



Final report

Project Code: A.SCC.0025

Prepared by: MINTRAC

Date published: 19 Dec 2006

PUBLISHED BY
Meat and Livestock Australia Limited
Locked Bag 991
NORTH SYDNEY NSW 2059

Meat Retail

Point of Sale Portal

Sales Operator Training Manual

Meat & Livestock Australia acknowledges the matching funds provided by the Australian Government to support the research and development detailed in this publication.

This publication is published by Meat & Livestock Australia Limited ABN 39 081 678 364 (MLA). Care is taken to ensure the accuracy of the information contained in this publication. However MLA cannot accept responsibility for the accuracy or completeness of the information or opinions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Reproduction in whole or in part of this publication is prohibited without prior written consent of MLA.



Managing Agent

National Meat Industry Training Advisory Council (MINTRAC)

Acknowledgements

MINTRAC acknowledges the contribution of AMC Convergent *IT* who designed the Point of Sale (POS) Portal for the meat retail industry and has provided operational advice and training materials used to prepare this manual.

Published by MINTRAC

Suite 2 150 Victoria Rd Drummoyne NSW 2047, Australia

Telephone +61 2 9819 6699

Facsimile +61 2 9819 6099

Web Site: www.mintrac.com.au

Contents

1	Using this training material.....	1
1.1	The purpose of the training materials.....	1
1.2	Using the training materials	1
1.3	The format of the training materials	1
1.4	Customising the training and assessment.....	2
2	Introduction.....	3
	Introduction to the POS portal	3
2.1	What is the POS portal?	3
2.2	The benefits of the POS portal.....	3
2.3	Time saving features	3
3	Operating the POS portal	4
	The main functions of the POS portal.....	4
3.1	How to sign on to the sales screen	4
3.2	How to sign off the sales screen	6
3.3	The sales screen function keys.....	7
3.4	How to sell an item using the sales screen	8
	Other sales functions on the POS portal	10
3.5	How to change or override the price did read quantity	10
3.6	How to find a PLU item to include in a transaction	12
3.7	How to process customer returns	13
3.8	How to void a transaction	15
3.9	How to void an item	16
3.10	How to park a sale	18
3.11	How to retrieve a parked sale	18
3.12	How to finalise a sale and pay for purchases	19
3.13	How to make an account enquiry	23
3.14	Debtor (account) transactions.....	23
4	Discounts and loyalty programs	24
4.1	When to apply a discount	24
4.2	What is a loyalty program	24
4.3	How to give a customer discount on an item.....	24
4.4	How to sign a customer up into a loyalty program.....	25
4.5	How a customer uses the loyalty card	26
	Appendix A: POS portal quick reference guides.....	27
	Sign on to the sales screen	28
	Sign off the sales screen	28
	Sell an item by weight	29
	Sell a fixed-priced item	29
	Price Change/Override	30
	Find a PLU item.....	30
	Process a return.....	31
	Void a transaction.....	31
	Void an item	32

Park a sale	32
Retrieve a parked sale	32
Receive payment by cash	33
Receive payment by cheque	33
Receive payment by credit card	33
Receive payment by debit card	34
Process a payment on account	34
Account enquiry.....	35
Apply a discount to one item	35

1 Using this training material

1.1 The purpose of the training materials

These training materials can be used for unaccredited training in the installation of the POS Portal, developed by AMC. They can also be used to support the delivery of the Unit of Competency *BSBCMNI07A Operate a personal computer* from the *National Training Package MTM06 Australian Meat Industry*.

1.2 Using the training materials

The training materials can be used by trainers to:

- plan and deliver training
- give additional information to trainees
- keep a record of the training they have delivered.

The training materials can be used by assessors to:

- plan assessment – after training and for recognition of current competence/prior learning
- show trainees the areas they need to work on to be competent
- keep a record of the evidence used in assessment.

The training materials can be used by trainees:

- as a resource during training
- to review knowledge, understanding and learning
- to prepare for assessment.

1.3 The format of the training materials

This Sales Operator Training Manual can be used as part of the learning and assessment strategies for one unit of competence from the National Training Package MTM06 Australian Meat Industry – *BSBCMNI07A Operate a Personal Computer* or for non-accredited training in the use of the POS portal. The **unit title** identifies which unit the materials support. **Topic headings** are used to break the material into logical sections.

The **How to** procedures covers the underpinning knowledge that trainees need to know for this unit.

The **Quick reference guides** can be detached from this resource, laminated and kept close to the POS portal for referral following training.

Pictures of the different POS Portal screens are included and important buttons and keys are highlighted with a dark oval.

1.4 Customising the training and assessment

Every meat retailer is different. The training and assessment will be based on the company's specific operations and the requirements of the units of competence. The material in this training manual must be customised to the company's and trainee's needs by including:

WI

Any relevant **work instructions** for the tasks in the material.

SOPs

Any relevant **standard operating procedures** for the tasks in the material.

E

Company **equipment** used for the tasks in the material.

D

Any **company documents or forms** used for the tasks in the material. This includes safety signs, material safety data sheets, quality assurance checklists and company memoranda.

These training materials must be updated to include any changes in the POS Portal system, relevant legislation, regulations, guidelines and codes of practice – for example, the *Australian Standard for the Hygienic Production and Transportation of Meat And Meat Products for Human Consumption*.

2 Introduction

Introduction to the POS portal

2.1 What is the POS portal?

The Point of Sale (POS) Portal is the computer based scale and till system that you will use to record all customer sales. From now on we will refer to the system as the “POS Portal”. The POS Portal has overall control of all sales and it sends information back to a central office via the internet.

As a sales operator, you will access the Portal through the user interface or the sales screen at the sales counter. The sales screen is connected to the scales, the receipt/journal printers, as well as barcode scanners for scanning items in the store and for frequent shopper (Loyalty) or other customer service functions.

The purpose of this sales operator training manual is to get you started on the basic technical parts of the POS Portal.

2.2 The benefits of the POS portal

Just about any type of meat can be sold in a meat retail shop. The only limitation is the amount of refrigeration space to keep the meat cold and the shop floor space. The POS Portal is a powerful computer system that helps meat retailers manage their business by tracking the different meat cuts and items sold in the store. Some of the basic things the POS Portal can do are:

- track what was sold in the store and at what time of the day
- identify fast and slow moving products
- track how much money we have taken for the day
- record purchases by customers in our loyalty program
- calculate the stock we need to order for the next day or within the day.

2.3 Time saving features

The POS portal includes several time-saving features:

- the touch screen is very simple and easy to use
- the system is fast so you can keep up when the store is busy
- the scales are linked to the POS portal which saves double handling
- products and their codes and prices are programmed into the computer which saves having to remember them all
- calculating how many customers you have served and the dollar value of your sales.

3 Operating the POS portal

The main functions of the POS portal

Sales operators access the POS Portal through the Sales screen which is also known as the User Interface.

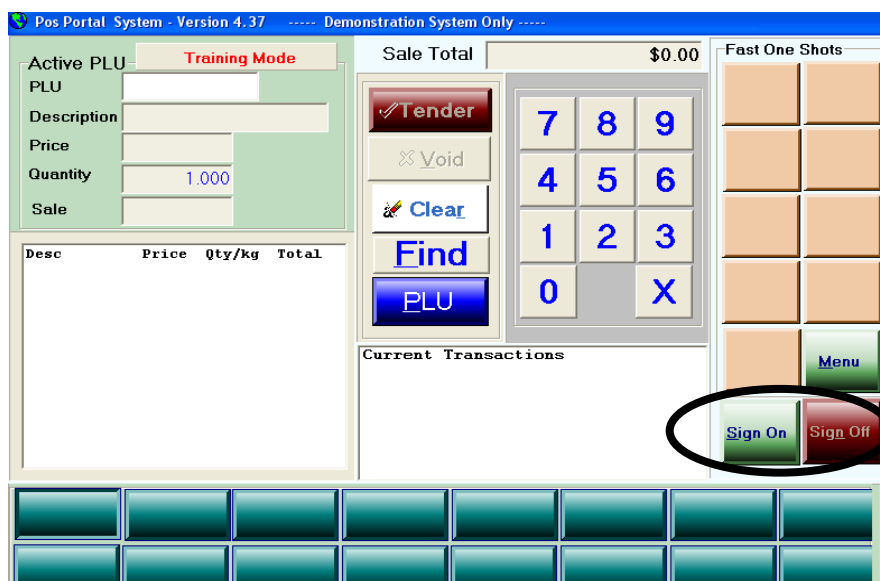
3.1 How to sign on to the sales screen

The Sales screen has a number of function keys. In this section we will show you how to sign on as a sales operator.

1. Touch the **“Sign On”** button. *Refer to Figure 3.1.*
2. The *Sales operator sign on screen* will appear. *Refer to Figure 3.2.*
3. Touch the **“User ID”** field and enter your Operator ID number.
4. Touch the **“Password”** field and enter your password.
*Note: To keep your password secret, it will show as *****. Refer to Figure 3.3 - User ID 1 is signed on.*
5. Touch the **“Accept”** button.
6. To re-enter a password, touch the **“Password”** field and re-enter the password.
7. To abort the sales operator sign-on process, touch the **“Cancel”** button.
8. If your sign on is successful the original Sales Screen will return and you will show as an active sales operator on the screen and buttons. *Refer to Figure 3.4.*

Note: Signing onto one POS terminal usually, depending on the set-up, logs you into all POS terminals in the store.

