCAS POS will verify whether the actual holdings in the drawer are compliant with the value from all receipts.

   a) If the settlement is verified and therefore the holdings in the drawer equate with the daily receipts, a settlement receipt is printed showing all payment methods together with the supposed and actual receipts.

   The **Settlement** window closes, the operator is signed off, and the **Sign On** window opens. If the operator wishes to continue working the till, they may sign on again.

   b) If LUCAS POS detects an imbalance between the holdings within the drawer and the daily receipts a warning message appears, informing you of the imbalance.

4) Close the till drawer.

*In the case of an imbalance...*

You may not possess the authorisation necessary to execute a settlement regardless of an imbalance. In this case the warning message will only contain the **[ Next ]** button. On pressing **[ Next ]** you will be lead to the **Settlement** window once again. Correct your entries or sign off to allow for an operator with the authorisation required (e.g. the store manager) to sign on and execute the settlement despite the imbalance.

- Press **[ Cancel ]** to return to the **Settlement** window, where you can verify and correct your entries.
- Press **[ Ignore ]** to ignore the warning message and complete the settlement despite the imbalance.

The **Settlement** window closes, the operator is signed off and the **Sign On** window opens.
A settlement receipt is printed showing the holdings within the drawer compared to the daily receipts along with any imbalance. Signing on to the till will only be possible after a manager till settlement has been executed in the back office.

9.2.6 Reconciliation

Compare the actual holdings in the drawer to the total amount of all receipts, e.g. in the event of a customer complaining about not having received the correct amount of change.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Reconciliation] within the Control menu.

The till drawer opens and the Reconciliation window appears.

![Reconciliation window](image)

2) Select a currency (e.g. EUR) from the list box to the left and enter the amount of cash.

The total of all amounts entered is displayed in the Total field to the right.

![Reconciliation window - amount entered under EUR and the total](image)

Any balances of electronic payments (and – depending on your customising – those of payment methods other than cash) do not have to be entered manually as they are submitted automatically.
You may employ the denomination function for the Settlement sales function (for further information on denomination fields, please refer to 3.2.2.1 Frequently used Buttons, paragraph Denomination and Denomination Fields). The total amount of all denominations will be calculated and registered automatically for the currency selected.

3) Once you have entered all cash contained in the till drawer, press [ OK ].

The Transaction window opens. A reconciliation receipt is printed stating the holdings within the drawer compared to the official receipts along with any imbalance.

4) Close the till drawer.

### 9.2.7 EFT Period Close

All current EFT-records will be sent to the head office or to the provider, depending on your customisation.

1) Press [ EFT Period Close ] within the Control menu.

All EFT records will be sent to the head office or to the provider.

### 9.2.8 Till State Report

This function provides you with an overview on any values in your till drawer.

```
<table>
<thead>
<tr>
<th>Currency</th>
<th>Open</th>
<th>Loan</th>
<th>Deposit</th>
<th>Pickup</th>
<th>Nominal</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUR</td>
<td>0.00</td>
<td>0.00</td>
<td>16,577.00</td>
<td>-50.00</td>
<td>16,527.00</td>
</tr>
<tr>
<td>USD</td>
<td>0.00</td>
<td>0.00</td>
<td>100.00</td>
<td>-0.00</td>
<td>100.00</td>
</tr>
<tr>
<td>GBP</td>
<td>0.00</td>
<td>0.00</td>
<td>50.00</td>
<td>-0.00</td>
<td>50.00</td>
</tr>
</tbody>
</table>
```

Till State Report

1) Press [ Till State Report ] within the Control menu.

The Transaction window opens and a receipt is printed.

This receipt displays the current till state. The positions “Open”, “Loan”, “Deposit”, “Pickup” and “Nominal” are listed for each currency.

The store, workstation, operator and receipt number as well as time and date will be stated at the bottom of the receipt.
9.3 The Financial Accounting Menu

This menu contains functions used to handle monetary movement, not goods movement. Financial accounting involves actual payment transactions which influence operating results and will trigger financial accounting actions.

You will find the following sales functions within the Financial Accounting menu.

- **Funds Receipt**
- **Cancel Funds Receipt**
- **Disbursement**
- **Cancel Disbursement**
- **Funds Receipt Position**
- **Disbursement Position**

For detailed information on individual sales functions refer to the corresponding chapters.

9.3.1 Funds Receipt

Funds Receipts are payment receipts at the till without goods movement. These incoming amounts may result e.g. from vending machines.

Funds receipts are made in cash.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

Depending on the reason for the funds receipt, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the funds receipt.


**Information**

You may also enter the amount of cash of the funds receipt into the input field within the Transaction window first, then press [Funds Receipt] within the Financial Accounting menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Funds Receipt window opens.
2) Select the reason for the funds receipt from the list box to the left.
3) Enter the cash into the Amount field.
   ● You may enter a comment into the Comment field.

If your till is not equipped with a keyboard use the virtual keyboard after pressing .
4) Press [ OK ].

The Transaction window appears and the till drawer opens. The Funds Receipt is registered and a receipt is printed.
5) Place the cash into the till drawer and close the till drawer.

9.3.2 Cancel Funds Receipt
Cancel a previously made funds receipt as follows.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
Depending on the reason for the cancellation of the funds receipt, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the cancellation of the funds receipt.


You may also enter the amount of the cash of the funds receipt to be cancelled into the input field within the Transaction window first, then press [ Cancel Funds Receipt ] within the Financial Accounting menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Cancel Funds Receipt window opens.
2) Select the reason for the cancellation of the funds receipt from the list box to the left.
3) Enter the cash you will redeem from the cancellation into the Amount field.
   ● You may enter a comment into the Comment field.

If your till is not equipped with a keyboard use the virtual keyboard after pressing .
4) Press [ OK ].
5) The Transaction window appears and the till drawer opens.
6) Redeem the cash resulting from the cancellation and close the till drawer. A receipt is printed.

### 9.3.3 Disbursement

Disbursements are payouts without goods movement. These may include meal allowances for staff members or compensations to a customer. Disbursements are made in cash.

---

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. Depending on the reason for the disbursement, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the disbursement.

---

You can process a disbursement in two different ways.


   The Disbursement window opens.

   ![Disbursement window](image)

   **Disbursement window**

2) Select the reason for the disbursement from the list box to the left.
3) Enter the cash of the disbursement into the Amount field.
   - You may enter a comment into the Comment field.

   If your till is not equipped with a keyboard use the virtual keyboard after pressing .

4) Press [OK].

   The Transaction window appears and the till drawer opens. The disbursement is registered and a receipt is printed.
5) Remove the cash from the till drawer and close the till drawer again.

### 9.3.4 Cancel Disbursement

Cancel a previously made disbursement as follows.

---

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

You may also enter the amount of the cash of the disbursement to be cancelled into the input field within the Transaction window first, then press [Cancel Disbursement] within the Financial Accounting menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Cancel Disbursement window opens.

2) Select the reason for the cancellation of the disbursement from the list box to the left.
3) Enter the cash into the **Amount** field.
   - You may add a comment into the **Comment** field. It will be printed on the receipt.

   If your till is not equipped with a keyboard use the virtual keyboard after pressing OK.
4) Press [OK].

The Transaction window appears and the till drawer opens.
5) Place the cash into the till drawer and close the till drawer after that.

A receipt is printed.

### 9.3.5 Funds Receipt Position

If you need to make several funds receipts you may perform them in one transaction. You may also register a funds receipt in the course of a regular sales transaction. This is particularly useful e.g. if your company is raising funds for a good cause and a customer agrees to participate with a donation which will be added to their regular purchase.


You may also enter the amount of the cash of the Funds Receipt Position into the input field within the Transaction window first, then press [Funds Receipt Position] within the Financial Accounting menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.
2) The **Funds Receipt** window opens.

![Funds Receipt window](image)

Funds Receipt window

3) Select the reason for the funds receipt position from the list box to the left.
4) Enter the amount of the funds receipt position into the **Amount** field.
   - You may enter a comment into the **Comment** field.

   If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ❏

The **Transaction** window opens.

   - You may register any items a customer wishes to purchase.
5) Press [ **Total** ].

The **Financing** window appears.

6) Choose a payment method and conclude the transaction.

---

**9.3.6 Disbursement Position**

Use this function e.g. to refund money to a staff member who bought goods for the company on their own expenses. This disbursement can be made using any means of payment.

1) Press [ **Disbursement Position** ] within the **Financial Accounting** menu.

You may also enter the amount of the **Disbursement Position** into the input field within the **Transaction** window first, then press [ **Funds Receipt** ] within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Disbursement** window opens.
2) Select a reason for the disbursement position from the list box to the left.
3) Enter the amount of the disbursement position into the Amount field.
   ● You may add a comment into the Comment field.

If your till is not equipped with a keyboard use the virtual keyboard after pressing . The Transaction window opens.
   ● You may register any items a customer may wish to purchase.
4) Press [Total ].

If there are no additional items registered the transaction’s total will be stating a negative amount.
   a) Select a payment method, refund the monetary value and conclude the transaction.

If additional items have been registered on the receipt the transaction’s total may be stating a positive amount (depending on the value of the disbursement position and that of any additional items registered).
   b) Select a payment method, finance the receipt, and conclude the transaction.
9.4 The Tender Control Menu

Tender control operations involve the movement of tender between different locations in the retail outlet (e.g. the till and the store safe) and external locations (e.g. the bank). Tender control operations have no impact on the operating result and do not trigger any financial accounting actions.

The sales functions in the Tender Control menu allow you to post the payment movements affecting the till directly at the till.

Operations window – Tender Control menu

You will find the following sales functions within the Tender Control menu.

- Till Loan
- Till Pickup
- Rebook Tender

For detailed information on individual sales functions refer to the corresponding chapters.

9.4.1 Till Loan

A till loan is registered and a defined amount of cash is added to the till drawer to provide sufficient change.

Till loans are executed in cash.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Till Loan] within the Tender Control menu.

The Till Loan window appears and the till drawer opens.
2) Place any cash into the till drawer.

3) Select a currency (e.g. **EUR**) from the list box to the left and enter the amount placed into the till drawer.

The total of all entered amounts is displayed to the right under **Total**. The list box to the left is displaying the currencies with all cash entered.

4) Once you have entered all cash press [ OK ] to confirm your entries.

The **Transaction** window opens. A receipt is printed stating all cash placed into the till drawer.

5) Close the till drawer again.
9.4.2 Till Pickup

A till pickup is registered and a defined amount of cash is taken from the till drawer and transferred e.g. to the store’s safe or the bank.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Till Pickup] within the Tender Control menu.

2) The Till Pickup window appears and the till drawer opens.

![Till Pickup window](image)

3) Take the cash desired from the till drawer.

4) Select a currency (e.g. EUR) from the list box to the left and enter the amount taken from the till drawer.

You may employ the denomination function for the Till Pickup sales function (for further information on denomination fields, please refer to 3.2.2.1 Frequently used Buttons, paragraph Denomination and Denomination Fields). The total amount of all denominations will be calculated and registered automatically for the currency selected.

5) Once you have entered all cash press [OK] to confirm your entries.

The Transaction window opens. A receipt on the till pickup is printed, stating all cash entered.

If the amount for one currency entered exceeds its defined limit, a warning message will be displayed.

- Press [Cancel] to return to the Till Pickup window and correct your entries.
- Press [Ignore] to ignore the message and complete the safe drop despite the imbalance.

6) Close the till drawer again.

9.4.3 Rebook Tender

Rebook a payment method which has been booked incorrectly.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Rebook Tender] within the Tender Control menu.

The Rebook Tender – Incorrectly Booked Tender window opens.
2) Select the currency booked incorrectly from the list box to the left.
3) Enter the amount you have booked incorrectly into the Amount field.
4) Press [ OK ] to confirm your entries.

The Rebook Tender − New Tender window opens.

5) Select the currency the booking will be converted into.
6) Press [ OK ].

The Transaction window opens.

The payment method is rebooked and a receipt on the booking is printed.
9.5 The Service Menu

The Service menu provides the operator with sales functions used to display particular information or for general service purposes. No goods or monetary movements occur when executing service functions.

Operations window – Service menu

You will find the following sales functions within the Service menu.

- **The Print Functions Submenu**
  - Delivery Receipt
  - Exchange Rates
  - Currency Converter
  - Remove Pos

- **The Workforce Submenu**
  - Training/Stop Training
  - Show M&M Promotions
  - Info Receipt

- **Gift Receipt**
  - Turnover Report
  - EFT Management
  - E-Journal

For detailed information on individual sales functions refer to the corresponding chapters.
9.5.1 **The Print Functions Submenu**

Print Functions allow for printing duplicates of all receipts in the store you are working at.

![Operations window - Print Functions submenu](image)

You will find the following sales functions within the **Print Functions** submenu (Service menu).

- **Reprint Receipt**
- **Reprint Last Receipt**

For detailed information on individual sales functions refer to the corresponding chapters.

**Reprint Receipt**

Print a duplicate of a receipt created in the same store.

![Reprint Receipt window](image)

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. A duplicate can only be produced if the original receipt was created in the same store. Duplicates of cancelled or aborted transactions cannot be printed.

1) Press [Reprint Receipt] within the **Print Functions** submenu (Service menu).

2) Scan the barcode of the receipt you would like to duplicate.
The Transaction window opens. A duplicate of the receipt is printed, labelled “Duplicate”.

