



CRS CASHIER TRAINING GUIDE FOR POS INVOICES

WELCOME TO POS INVOICE TRAINING!

We are delighted to teach you how to use POS Invoices in agrē! This guide is yours to keep. Feel free to write notes and comments in it for your future reference.

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What is a POS Invoice?

A POS Invoice is an abbreviated version of the regular agrē invoice that's designed for speed! You can use a barcode scanner to quickly enter items onto the invoice, take the customer's payment, and print the till-tape receipt. Even without a barcode scanner you'll be able to enter a POS Invoice quickly using special keyboard shortcuts.

POS Invoices are much faster to enter but the trade-off is less flexibility - you aren't able to add blends, or indicate a shipping address, there's no place for flagging purchases as prepaid, selecting a Lot Number (Lot#) or adding customer order number; you can't link to or import from a loadout ticket or work order, and some payment types may not be acceptable.

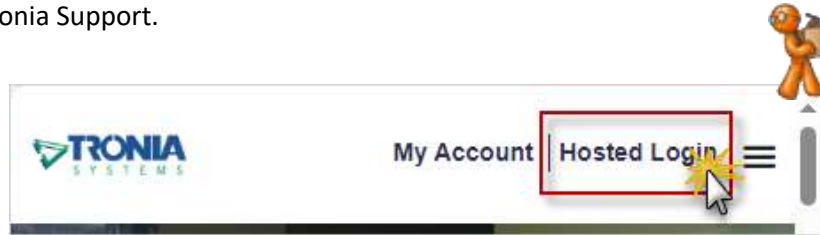
POS Invoices are formatted to print on "till-tape" instead of on an 8½ x 11 sheet of paper (but there is an option to print them that big if you need to).



Logging On

You will have received your **Citrix ID and password**, as well as your own **agrē User Name and password**, from your supervisor or from Tronia Support.

- navigate to **www.tronia.com** and then click **Hosted Login**.



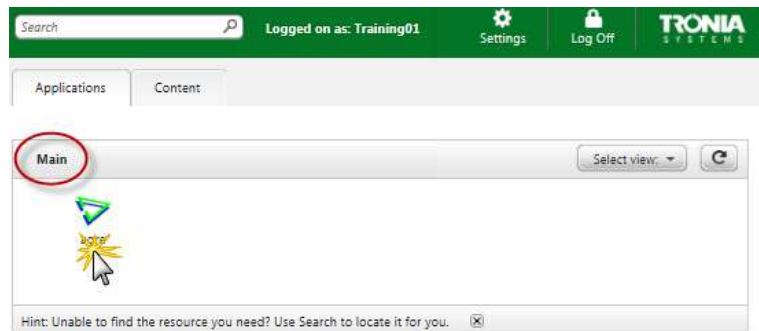
Tip If you are unable to access the Hosted Login link, you can navigate directly to the login page: <https://citrix.tronia.com>

- in the **User name** and **Password** boxes, enter your **Citrix ID** and password.



- click **Log On**.

- click **agrē**

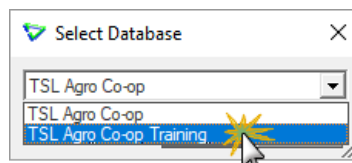


- in the **User Name** and **Password** boxes, enter your **agrē user name** and password.