Figure 3.1 Sales screen



*Note:
Sign On
Sign Off
buttons*

Figure 3.2 Sales operator sign on screen



Figure 3.3 Sales operator sign on screen with ID 1 and password entered

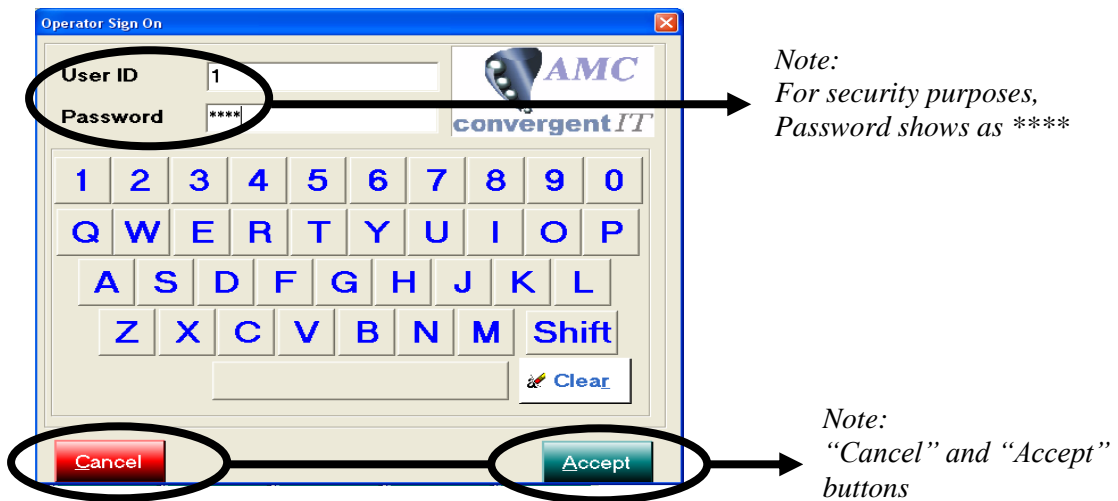


Figure 3.4 Sales operator sign on screen after a successful sign-on



3.2 How to sign off the sales screen

Follow these steps to sign off the Sales screen.

1. Touch the “**Sign Off**” button. Refer to Figure 3.5.
2. To sign off the sales screen touch your **Sales operator ID** button.
3. Touch the “**Sign Off**” button on the right hand side of the screen.
4. Touch the “**User ID**” field and enter your ID number.
5. Touch the “**Password**” field and enter your password.
6. Note: To keep your password secret, it will show as *****.
7. Touch the “**Accept**” button.

A successful sign off is confirmed by the removal of the sales operator’s name from the shop assistant buttons at the bottom of the sales screen.

Signing off on one POS terminal usually, but not always, signs you off all POS terminals in the store.

Passwords

The password you are given is very important and must only be used by you. Do not let any other sales operator sign on using your ID and password. You are accountable for your password and any transactions performed while you are signed on. Ensure you keep your password secure – do not tell anybody what it is.

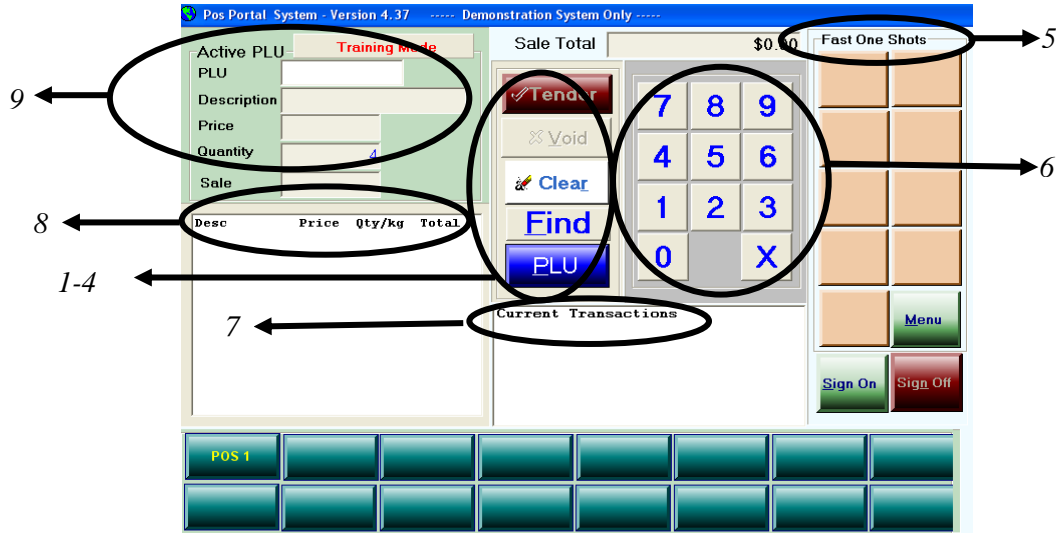
Activity 1

Demonstrate how to sign on and sign off using your ID and password.

3.3 The sales screen function keys

All function keys on the sales screen have a critical role in operating the POS Portal. The keys circled in Figure 3.6 are explained below.

Figure 3.6 Function keys on the sales screen



Note: The buttons described below are circled on Figure 1.4.

1. **Tender** Also known as the “Ring Off.” This button finalizes the current active customer transaction, collects the tender, opens the cash draw and prints a receipt if required.
2. **Void** Allows you to void an entire transaction that has to be aborted. This button will change to DELETE to perform the void item function.
3. **Find** Opens a search window. A sales operator can search for an item in the database by description or item code. When the item is found, insert it into the active transaction.
4. **PLU** Tells the sales screen that the numbers entered are a price look up.
5. **Fast one shot PLU** There are nine (9) One Shot PLU buttons on the top right hand corner of the screen. There may be more of these buttons on the screen depending on the setup of the system. These buttons can be used for the top lines sold, or for specials. *Note: The products associated with these buttons may change regularly depending on the top seller’s lists or the current specials. Ensure the key button you are touching is the item you are selling.*
6. **Numeric keypad** The numeric keypad is used to enter PLUs. The “X” button is used to tell the system you are entering a number of fixed-price items e.g. if you sold 4 cartons of milk, touch the “4” button then touch “X” button. This puts the number 4 into the Quantity window rather than the PLU window.

7. **Current transactions** A window below the numeric keypad shows the customer transactions that are active. Sales operators use this window to retrieve active sales, for further sales or to finalise the sale.
8. **Active transaction** The transaction currently being processed is displayed in a window immediately below the PLU sold window. It shows the active transaction, what items are being sold and the sales operator performing the transaction.
9. **PLU window** The PLU window is on the top left of the sales screen. When a PLU is entered using the numeric keypad, numbers show in the PLU window and the description and price per kilogram will show in their allocated windows as long as the correct PLU has been entered.

Activity 2

Get a PLU list from your workplace and enter five PLUs into the system. In the space provided below, record the information that appears e.g. description, cost, whether the item is a fixed-weight or weighable item.

- | |
|----|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

3.4 How to sell an item using the sales screen

Items can be sold as a fixed-price unit or by weight. This is controlled by settings in the inventory or information pre-programmed into the Product Master File. Every product for sale in the store must have a PLU number or a bar code to scan. This system controls the pricing of products and gives accurate reports on what products and items are being sold.

Selling an item by weight

Follow these steps to sell an item by weight.

1. Select the product and place it on the scales.
2. Touch either:
 - the item number using the numeric pad and then touch the PLU button, or
 - a One Shot PLU button (if one is programmed for this item).

After the PLU has been selected, the weight, description, selling price per kilogram and total price will be displayed for you and for the customer to see on their side of the counter.

3. Check whether the customer is happy with the amount of product selected and/or the price. As necessary, add or remove some product. The scales will automatically adjust to the change. This is known as an “Active Weight”.

Note: If your customer is undecided whether the product you are weighing for them is acceptable and another sales operator wants to use your terminal, make sure the item you were weighing is off the scale and the correct PLU for the new sales operator’s sale is entered into the sales screen. If your PLU is still on the screen the customer may be charged incorrectly for their purchase and they will be dissatisfied or the business may lose money by charging a lesser price for the product purchased.

4. When the weight is agreed, touch your “**Active sales operator ID**” button. This commences the transaction or adds the item details to an existing sale.

Note: Touching the Active sales operator ID button records the last valid weight from the sale as the final weight for that item.

Selling a fixed-price item

Fixed-priced items are not sold on weight, they have a fixed-price for example, a carton of eggs costs \$3.50, or a bottle of marinade costs \$4.20.

Follow these steps to sell a fixed-price item.

1. Select the PLU for the item (by touching the numbers on the **numeric keypad**) then touch the “**PLU**” button.
2. If a customer buys more than one of a fixed-price item e.g. four (4) cartons of eggs, touch the “**PLU**” button then touch the number (in this case 4) then touch the “**X**” button.
3. When the number of items has been entered touch your “**Active Sales Operator ID**” button. This commences the transaction or adds this to an existing sale.

Notes

- *The item and the selling weight, selling price and extended price form part of the Sales operator’s active sale.*
- *All the information is recorded on the screen and the final receipt is automatically printed.*
- *Once this is done the scale and the sales screen can be used either by you to process another item for the same customer or by another by another sales operator.*

Other sales functions on the POS portal

There are a number of other sales-related functions that sales operators can perform. We will cover the main ones in this training manual.

3.5 How to change or override the price

The “price change” function (also known as “price override”) allows you to change the price of an item that has been included in a customer’s transaction.

Follow these steps to change or override the price.