**Reprint Last Receipt**

Duplicate the previously printed receipt.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

Duplicates of cancelled or aborted transactions cannot be printed.

1) Press [Reprint Last Receipt] within the Print Functions submenu (Service menu).

The Transaction window opens and the previously printed receipt is duplicated, labelled “Duplicate”.

You may also enter the information required manually and press [OK] after. Ensure that all information is entered correctly. If the receipt’s number is not available to you, you may execute a transaction search, see 3.2.2.1 Frequently used Buttons.
9.5.2 The Workforce Submenu

The Workforce submenu contains sales functions for planning and controlling the deployment of your staff.

Operations window – Workforce submenu

You will find the following sales functions within the Workforce submenu.

Time Recording

For detailed information on individual sales functions refer to the corresponding chapters.

Time Recording

Time Recording is used to log working hours in an internal time recording system, which may also transfer any logged hours to an external time recording system.

This sales function will only be available in combination with Micros Workforce Management.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [ Time Recording ] within the Workforce submenu (Service menu).

The Time Recording window opens.

Time Recording window
2) Enter your employee number into the **Employee** field.
3) Enter your operator number into the **Operator** field.
4) Depending on whether you are starting or exiting time recording:
   a) press **[ Punch In ]** to start your shift.
   Working hours will be logged from this point on. The **Transaction** window opens.
   b) press **[ Punch Out ]** to end your shift.
   The current time is logging the ending of working hours. The **Transaction** window opens.

### 9.5.3 Gift Receipt

All items or just particular ones from a previously printed receipt may be printed as a gift receipt.

The receipt will only show item details without any prices stated. The customer may enclose the receipt in a present for warranty purposes without the recipient learning about the price.

The gift receipt has the same receipt number as the original receipt.

---

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
Gift receipts may only be printed in the store the original receipt has been created at.

1) Press **[ Gift Receipt ]** within the **Service** menu.

The **Gift Receipt** window opens.

![Gift Receipt window](image)

**Gift Receipt** window

Information on the company and store are displayed by default and cannot be changed.

2) Ensure that the fields **Business Day** and **Workstation** contain the correct information for the gift receipt.

3) Scan the receipt's barcode or manually enter the receipt's number into the **Receipt Number** field.

   If the receipt's number is not available to you, you may execute a *transaction search*, see 3.2.2.1 Frequently used **Buttons**.

4) If you entered the information manually, press **[ OK ]**.

The **Gift Receipt – Item Selection** window opens.
Gift Receipt – Item Selection window

All items registered on the receipt are displayed here.

5) Select an item to be stated on the gift receipt.

The item will be highlighted in colour.

<table>
<thead>
<tr>
<th>Article Number</th>
<th>Product Text</th>
<th>x</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>4901780009237</td>
<td>Dress 1</td>
<td>1</td>
<td>50.00</td>
</tr>
<tr>
<td>4901780009244</td>
<td>Dress 2</td>
<td>1</td>
<td>45.00</td>
</tr>
<tr>
<td>4901780009312</td>
<td>Skirt</td>
<td>1</td>
<td>29.00</td>
</tr>
</tbody>
</table>

Gift Receipt – Item Selection window with the selected position

- You may select additional items.
  These will be highlighted in colour.
- If you would like to cancel a selection, select the relevant item again.
  The selection is cancelled and the item is no longer highlighted in colour.

If several identical items have been registered as one position, all items contained in this position will be registered on the gift receipt.

6) Once you have selected all items to be printed as a gift receipt, press [Print].

The gift receipt is printed. The Gift Receipt – Item Selection window remains open for additional gift receipts to be printed. The items already selected appear greyed out and can no longer be selected for an additional gift receipt.

- You may select additional items from the receipt to print as gift receipts.


The Transaction window opens.

9.5.4 Delivery Receipt

Compose a delivery order from a previously financed transaction in order to send all or particular items to the address stated.

The delivery order will be registered under the same number as the original receipt.

Notice: Any transaction needs to be concluded and no items must be registered yet on the current transaction.

A delivery order may only be printed in the store the original receipt was created at.
1) Press [Delivery Receipt] within the Service menu. The Delivery window opens.

![Delivery window]

Information on the store ID is displayed by default under Store and cannot be changed.

2) Ensure that Business Day and Workstation contain the correct information (the business day on which the receipt was created, and the number of the till at which the receipt was created). Correct the entries if necessary.

3) Scan the receipt's barcode or enter the receipt's number into the Receipt field.

If the receipt's number is not available to you, you may execute a transaction search, see 3.2.2.1 Frequently used Buttons.

4) If you have entered the receipt's number manually, press [OK]. The Delivery – Delivery Address window opens.

![Delivery – Delivery Address window]

5) Enter the recipient’s name and address.

If your till is not equipped with a keyboard use the virtual keyboard after pressing .

6) Enter the date of the current business day into the Date field (DD/MM/YY).

7) Once you have entered all details, press [OK]. The Delivery – Item Selection window opens.
All items registered on the particular receipt are displayed in the list box.

8) Select an item chosen for delivery.

The selected item is highlighted in colour.

<table>
<thead>
<tr>
<th>Article Number</th>
<th>Product Text</th>
<th>x</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>4901780009237</td>
<td>Dress 1</td>
<td>1</td>
<td>50.00</td>
</tr>
<tr>
<td>4901780009244</td>
<td>Dress 2</td>
<td>1</td>
<td>45.00</td>
</tr>
<tr>
<td>4901780009312</td>
<td>Skirt</td>
<td>1</td>
<td>29.00</td>
</tr>
</tbody>
</table>

You may now select additional items from the list box.

If you need to cancel a selection, select the item again.

The selection is cancelled and the item is no longer highlighted in colour.

If several identical items have been registered as one position, all items contained in this position will be registered on the delivery order if selected.

9) Once you have selected all items for the delivery order, press [ OK ].

The delivery order is printed in duplicate – one for the customer and one for the records.

The Delivery – Delivery Address window remains open for additional delivery orders to be printed, containing the information previously entered.

If several identical items have been registered as one position, all items contained in this position will be registered on the delivery order if selected.

a) Press [ OK ] to create another delivery order.
The **Delivery – Item Selection** window opens. You may now select additional items for another delivery order. Items already selected for a previous delivery order are greyed out and cannot be selected.

b) If you would like to send another delivery to a different address, change the information displayed within the **Delivery – Item Selection** window and press [OK].

The **Delivery – Item Selection** window reopens. Select additional items and print a new delivery order if required.
9.5.5 Training

The training mode is a real life simulation and lets an operator new to LUCAS POS get familiar with all processes and functions without any monetary or goods movement involved.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

An operator needs to be authorised in order to being able to call the training mode. Call the Stop Training function to exit training mode (see 9.5.6 Stop Training).

1) Press [Training] within the Service menu.

The till is switching into training mode. The header appears red and the user interface displays the labelling Training. Monetary or goods movements executed in this mode will not affect the store’s turnover balance.

Note that you cannot sign off from LUCAS POS while in training mode. To sign off, exit training mode first.

Transactions and receipts created in training mode will be numbered consecutively, starting from the last receipt printed before training mode has been called.

Any receipt created in training mode will be labeled “Training”.

9.5.6 Stop Training

Use this function to exit the training mode.

The training mode has to be called in order to call StopTraining.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Stop Training] within the Service menu.

Training mode will be exited. The labelling Training is no longer displayed and all monetary and goods movements will affect the store’s turnover.
**9.5.7 Turnover Report**

This function displays the daily turnover for the till and store up to the point of having called the function.

> This function only offers an informational overview. The exact analysis on daily turnovers will be conducted at the back office. You need to be authorised in order to being able to call this function.


The **Turnover Report** window opens.

![Turnover Report window](image)

**Turnover Report window**

Each line displays the **POS Turnover** as well as the **Store Turnover** generated within each period (Time From and Time To).

The line **Total Turnover** displays the daily turnover up till that point for the till and store.

2) Press [Back] to close the **Turnover Report**.

The **Transaction** window opens.
9.5.8 Exchange Rates

LUCAS POS can display exchange rates for all currencies supported. This is helpful e.g. if a foreign customer asks for the current exchange rate to convert their spending.


The Display Exchange Rates window opens.

The local currency used as a reference for converting foreign currencies appears under Key currency.

<table>
<thead>
<tr>
<th>Foreign Currency</th>
<th>Key currency converted into foreign currency</th>
<th>Exchange rate when buying</th>
<th>Exchange rate when selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHF</td>
<td>1.61</td>
<td>1.92</td>
<td>0.54</td>
</tr>
<tr>
<td>JPY</td>
<td>1.23</td>
<td>1.39</td>
<td>0.58</td>
</tr>
<tr>
<td>EUR</td>
<td>5.25</td>
<td>5.47</td>
<td>5.09</td>
</tr>
<tr>
<td>GBP</td>
<td>1.97</td>
<td>2.87</td>
<td>2.49</td>
</tr>
<tr>
<td>US Dollar</td>
<td>97.95</td>
<td>99.99</td>
<td>101.03</td>
</tr>
<tr>
<td>Korean Won</td>
<td>0.62</td>
<td>0.73</td>
<td>0.94</td>
</tr>
<tr>
<td>AUD</td>
<td>0.84</td>
<td>0.98</td>
<td>1.12</td>
</tr>
<tr>
<td>CAD</td>
<td>1.03</td>
<td>1.24</td>
<td>1.24</td>
</tr>
<tr>
<td>SEK</td>
<td>10.03</td>
<td>12.47</td>
<td>11.04</td>
</tr>
</tbody>
</table>

Display Exchange Rates window

2) Press [OK] to close the Display Exchange Rates window.

The Transaction window opens.

9.5.9 Show M&M Promotions

Have available Mix&Match promotions displayed directly at the till. All promotions currently active are displayed or - depending on your configuration - all current and future promotions, future promotions only, or expired promotions only are displayed.

1) Press [Show M&M Promotions] within the Service menu.

The Loaded Mix&Match Promotions window opens.
Loaded Mix&Match Promotions window

All Mix&Match promotions are displayed according to your configuration (loaded and currently active promotions by default) along with the promotion names, date and time of the promotion’s start and of the promotion’s ending.

2) Select a promotion.

3) If you have selected a promotion with one or more defined time periods the [Show Timeperiod] button is displayed.

4) Press [Show Timeperiod] to display all time periods during which the selected promotion is active.

The Promotions details window opens.

Promotions details window

All time periods (previous as well as future periods) in which the selected Mix&Match promotion is active are displayed.
5) Press [Back] to close the Promotions details window. The Loaded Mix&Match Promotions window opens again.

6) Press [Close] to close the Loaded Mix&Match Promotions window. The Transaction window opens again.

9.5.10 EFT Management

EFT Management displays all functions available in your EFT device. Which functions are available will depend on your provider.


An information message will be displayed. Wait for the message to disappear. The EFT Management window appears.

2) Select the option with which you want to proceed.
9.5.11 Currency Converter
Convert one currency into another.
1) Press [Currency Converter] within the Service menu.
The Currency Converter window opens.

![Currency Converter window]

2) Select the base currency and the desired currency from the drop down menus to the left.

EUR will be displayed as base currency by default in the Convert from field.
3) Enter the amount to be converted in the Amount field.
4) Press [Convert].

![Currency Converter window]

The Currency Converter window will now display the result of the conversion as well as the current exchange rate.
- You may convert more currencies now.
5) Press [Close] to close the window.
The Transaction window opens.

9.5.12 Info Receipt
Print an informational receipt to check for the following information.
- Name of Software used
- Software version
Calibrated modules

- Scale Calibration Checksum (valid for all devices which require calibration, e.g. scales)

1) Press [Info Receipt] within the Service menu.

![Info receipt](image1)

The Info receipt is printed, the POS it was created at is identifiable from the receipt. At the bottom of the receipt you will find information on the store, till, operator (if applicable), date, and time.

### 9.5.13 E-Journal

View a list of all transactions made during the current period. General sale transactions will be displayed as well as sign on and sign off processes and other transactions. You may search the E-Journal for specific positions.


The E-Journal - Overview window opens.

![E-Journal - Overview](image2)

2) Select the particular business day from the list box to view all transactions made.

3) Press [OK].

The E-Journal window opens.
4) Enter a keyword into the **Search text** input field.

If your till is not equipped with a keyboard use the **virtual keyboard** after pressing ![virtual keyboard](image).

5) Use ![left arrow](image) and ![right arrow](image) to search all available transactions for the keyword entered.

Any matches will be highlighted in colour.
- Search for further positions.

6) Press **[ Back ]** to end search.

The **E-Journal – Overview** window opens.

a) Select another business day to search for transactions, or

b) Exit the **E-Journal** on pressing **[ Cancel ]**.

### 9.5.14 Remove POS

Remove a POS from the corporate structure.

---

**NOTICE**

The particular POS needs to be settled before removal to prevent data loss.

**NOTICE**

**Removal of back office is not possible through this function!**

When executing this function from the particular till a connection between back office and till needs to be established.

You need to be authorised to remove a POS from the corporate structure.

1) Press **[ Remove POS ]** within the **Service** menu.

   The **Remove POS** window opens.

2) Press **[ OK ]** to remove POS from the corporate structure.

3) The **Transaction** window opens. The POS can now be removed.