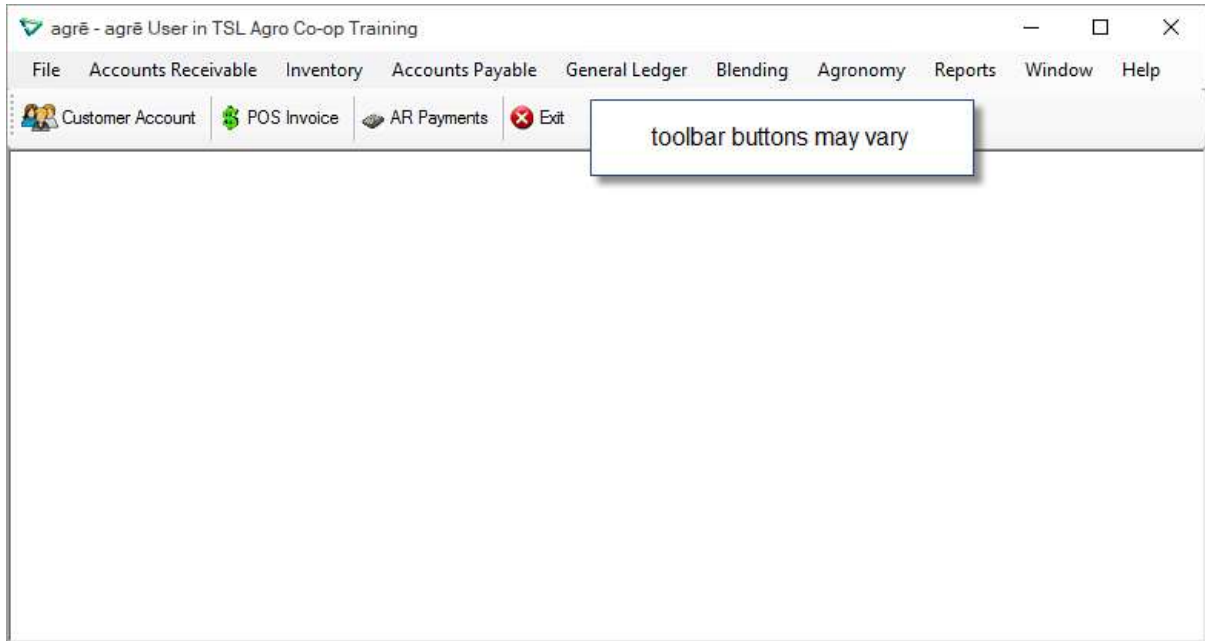


- click **OK**

- your **training database** can be used in conjunction with this guide

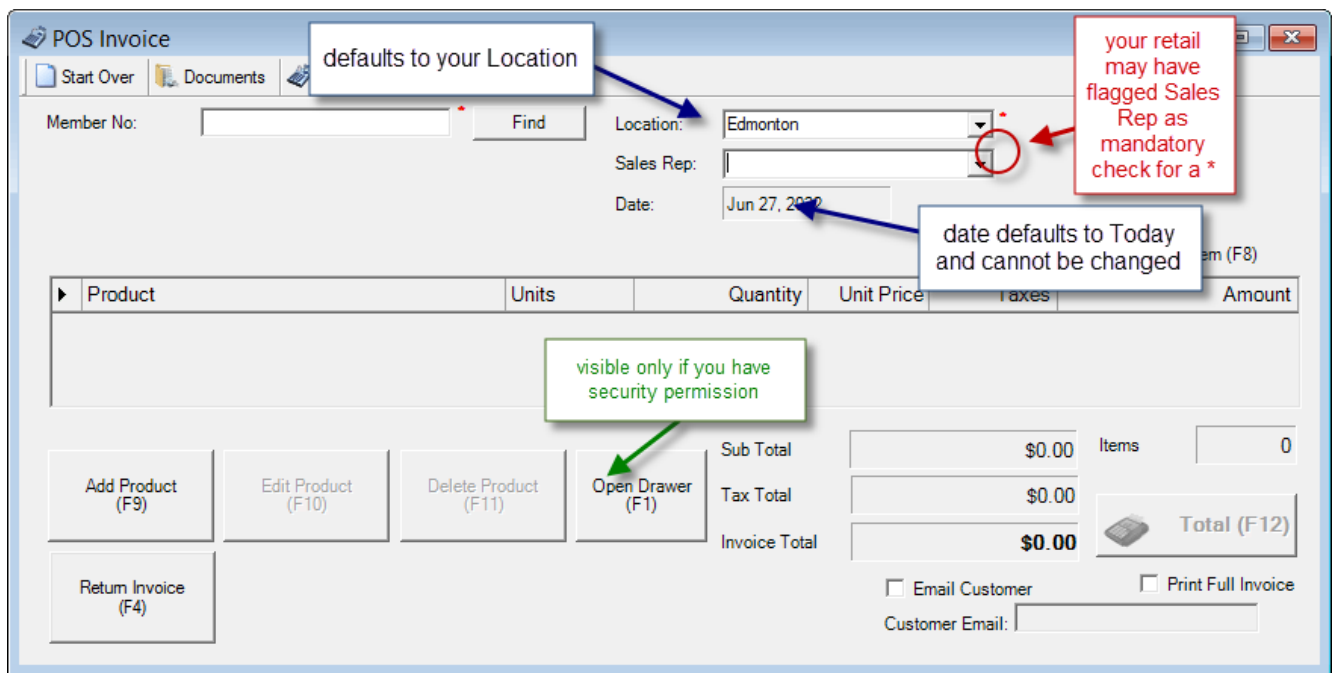
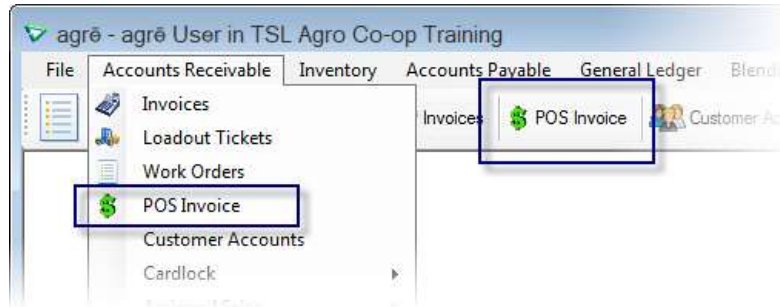


- your agrē database opens and you're ready to start adding POS Invoices



Adding POS Invoices

New POS invoices are added from the **Accounts Receivable** menu or from the toolbar quick button (see page 34 to add if you don't see it).