1. Touch your “**Active Sales Operator ID**” button or your transaction.
2. Touch the “**Menu**” button.
3. Touch the “**Functions**” button. Refer to Figure 3.7 which shows a list of all the available functions. *Note: additional functions may be set up on the blank buttons.*

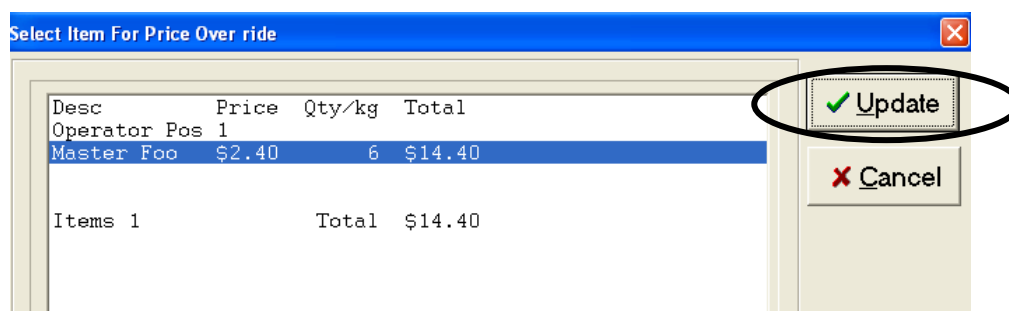
Figure 3.7 Functions selection screen



Note:
Location of the
Functions, Menu,
Price Change and
Return Item
buttons.

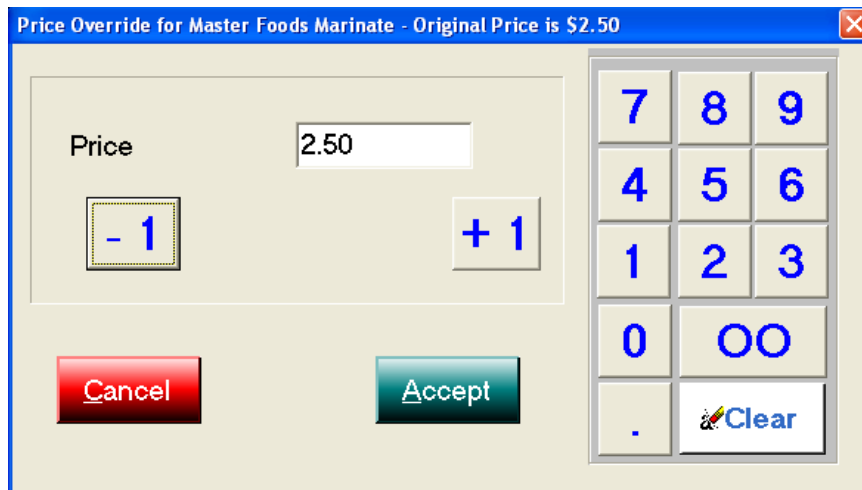
4. Touch the “**Price Change**” button. A *Select Item for Price Override* screen will open. Highlight the item you wish to change by touching it. Refer to Figure 3.8 *Master Foods Marinade has been highlighted.*

Figure 3.8 Select item for price override screen



5. Touch the **“Update”** button and the Price override screen will open for the item you selected. Refer to Figure 3.9 Master Food Marinade and the original price entered is showing.
6. Touch the **“+1”** or **“-1”** buttons to adjust the price in whole numbers.
7. Touch the numbers on the **numeric keypad** to adjust numbers after the decimal point.
8. Touch the **“Clear”** button to empty the screen and re-enter the price including the decimal point.
9. Touch the **“Accept”** button to enter the new price into the Sales screen. The new price will show and the Total transaction price value will have changed.

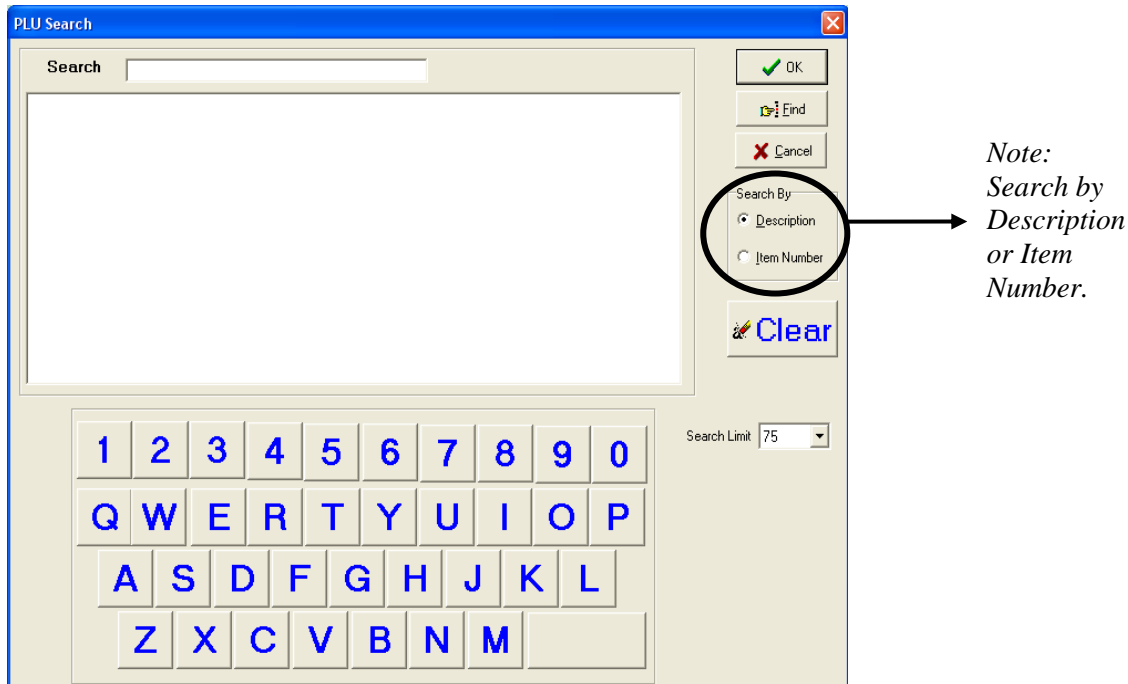
Figure 3.9 Price override for master food marinade screen.



3.6 How to find a PLU item to include in a transaction

The POS Portal has a PLU search function so sales operators can find an item or PLU to include in a transaction. Refer to Figure 3.10.

Figure 3.10 The PLU search window



Follow these steps to use the two different PLU search functions.

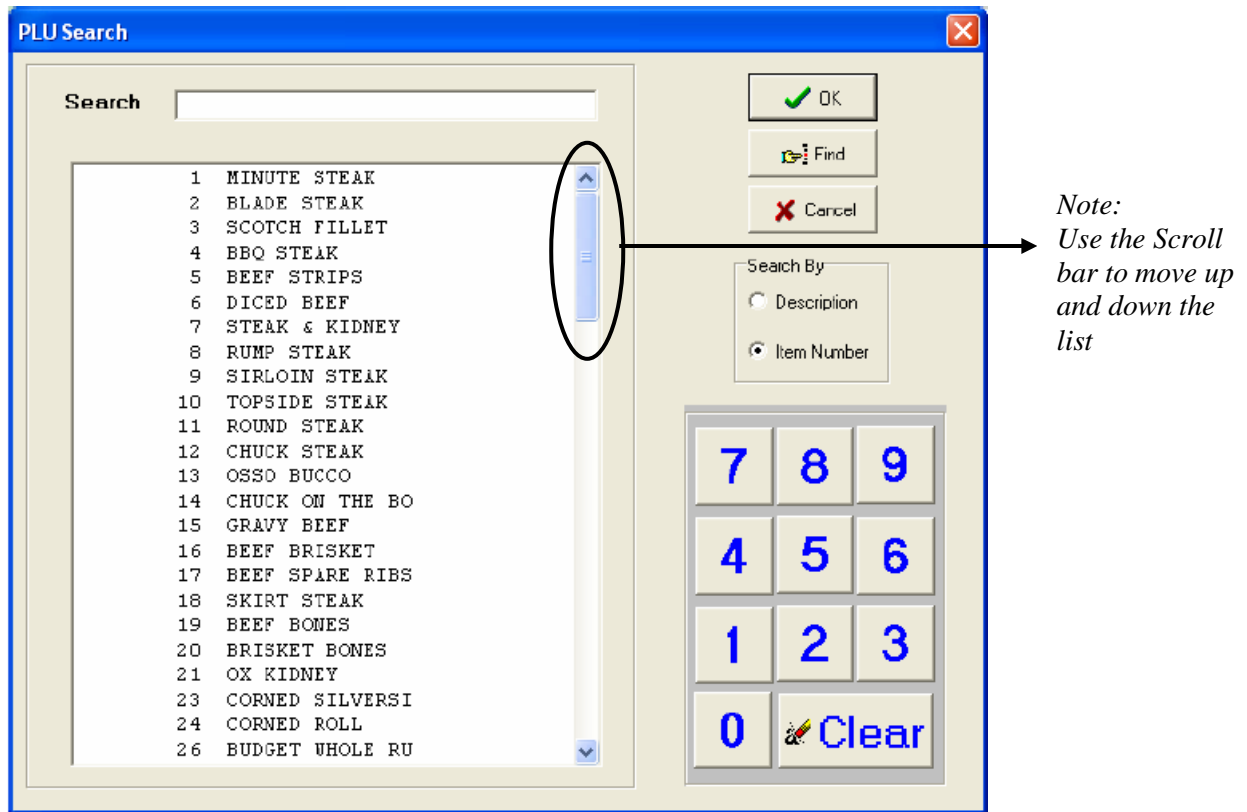
Search by **product name**.

1. Touch the “**Description**” button.
2. Touch the “**Search**” field and type in the product name e.g. Lamb Chump Chops. Inserted lamb need to search by product
3. Touch the “**Find**” button. A list of PLU descriptions will show in alphabetical order. *Refer to Figure 3.11.*

Search by **item number**.

1. Touch the “**Item Number**” button.
2. Touch the “**Find**” button. A list of PLU numbers will show. *Refer to Figure 3.11.*
3. Touch the “**Scroll Bars**” to move up or down the list.
4. Touch the item you are looking for.
5. Touch the “**OK**” button to include the item in the transaction.