---

**NOTICE**

Unplug the POS from the mains after removal and make sure it is deactivated within the (C)SMS otherwise undeliverable requests to the POS may cause congestion.
9.5.15 **Messages**
You may send messages from the head office to all POS systems within the company. Whenever new messages are available they will be displayed after the operator signed in on a POS.

1) Sign in on the POS System.

If there is a new message available, it will be displayed immediately after sign on.

2) Press [OK].
You will be signed on to the system.

9.5.16 **Password Change**
The operator may change their password right at the POS system while the particular operator is signed on.

1) Press [Password change] within the Service menu.
The Change Password window opens.
135

Change Password window

Your operator number will be displayed.
2) Enter old password.
3) Enter new password.
4) Re-enter new password.
Your password has been changed. You will be directed to the transaction window.

9.5.17 Article Info
You may display all information available on a particular item.
1) Press [Article info] within the Service menu

The Item Search window opens.

Item search window

2) Enter an item ID.

The Article Information window opens.
Any information available on this item will be displayed. Press [ OK ] to return to the Transactions window.

9.6 The Customer Menu

The Customer menu contains all sales functions available to maintain the customer database directly from the till and to assign sales transactions to customers.

For detailed information on individual sales functions refer to the corresponding chapters.

In order to employ some functions contained in the Customer menu a central customer database has to be established and LUCAS POS needs to have access to the head office’s Transaction Pool (T-Pool) containing your company’s entire transaction data.
9.6.1 Customer View

This function allows you to display a customer’s information stored in the customer database. Use this function, e.g. to see whether a customer’s profile is still up-to-date.

This function only allows for viewing customer details, not for changing it.


Customer View – Customer Data window

Here, you may search for customer data to be displayed.

2) Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the virtual keyboard after pressing.

3) Press [Search] to initiate the customer search.

The Customer View – Customer Selection window appears.

Customer View – Customer Selection window

All customers found based on the search criteria entered are displayed along with their corresponding customer ID’s in a list box.
● On selecting an entry the customer’s address and phone number are displayed to the right.

4) Select a customer and press [View] to view the information available.

The **Customer Information** window opens.

![Customer Information window]

All available customer information is displayed.

- Press [Details] to display the workplace address and additional addresses of the customer (if available).
- Press [Purchase History] to display all previous purchases made by this customer.
- Press [Gift Voucher] to display all vouchers issued to this customer. You may check for the customer whether they still have unredeemed vouchers.
- Press [Back] to return to the window **Customer View – Customer Selection** to initiate a new search.

### 9.6.2 New Customer

Add a new customer to the customer database. An individual customer ID is assigned to the new customer. They will be able to enjoy certain privileges such as customer discounts or special promotions.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [New Customer] within the **Customer** menu.

The **New Customer – Main Data** window opens.
New Customer – Main Data window

2) Enter the main customer’s information into the input fields.

In order to add a new customer to the database you need to enter the customer’s last name. All further entries are optional.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title (e.g. Mr, Ms, Dr)</td>
</tr>
<tr>
<td>First Name</td>
<td>Customer’s first name</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>The first letter of the customer’s middle name (if applicable)</td>
</tr>
<tr>
<td>Last Name</td>
<td>Customer’s last name</td>
</tr>
<tr>
<td>Position</td>
<td>Customer’s job position (e.g. employee, manager)</td>
</tr>
<tr>
<td>Discount info</td>
<td>Information on any discounts assigned to the customer</td>
</tr>
<tr>
<td>Birthday</td>
<td>Customer’s birthday (DD/MM/YYYY)</td>
</tr>
<tr>
<td>Anniversary</td>
<td>Day of a particular anniversary (DD/MM/YYYY)</td>
</tr>
</tbody>
</table>

If your till is not equipped with a keyboard use the virtual keyboard after pressing . Additionally, you may activate the following check boxes.

- **Phone Desired**
  The customer wishes to receive information etc. by phone. In this case, the customer’s phone number needs to be stored in the database.

- **Mail Desired**
  The customer wishes to receive information etc. by mail. In this case, the customer’s postal address needs to be stored in the database.

- **Corporate Customer**
  The customer is a corporate customer.

- **Email Desired**
  The customer wishes to receive information etc. via e-mail. In this case, the customer’s e-mail address needs to be stored in the database.

You may enter further information into the input fields available. All information stored will be displayed.

Change or add:
- The customer’s home address on pressing [Home Address].
- The customer’s workplace address on pressing [Working Address].
- An additional address on pressing [Additional Address].
- The customer’s assignment to a specific group on pressing [Group].

New Customer – Group window

a) Select a group from the drop down menu.

3) Press [OK] once you have entered all information available.

The Transaction window opens. The customer details entered are stored in the customer database along with an individual customer ID.

9.6.3 Modify Customer
Modify or complete a customer’s information in the database.

NOTICE

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.


The Modify Customer – Customer Data window opens.

Modify Customer – Customer Data window

Here, you may search the database for the specific customer.

2) Enter information on the customer into at least one of the input fields.
If your till is not equipped with a keyboard use the virtual keyboard after pressing.

3) Press [Search] to initiate the customer search.

The Modify Customer – Customer Selection window opens.

All customers found based on the search criteria entered are displayed along with their corresponding customer ID’s in a list box.

4) Select a customer and press [Modify] to view, change or add information.

On selecting an entry the customer’s address and phone number are displayed to the right.

The Modify Customer – Main Data window opens.

The customer’s main information is displayed.

5) You may now modify or – if not yet entered – complete any information displayed.

In order to add a new customer to the database you need to enter the customer’s last name. All further entries are optional.
Title  
First Name  
Middle Initial  
Last Name  
Position  
Discount info  
Birthday  
Anniversary  

Title (e.g. Mr, Ms, Dr)  
Customer’s first name  
The first letter of the customer’s middle name (if applicable)  
Customer’s last name  
Customer’s job position (e.g. employee, manager)  
Information on any discounts assigned to the customer  
Customer’s birthday (DD/MM/YYYY)  
Day of a particular anniversary (DD/MM/YYYY)  

If your till is not equipped with a keyboard use the virtual keyboard after pressing . Additionally, you may activate the following check boxes.

Phone Desired  
Mail Desired  
Corporate Customer  
Email Desired  
The customer wishes to receive information etc. by phone. In this case, the customer’s phone number needs to be stored in the database.

The customer wishes to receive information etc. by mail. In this case, the customer’s postal address needs to be stored in the database.

The customer is a corporate customer.

The customer wishes to receive information etc. via e-mail. In this case, the customer’s e-mail address needs to be stored in the database.

You may enter further information into the input fields available. All information saved will be displayed.

Change or add:

- The customer’s home address on pressing [ Home Address ].
- The customer’s workplace address on pressing [ Working Address ].
- An additional address on pressing [ Additional Address ].
- The customer’s assignment to a specific group on pressing [ Group ].

6) Press [ OK ] once you have entered or changed all information available.
The Transaction window opens. The customer information entered or changed is stored in the customer database.

9.6.4 Customer Purchase
Assign a receipt to a specific customer and save all transaction details in the corresponding customer account.

**NOTICE**
Note that a customer will only be assigned to the current transaction until this transaction is concluded. The following transactions will not be assigned to them.
To remove a customer from the current transaction call the Deselect Customer function.

1) Press [Customer Purchase] within the Customer menu.
The Customer Purchase window opens.

![Customer Purchase window](image)

You may either enter the customer’s ID or account, search the customer database for the particular customer, or create a new customer profile within the customer database.

*The customer exists within the database.*

1) Scan the customer card. You may enter the information manually into the input fields and press [OK].

2) If the customer does not know their account number or customer ID, you can search for the customer (in this case, follow the steps described under Customer Search (see below)).

The Transaction window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.
The customer does not yet exist in the database.

1) Press [New].

The New Customer – Main Data window opens.

2) Enter at least the customer’s last name to create a new customer profile.
   - Enter other customer details (optional, see 9.6.2 New Customer).
3) Press [OK] once you have entered all information available.

The customer profile is created and the Transaction window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Customer Search

If the customer already exists in the customer database but does not know their account number or customer ID, you may search for this information.


The Search Customer – Customer Data window appears.
This window allows for searching the customer database for a particular customer.

2) Enter information on the customer into at least one of the input fields.

If your till is not equipped with a keyboard use the virtual keyboard after pressing.

3) Press [Search] to initiate the customer search.

The Search Customer – Customer Selection window opens.

All customers found based on the search criteria entered are displayed along with their corresponding customer ID’s in a list box.

On selecting an entry the customer’s address and phone number are displayed to the right.

4) Press [OK] to select the customer who wishes to make a customer purchase.

The Transaction window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.
9.6.5 **Deselect Customer**

If you have assigned the current transaction to a customer by calling the **Customer Purchase** function, you can call the **Deselect Customer** function to cancel it.

### NOTICE

A customer needs to be assigned to the current transaction in order to call the **Deselect Customer** function.

1) Press [Deselect Customer] within the **Customer** menu.

The customer purchase is cancelled. Items already registered and all subsequently registered items are no longer assigned to a customer.

### NOTICE

In order to execute the **Customer Gift Certificate** function you need to have called the **Customer Purchase** function through the customer search, not by entering the customer ID or their account information.

### NOTICE

For refunding gift certificates which require validation a connection must be established between the gift certificate server and the till.

- If the connection is not established an information message is displaying a code and your head office’s phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
- Alternatively, a warning message might be displayed requesting your permission to

Any unredeemed vouchers of the customer stored in the customer database are displayed including the following information.

- **Store**: Store the voucher was created
- **Number**: Voucher number
- **Description**: Voucher type, e.g. Gift Voucher or Bonus Voucher
- **Date**: Date, the voucher was created
- **Amount**: The voucher’s value
- **State**: Status of the voucher
  - **sold**: The voucher has not yet been redeemed and can be returned.

- If the customer would like to return one of the vouchers, select the voucher and press [OK]. The Transaction window opens. The voucher is returned, the voucher’s value is transferred as a negative amount to the list of positions registered and deducted from the total amount. The voucher’s value is paid to the customer or is offset against the current transaction if the customer is making a purchase.

If a connection to the gift certificate server could not be established and an authorisation through the head office is not available the Voucher Return window opens. Enter the voucher’s information and press [OK] to return the voucher.

- If the customer would not like to return a voucher press [Back]. The Transaction window opens without a voucher being returned.

### 9.6.7 Invoice Settlement
A customer may settle a previously issued invoice at the store.

![Invoice Settlement window]

2) Enter the required information (Company, Store, Workstation).

3) Press [OK]. The Transaction window opens. The invoice may now be financed.

9.6.8 **Account Pay In**

Registered customers may transfer money onto or withdraw it from their customer accounts.

This function does not work if items are already registered. Please finance transaction and register an account pay in within a new transaction.

2) Scan customer card or enter information manually. The **Customer Pay In** window opens.

3) Enter the amount the customer likes to pay into their account and press [OK].
4) Finance transaction as any other transaction.

The amount paid in is transferred to the customer’s account.

### 9.6.9 Account Pay Out
Registered Customers may transfer money onto or withdraw it from their customer accounts.

- This function does not work if items are already registered. Please finance transaction and register an account pay in within a new transaction.

1) Press [Account Pay Out] in the **Customer** menu.
The Customer Purchase window opens.

2) Scan customer card or enter information manually.

The Customer Pay Out window opens.

3) Enter the amount the customer would like to withdraw and press [OK].

The Financing window opens.

3) Press [Change] and hand the amount to the customer.

The amount will be deducted from the customer's account.
9.7 The VAT Menu

The VAT menu offers possibilities to print tax free or Global Blue receipts as well as receipts with the VAT stated separately. Certain customer groups may be eligible for a VAT refund when Global Blues do not apply. This may be the case e.g. in foreign military stationed within your country.

The range of buttons displayed within the VAT Refund submenu depends on the tax rates defined within your company or branch. In the case of Germany, the tax rates available are 7% and 19%, therefore the buttons will be displaying 7% and 19%.

The VAT can be refunded after a transaction has been concluded.

1) Press the button corresponding to the specific tax rate within the VAT Refund submenu (VAT menu).

The VAT Refund window opens.

NOTICE

A VAT Refund is not the same as a Global Blue!

In the case of a Global Blue the VAT is only refunded to the customer when leaving the country to prevent fraudulent use. Enquire on any legal requirements before refunding VAT through the VAT Refund function instead of the Global Blue.
2) Enter the amount into the **Total amount** field and press **[ OK ]**. The VAT Refund will be displayed within the list of positions registered.

3) Press **[ Total ]** to initiate financing.

4) Select the payment method desired for the refund and conclude the transaction. The refund will be paid to the customer.

### 9.7.2 Tax Free Receipt

A duplicate of a transaction already concluded is printed and attached to a tax free receipt. A foreign customer may claim taxes paid for goods purchased abroad.

---

**NOTICE**

- Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
- You may only create duplicates of regular sales receipts of transactions concluded, not including cancelled receipts.
- A duplicate for a tax free receipt can only be printed in the same store the original receipt has been created.

1) Press **[ Tax Free Receipt ]** within the **VAT** menu. The **Tax Free Receipt** window opens.
2) Scan the barcode of the receipt you would like to duplicate.

You may also enter the information required manually and press [OK] after. Ensure that all information is entered correctly. If the receipt’s number is not available to you, you may execute a transaction search, see 3.2.2.1 Frequently used Buttons.