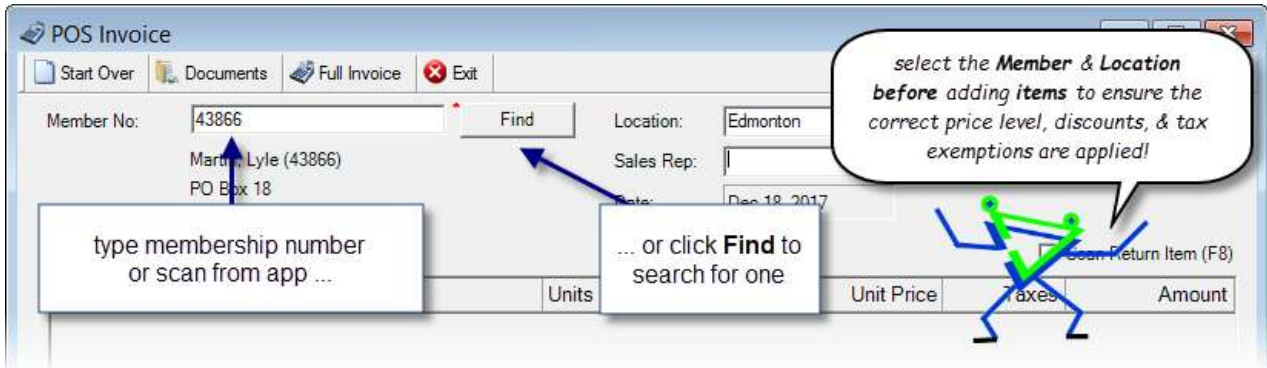
fields with red stars * are mandatory, others are optional



Speed Tip

Press the **TAB key** to advance to the next field instead using of the mouse.

Start by typing or scanning the **Membership Number**. If your customer cannot remember their member number, or they can remember only part of their member number, please ask their name then click **Find** to search for them.




Quick Search looks at several fields for the text you type and returns all matches. For example, when quick searching for 436, the results would include all members with 436 as part of their member number as well as all members with 436 as part of their phone number. That could be a lot of members.

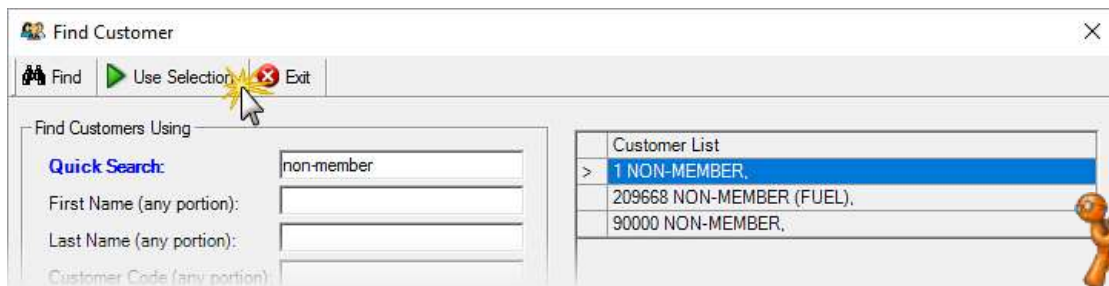


To narrow down the list of results, type what portion of the member number they can remember in **Customer Code** (which looks *only* at member number, not name or any other field) and/or type their name in **Quick Search**, then click **Find**.

Highlight the member then click **Use Selection**.

If you cannot find a member after searching using different criteria please consult with your supervisor 

If the customer is *not* a member, use the Non-Member number. If you can't recall the non-member number, you can **Find** it the same way.