Figure 3.11 List of PLU items to choose from



3.7 How to process customer returns

The returns process allows a sales operator to:

- put a returned item back into stock, and
- refund money to a customer.

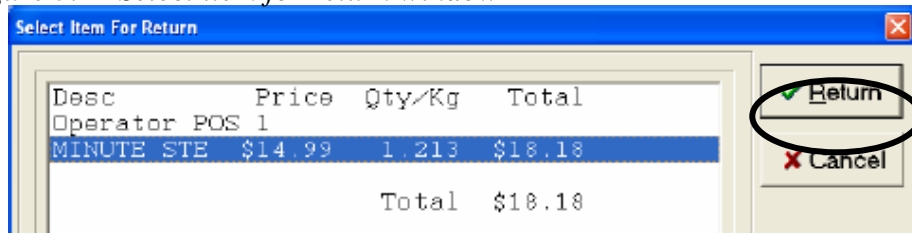
The POS Portal tracks all returns made by a sales operator and a report is printed on either the office computer or the POS Portal depending on how the system is set up.

Follow these steps to process a return.

1. Touch your “**Active Sales Operator ID**” button.
2. Enter the item to be returned as you would if a sale was being made.
3. Touch the “**Menu**” bolded button.
4. Touch the “**Functions**” button.

Touch the “**Return Item**” button, located one row below and to the left of the “**Quantity Change**” button which we discussed earlier. The *Select item for return window* will show. Refer to Figure 3.12.

Figure 3.12 Select item for return window



2. Touch the item to be returned. The example in Figure 2.0 is 1.213kg of minute steak valued at \$18.18.
3. Touch the **“Return”** button. The *Sales screen* shows and the sale is automatically converted to a negative quantity amount and a negative sale amount and taken off the transaction.
4. Touch the **“Ring Off”** button to finalise the transaction. Refer to Figure 3.13.
5. The *Tender Group 1 – Return window* will open and you can now process the customer’s refund. Refer to Figure 3.14.
6. Touch the **“Accept”** button to refund the money to the customer.

Figure 3.13 The sales screen showing the returned amount

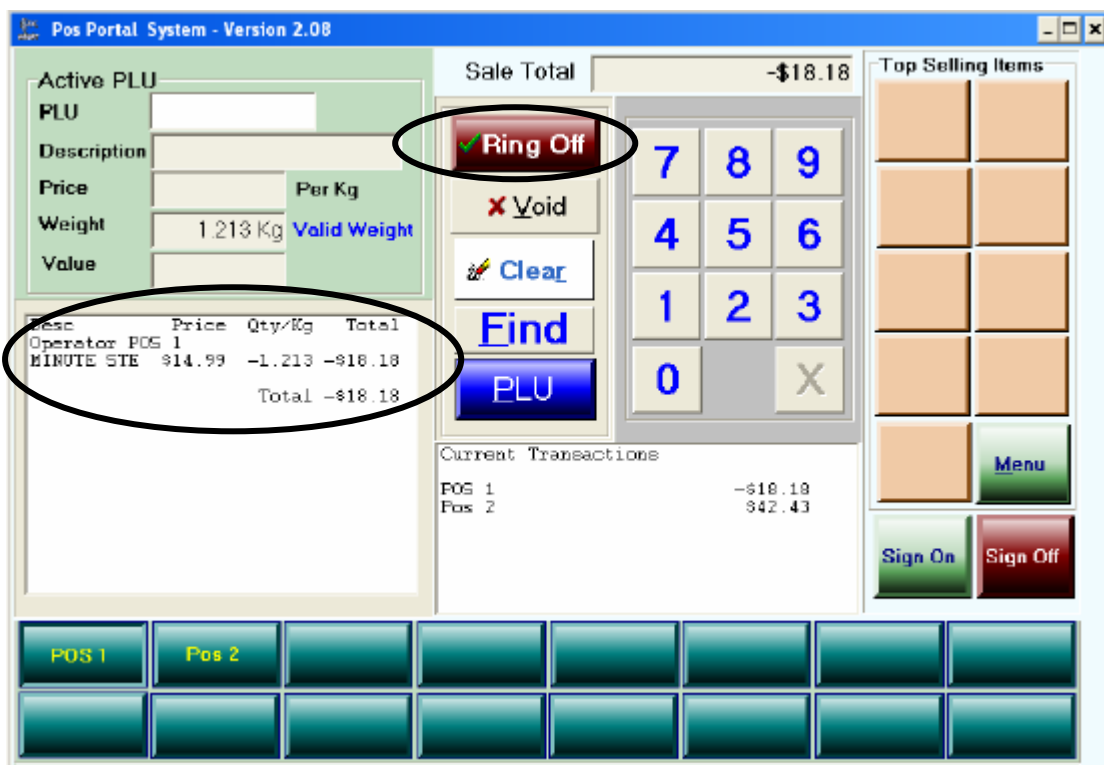
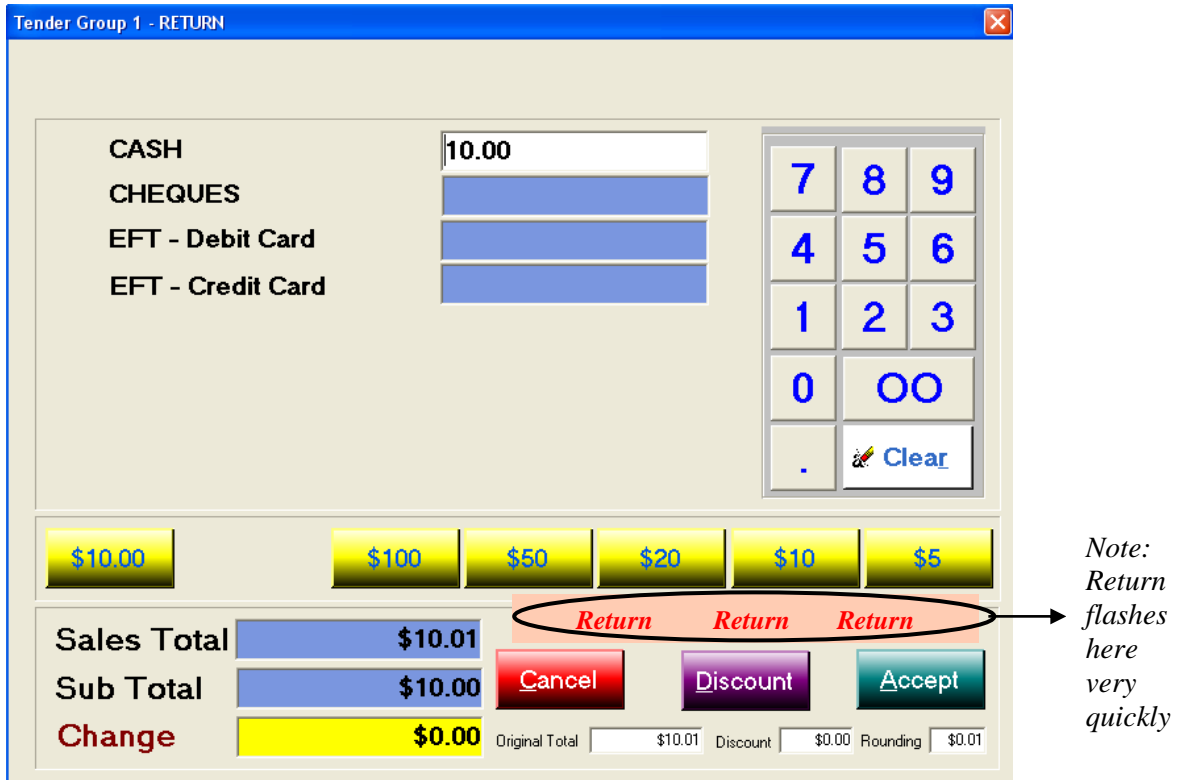


Figure 3.14 Tender group 1 – return window



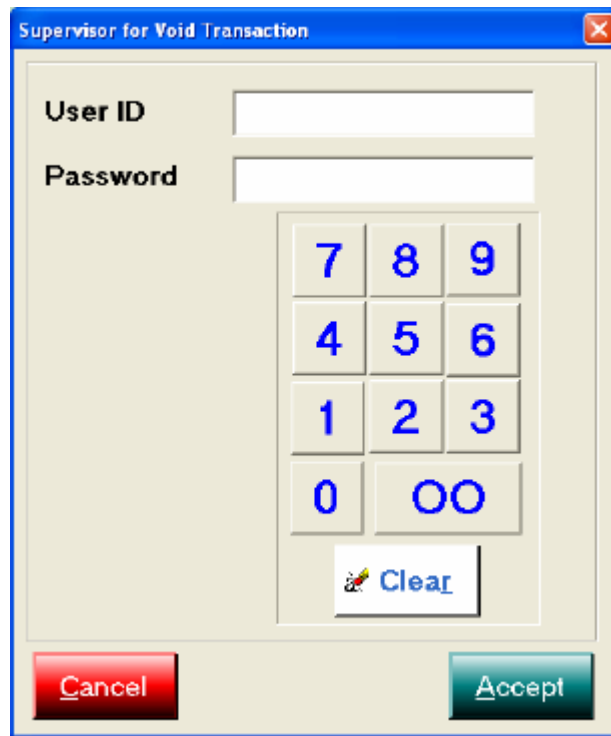
Note: Figure 3.14 shows a refund of \$10.00. If we had used the minute steak example, the refund amount would have been \$18.18.

3.8 How to void a transaction

The POS Portal tracks all transactions voided by a sales operator. Follow these steps to void a transaction.

1. Select the sales operator’s transaction. The “Void” button will show.
2. Touch the “Void” button. A confirmation window will open.
3. Touch the “Accept” button to continue the void.
4. Touch the “Cancel” button to abort the void. The Supervisor for Void Transaction window will open if a supervisor’s authorisation is required. Refer to Figure 3.15.
5. Enter the Supervisor ID and Password.
6. Touch the “Accept” button. The transaction will be voided.