The system displays an information message requesting the tax free slip to be attached to the receipt.

3) Confirm the information message with [OK].

The Transaction window opens. A duplicate of the receipt is printed, labelled “attachment to the tax free receipt” and can now be attached to the tax free receipt.

### 9.7.3 Show VAT Receipt

Print a duplicate of a transaction already concluded. This states the amount of the VAT in a separate line.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

You may only create duplicates of regular sales receipts of transactions concluded, not including cancelled receipts.

A duplicate for a tax free receipt can only be printed in the same store the original receipt has been created.

Print a VAT Receipt as described in the following.

1) Press [Show VAT Receipt] within the VAT menu.

The Show VAT Receipt window opens.
2) Scan the barcode of the receipt you would like to duplicate.

You may also enter the information required manually and press [ OK ] after. Ensure that all information is entered correctly. If the receipt’s number is not available to you, you may execute a transaction search, see 3.2.2.1 Frequently used Buttons.

The Transaction window opens. A duplicate of the receipt is printed. This duplicate states the VAT separately.

9.7.4 Global Blue TFS

Global Blue is employed whenever a customer is eligible for tax free shopping, e.g. when a tourist from another country purchases goods that are eligible for a global blue transaction. With the receipt issued, the customer can claim taxes on departure (e.g. at the air-port).

A transaction has to be registered and financed in order to issue a global blue receipt. A minimum value must be met.

1) Press [ Global Blue TFS ] within the VAT menu.

If more than one type of receipt is configured within your system, you will be prompted to select your preferred type of receipt (e.g. PDF, regular receipt, etc.)

2) The Global Blue Receipt window opens.
3) Enter required information (business day, workstation, receipt number). The store ID is entered by default.

4) Press [OK].

The Global Blue Customer Receipt – Customer Data window opens.

There are several ways of identification.

ISO or Global Blue Card, Passport and Mobile Number require previous registration with Global Blue. If the customer is not registered with any of these tokens with global blue, a global blue receipt may be issued as described further below.

5) Identification may be done by:
   a) Global Blue Card ([ISO or Global Blue Card])
   b) Passport ([Passport], nationality and passport number required), or
   c) Mobile number ([Mobile Number], mobile number required).
After selecting any of the options above, the Global Blue Receipt – Identity Check window opens.

6) By pressing [Yes] the operator verifies that they have identified the customer. The Global Blue Receipt is printed.

7) If the customer is not registered with Global Blue, his information may either be
   a) Entered manually into the system after pressing [Enter Customer Data], or
   b) Written onto the receipt after it is printed without any information, on pressing [Print without customer data].

   A receipt will be printed. Any information required must be filled out on the receipt, or else it may become invalid.

9.7.5 Void Global Blue Cheque

Void a previously issued Global Blue Receipt as follows.

1) Scan Global Blue receipt or press [Void Global Blue Cheque] within the VAT menu and enter the Global Blue receipt ID.
An information window opens.

2) Press [ OK ].
A receipt is printed. Keep original Global Blue receipt with confirmation of void.

9.7.6 Duty Free
All items registered will be registered without the corresponding VAT value.

NOTICE
Once called, the Duty Free function cannot be undone. If you have called the Duty Free function by accident, you need to cancel the entire receipt.

1) Press [ Duty Free ] within the VAT menu.
All items registered after are registered without their VAT value.
9.8 The Giftcard Menu

A gift card may be used similar to a prepaid card which is charged in advance and then used as a payment method.

The Giftcard menu contains all sales functions needed to sell, recharge and void a gift card or to display the actual balance.

Operations window – Giftcard menu

You will find the following sales functions within the Giftcard menu.

- Activate GC (Gift Card)
- Balance GC (Gift Card)
- Reload GC (Gift Card)
- Cashout GC (Gift Card)

For detailed information on individual sales functions refer to the corresponding chapters.

NOTICE

A connection between your till and the gift card server needs to be established in order to execute gift card functions. If a connection could not be established, gift card functions may be not or only partially available after authorisation by phone. This is depending on the customisation of your LUCAS POS.

9.8.1 Activate GC (Gift Card)

This function allows you to sell a gift card. It is recharged with an amount, registered as a position, and then handed over to the customer after financing the transaction.


The Gift Card Activation window opens.
1) Gift Card Activation window

2) Scan the gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Enter the desired value of the gift card.

Information

The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

4) Press [OK] to confirm your entries.

The gift card is activated and the value entered is charged to the card. The Transaction window opens. The card’s value is added to the list of positions registered.

Information

In the case of the transaction being cancelled the gift card will not be recharged with any amount.

5) Hand over the gift card to the customer after financing.
9.8.2 Balance GC (Gift Card)

Using this function you will be able to let a customer know about the current balance on their gift card.

**NOTICE**

The gift card must be at hand or the gift card number must be available.


2) Scan the customer’s gift card. Alternatively, swipe it through a card-reading device or enter the information manually.


4) Press [Close] to return to the Transaction window.
9.8.3 **Reload GC (Gift Card)**

Gift cards can be recharged in order to increase an existing balance.

**NOTICE**

The gift card must be at hand or the gift card number must be available.

1) Press [Reload GC] within the Gift Card menu.

The **Increase giftcard balance** window opens.

2) Scan the customer’s gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Enter the value which will be transferred onto the gift card.

4) Press [OK] to confirm your entries.

The **Transaction** window opens. The gift card is recharged with the amount entered, and the amount appears as a position within the list of positions registered and is financed with the current transaction.

**Information**

In the case of the transaction being cancelled the gift card will not be recharged with any amount.
9.8.4 Cashout GC (Gift Card)

This function allows for the gift card to be terminated and for all remaining value to be paid to the gift card holder.

**NOTICE**

The gift card must be at hand or the gift card number must be available.


2) Scan the customer’s gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Press [OK] to confirm your entries. The Transaction window opens. The gift card is terminated and the gift card’s value is registered as a negative amount within the list of positions registered. Register any items the customer may wish to purchase or pay the remaining amount to the customer.

**Information**

In the case of the transaction being cancelled the gift card will not be cashed out.
9.9 The Stock Control Menu

The Stock Control menu contains sales functions used to book all goods inwards and goods outwards to the inventory, which means that they do not necessarily have to be scheduled at the head office or in the back office.

If goods inwards or goods outwards were scheduled by the head office, they can be checked against the delivery documents and may also be corrected if necessary. This ensures your store’s inventory is kept up-to-date.

Any transaction data is exported as XML files, which are used for data exchange between LUCAS POS and the stock control system.

Refer to the XML transaction files to learn about any changes in the inventory (see LUCAS XML Interface Export documentation, Chapter 3.6 Item Movement Transactions).

Operations window – Stock Control menu

You will find the following sales functions within the Stock Control menu.

- **Transfer In**
- **Scheduled Transfer Out**
- **Reservation**
- **Reservation Number**
- **Withdrawal**
- **Cancel DC Return**

- **Transfer Out**
- **(O) Stock Return**
- **Prolong Reservation**
- **Collect missing Items**
- **Withdrawal Return**

- **Scheduled Transfer In**
- **(O) Withdrawal**
- **Terminate Reservation**
- **Reverse missing Items**
- **Depot Return Item**

For detailed information on individual sales functions refer to the corresponding chapters.
9.9.1 Transfer In
Book goods inwards transactions which have not been scheduled by the head office or back office and for which no goods-receipt file is available (e.g. when receiving goods from another store without the head office being involved).

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Transfer In] within the Stock Control menu.
The Goods In window opens.

2) Enter the delivery order (D/O) number into the Doc. ID field.
3) Press [OK] to confirm your entry.
The Stocktaking window opens.

4) Scan the item’s barcode to book any items to the inventory, or enter the item number/barcodes manually and press [PLU] (see 4.1 Registering Items).
Use the functions Pre-Select Quantity (see 9.1.4 Pre-Select Quantity) and Post-Select Quantity (see 9.1.5 Post-Select Quantity) to register several identical items at a time.

Note that items booked to the inventory cannot be cancelled or duplicated afterwards.
If you have entered the incorrect quantity, use Post-Select Quantity and enter “0” as a
Any items registered are displayed with their item numbers and quantities in the list of positions registered.

5) Once all goods received have been registered, press [ OK ].

The Transaction window opens and a goods inwards receipt is printed.

All goods have been booked to the inventory. Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

9.9.2 Transfer Out

Book goods outwards transactions which have not been scheduled by the head office or back office and for which no goods-receipt file is available (e.g. when shipping goods to another store without the head office being involved).

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [ Transfer Out ] within the Stock Control menu.

The Target Store window opens.
The **Doc. ID** field already contains an automatically generated delivery document number for the goods outwards transaction.

2) Select the destination store from the list box to the left.

3) Press [ **OK** ] to confirm your selection.

The **Stocktaking** window opens.

![Stocktaking window](image)

The **Stocktaking** window

4) Scan the items’ barcode to book any items to the goods outwards, or enter the item number/barcodes manually and press [ **PLU** ] (see 4.1 Registering Items).

Use the functions **Pre-Select Quantity** (see 9.1.4 Pre-Select Quantity) and **Post-Select Quantity** (see 9.1.5 Post-Select Quantity) to register several identical items at a time.

**NOTICE**

Note that any items booked cannot be cancelled or duplicated afterwards.

If you have entered an incorrect quantity, use the **Post-Select Quantity** function and enter "0" as a quantity to reverse the booking or cancel the entire booking on pressing [ **Void All** ].

The items booked are displayed with their item numbers and quantities in the list of positions registered.

![Stocktaking window showing the items registered](image)

**Stocktaking** window showing the items registered

5) Once all outgoing goods have been booked, press [ **OK** ].

The **Transaction** window opens and a goods outwards receipt is printed. The stock control system is updated.
9.9.3 Scheduled Transfer In

If a goods inwards transaction was scheduled at the head office, a goods-receipt file is sent to the destined store and will be available at the POS.

Use the Scheduled Transfer In function to check for any pending goods-receipt files. Compare the documents with the goods received and, if necessary, make corrections. This ensures that your store’s inventory is kept up-to-date.

**Notice**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

A goods-receipt file needs to be available at the store to execute this function.

1) Press [Scheduled Transfer In] within the Stock Control menu.

The Scheduled Deliveries window opens.

![Scheduled Deliveries window](image)

All scheduled goods inwards transactions contained in the goods-receipt file are displayed.

- **Transfer Number**: Delivery order number of the goods delivered
- **Transfer Date**: Date of the goods’ delivery
- **from Store**: Store, from which the goods are shipped
- **Creation Date**: Date of scheduling the goods inwards transaction

2) Select the goods inwards transaction corresponding to the goods delivered.

3) Press [Details].

The Details window opens. All items from the selected goods inwards transaction are displayed.
a) If the transaction displayed does not match the delivery order of the goods delivered, press [ Back ].

The Scheduled Deliveries window opens. Select another transaction from the list.

b) If the transaction displayed matches the delivery order of the goods delivered, press [ Goods in ] to confirm your selection.

The Stocktaking window opens.

All items contained in the delivery order for this goods inwards transaction are displayed in the list of positions registered along with their item numbers and quantities.

4) Check the items listed on the delivery order against the items delivered.

If you need to correct any positions you will have the following options.

- If an item delivered does not appear on the delivery order, scan the item’s barcode or enter the item number/barcode into the input field manually and press [ PLU ].

The item is registered and appears in the list of positions registered.

a) If you would like to add multiple identical items to the list, use the functions Pre-Select Quantity (see 9.1.4 Pre-Select Quantity) and Post-Select Quantity (see 9.1.5 Post-Select Quantity).

- If the quantity of a specific item delivered differs from the quantity specified in the delivery order use the function Post-Select Quantity (see 9.1.5 Post-Select Quantity).

- If an item on the list was not delivered use the function Post-Select Quantity (see 9.1.5 Post-Select Quantity) to enter the quantity "0" for this item.

5) Once the delivery order matches the goods delivered, press [ OK ].
The Transaction window opens and a receipt on the scheduled delivery is printed. Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

**NOTICE**

Note that delivery orders which have already been closed can no longer be displayed and changed using the Scheduled Transfer In function.

### 9.9.4 Scheduled Transfer Out

If a goods outwards transaction was scheduled at the head office, a goods-despatched file is sent to the consigning store and will be available at the POS.

Use the Scheduled Transfer Out function to check for any pending goods-despatched files. Compare the documents with the goods to be despatched, if necessary, make corrections. This ensures that your store’s inventory is kept up-to-date.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. A goods-despatched file needs to be available at the store to execute this function.


![Scheduled Transfers window](image)

All scheduled goods outwards transactions contained in the goods-despatched file are displayed.

- **Transfer Number**  Despatch order number of the goods despatched
- **Transfer Date**  Date of the goods’ despatch
- **to**  Destination for the despatched goods
- **Creation Date**  Date of scheduling the goods outwards transaction

2) Select the goods outwards transaction you would like to check and correct any information if necessary.

3) Press [Details].
The **Details** window opens. All items from the selected goods outwards transaction are displayed.

![Details window](image)

**Details window**

a) If the transaction displayed does not match the despatch order of the goods despatched, press **[ Back]**.

The **Scheduled Transfers** window opens. Select another transaction from the list.

b) If the transaction displayed matches the despatch order of the goods despatched, press **[ Goods out]** to confirm your selection.

The **Stocktaking** window opens.