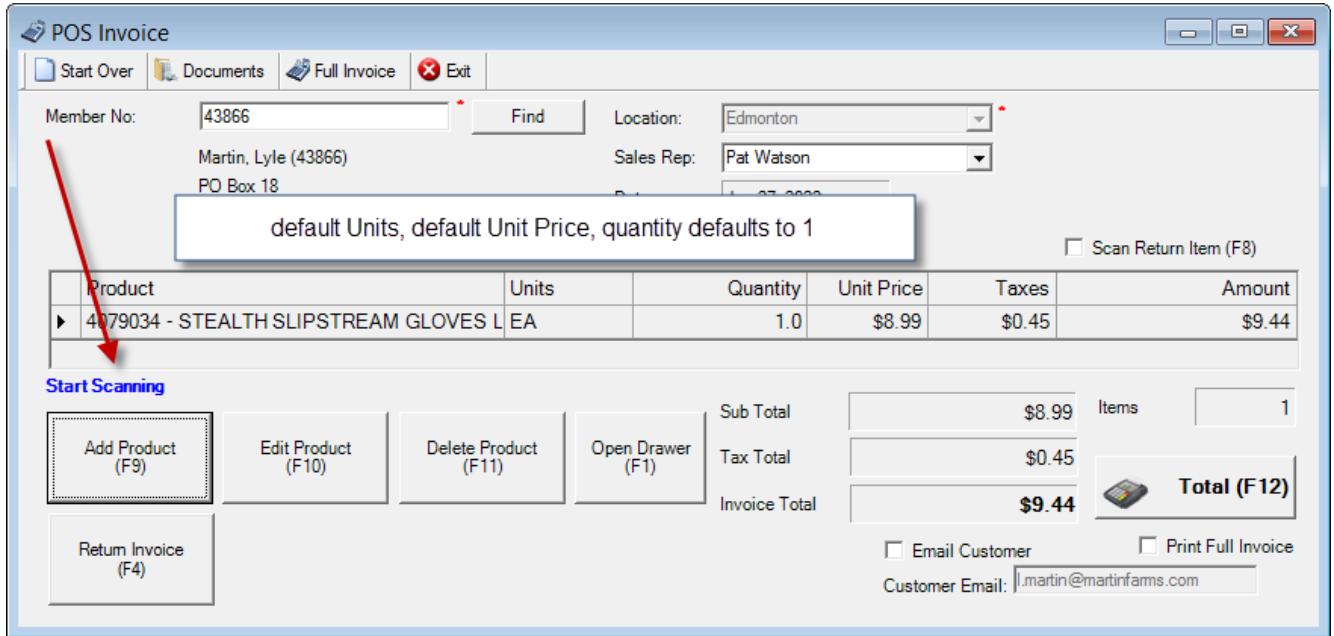


If your association has multiple Non-Member accounts confirm with your supervisor which one to use.

Adding Items to POS Invoices

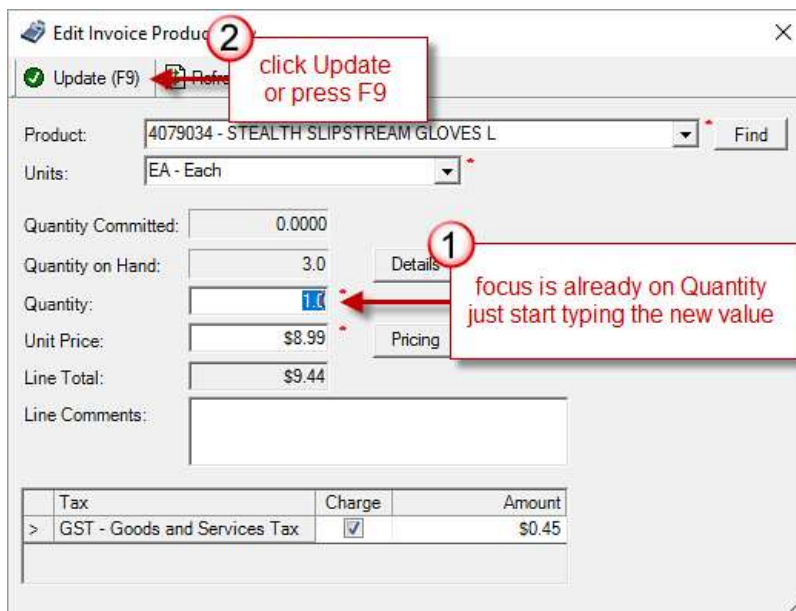
Adding Items with a Bar Code Scanner

Scan the first item. The scanned item is added to the POS Invoice with a default quantity of 1.

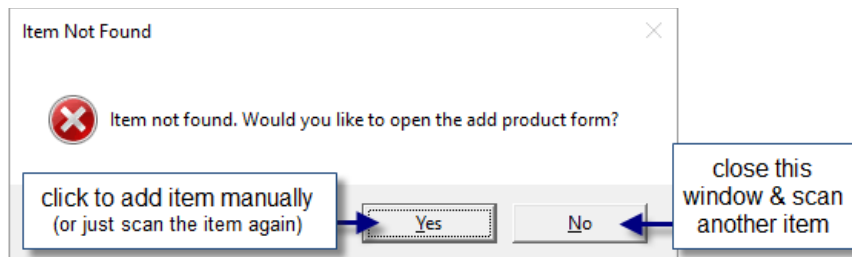


Increasing Quantity of Scanned Items

If the member is taking more than one, you can scan the item again (which appends another product row of the same product with a quantity of 1), or edit the product row by **double-clicking** or by pressing either **Edit Product** or **F10**, and increase the quantity.

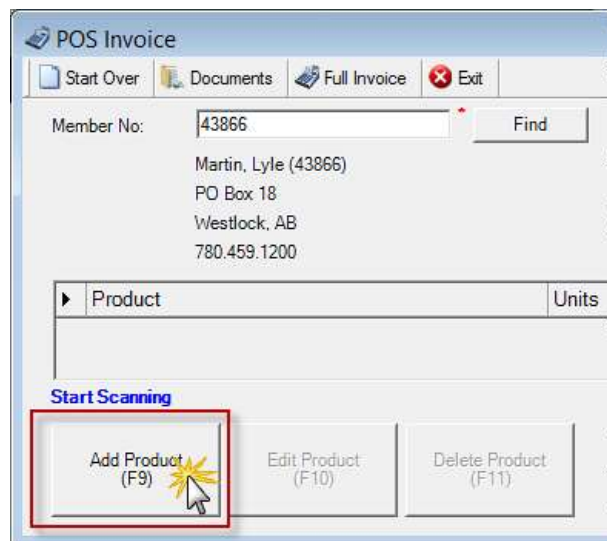


Note If the scanned UPC is not found, inactive, or associated with multiple items you'll be prompted to add the item manually. Scanning the item again will open the **Add Product** window automatically.