Figure 3.15 Supervisor for void transaction window



The image shows a software window titled "Supervisor for Void Transaction". It features a light beige background and a blue border. At the top left, there are two text input fields: "User ID" and "Password". Below these fields is a numeric keypad with buttons for digits 0-9, a "Clear" button with a trash icon, and two buttons at the bottom: a red "Cancel" button and a green "Accept" button.

3.9 How to void an item

Follow these steps to void or delete an item from a transaction.

1. Select the transaction so all items for the POS you are working under are visible. *Refer to Figure 3.16 (four items are showing for POS 1).*
2. Touch the “**Delete**” button. Supervisor authorisation is usually required and the Supervisor for void item window will open.
3. Enter the **Supervisor ID** and **Password** and touch the “**Accept**” button. The Select item to void window will open.
4. Touch the item to be deleted. Refer to Figure 3.17 Blade Steak is selected.
5. Touch the “**Delete**” button. The item will be deleted from the transaction and the item void is complete. *Refer to Figure 3.18.*

Figure 3.16 The sales screen showing the transactions for Operator POS 1

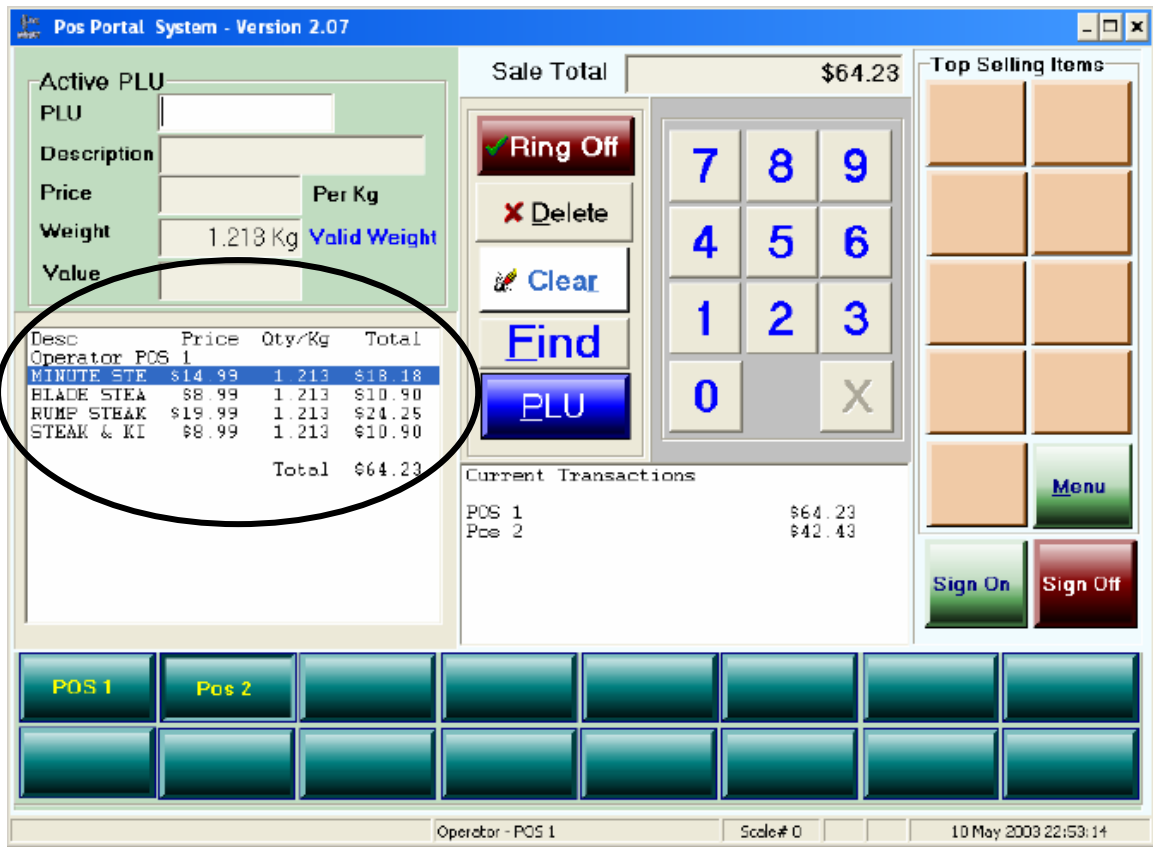


Figure 3.17 Select item to void window – blade steak is selected

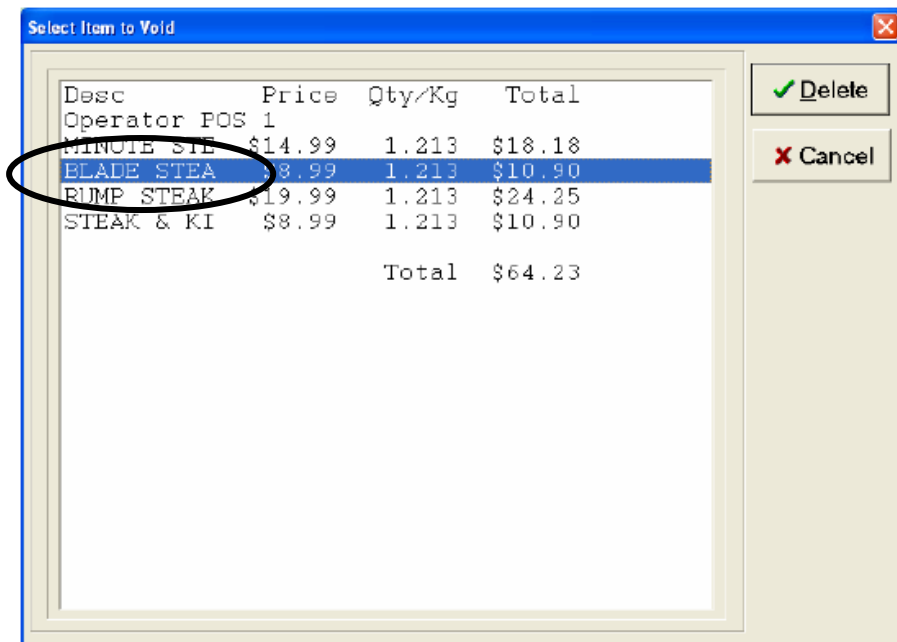
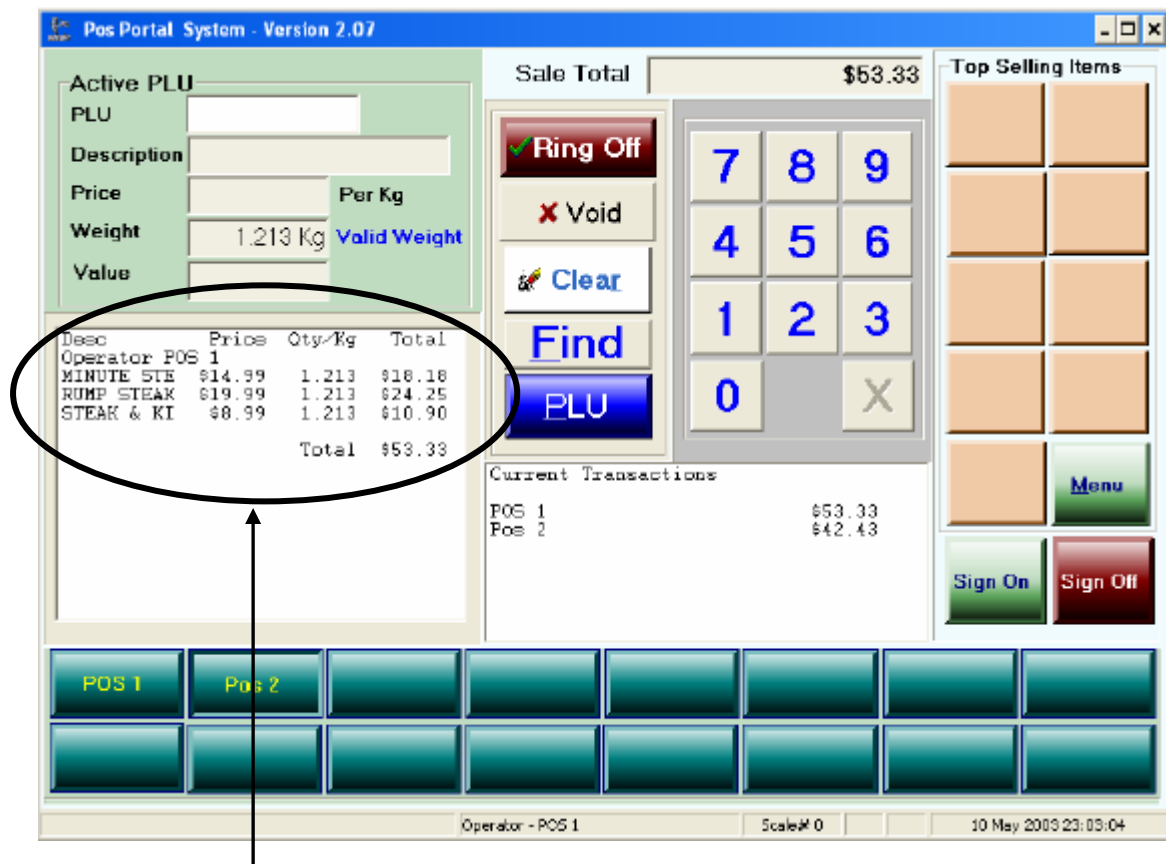


Figure 3.18 Sales screen showing that blade steak has been deleted.



Note: The transaction value has reduced to \$53.33

3.10 How to park a sale

Parking is the term used when a customer has purchased some items and cannot complete the sale immediately e.g. they leave the store or are talking to somebody.