![Stocktaking window](image)

**Stocktaking window**

All items contained in the despatch order for this goods outwards transaction are displayed in the list of positions registered along with their item numbers and quantities.

4) Check the items listed on the despatch order against the items despatched.

If you need to correct any positions you will have the following options.

- If an item despatched does not appear on the despatch order, scan the item’s barcode or enter the item number/barcode into the input field manually and press **[ PLU]**.

The item is registered and appears in the list of positions registered.

a) If you would like to add multiple identical items to the list, use the functions **Pre-Select Quantity** (see 9.1.4 Pre-Select Quantity) and **Post-Select Quantity** (see 9.1.5 Post-Select Quantity).

- If the quantity of a specific item despatched differs from the quantity specified in the despatch order use the function **Post-Select Quantity** (see 9.1.5 Post-Select Quantity).
If an item on the list was not despatched use the function **Post-Select Quantity** (see 9.1.5 Post-Select Quantity) to enter the quantity "0" for this item.

5) Once the despatch order matches the goods despatched, press [ OK ].

The Transaction window opens and a receipt on the scheduled transfer is printed.

Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

---

**NOTICE**

Note that delivery orders which have already been closed can no longer be displayed and changed using the **Scheduled Transfer In** function.

---

### 9.9.5 (O) Stock Return

Employ this sales function if damages have been discovered in goods delivered to your store.

The local store will have to be imported as target store before executing this function.

1) Press [ (O) Stock Return ] within the **Stock Control** menu. The **stockreturn** window opens.

![Stockreturn window](image)

The delivery document ID and the number of items registered will be displayed in the lower left. The deliver document ID will be generated automatically for each stock return.

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

3) The **stockreturn reason** window opens.
4) Select the reason for the stock return from the list box and confirm through [OK].

The stockreturn window opens.

The item will be listed within the list of positions registered.

- You may register more items.
- Press [OK] to conclude the stock return process.

The Transactions window opens. A receipt will be printed. The executing operator as well as the store manager will have to sign the receipt.

Refer to 9.9.16 Cancel DC Return to cancel a stock return.

9.9.6 (O) Withdrawal

A withdrawal must be executed whenever an item is used for purposes other than sales (i.e. window decorations).

The local store will have to be imported as target store before executing this function.

1) Press [(O) Withdrawal] within the Stock Control menu.

The withdrawal window opens.
The delivery document ID and the number of items registered will be displayed in the lower left. The deliver document ID will be generated automatically for each stock return.

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

3) The **withdrawal reason** window opens.

4) Select the reason for the stock return from the list box and confirm through [OK].

The **withdrawal** window opens.

The item will be listed within the list of positions registered.

- You may register more items.

Press [OK] to conclude the withdrawal process.

The **Transactions** window opens. A receipt will be printed. The executing operator as well as the store manager will have to sign the receipt.

---

**Refer to 9.9.14 Withdrawal Return to cancel any withdrawals executed.**

---

### 9.9.7 Reservation

If a customer would like to reserve goods at your till you may create a reservation on these goods. Depending on the type of reservation, one or more items may be registered in one reservation.

Only **Collective Reservations** allow for several items to be registered in one reservation.

1) Press [Reservation] within the **Stock Control** menu.

The **Reservation** window opens.

---

**Reservation** window

2) Select the reservation type from the list box to the left.

---

**Reservation** window – list box reservation types
Depending on the reservation type selected the expiration date may be set by default.
3) Enter the number you would like to assign to this reservation.
4) Enter the expiration date if not set by default.
5) Press [OK].
The Transaction window opens.
6) Register one or several items to be assigned to this reservation and press [OK].
A receipt on the reservation created will be printed. Inform the customer on the duration of their reservation.

9.9.8 Prolong Reservation
Depending on the reservation type an existing reservation may be extended.
1) Press [Prolong Reservation] within the Stock Control menu.
The Prolong Reservation window opens.

```
Number
Expiration date
```

Prolong Reservation window

2) Enter the customer’s reservation number, as well as the expiration date.

```
<table>
<thead>
<tr>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depending on the reservation type it may not be possible to extend a reservation. In this case you will be informed about this in an information message. The new expiration date will be limited to a particular amount of days. If the selected expiration date lies beyond this time frame you will be asked to select another date within a time frame displayed in an information message.</td>
</tr>
</tbody>
</table>
```

3) If all entries are correct, press [OK].
The reservation will be extended and a receipt will be printed.

9.9.9 Terminate Reservation
Reservations previously created can also be terminated.
1) Press [Terminate Reservation] within the Stock Control menu.
The Terminate Reservation window opens.
2) Enter the reservation number and press [OK].
The reservation is terminated.

9.9.10 Reservation Number
Register several items within one “day reservation”.
1) Press [Reservation Number] within the Stock Control menu.
2) Select Day Reservation from the list box.
3) Enter a new reservation number.
The reservation number must not have been assigned yet.
4) Press [OK].
5) Register the first item.
6) Open the Stock Control menu and press [Reservation Number].
7) Enter a new reservation number
The reservation number must not have been assigned yet.
8) Press [OK].
The Transaction window opens.
9) Register another item.
   • If you need to register more items to the transaction, repeat steps 6) through 9).
10) Conclude the transaction through pressing [OK].
The Transactions window opens.

9.9.11 Collect missing Items
If staff has discovered an empty box you can register the missing item to keep the inventory up-to-date.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press [Collect missing items] within the Stock Control menu.
The Missing Items window opens.
2) Scan the barcode or enter the item number manually and press [OK] afterwards.
The **Sell Item** window opens.

![Sell Item window](image)

3) Scan your ID-card or enter your salesperson ID and press **[ OK ]** afterwards.

Regardless of how many items you are registering, you will only be asked to enter your ID once.

- Register more missing items if necessary.

4) Press **[ Total ]** and conclude the transaction.
   The **Transaction** window opens. The inventory is updated.

### 9.9.12 Reverse missing Items

If a missing item has been booked but the respective item is later found you may cancel the booking.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[ Reverse missing items ]** within the **Stock Control** menu.
   The **Void Missing Items** window opens.

2) Scan the barcode or enter the item number manually and press **[ OK ]** afterwards.
   The **Sell Item** window opens.
3) Scan your ID-card or enter your salesperson ID and press [OK] afterwards.

**Information**

Regardless of how many items you are registering, you will only be asked to enter your ID once.

- Register more missing items if necessary.
- 4) Press [Total] and conclude the transaction.

The Transaction window opens. The inventory is updated.

### 9.9.13 Withdrawals

Register items which are determined for other purposes than sales purposes, e.g. for window displays. You may also use this function if you need to write-off an item.

1) Press [Withdrawal] within the Stock Control menu.

The Withdrawal window opens.

2) Select the reason for the withdrawal from the list box to the left.

3) Press [OK].

The Transaction window opens.

4) Register the item you need to write off.

The Sell Item window opens.
5) Scan your ID-card or enter your salesperson ID and press [ OK ] afterwards.
   • Register more missing items if necessary.
6) Press [ Total ] and conclude the transaction.
The Transaction window opens. The inventory is updated.

Refer to 9.9.14 Withdrawal Return if you need to cancel a withdrawal.

9.9.14 Withdrawal Return
Proceed as follows if you need to cancel a withdrawal.
1) Press [ Withdrawal Return ] within the Stock Control menu.
The Withdrawal Return window opens.
2) Register the particular item.
   • If you need to cancel a withdrawal containing several identical items use the Pre-Select Quantity sales function.
The Sell Item window opens.
3) Enter your salesperson ID and press [ OK ].
The item will be listed within the list of positions registered.
   • You may register more items.
4) Conclude the transaction on pressing [ Total ].
The Transaction window opens.

9.9.15 Depot Return Item
Employ this sales function if damages have been discovered in goods delivered to your store.
1) Press [ Depot Return Item ] within the Stock Control menu.
The DC Faulty window opens.
You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

The **Sell Item** window opens.

3) Enter your salesperson ID and press `[OK]`.

The **DC Faulty** window opens.

The item registered will appear within the list of positions registered.

You may register further items.

4) Conclude the transaction on pressing `[Total]`.

The **Transaction** window opens. A receipt will be printed. The store manager is required to sign the receipt.

---

**9.9.16 Cancel DC Return**

If you need to cancel a DC return, proceed as follows.

1) Press `[Cancel DC Return]` within the **Stock Control** menu.

The **Cancel DC Faulty** window opens.

2) Register the particular item.

   - You may use the **Pre-Select Quantity** sales function to register several of the same items.

   The **Sell Item** window opens.

3) Enter your salesperson ID.

   The item will be listed within the list of position registered.

   - You may register further items.

4) Conclude the transaction on pressing `[Total]`.

   The **Transactions** window opens
The **Languages Menu** contains all languages available for your LUCAS POS. You may change the POS' language at any time, even when it is operating.

1. Press the button displaying the desired language within the **Languages** menu (e.g. **English** or **German**).

   The user interface will be displayed in the language selected.

**NOTICE**

A multi-language version of LUCAS POS needs to be installed in order to switch between languages.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

**Information**

Depending on your configuration some texts may not be displayed in the language selected but in the superordinate language.
10 Financing Functions

Any operation used for financing a sales transaction is defined as a financing function. Financing functions are called from the Financing window after pressing [Total] in the Transaction window.

A transaction may be financed through different payment methods (e.g. in cash, in foreign currency, through credit or debit cards, with gift cards, etc.), or even through a combination of different payment methods. The type of transaction financed does not matter; it may be a sales transaction or a refund to a customer.

The financing menus contain all functions required to finance a transaction.

Any currencies approved in your company as well as card payments of all kinds, cheques may be booked for the entire receipt. Discounts or rebates, etc. may still be granted for the entire receipt while financing has already been initialised.

The following chapters explain the financing functions available in LUCAS POS. They will be described in the same order they appear within the LUCAS POS menu.

Calling Financing Functions

There are different options located on different levels for calling financing functions contained in LUCAS POS.

---

**NOTICE**

Note that only those financing functions you can actually execute at a particular time can be activated. Which financing functions are currently available depends on the status of the financing process (e.g. on whether or not financing may have been partially realised). If a financing function is currently not available, its button is greyed out.

The range of financing functions you may call also depends on the customising of your LUCAS POS and on your user rights.

---

**Level 1**

The Financing window contains buttons with frequently used financing functions (e.g. [Cheque, Card] and [Gift Voucher Redemption], etc.). Execute these functions easily and quickly by pressing the relevant button.

---

**Level 2**

The **Operations** window opens.

![Operations window](image)

**Operations window - Top 10 - financing functions**

To the right you will find ten centrally defined buttons for frequently used financing functions (“Top 10”), which you can execute directly by pressing the relevant buttons.

**Level 3**

To the left you will find a menu divided into several categories holding the complete range of financing functions available.

![Operations window with menu buttons for all financing functions](image)

**Operations window with menu buttons for all financing functions**

On pressing a category all of its containing financing functions are displayed. Execute any by pressing the corresponding button.

If the complete range of menus available cannot be displayed on one page, use ▲ and ▼ to scroll up or down the list of menus.
10.1 The Local Currencies Menu

If you would like to finance a transaction’s total entirely or partially in local currency call the Local Currencies financing function.

Operations window - Local Currencies menu

Note that there can only be one local currency which in general will be your country’s national currency. The local currency is defined centrally at the head office.

Financing a transaction in local currency (cash)

Finance a transaction in local currency as follows.

If the transaction is financed with a negative total press to pay the change to the customer in local currency cash.

1) Press [Local Currency] within the Local Currency menu or press .

You may also enter the cash received from the customer into the input field within the Financing window first, then press [Local Currency] or after that. If you choose to enter the information beforehand, skip the corresponding step later in the process.

The Cash Payment window opens.
The amount due is displayed in the **Amount Due** field.

2) Enter the amount received in cash from the customer into the **Amount** field. The transaction’s total is already entered here by default. If you received a different amount from the customer enter the amount into the input field.

- If you need to make corrections, press [ ← ] to delete the entry character by character from left to right. Press [ Delete ] to delete all content from the input field.

3) Press [ OK ].

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The **Cash Payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

---

**Information**

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e. g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Cash Payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.
Using Denomination fields for financing

1) Press the denomination button displaying the amount received from the customer.

   If a customer pays with 10,-, 20,-, 50,- or 100,- notes you may use the denomination buttons for financing instead of entering the amount manually.

   - If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

     The Transaction window opens.

   - If the payment exceeds the transaction’s total, the customer is receiving change.

     The Cash payment window closes and the Financing window opens again. The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under Change. The till drawer opens, so that any cash can be placed inside.

     Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency, vouchers, etc.)

     If you would like to pay back change using another payment method, call the corresponding financing function.

   - If the amount due is not settled through the payment, the Cash payment window closes and the Financing window opens again.

     The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may settle the outstanding balance using another payment method.

     If the transaction is financed with a negative total and the customer would like the change to be paid in foreign currency cash press the corresponding button for the foreign currency and conclude the transaction.
10.2 The **Foreign Currencies Menu**

Finance a transaction's total entirely or partially in foreign currency cash.

**Operations window − Foreign Currencies menu**

You will find the following financing functions within the **Foreign Currencies** menu.

- **Selected foreign currencies**
- **Exchange Rates**
- **Currency Converter**

For detailed information on individual financing functions refer to the corresponding chapters.