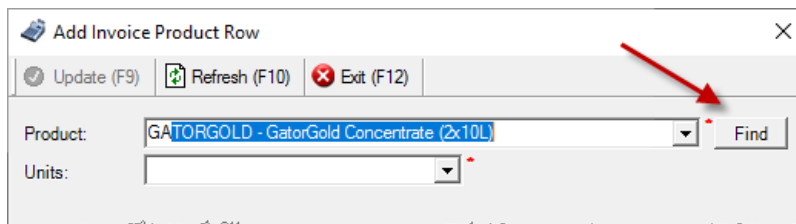


Adding Items Manually

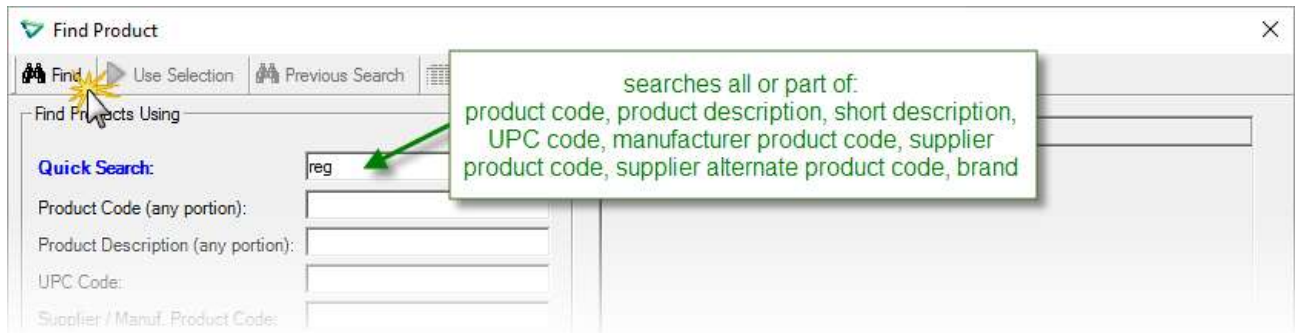
If you're not using a barcode scanner, add items manually by clicking the **Add Product** button, or by pressing the **F9** function key.



Start by typing the **Product Code**. If you are unsure of the code, click **Find** to search for it.

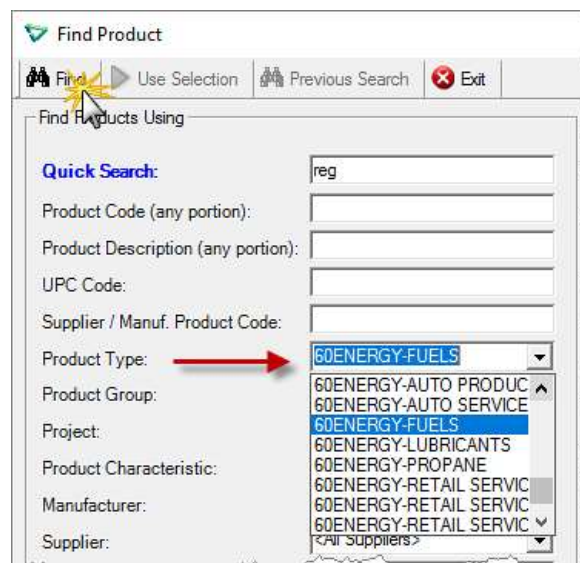


Quick Search looks at several fields for the text you type and returns all matches. For example, when quick searching for **reg**, the results would include all items with **reg** as part of the product code as well as all items with **reg** as part of the product description, UPC, or manufacturer.

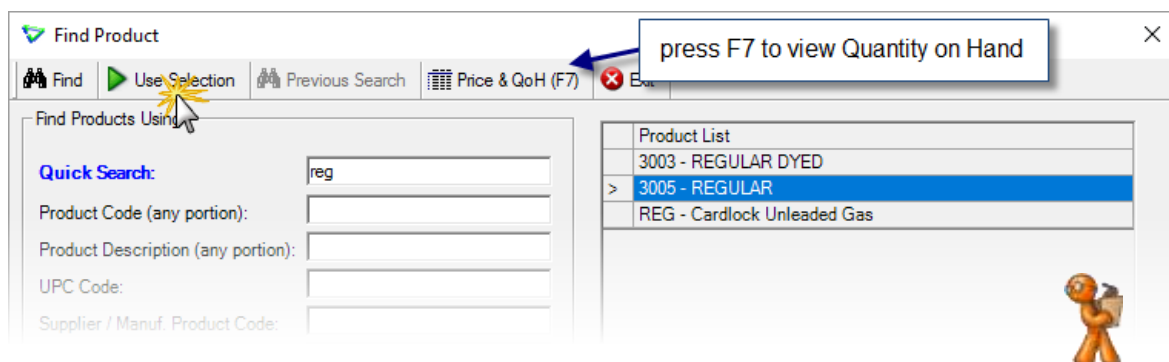


Type what portion you can remember in **Quick Search**, then click **Find**.