Follow these steps to Park a sale.

1. Select the active sale transaction to be parked.
2. Touch the **“Menu”** button.
3. Touch the **“Functions”** button.
4. Touch the **“Park Sale”** button. A receipt with a reference number is issued and should be kept by the sales operator or given to the customer. The sales operator can now serve another customer.

3.11 How to retrieve a parked sale

Any active sales operator can retrieve a parked sale using the reference number on the receipt given to the customer. Follow these steps to retrieve a parked sale.

1. Select the signed in operator you are retrieving the sale for.
2. Touch the **“Menu”** button.
3. Touch the **“Functions”** button.

4. Touch the “**Retrieve Sale**” button which is beside the Park Sale button. The *Select parked sale for retrieval window* will open.
5. Select and touch the **parked sale** you are retrieving by checking the reference number against the docket given to the customer.
6. Touch the “**Retrieve**” button. The transaction will show in the selling screen and the sales operator can continue with the sale.

3.12 How to finalise a sale and pay for purchases

A customer sale is finalised when the customer pays for the items they purchased. This is known as “tendering” i.e. the customer tenders money for their purchases.

All customer sale functions are performed in the POS portal including:

- discounts
- item corrects
- loyalty transactions
- tendering and finalising the sale.

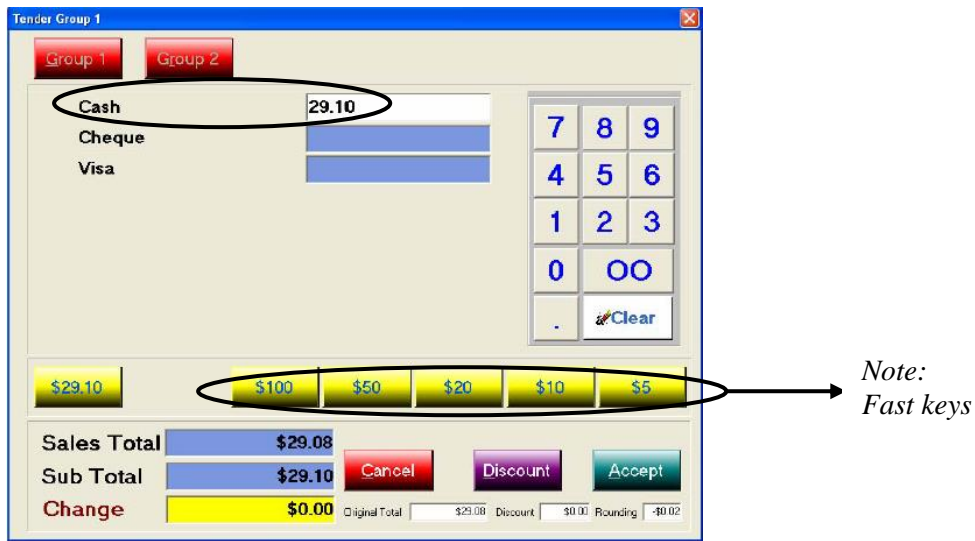
Follow these steps to tender and finalise a sale.

1. Touch your “**Active Sales Operator ID**” button to activate the sale.
2. Touch the “**Tender**” button or “**Ring Off**” button to open the *Tendering screen*. The sale total will be displayed.
3. The “**Cash**”, “**Visa**” or “**Cheque**” buttons can be selected. A discount function is available, but Supervisor ID may be required to continue.

To process a payment by cash

1. Touch the “**Cash**” field.
2. Enter the sale amount using the **numeric keypad** or the **fast keys**. Refer to *Figure 3.19*.
3. Touch the “**Accept**” button.

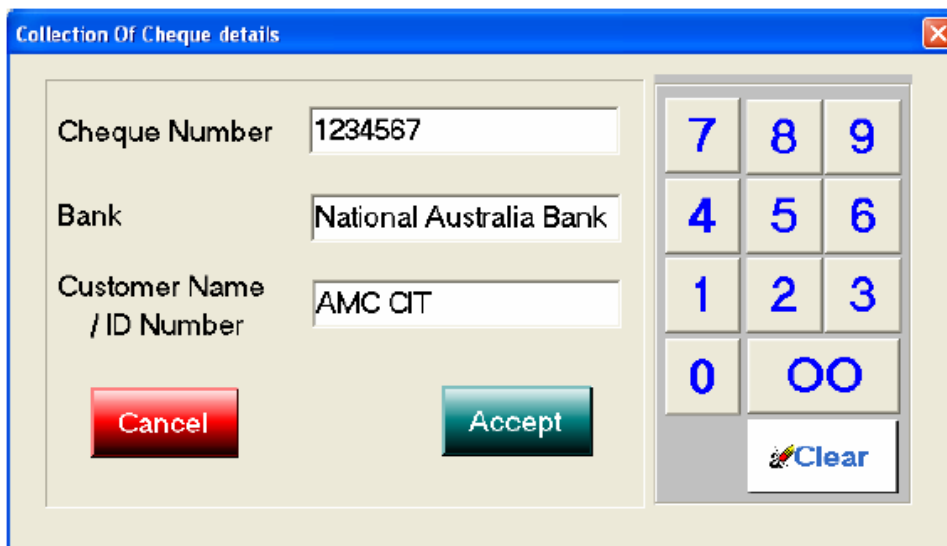
Figure 3.19 Tender group 1 window – the cash tendered has been entered.



To process a payment by cheque

1. Touch the “Cheque” field which is one row below the Cash field.
2. Enter the cheque amount using the **numeric keypad**.
3. Touch the “Accept” button. The Collection of Cheque Details Window will open. Refer to Figure 3.20.
4. Enter the Cheque Number, Bank, and Customer Name information in the fields.
5. Touch the “Accept” button to finalise the transaction.

Figure 3.20 The collection of cheque details window



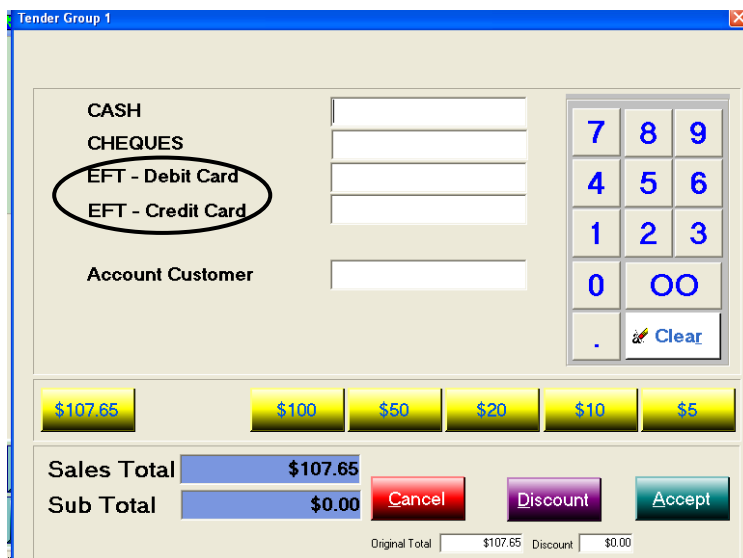
To process a payment by EFTPOS or credit card

EFTPOS transactions are when customers use their credit or debit card to pay for their purchases.

1. Touch the “**EFT Credit card**” or “**EFT Debit card**” field. *Refer to Figure 3.21.*
2. Enter the payment amount using the numeric keypad or fast keys.
3. Touch the “**Accept**” button.
4. Follow your store’s procedures for handling credit and debit card transactions.

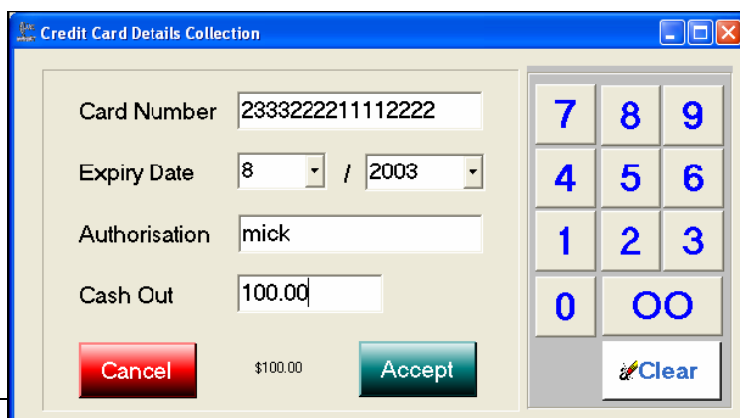
Note: You will be trained in how to use your store’s EFTPOS facilities. Normally, credit card payments require the customer to sign a docket and debit card payments need a PIN number entered. Cash may also be taken out with debit card transactions.

Figure 3.21 Tender Group 1 screen with EFT- Credit and Debit card selected



5. If you do not have an automatic EFTPOS interface a Credit Card Details window will open for you to manually enter the credit card details. A supervisor’s authorisation will be required. *Refer to Figure 3.22.*

Figure 3.22 The credit card details collection window (for manual transactions)



To process a payment on account

1. Touch the “**Account customer**” field which is directly below the EFT-credit card field. *Refer to Figure 3.21.*
2. Enter the payment amount using the numeric keypad or fast keys.
3. Touch the “**Accept**” button.
4. The Checking portal for customer account screen will appear. Refer to Figure 3.23.
5. Touch the “**Search**” field and enter the customer’s name or account number (if they know it).
6. Touch the “**Find**” button. A list of customers or accounts will be listed.
7. Touch the “Customers name or account number”.
8. Touch the “**Select**” button. The Charge to account screen will show. *Refer to Figure 3.24.*
9. Touch the “**OK**” button to complete the transaction.