---

**Note that foreign currencies approved for payment will be centrally determined. The Foreign Currencies menu will therefore only contain currencies which have been previously approved and set at the head office.**

---

**Financing a transaction in foreign currency (cash)**

Finance a transaction in foreign currency cash as follows.

4) Press the button of the desired foreign currency within the **Foreign Currencies** menu.

**Information**

You may also enter the cash received from the customer into the input field within the **Financing** window first, then press the corresponding button for the currency desired (e.g. £) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

---

The **Cash Paying Foreign Currency** window opens.
The amount due is displayed in the **Amount Due** field.

5) Enter the amount received in cash from the customer into the **Amount** field.

The transaction’s total is already entered here by default. If you received a different amount from the customer enter the amount into the input field.

- If you need to make corrections, press [ ← ] to delete the entry character by character from left to right. Press [ Delete ] to delete all content from the input field.

6) Press [ OK ].

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The **Cash Paying Foreign Currency** window closes and the **Financing** window opens again.

### Foreign currency

<table>
<thead>
<tr>
<th>Amount paid in foreign currency</th>
<th>Amount converted into local currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender</td>
<td>Comment</td>
</tr>
<tr>
<td>GEP</td>
<td>20.00</td>
</tr>
<tr>
<td></td>
<td>29.67</td>
</tr>
</tbody>
</table>

**Financing** window – list of payment methods used in foreign currency

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e. g. foreign currency cash, vouchers, etc.).

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Cash Paying Foreign Currency** window closes and the **Financing** window opens again.
The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may settle the outstanding balance using another payment method.

10.2.1 Exchange Rates
LUCAS POS can display exchange rates for all currencies accepted. This is helpful e.g. if a foreign customer asks for the current exchange rate to convert their spending.
The Display Exchange Rates window opens.
The local currency used as a reference for converting foreign currencies appears under Key currency.

<table>
<thead>
<tr>
<th>Foreign Currency</th>
<th>Key currency converted into foreign currency</th>
<th>exchange rate when buying</th>
<th>exchange rate when selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key currency</td>
<td>Conversion rate to foreign currency</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1) Press [OK] to close the Display Exchange Rates window.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Financing window opens.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10.2.2 Currency Converter
Convert one currency into the other employing this function.
1) Press [Currency Converter] within the Foreign Currencies menu.
The Currency Converter window opens.
2) Select the base currency and the desired currency from the drop down menus to the left. 

**EUR** will be displayed as base currency by default in the **Convert from** field.

3) Enter the amount to be converted into the **Amount** field.

4) Press [**Convert**].

The **Currency Converter** window will now display the result of the conversion as well as the current exchange rate.

- You may convert further values into different currencies now.

5) Press [**Close**] to close the window.

The **Financing** window opens.
10.3 The *Other Payment* Menu

The *Other Payment* menu contains financing functions for financing a transaction using payment methods other than cards, cheques or cash payments.

Any payment method accepted will be determined centrally at the head office.

You will find the following financing functions within the *Other Payment* menu. Note that the range of payment methods available will depend on your customisation.

### 10.3.1 Points

A customer may finance the current transaction entirely with points.

1) Press [Points] within the *Other Payment* menu.

The amount due is financed with points. A receipt is printed and the *Transaction* window opens.

### 10.3.2 Miles & More

This function allows the customer to finance the total amount or partial amount of the current transaction using miles from the Lufthansa Miles & More bonus programme.

An online connection between the till and the central Miles & More database must be established in order to execute this function.

1) Press [Miles & More] within the *Other Payment* menu.

The *Miles and More Payment* window opens.
In the Amount Due field you will find the amount of miles required to finance the entire receipt (the exchange rate is determined within the Miles & More database).

2) Swipe the card through the card reader or enter the customer's Miles & More card number manually.
   
a) Press [OK] to confirm your entry.

If sufficient miles are available to settle the entire amount, the Miles and More Payment window closes, a receipt is printed and the Transaction window opens.

If the transaction’s total cannot be settled fully, the configuration of your till application determines whether partial financing using miles is possible.

a) If a partial financing using miles is possible, the Miles and More Payment window closes and the Financing window opens.

The miles’ value is added to the list of payment methods used and the outstanding balance due is displayed under Amount Due. The customer will have to choose another payment method to conclude the transaction.

b) If partial financing using miles is not possible, the receipt cannot be financed using miles and you will receive an error message. Confirm the error message by pressing [OK] and finance the transaction using a different payment method.

10.3.3 Coupon Payment

This function allows for the current transaction to be financed either partially or entirely through coupons. A coupon may trigger a discount, rebate or a Mix&Match promotion.

Notice

Note that some coupons may only be redeemed together with the purchase of a specific item and may be valid for only a limited time.

1) Press [Coupon Payment] within the Other Payment menu.
You may also enter the amount of the coupon into the input field within the **Financing** window first, then press [**Coupon Payment**] within the **Other payment** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

**The Coupon window opens.**

2) Scan the coupon’s barcode. If no barcode is printed on the coupon enter the information required manually (enter the date using DD/MM/YY).

3) Press [**OK**] to confirm your entry.
   - If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

**The Transaction window opens.**

- If the payment exceeds the transaction’s total, the customer is receiving change. The **Coupon** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

**Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.).**

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Coupon** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.
10.3.4 **Downpayment Redemption**

Book a downpayment already made by the customer to use as a payment method to finance the current transaction’s total either entirely or in parts.

A connection between your till and the store or back office database must be established in order to execute this function.

1) Press [**Downpayment Redemption**] within the **Other Payment** menu.

You may also enter the amount of the downpayment into the input field within the **Financing** window first, then press [**Downpayment Redemption**] within the **Other payment** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Downpayment Redemption** window opens.

Downpayment redemption window

2) Enter the number of the downpayment you would like to redeem for financing.

The downpayment ID is printed on the receipt containing the downpayment.

3) Press [**OK**] to confirm your entry.

The **Downpayment** field will automatically display the amount of the downpayment once the downpayment ID has been entered and confirmed.

4) Press [**OK**] if all entries displayed are correct.

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The **Downpayment Redemption** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.)
If the amount due is not settled through the payment, the **Downpayment Redemption** window closes and the **Financing** window opens again. The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

### 10.3.5 Gift Voucher Redemption

You can use this function to accept a voucher as tender and use it to finance the amount of the current transaction either entirely or partially.

**NOTICE**

A connection between the till and the gift certificate server needs to be established in order to redeem vouchers which require validation from the gift certificate server.

- If the connection is not established an information message is displaying a code and your head office’s phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed yet. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
- Alternatively, a warning message might be displayed requesting your permission to proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

**Information**

Depending on the configuration of your LUCAS POS, it may be possible to overpay a transaction’s total using a voucher. The remaining amount may be paid out in another means of payment (e.g. cash or even in the form of another voucher).


![Gift Voucher Redemption window](image)

2) Select the type of voucher from the list box to the left. Ensure that the store which issued the gift voucher is displayed under **Store**. Make corrections if necessary. The company number is displayed by default and cannot be changed.

3) Enter the voucher ID into the **Number** field.
4) Enter the voucher’s value into the Amount field.

If the Amount field appears greyed out no entry is required.

5) Press [OK] to confirm your entries.
   - If the payment covers the transaction’s total exactly, a receipt is printed and The till drawer opens so that any cash can be placed inside. The Transaction window opens.
   - If the payment exceeds the transaction’s total, the customer is receiving change. The Gift Voucher Redemption window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under Change. The till drawer opens so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method call the corresponding financing function.

- If the amount due is not settled through the payment, the Gift Voucher Redemption window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.
10.3.6 Credit Notes

If a customer has overpaid the amount due through a voucher, the change can be issued in the form of another voucher. You may use this function for other reasons (e.g. returns).

**NOTICE**

The transaction’s total must be negative or the customer must have overpaid the amount due in order for you to execute this function.

A connection between the till and the central gift certificate server needs to be established in order to return vouchers which require validation from the gift certificate server. If the connection is not established, a warning message is displayed and you may choose whether or not you would like to proceed.

1) Press [Credit Notes] within the Other Payment menu.

The Voucher Sales window opens.

![Voucher Sales window]

2) Select the voucher type from the list box to the left.

**Information**

Each voucher description corresponds to a specific voucher type which determines the voucher’s conditions. These may be a minimum or maximum amount, a limited validity or whether or not the voucher ID is generated and issued automatically.

Voucher types may be created and configured within the (Central) Store Management System ((C)SMS).

Depending on the voucher type the fields Valid to and Number may already contain information. If this is not the case:

3) Enter the expiration date into the Valid To field (using MM/YY format).

4) Enter the voucher’s number.

If the voucher ID is printed on the vouchers, enter the specific voucher number. If the Number field displays the entry issued automatically the voucher number has been generated automatically.

The change is displayed under Amount in local currency value. Make corrections if necessary.

5) Press [OK] to confirm your entries.

The Transaction window opens. The transaction is concluded and a receipt is printed. A receipt is printed for the voucher issued.
10.3.7 Customer Gift Certificate

If the current transaction has already been assigned to a specific customer by calling the Customer Purchase function, all unredeemed gift certificates stored for this customer are displayed after having called the Customer Gift Certificate function. You may point out the existence of unredeemed gift certificates to a customer and they may then be redeemed to finance the current transaction.

**NOTICE**

In order to execute the Customer Gift Certificate function you need to have called the Customer Purchase function through the customer search, not by entering the customer ID or their account information.

**NOTICE**

A connection between the till and the gift certificate server needs to be established in order to redeem vouchers which require validation from the gift certificate server.

- If the connection is not established an information message is displaying a code and your head office’s phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed yet. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
- Alternatively, a warning message might be displayed requesting your permission to proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

**Information**

Depending on the configuration of your LUCAS POS, it may be possible to overpay a transaction’s total using a voucher. The remaining amount may be paid out in another means of payment (e.g. cash or even in the form of another voucher).

1) Press [Customer Gift Certificates] within the Other Payment menu.

The Available Gift Certificates window opens.

![Available Gift Certificates window](image)

Any unredeemed vouchers are displayed along with the following information.

- **Store**: Store the voucher was created
- **Number**: Voucher number
- **Description**: Voucher type, e.g. Gift Voucher or Bonus Voucher
Date: Date, the voucher was created
Amount: The voucher’s value
State: Status of the voucher
sold: The voucher has not yet been redeemed and can be returned.

2) If the customer wishes to redeem one of the vouchers displayed, select the voucher and press [OK].
   - If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

   The Transaction window opens.
   - If the payment exceeds the transaction’s total, the customer is receiving change. The Available Gift Certificates window closes and the Financing window opens again.

   The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under Change. The till drawer opens so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.).
If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the Available Gift Certificates window closes and the Financing window opens again.

   The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.

If you need to redeem a voucher without a connection to the gift certificate server being established and without validation from the head office being available the Gift Voucher Redemption window will open. Enter the information required and press [OK] to redeem the voucher.

10.3.8 Customer Card
Registered customers may finance their transaction through their customer account.

The transaction must be within financing mode.

1) Press [Customer Card] within the Other Payment menu.

The Customer Purchase window opens.
2) Scan customer card or enter information manually. The transaction will be linked to the customer. The amount due will be displayed.

3) On pressing [OK] the transaction will be financed through the customer’s account.

10.3.9 Merchandise Credits

This function allows the customer to take out a purchase loan in order to conclude their purchase.

1) Press [Merchandise Credits] within the Other Payment menu.

You may also enter the amount for the purchase loan into the input field within the Financing window first, then press [Merchandise Credits] within the Other payment menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Other Payments: Merchandise Credits window opens.
Other Payments: Merchandise Credits window

The amount due is displayed in the Amount Due field.

2) Enter the amount of the purchase loan into the Amount field.

3) Press [OK] to confirm your entry.

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The Transaction window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The Other Payments: Merchandise Credits window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under Change. The till drawer opens so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the Other Payments: Merchandise Credits window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may settle the outstanding balance using another payment method.

10.3.10 Gift Certificate fixed value

A transaction will be financed, either entirely or in parts, through a gift certificate that possesses a previously configured, fixed value.

1) Press [Gift Certificate fixed value] in the Other payment menu.

2) Enter the amount of gift certificates and press [OK].

The value cannot be modified at the POS.

The transaction’s total will be deducted by the voucher’s value.

3) Finance the transaction with further tender if necessary.
10.4 The Cards Menu

The Cards menu contains all financing functions required to settle the current transaction through card payment (e.g. debit or credit card).

You will find the following financing function within the Cards menu.

Card

For detailed information on individual financing functions refer to the corresponding chapters.

NOTICE

Depending on your customisation only one financing function will be displayed in the Cards menu. However, it will be possible to book both debit and credit card purchases through this function. Alternatively, two individual financing functions for each debit and credit cards can be displayed.

10.4.1 Card

Settle the entire transaction or part of it through debit or credit card.

A transaction’s total cannot be overpaid through credit or debit card payment.

1) Press [Card] within the Cards menu.

The Card payment window opens.
The full amount of the transaction’s total is already displayed in the Amount field. If only part of the transaction’s total will be paid through credit or debit card, make corrections accordingly.

**NOTICE**

Depending on your configuration additional entries such as card/account number, sort code and the card’s expiry date (using MM/YY format) must be made. In this case swipe the card through the card reader or enter the information manually.