If a long list of items is retrieved, you can use additional criteria to narrow down the results. Try selecting a **Product Group**, **Product Type**, **Manufacturer**, or **Brand**, then click **Find** again.

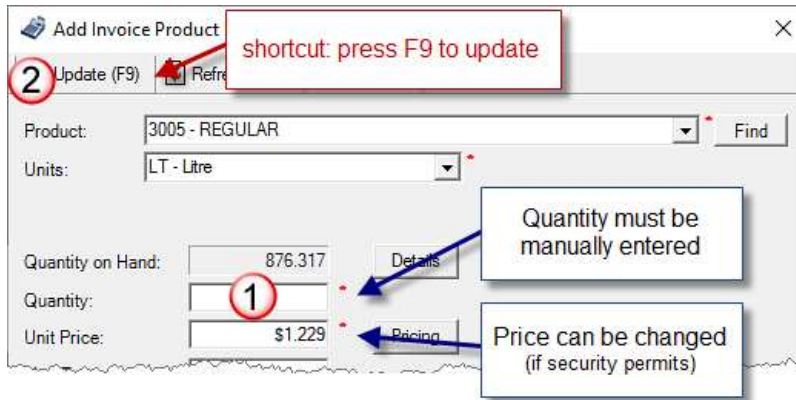


Highlight the item then click **Use Selection**.



If you cannot find an item after searching using different criteria please consult with your supervisor.

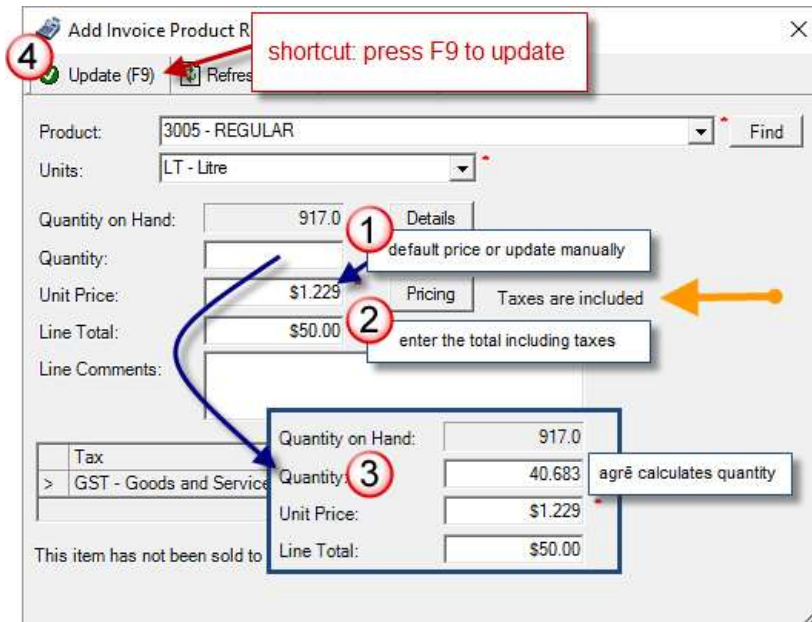
Products added manually don't have a default quantity so you'll need to enter one before you press **F9** or click the button to **Update**.



Speed Tip

If you're not using a barcode scanner press the **TAB** key to advance to the next field instead using of the mouse.

For *prepaid* fuel purchases (and other items with tax-included pricing) you can enter the **Unit Price** and the **Line Total**, then agrē will calculate the **Quantity** for you.



Removing Items

To **remove** a product row, select it and press **F11** or click **Delete Product**.

The screenshot shows the 'POS Invoice' application window. At the top, there are menu options: Start Over, Documents, Full Invoice, and Exit. Below the menu, there are fields for Member No. (43866), Location (Edmonton), Sales Rep. (Pat Watson), and Date (Jun 27, 2022). A table below shows a single product row: 3005 - REGULAR, LT, 50.0, \$1.899, \$4.52, \$94.95. A red arrow points to the first column of this row. Below the table, there are buttons for 'Add Product (F9)', 'Edit Product (F10)', 'Delete Product (F11)', and 'Open Drawer (F1)'. The 'Delete Product (F11)' button is highlighted with a red box. To the right of these buttons, there are fields for Sub Total (\$90.43), Tax Total (\$4.52), and Invoice Total (\$94.95). There are also checkboxes for 'Email Customer' and 'Print Full Invoice', and a customer email field.

Product	Units	Quantity	Unit Price	Taxes	Amount
3005 - REGULAR	LT	50.0	\$1.899	\$4.52	\$94.95

To confirm the deletion, click **Yes**.

The screenshot shows a 'Confirm Row Removal' dialog box. It contains a question mark icon and the text: 'Are you sure you want to remove 3005 - REGULAR from this invoice?'. At the bottom, there are two buttons: 'Yes' and 'No'. A mouse cursor is pointing at the 'Yes' button.



Speed Tip

Enter = No
Tab, then Enter = Yes

Editing Items

To **edit** a product, select the row and either press **F10**, double-click it, or click **Edit Product**.