Figure 3.23 Checking portal for customers screen

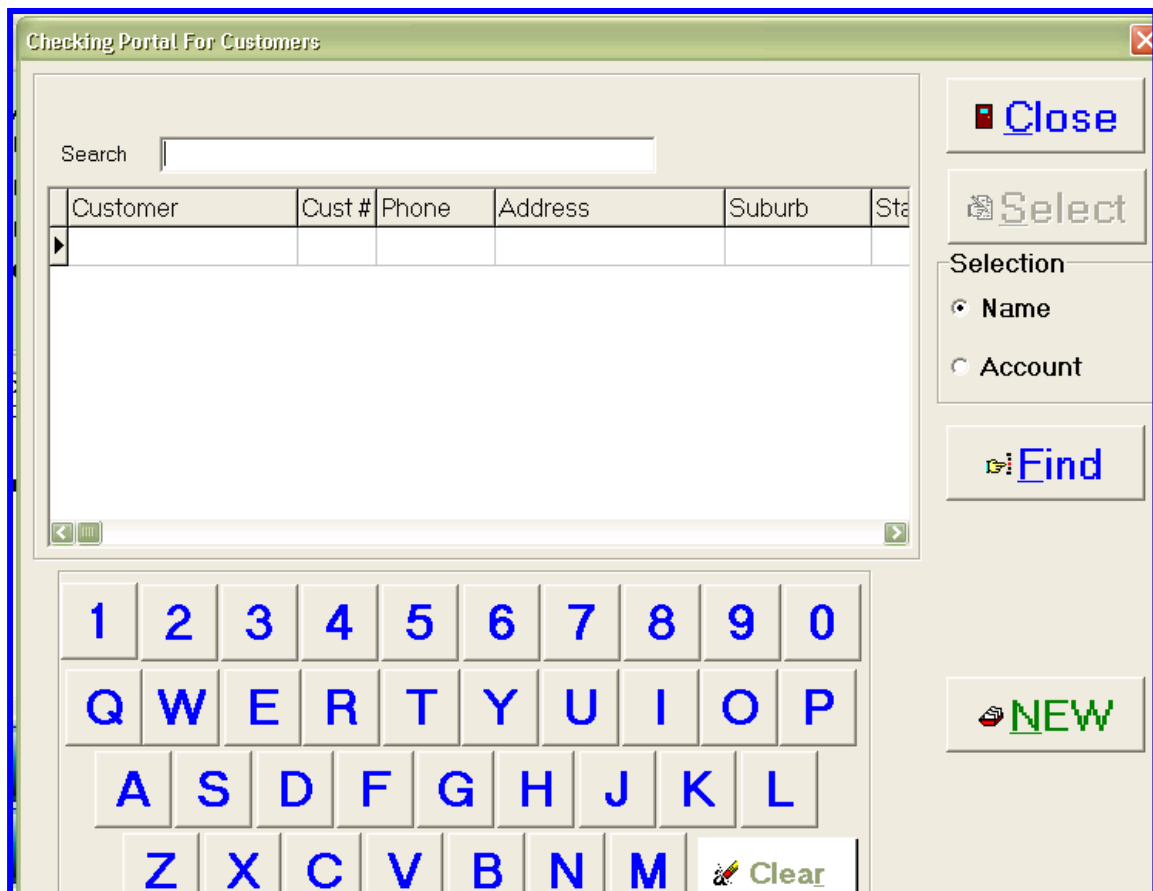
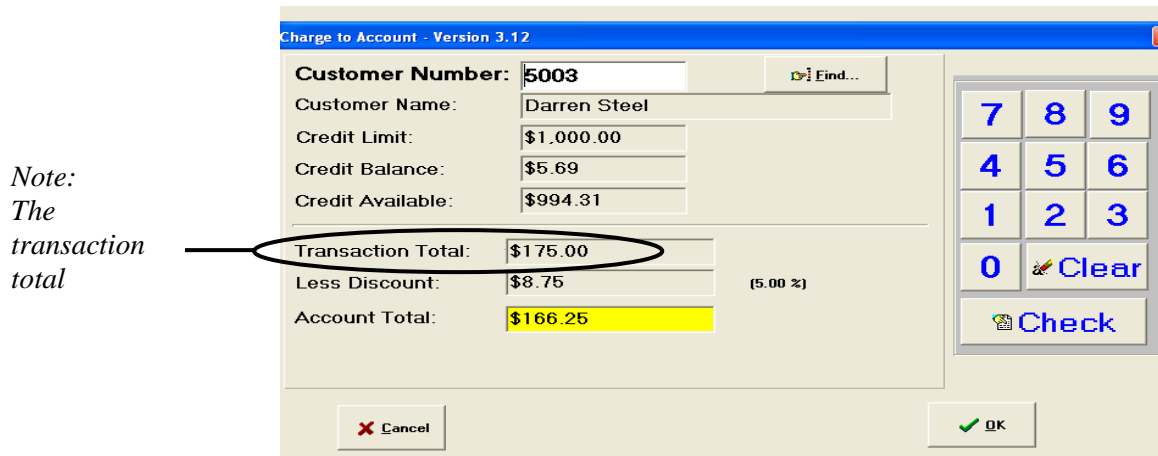


Figure 3.24 Charge to account screen



3.13 How to make an account enquiry

Follow these steps to make an account enquiry. (*Note: Supervisor access is required.*)

1. Touch the “**Menu**” button.
2. Touch the “**Functions**” button.
3. Touch the “**Account Enquiry**” button. The *Supervisor for account enquiry screen* may show.
4. Touch the “**Accept**” button. The Checking portal for customer screen will show. Refer to Figure 3.23.
5. Touch the **Search field** and enter the customer’s name.
6. Information about the customer is then displayed on the screen.

3.14 Debtor (account) transactions

In accounting terms, people or businesses with accounts at a store are known as Debtors. Having an account allows purchases to be made and charged and paid for at the end of an agreed time e.g. monthly. All Debtors must be entered into the system before purchases can be made and charged to the account.

The portal tracks all purchases made on a customer’s account and uses the information for accounting purposes e.g. to issue an invoice and track payment.

Sales operators handle account holder purchases exactly the same way as for other customers.

Stores have different procedures for opening an account. Check with the owner/manager for your store’s procedures.

Note: Debtors may receive additional benefits from opening an account e.g. a 5% discount on all purchases due to the amount of business put through the store. All account terms and conditions are set in the portal when the account is opened.

4 Discounts and loyalty programs

4.1 When to apply a discount

While many stores offer a loyalty program, not all customers will join and you need to be able to offer discounts for a variety of reasons. Discounts can be fixed e.g. all staff and seniors receive a five percent discount on their purchase or they can be one-off situations e.g. all chops sold today receive a 10% discount.

Each discount must be set up in the POSPortal so it is accounted for in the cashup. This section explains discounts at the item level not on the total sale.

4.2 What is a loyalty program

A loyalty program is a promotional activity to reward customers for their loyalty to your business. By law, any customer joining a loyalty program must be given a copy of the terms and conditions document. This is often included with the registration form. Each store determines how their loyalty program will run and how the customer will be rewarded. Two common loyalty programs are:

- Purchase a certain amount of product and receive some product for free e.g. buy five chicken Kiev's and receive one free.
- For every purchase over a certain amount, a number of points are awarded and when points reach a certain level the customer receives something for free e.g. for every purchase over \$50 the customer receives 10 points and when 100 points are accrued the customer receives a 10% discount off their next purchase.

Customers must be issued with a loyalty card and these can be purchased through a commercial printing company or through Meat and Livestock Australia.

The portal must be programmed with the points and reward levels for the loyalty program.

4.3 How to give a customer discount on an item

Follow these steps to give a customer discount on an item. (*Note: the discount is offered on one more items in their transaction, not the total sale.*)

1. Select the transaction containing the item to be discounted.
2. Touch the “**Menu**” button.
3. Touch the “**Functions**” button.
4. Touch the “**Discount**” button. The Select item for discount screen will show. Refer to Figure 4.1 Size 32 turkey is highlighted
5. Touch the **item to be discounted** if it is not the item highlighted.

6. Touch the “**Discount**” button. The *Function/Button selection screen* will show.
7. Touch the **discount level** to be applied. Refer to Figure 4.2 Customer discount of 5% is highlighted.
8. Repeat steps 1-7 to apply discount to other items in the transaction.