2) Press [OK] to confirm your entries and follow any instructions displayed on the EFT terminal.

**NOTICE**

You may be required to enter additional information if a corresponding message appears on your screen. Credit card payments may require validation. In this case a phone number will be displayed. Call the number to receive confirmation on the credit line and enter the code required to continue financing.

3) After the transaction is concluded, a receipt is printed, which the customer may have to sign in order for the debit to be effective.

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The Transaction window opens.

- If the amount due is not settled through the payment, the Card payment window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.
10.5 The Cheque Menu

You can use the financing functions in the Cheque menu to finance the current transaction with a variety of different cheques (e.g., Travellers Cheques).

Operations window – Cheque menu

You will find the following financing functions within the Cheque menu.

- Travellers Cheque
- Cheque with number
- Cheque with magnetic ink
- Mail Cheque

For detailed information on individual financing functions refer to the corresponding chapters.

10.5.1 Travellers Cheque

Finance the current transaction either entirely or partially through a Travellers Cheque.

1) Press [Travellers Cheque] within the Cheque menu.

You may also enter the Travellers Cheque’s value into the input field within the Financing window first, then press [Travellers Cheque] within the Cheque menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Travellers Cheque window opens.
The amount due is displayed in the **Amount** field.

- If the Travellers Cheque only covers part of the transaction’s total, make changes accordingly.

2) Press [ **OK** ] to confirm your entry.

An information message opens requesting an identity check by checking the customer’s signature on the cheque against an ID bearing their signature.

   a) Press [ **No** ] if the identity check has failed.

Payment through Travellers Cheque will be denied. Ask the customer to conclude the purchase using another payment method.

   b) Press [ **Yes** ] if the customer could be clearly identified.

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The **Travellers Cheque** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens and the Travellers Cheque can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.). If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Travellers Cheque** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.
10.5.2 Cheque with number

1) Press [Cheque with number] within the Cheque menu. The Cheque window opens.

![Cheque window](image)

The amount due is displayed in the Amount field.
- If the cheque only covers part of the total amount due, make changes accordingly.

2) Enter the cheque’s number.

3) Press [OK] to confirm your entry.

An information message opens requesting an identity check by checking the customer’s signature on the cheque against an ID bearing their signature.
- Press [No] if the identity check has failed.
- Payment through cheque will be denied. Ask the customer to conclude the purchase using another payment method.
- Press [Yes] if the customer could be clearly identified.
- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The Transaction window opens.
- If the amount due is not settled through the payment, the Cheque window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.
10.5.3 Cheque with magnetic ink

1) Press [Cheque with magnetic ink] within the Cheque menu.
   
   The Cheque with magnetic ink window opens.
   
   The amount due is displayed in the Amount field.

2) Enter the customer’s sort code and account number along with the cheque’s number.

3) Press [OK] to confirm your entry.

An information message opens requesting an identity check by checking the customer’s signature on the cheque against an ID bearing their signature.

   a) Press [No] if the identity check has failed.

Payment through cheque will be denied. Ask the customer to conclude the purchase using another payment method.

   b) Press [Yes] if the customer could be clearly identified.

Another information message opens, asking whether you would like to print onto the face of the cheque.

   a) Press [Yes] to print onto the face of the cheque, or

   b) press [No] if you do not wish to print onto the face of the cheque.

The Capture Identification window opens.

4) Enter the required information under Type/Postcode and Identification No. and press [OK] afterwards.

   a) If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The Transaction window opens.

   a) If the amount due is not settled through the payment, the Capture Identification window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.

If your till is equipped with a MICR (Magnetic Ink Character Recognition) reader, read out the cheque’s information. All information will then be registered within the entry fields. Ensure that any information stated is correct and press [OK].
10.5.4 Mail Cheque

If the transaction's total is a negative amount and therefore financing will involve paying change to the customer, you have the option to pay the entire amount in form of a cheque that is sent via mail to an address stated by the customer. This is particularly useful in cases where there is not enough cash in the drawer.

1) Press [Mail Cheque] within the Cheque menu. The Mail Cheque window opens.

Mail Cheque window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described steps. Choose between...

- acquiring customer information, see Acquiring customer information.
- searching for customer information, see Searching for Customer information.

Acquiring customer information

1) Press [Enter Address]:
   a) If the customer's information has not yet been saved in the database and the customer would like his information to be entered, or
   b) If the current transaction has been assigned to the customer prior to executing the Mail Cheque function and if the information saved does not require an update.

The Mail Cheque – Address Entry window opens.

Address Entry window
2) Enter the customer’s name, address and phone number.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing .
If the current transaction has been assigned to the customer prior to executing the **Mail Cheque** function the customer’s information contained in the database will be displayed and may be changed if necessary.
Changes made will not be saved within the database.
3) Press [ OK ].

If the entries made are incorrect, press [ Enter Address ] again and correct them.
The mail cheque will be printed along with a receipt and the transaction will be concluded.

**Searching for Customer information**

1) Press [ Search Address ] when:
   a) The customer would like to have his information entered into the database, or
   b) The customer’s information has already been saved in the database, but the information has changed or when there are several addresses at choice.

The **Mail Cheque – Customer Address** window opens.

All addresses available are displayed.
2) Select an address out of all addresses displayed for this customer.

Alternatively you may choose between the following options:

- If the customer’s information has not yet been entered and saved within the database you may create a new entry for this customer on pressing [ Create Customer ] (see 9.6.2 New Customer).
- You may change any existing customer information by pressing [ Change Customer ] (see 9.6.3 Modify Customer).
- If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing [ Search Customer ] (see 9.6.1 Customer View).
3) After selecting the address, press [ OK ].
The mail cheque will be printed along with the receipt and the transaction will be concluded.
10.6 The Price Reduction Menu

The Price Reduction menu provides you with financing functions that allow you to reduce the regular total amount of a receipt by either a percentage amount (Receipt Discount) or an absolute amount (Receipt Reduction), e.g. to provide a privilege to customers purchasing a large number of items.

Operations window – Price Reduction menu

You will find the following financing functions within the Price Reduction menu.

Receipt Discount | Receipt Reduction | Customer Group Receipt Discount

Germany rounds up

For detailed information on individual financing functions refer to the corresponding chapters.

10.6.1 Receipt Discount

Allow a percentage discount on a transaction's discountable amount.

NOTICE

The transaction must not be financed yet in order to call this function.

Only a transaction's discountable positions will be affected. Find out which positions are eligible for a discount or change settings within the (C)SMS under Item Maintenance ➔ Item Options.

A receipt discount cannot be reversed. If one has been assigned by accident, financing must be aborted (see 6.4 Abort Financing) and must be initiated again.

2) Press [Receipt Discount] within the Price Reduction menu.

Information

You may also enter the discount percentage into the input field within the Financing window first, then press [Receipt Discount] within the Price Reduction menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The Receipt Discount window opens.
The transaction’s discountable amount is displayed in the **Discountable Amount** field.

3) Select the discount type from the list box to the left.

4) Enter the discount percentage into the **Percent** field.

5) Press **[ OK ]** to confirm your entries.

The **Financing** window opens. The discount is added to the list of payment methods and is deducted from the transaction’s total.

### 10.6.2 Receipt Reduction

Allow a price reduction in the form of a fixed amount on a transaction’s discountable amount.

**NOTICE**

The transaction must not be financed yet in order to call this function.

The price reduction must not exceed the total of the transactions discountable positions. Only discountable positions from the transaction will be affected. Find out which positions are eligible for a discount or change settings within the (C)SMS under **Item Maintenance  Item Options**.

A receipt discount cannot be reversed. If one has been assigned by accident, financing must be aborted (see 6.4 **Abort Financing**) and must be initiated again.

1) Press **[ Receipt Reduction ]** within the **Price Reductions** menu.

You may also enter the discount’s amount into the input field within the **Financing** window first, then press **[ Receipt Reduction ]** within the **Price Reduction** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

Note that the amount entered must have two decimal places (e. g. 5.00)

The **Receipt Reduction** window opens.
Receipt Reduction window

The transaction’s discountable amount is displayed under **Discountable Amount**.

2) Select the reduction type from the list box to the left.

3) Enter the amount of the reduction into the **Reduction** field.

4) Press [ **OK** ] to confirm your entries.

The **Financing** window opens. The price reduction is added to the list of payment methods and is deducted from the transaction’s total.

### 10.6.3 Customer Group Receipt Discount

Allow a receipt discount for customers who belong to a particular customer group.

1) Press [ **Customer Grp. Receipt Discount** ] within the **Price Reduction** menu.

   The **Customer Purchase** window opens.

   2) Enter the required information into at least one of the two input fields and press [ **OK** ].

   The **Receipt Discount** window opens.
Receipt discount window

In the list box to the left Customer Group Receipt Discount is already selected as a reason.

3) Enter the discount percentage into the Percent field.
4) Press [ OK ].

The Financing window opens. The discount is added to the list of payment methods and is deducted from the transaction's total.

10.6.4 Germany rounds up

Donations for the charitable foundation “Germany rounds up” may be collected through this function. Customers who decide to participate allow for the transaction’s total to be rounded to the next higher tenth of the Euro (or local currency).

1) Press [ Germany rounds up ] within the Price Reduction menu.

The Financing window displays the amount by which the transaction’s total will be raised within the list of positions registered.

 Initialise payment to conclude the transaction.
10.7 The Giftcard Menu

A gift card can be compared to a prepaid card which can be recharged with a particular value and then used as a payment method.

Operations window – Giftcard menu

You will find the following financing functions within the Giftcard menu.

- Redeem GC (Gift Card)
- Cashout GC (Gift Card)
- Activate GC (Gift Card)
- Reload GC (Gift Card)

For detailed information on individual financing functions refer to the corresponding chapters.

**NOTICE**

A connection between your till and the gift card server needs to be established in order to execute gift card functions. If a connection could not be established, gift card functions may be not or only partially available after authorisation by phone. This is depending on the customisation of your LUCAS POS.

10.7.1 Redeem GC (Gift Card)

This function allows for financing a transaction through gift cards.

**NOTICE**

The gift card must be at hand or the gift card number must be available.

1) Press [Redeem GC] within the Gift Card menu.

   The Redeem Gift Card window opens.
The transaction’s total is displayed in the Amount field.

If the customer chooses to settle only a part of the transaction’s total through a gift card, make changes in the Amount field accordingly. However, the amount paid through a gift card may not exceed the transaction’s total.

2) Scan the gift card. Alternatively, you may enter the information manually or swipe it through a card-reading device.

3) Press [ OK ] to confirm your entries.

- If the payment covers the transaction’s total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The Transaction window opens.

- If the amount due is not settled through the payment, the Redeem Gift Card window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the Amount Due field. The customer may settle the outstanding balance using another payment method.

In the case of the transaction being cancelled or post-voided the gift card will not be charged with any amount.

10.7.2 Cashout GC (Gift Card)

This function allows for the gift card to be terminated and for all remaining value to be paid to the gift card holder or used to finance the current transaction.

The gift card must be at hand or the gift card number must be available.

1) Press [ Cashout GC ] within the Giftcard menu.

The Giftcard cashout window opens.
2) Scan the customer’s gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Press [ OK ] to confirm your entries.

The gift card is terminated.

- If the exact amount is paid through the gift card’s funds, a receipt is printed. The till drawer opens so that any cash can be placed inside.

The Transaction window opens.

- If the payment exceeds the transaction’s total, the customer is receiving change. The Gift Card Cashout window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under Change. The till drawer opens so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e.g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the Gift Card Cashout window closes and the Financing window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under Amount Due. The customer may settle the outstanding balance using another payment method.

In the case of the transaction being cancelled or post-voided the gift card will not be cashed out.
10.7.3 Activate GC (Gift Card)

If the customer is due change from a transaction (e.g., from a return) you may refund the change’s value through activating and recharging a new gift card with the change.

1) Press [Activate GC] within the Giftcard menu.

   The Gift Card activation window opens.

   The amount due to the customer is displayed in the Amount field.
   Ensure that the amount displayed is correct or make changes if necessary.

   The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

2) Scan the gift card. Alternatively, you may enter the details manually or swipe the card through a card-reading device.

3) Press [OK] to confirm your entries.

   The Transaction window opens. The gift card is activated and recharged with the value entered. The transaction is concluded and a receipt is printed.

4) Hand over the new gift card to the customer.
10.7.4 **Reload GC (Gift Card)**

If the customer is due change from a transaction (e.g. from a return) you may refund the change’s value through recharging the customer’s existing gift card with the change.

The gift card must be at hand or the gift card number must be available.

1) Press [Reload GC] within the Giftcard menu. The **Increase gift card balance** window opens.

   ![Increase gift card balance window with displayed amount](image)

   The amount due to the customer is displayed in the **Amount** field.

   Ensure that the amount displayed is correct or make changes if necessary.

   The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

2) Scan the gift card. Alternatively, you may enter the details manually or swipe the card through a card-reading device.

3) Press [OK] to confirm your entries.

   The **Transaction** window opens. The gift card is recharged with the value entered. The transaction is concluded and a receipt is printed.
10.8 The Customer Menu

The Customer menu contains financing functions used to assign receipts to customers or to access and manage the customer database directly from the till.

Operations window − Customer menu

You will find the following financing functions within the Customer menu.

- **Customer View**
- **New Customer**
- **Modify Customer**
- **Customer Purchase**
- **Deselect Customer**
- **Customer Gift Certificate**

For detailed information on individual financing functions refer to the corresponding chapters.

**NOTICE**

Some functions from the Customer menu will require access to the Transaction Pool (T-Pool) and centralized customer administration.

10.8.1 Customer View

Display a customer’s information stored in the customer database. Use this function, e.g. to see whether a customer’s profile is still up-to-date.

**Information**

This function only allows for viewing customer information, not for changing it.

Here, you may search for customer information to be displayed.

2) Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the virtual keyboard after pressing

3) Press [Search] to initiate the customer search.

The Customer View – Customer Selection window appears.

All customer names along with their corresponding customer ID’s found based on the search criteria entered are displayed in a list box.

- On selecting an entry the customer’s address and phone number are displayed to the right.

4) Select a customer and press [View] to view the available information.

The Customer Information window opens.
All available customer information is displayed.

- Press [Details] to display the workplace address and additional addresses of the customer (if available).
- Press [Purchase History] to display all previous purchases made by this customer.
- Press [Gift Voucher] to display all vouchers issued to this customer. You may check for the customer whether they still have unredeemed vouchers.
- Press [Back] to return to the window Customer View – Customer Selection to initiate a new search.

**10.8.2 New Customer**

Add a new customer to the customer database. An individual customer ID is assigned to the new customer. They will be able to enjoy certain privileges such as customer discounts or special promotions.

**NOTICE**

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.


   The New Customer – Main Data window opens.

2) Enter the main customer’s information into the input fields.
In order to add a new customer to the database you need to enter the customer's last name. All further entries are optional.

<table>
<thead>
<tr>
<th>Title</th>
<th>Title (e.g. Mr, Ms, Dr)</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Customer’s first name</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>The first letter of the customer’s middle name (if applicable)</td>
</tr>
<tr>
<td>Last Name</td>
<td>Customer’s last name</td>
</tr>
<tr>
<td>Position</td>
<td>Customer’s job position (e.g. employee, manager)</td>
</tr>
<tr>
<td>Discount info</td>
<td>Information on any discounts assigned to the customer</td>
</tr>
<tr>
<td>Birthday</td>
<td>Customer’s birthday (DD/MM/YYYY)</td>
</tr>
<tr>
<td>Anniversary</td>
<td>Day of a particular anniversary (DD/MM/YYYY)</td>
</tr>
</tbody>
</table>

If your till is not equipped with a keyboard use the virtual keyboard after pressing **[ ]**. Additionally, you may activate the following check boxes.

- **Phone Desired** The customer wishes to receive information etc. by phone. In this case, the customer's phone number needs to be stored in the database.
- **Mail Desired** The customer wishes to receive information etc. by mail. In this case, the customer’s postal address needs to be stored in the database.
- **Corporate Customer** The customer is a corporate customer.
- **Email Desired** The customer wishes to receive information etc. via e-mail. In this case, the customer’s e-mail address needs to be stored in the database.

You may enter further information into the input fields available. All information stored will be displayed.

Change or add:
- The customer’s home address on pressing **[ Home Address ]**.
- The customer’s workplace address on pressing **[ Working Address ]**.
- An additional address on pressing **[ Additional Address ]**.
- The customer’s assignment to a specific group on pressing **[ Group ]**.
New Customer – Group window

a) Select a group from the drop down menu.

3) Press [OK] once you have entered all information available.
The Financing window opens. The customer information entered is stored in the customer database along with an individual customer ID.

10.8.3 Modify Customer
Modify or complete a customer’s profile in the database.

NOTICE
Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.


Modify Customer – Customer Data window

Here you may search the database for a specific customer.

2) Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.
If your till is not equipped with a keyboard use the virtual keyboard after pressing.

3) Press [Search] to initiate the customer search.

The Modify Customer – Customer Selection window opens.

![Modify Customer – Customer Selection window](image)

All customer names along with their corresponding customer ID’s found based on the search criteria entered are displayed in a list box.

- On selecting an entry the customer’s address and phone number are displayed to the right.

4) Select a customer and press [Modify] to view, change or add information.

The Modify Customer – Main Data window opens.

![Modify Customer – Main Data window](image)

The customer’s profile with their main information is displayed.

5) You may now modify or – if not yet entered – complete all information displayed.

![NOTICE](image) In order to add a new customer to the database you need to enter the customer’s last name. All further entries are optional.
Title Title (e.g. Mr, Ms, Dr)
First Name Customer’s first name
Middle Initial The first letter of the customer’s middle name (if applicable)
Last Name Customer’s last name
Position Customer’s job position (e.g. employee, manager)
Discount info Information on any discounts assigned to the customer
Birthday Customer’s birthday (DD/MM/YYYY)
Anniversary Day of a particular anniversary (DD/MM/YYYY)

If your till is not equipped with a keyboard use the virtual keyboard after pressing . Additionally, you may activate the following check boxes.

Phone Desired The customer wishes to receive information etc. by phone. In this case, the customer’s phone number needs to be stored in the database.
Mail Desired The customer wishes to receive information etc. by mail. In this case, the customer’s postal address needs to be stored in the database.
Corporate Customer The customer is a corporate customer.
Email Desired The customer wishes to receive information etc. via e-mail. In this case, the customer’s e-mail address needs to be stored in the database.

You may enter further information into the input fields available. All information stored will be displayed.

Change or add:
- The customer’s home address on pressing [ Home Address ].
- The customer’s workplace address on pressing [ Working Address ].
- An additional address on pressing [ Additional Address ].
- The customer’s assignment to a specific group on pressing [ Group ].

Modify Customer – Group window

6) Press [ OK ] once you have entered or changed all information available.
The Financing window opens. The customer information entered or changed is stored in the customer database.

10.8.4 Customer Purchase
Assign a receipt to a specific customer and save the receipt for the corresponding customer account.

Notice
Note that a customer can only be assigned to the current transaction. The following transactions will not be assigned to them.
To remove a customer from the current transaction call the Deselect Customer function.

1) Press [Customer Purchase] within the Customer menu.
   The Customer Purchase window opens.

   Customer Purchase window

   You may either enter the customer’s ID or account, search the customer database for the particular customer, or create a new customer within the customer database.

   The customer exists within the database.

   1) Scan the customer card. You may enter the information manually into the input fields and press [OK].

   2) If the customer does not know their account number or customer ID, you can search for the customer (in this case, follow the steps described under Customer Search (see above)).

   The Financing window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.
The customer does not yet exist in the database.

1) Press [New].

The New Customer – Main Data window opens.

2) Enter at least the customer’s last name to create a new customer profile.
   - Enter other information on the customer (optional, see chapter 9.6.2 New Customer).
3) Press [OK] once you have entered all information available.

The customer is entered into the customer database, the Financing window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Customer Search

If the customer already exists in the customer database but does not know his account number or customer ID, you may search for this information.


The Search Customer – Customer Data window appears.
This window allows you to search the customer database for the customer who wishes to make a customer purchase.

2) Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the virtual keyboard after pressing .

3) Press [Search] to initiate the customer search.

The Search Customer – Customer Selection window opens.

All customer names along with their corresponding customer ID’s found based on the search criteria entered are displayed in a list box.

- On selecting an entry the customer’s address and phone number are displayed to the right.
  
  a) Press [OK] to select the customer who wishes to make a customer purchase.

The Financing window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.
If you have assigned the current transaction to a customer by calling the Customer Purchase function, you can use the Deselect Customer function to cancel it.

1) Press [ Deselect Customer ] within the Customer menu. The customer purchase is cancelled. Items already registered and all subsequently registered items are no longer assigned to a customer.

10.8.6 Customer Gift Certificate

If the current transaction has been assigned to a specific customer, all unredeemed vouchers stored for this customer are displayed after calling the Customer Gift Certificate function. You may inform a customer on any unredeemed gift certificates which may also be refunded.

In order to execute the Customer Gift Certificate function you need to have called the Customer Purchase function through the customer search, not by entering the customer ID or their account information.

For refunding Gift Certificates which require validation a connection between the gift certificate server and the till must be established.

- If the connection is not established an information message is displaying a code and your head office’s phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
- Alternatively, a warning message might be displayed requesting your permission to

Any unredeemed vouchers of the customer are displayed, including the following information.

- **Store**: Store where the voucher was created at
- **Number**: Voucher number
- **Description**: Voucher type, e.g. Gift Voucher or Bonus Voucher
- **Date**: Date the voucher was created
- **Amount**: The voucher’s value
- **State**: Status of the voucher
  - **sold**: The voucher has not yet been redeemed and can be returned.

- If the customer would like to return one of the vouchers, select the voucher and press [OK]. The Transaction window opens. The voucher is returned, the voucher’s value is transferred as a negative amount to the list of positions registered and deducted from the total amount. The voucher’s value is paid to the customer or is offset against the current transaction if the customer is making a purchase.

If a connection to the gift certificate server could not be established and an authorisation through the head offices is not available the Voucher Return window opens. Enter the voucher’s information and press [OK] to return the voucher.

- If the customer would not like to return a voucher press [Back]. The Financing window opens without a voucher being returned.

**10.8.7 Deferred Payment**

A customer may decide to split the amount due into several monthly payments.
1) Press [Deferred Payment] within the Customer menu. The Deferred Payment window opens.

2) Select the number of instalments from the drop-down list box to the right. The box in the upper left area will automatically display the instalments, including the respective due dates and their valid amounts. The box in the lower left will display the total value of the goods, any additional costs and the total amount. Additional fees for deferred payments can be adjusted at the (C)SMS.

3) Press [OK] to conclude the transaction if the customer does not wish to make a payment right away.

However, if the customer wishes to make a first payment (deposit) on the goods, proceed as follows.

4) Enter the amount of the deposit into the Deposit entry field.

5) Press [OK].

The Financing window opens.

6) Conclude the transaction.

The transaction will be partly financed through the deposit made. The remaining balance will be settled monthly as agreed.

10.8.8 Customer Related tenders

Please proceed as described in 10.3.8 Customer Card.

10.8.9 Customer Selection

A customer may want to take a selection of items home with them in order to decide which items to buy and which to return. The function Customer Selections only applies to registered customers. The selection will be stored in their customer profile. Once the customer has decided they will return the unwanted items and pay for the items they will keep.
10.8.10 NuBON – External Customer Code

The function **External Customer Code** is designed specifically for customers registered with the NuBON website. This function enables the issuing of digital receipts through use of a smartphone equipped with the respective NuBON App.

The NuBON website further offers central management of customer cards, coupons and plans to introduce a mobile payment solution in the future.

In order to use this function the customer must register with NuBON and they must download the NuBON App. The App generates a QR-Code which is required at check out.

Register: www.nubon.de

1) Register all of the customer’s items for checkout.
2) Press [Total].
3) Within the financing menu, press [Customers].
4) Press [External Customer Code].

The **Enter NuBON Code** window opens.

5) Please ask the customer for their NuBON QR code.

The code is generated by the NuBON App.
6) Scan or manually register QR code.

Depending on the configuration your POS system may or may not allow for manual entry of QR code.

Depending on the configuration of your POS system you may scan the code directly after pressing [Total].

Only after scanning the QR code a message will appear stating the successful registry of the QR code. There will not be a message after manual registry!
7) Confirm by pressing [OK].

You will be forwarded to the financing window. The transaction may now be financed with the tender of the customer’s choice.

The transaction data will be transmitted to the head office and from there will be sent to the NuBON provider. A few seconds after the transaction was made the customer will be able to see their receipt in the NuBON App.

The customer may further view all their registered receipts once logged on to the app/website.

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**NuBON – External customer code may be further customized within the CSMS properties.**

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**Mein NuBON**

**Kassenbelege (168)**

- Kassenbelege
- Beleg erstellen
- Coupons
- Haushaltbüch
- Mein Profil

---

**NuBON**

All receipts are listed. Details will be displayed after clicking a receipt.
10.9 **External EFT**

The **External EFT** functions offer further card payment options.

10.9.1 **Visa**

1) Press [External EFT] and select the pre-configured payment option **Visa**.

2) After inserting the VISA card into the EFT device, the **External EFT: Visa** window will open.

3) Enter the amount due and press [OK].

The customer will have to verify either through their PIN or by signing the receipt.

10.9.2 **American Express**

1) Press [External EFT] and select the pre-configured payment option **American Express**.

2) After inserting the American Express card into the EFT device, the **External EFT: American Express** window will open.

3) Enter the amount due and press [OK].

The customer will have to verify either through their PIN or by signing the receipt.
10.10 **Invoice**

In order to finance a transaction with an invoice payment, the customer must be registered and the transaction must be connected to their account. The transaction must already be in financing mode.

10.10.1 **Invoice**

1) Press `[Invoice]` within the **Invoice** menu.
   
   The amount due will be displayed.

2) Confirm amount with `[OK]`.
   
   The invoice will be printed.

---

**Invoice**

Cashier 1

null

Katrin Müller

24/06/2014 15:06:10

<table>
<thead>
<tr>
<th>010</th>
<th>Renè Lezard jeans anthrazit</th>
<th>129.00</th>
<th>1</th>
<th>129.00</th>
<th>EUR</th>
</tr>
</thead>
</table>

**Total Amount:**

129.00 EUR

**Invoice Amount:**

129.00 EUR

Invoice Number:

300100020010001000

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Please transfer the given amount by specifying the invoice number until 06/01/2024.