Figure 4.1 Select items for discount screen

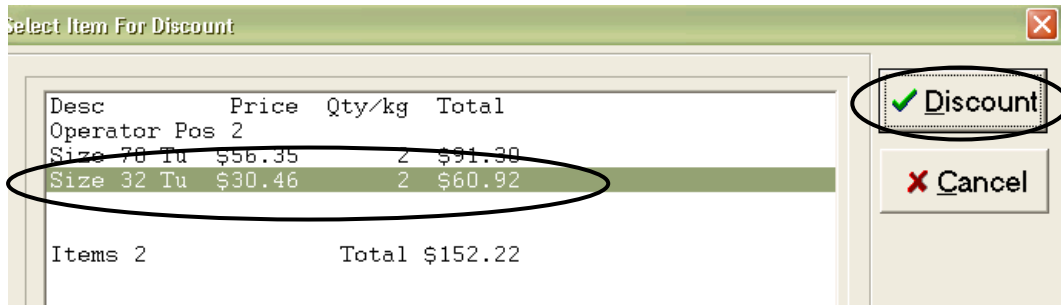
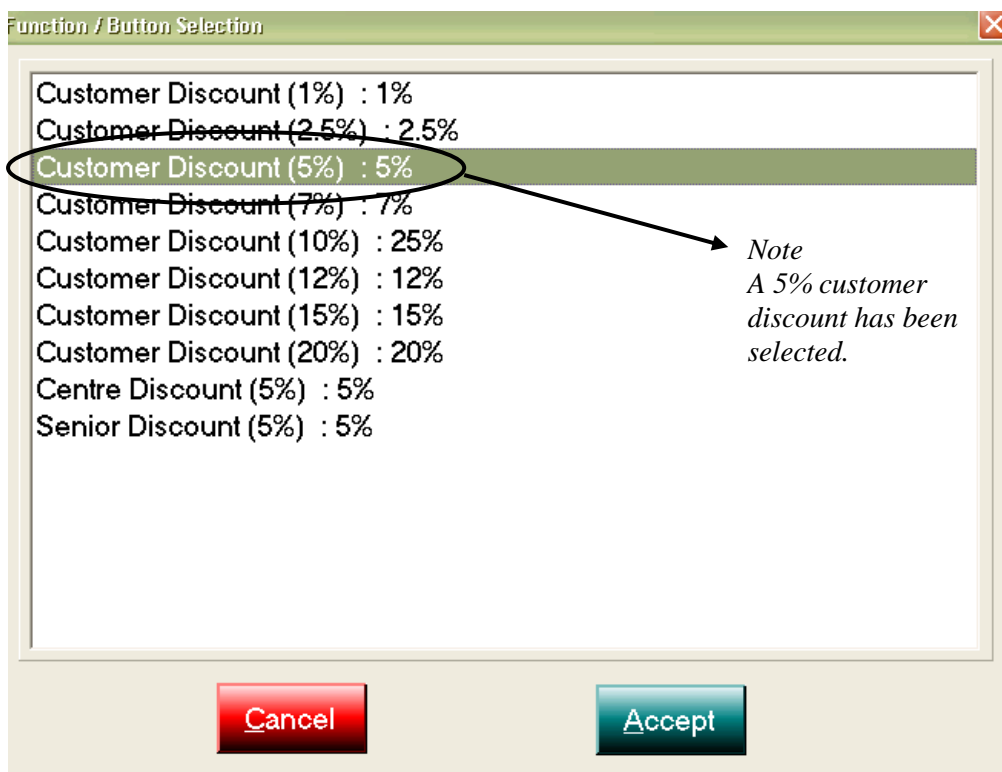


Figure 4.2 Function/button selection – 5% discount is selected



4.4 How to sign a customer up into a loyalty program

Follow these steps to sign up a customer into your store’s loyalty program.

1. Ensure you explain the loyalty system to the customer.
2. Give the customer a registration form. Preferably get the customer to complete it while they are in the store.
3. Allocate a loyalty card.

4. Write the number on the registration form.
5. Scan card and press operator name before end of current sale to start validation process inserted extra step
6. Explain to the customer that the card is now active, however points will not show on their receipts until it is entered into the Portal and this may take a few days. Reassure them that any purchases they make will be recorded in the computer system and their points will be allocated.
7. Give the completed registration form to the supervisor who will arrange for the customer to be entered into the loyalty system.

4.5 How a customer uses the loyalty card

Each time a customer in your loyalty program makes a purchase they must have their card scanned for the sale to be registered against their loyalty account. It is a good idea to ask customers if they are a member of the store's loyalty program. If they are, ask them for their card. If not, ask if they would like to join.

When a customer's loyalty points reach the level where a discount can be redeemed, the sales screen will alert the operator. Advise the customer that the level has been reached and ask them if they wish to redeem their discount before you finalise the sale.

Appendix A: POS portal quick reference guides

These quick reference guides contain the steps required to perform the key sales tasks outlined in this training manual.

Each quick reference guide includes a cross-reference back to the relevant page in the training manual.



We suggest you laminate these guides and locate them on a key chain beside the POS portal for quick reference by sales operators.

Sign on to the sales screen



Page
1

1. Touch the “**Sign On**” button.
2. Touch the “**User ID**” field.
3. Enter your Sales Operator ID number.
4. Touch the “**Password**” field.
5. Enter your password.
6. Touch the “**Accept**” button.
7. Touch the “**Cancel**” button to abort the sign on process.

Sign off the sales screen



Page
2

1. Touch the “**Sign Off**” button.
2. Touch your “**Active Sales Operator ID**” button.
3. Touch the “**Sign Off**” button.
4. Touch the “**User ID**” field.
5. Enter your ID number.
6. Touch the “**Password**” field.
7. Enter your Password.
8. Touch the “**Accept**” button.

Sell an item by weight



Page
29

1. Put the product on the scales.
2. Enter the item number
 - a. Use the numeric keypad then touch the PLUOR
 - b. Touch a “**One Shot PLU**” button.
3. Touch the “**Active Sales Operator ID**” button.

Sell a fixed-priced item



Page
29

1. Enter the item number.
2. Touch the PLU button.
3. If multiple items are purchased touch the number (e.g.: four cartons of eggs – touch 4) then the “X” button.
4. Touch your “**Active Sales Operator ID**” button.

Price change/override

Page
10

1. Touch your “**Active Sales Operator ID**” button of your transaction.
2. Touch the “**Menu**” button.
3. Touch the “**Functions**” button
4. Touch the “**Price Change**” button.
5. Touch the “**Update**” button
6. Touch the “**+1**” or “**-1**” buttons to adjust the price in whole numbers.
7. Use the numeric keypad to adjust numbers after the decimal point,

OR

8. Touch the “**Clear**” button to empty the screen and re-enter the quantity.
9. Touch the “**Accept**” button.

Find a PLU item

Page
10

To search by **product name**.

1. Touch the “**Description**” button.
2. Touch the “**Search**” field and type in the product name e.g. Chump Chops.
3. Touch the “**Find**” button. A list of PLU descriptions will show in alphabetical order.

To search by **item number**.

1. Touch the “**Item Number**” button.
2. Touch the “**Find**” button. A list of PLU numbers will show.
3. Touch the “scroll bars” to move up or down the list.
4. Touch the “**item**” you are looking for.
5. Touch the “**OK**” button to include the item in the transaction.

Process a return

Page
18

1. Touch your “**Active Sales Operator ID**” button.
2. Enter the item to be returned.
3. Touch the “**Menu**” button.
4. Touch the “**Functions**” button.
5. Touch the “**Return Item**” button.
6. Touch the item to be returned.
7. Touch the “**Return**” button.
8. Touch the “**Ring Off**” button.
9. Touch the “**Accept**” button to refund the money to the customer.

Void a transaction

Page
15

1. Select the sales operator’s transaction.
2. Touch the “**Void**” button. A confirmation window will open
3. a) Touch the “**Accept**” button to continue. A supervisor’s ID and Password may be required.
Or
b) Touch the “**Cancel**” button to abort the void.

Void an item



Page

1. Select the transaction so all items are visible.
2. Touch the “**Delete**” button.
3. Enter the **Supervisor ID** and **Password** if requested.
4. Touch the “**Accept**” button.
5. Touch the item to be deleted.
6. Touch the “**Delete**” button.

Park a sale



Page

1. Select the “**active sale transaction**” to be parked.
2. Touch the “**Menu**” button.
3. Touch the “**Functions**” button.
4. Touch the “**Park Sale**” button.
5. Keep the receipt or give it to the customer.

Retrieve a parked sale



Page

1. Touch the “**Signed on operator**” you are retrieving the sale for.
2. Touch the “**Menu**” button.
3. Touch the “**Functions**” button.
4. Touch the “**Retrieve Sale**” button.
5. Touch the Parked Sale you are retrieving.
6. Touch the “**Retrieve**” button.

Receive payment by cash



1. Touch your **“Active Sales Operator ID”** button.
2. Touch the **“Tender”** button or **“Ring Off”** button.
3. Touch the **“Cash”** field and enter the amount of cash received.
4. Touch the **“Accept”** button.

Receive payment by cheque



1. Touch your **“Active Sales Operator ID”** button.
2. Touch the **“Tender”** button or **“Ring Off”** button.
3. Touch the **“Cheque”** field and enter the cheque amount.
4. Touch the **“Accept”** button.
5. Enter the Cheque Number, Bank and Customer Name in the Collection of Cheque Details window
6. Touch the **“Accept”** button to finalise the transaction.

Receive payment by credit card



1. Touch your **“Active Sales Operator ID”** button.
2. Touch the **“Tender”** button or **“Ring Off”** button.
3. Touch the **“EFT – Credit card”** field and enter the sales amount.
4. Touch the **“Accept”** button.
5. a) Process the credit card transaction using the store’s automatic EFTPOS interface
OR
b) If you only have manual credit card facilities, enter the necessary information in the Credit Card Details window.



Receive payment by debit card

1. Touch your “**Active Sales Operator ID**” button.
2. Touch the “**Tender**” button or “**Ring Off**” button.
3. Touch the “**EFT – Debit card**” field and enter the sales amount.
4. Touch the “**Accept**” button.
5. Process the debit card transaction using the store’s automatic EFTPOS interface

Process a payment on account



1. Touch the “**Account customer**” field.
2. Enter the payment amount using the numeric keypad or fast keys.
3. Touch the “**Accept**” button.
4. Touch the “**Search**” field and enter the customer’s name or account number.
5. Touch the “**Find**” button.
6. Touch the “**Customers name or account number**”.
7. Touch the “**Select**” button.
8. Touch the “**OK**” button to complete the transaction.

Account enquiry



1. Touch the **“Menu”** button.
2. Touch the **“Functions”** button.
3. Touch the **“Account Enquiry”** button.
4. Touch the **“Accept”** button.
5. Touch the **Search** field.
6. Enter the customer’s name.
7. Touch the **“Select”** button.

Apply a discount to one item



1. Select the transaction containing the item to be discounted
 2. Touch the **“Menu”** button.
 3. Touch the **“Function”** button.
 4. Touch the **“Discount”** button.
 5. Touch the **“discount level”** you wish to apply. Note: Some levels may require supervisor approval.
 6. Touch the **“Accept”** button.
- Repeat steps 1-6 to apply discounts to other items in the transaction.