The screenshot shows the 'POS Invoice' application window. At the top, there are menu options: 'Start Over', 'Documents', 'Full Invoice', and 'Exit'. Below the menu, the 'Member No:' field contains '43866' with a 'Find' button next to it. The 'Location:' dropdown is set to 'Edmonton'. The 'Sales Rep:' dropdown is set to 'Pat Watson'. The 'Date:' field shows 'Jun 27, 2022'. There is a checkbox for 'Scan Return Item (F8)'. Below this is a table with the following data:

Product	Units	Quantity	Unit Price	Taxes	Amount
695916 - C.GOLD BLUE COLA	CS	1.0	\$0.00	\$0.00	\$0.00

A red arrow points to the first row of the table. Below the table, there are several buttons: 'Add Product (F9)', 'Edit Product (F10)' (highlighted with a red box), 'Delete Product (F11)', and 'Open Drawer (F1)'. To the right of these buttons, there are fields for 'Sub Total' (\$0.00), 'Tax Total' (\$0.00), and 'Invoice Total' (\$0.00). There is also a 'Total (F12)' button with a calculator icon. At the bottom right, there are checkboxes for 'Email Customer' and 'Print Full Invoice', and a 'Customer Email:' field with the value 'l.martin@martinfarms.com'.

When editing items you can change the **Unit Type** (which will likely change the price).

The screenshot shows the 'Edit Invoice Product Row' dialog box. At the top, there are menu options: 'Update (F9)', 'Refresh (F10)', and 'Exit (F12)'. Below the menu, the 'Product:' dropdown is set to '695916 - C.GOLD BLUE COLA' with a 'Find' button next to it. The 'Units:' dropdown is highlighted with a red box and is open, showing a list of options: 'CS - Case', 'EA - Each', and 'CS - Case'. Below the 'Units:' dropdown, there are fields for 'Quantity on Hand' (2.0), 'Quantity' (1.0), and 'Unit Price' (\$7.50). There are 'Details' and 'Pricing' buttons next to the 'Quantity on Hand' and 'Unit Price' fields, respectively. At the bottom left, there is a small display showing '\$7.50'.

You can also change the **Quantity**.

If the **Check Inventory** warning blinky appears, it means the Quantity on Hand is less than the Quantity the member is taking. Finish the transaction, take note of the item, and notify your supervisor.

The screenshot shows the 'Edit Invoice Product Row' window with the following details:

- Product: 695916 - C.GOLD BLUE COLA
- Units: EA - Each
- Quantity on Hand: 3.0
- Quantity: 5.0
- Buttons: Update (F9), Refresh (F10), Exit (F12), Details, Check Inventory (with a warning icon)

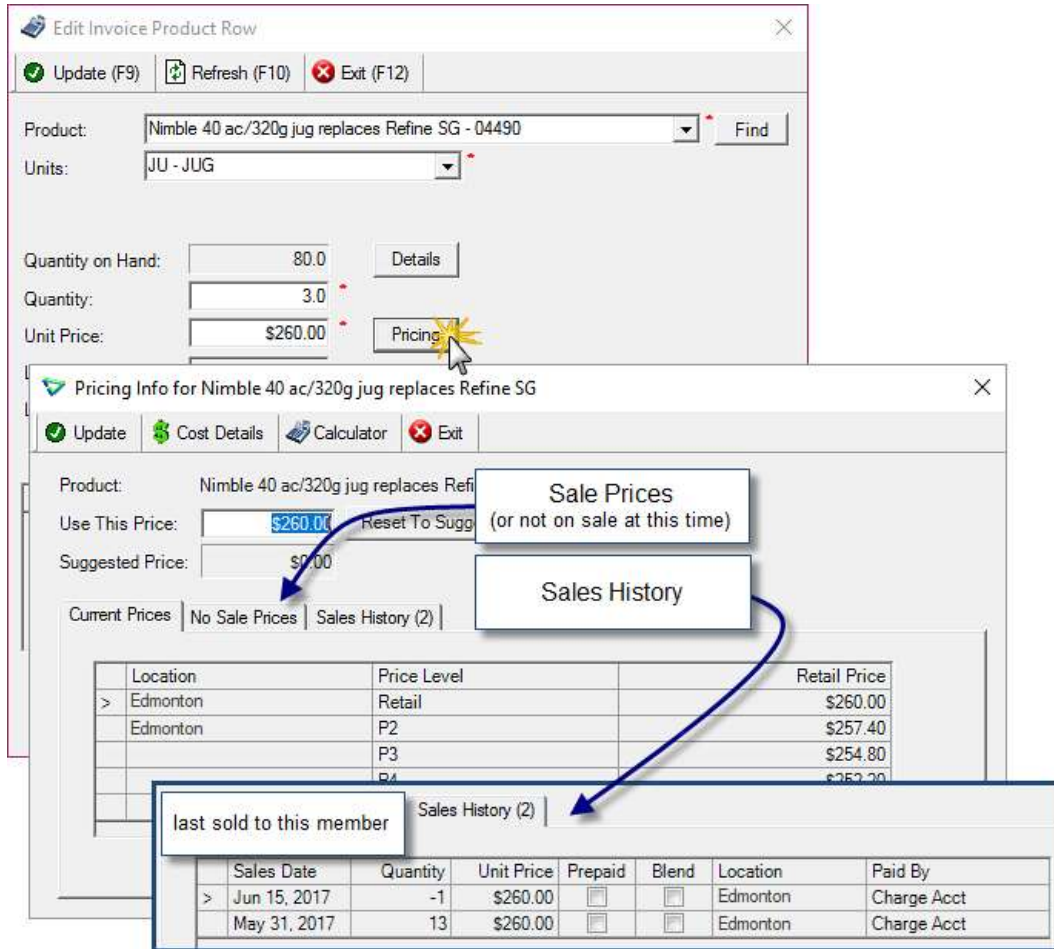
An 'Inventory Summary' window is open, showing the following table:

Location	On Hand	Committed	On Hold	On Order	Position
Dog River	-1	0	0	0	-1
Edmonton	3	0	0	0	3
St. Albert	0	0	0	0	0
Stony DTF Warehouse	0	0	0	0	0
Stony Plain	0	0	0	0	0
Strathcona Warehouse	0	0	0	0	0
All Locations	2	0	0	0	2

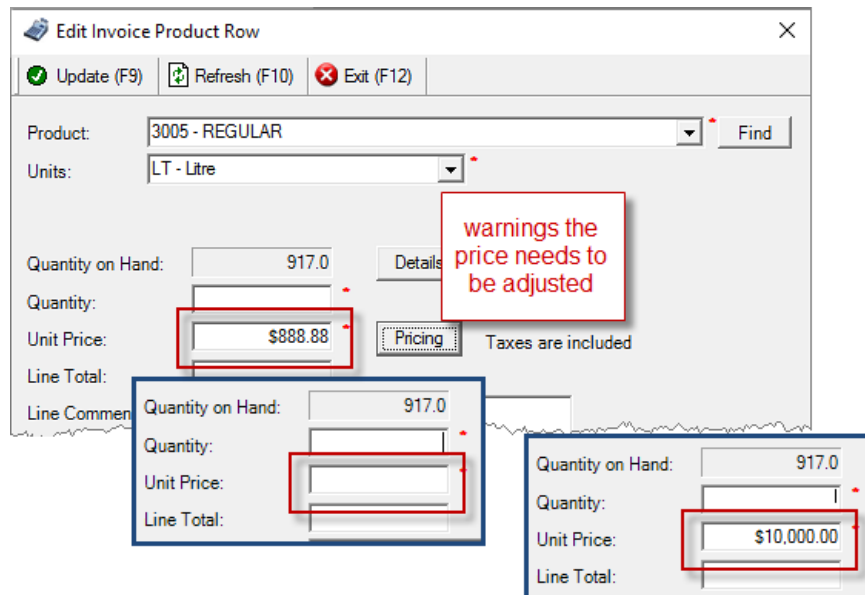
A callout box with a question mark icon asks: "does another location have any on hand?".

If you're looking up availability of an item (the item is not actually present) click **Details** then **Show Other Locations** to see if another location within your association has more on hand.

The default price should automatically populate for the item but if it doesn't, or you need to change it, click **Pricing** and review the **Current Prices** tab, the **Sale Prices** tab, and the Sales History tab (security may restrict what you can select) to choose the best applicable price.



No default price, a price of \$888.88, or an unusually high price are all indicators the price must be changed.



Finalizing the Transaction

Emailing the Customer Receipt (optional)

Before accepting payment, ask the customer if they would like the receipt emailed to them (please confirm with your supervisor that emailing is available).

The screenshot shows a POS interface with a table of items and a summary section. The table lists one item: 3005 - REGULAR, LT, 40.683 units, \$1.229 unit price, \$2.38 taxes, and a total amount of \$50.00. Below the table are buttons for 'Add Product (F9)', 'Edit Product (F10)', 'Delete Product (F11)', and 'Open Drawer (F1)'. A callout box points to the 'Email Customer' checkbox, stating: 'check **Email Customer** if you want to email an additional copy of the POS Invoice & Payment Receipt (they can still get a printed)'. Another callout box points to the 'Customer Email' field, stating: 'when checked, email address is mandatory'. Below the main interface, there is a note: 'if the customer has no default email address - or for this one sale they'd like it emailed to a different address - type one manually'. A separate box shows the 'Email Customer' checkbox checked and the 'Print Full Invoice' checkbox unchecked, with the 'Customer Email' field containing 'j.martin@martinfams.com'.

The **Customer Email** address will default to the email address(es) on the Customer tab of their account.

The invoice/receipt can be emailed to more than one email address, just separate them with a semi colon. eg. l.martin@martinfarms.com; pat@agroaccountingsolutions.ca

Full Size Invoice

You can just print a regular invoice report, or you can flip from a POS invoice to a full invoice.

Print Full Invoice

Before accepting payment, check **Print Full Invoice** if the customer would prefer an 8½ x 11 full-size invoice/payment receipt printed from a regular printer, not the till tape printer (please confirm with your supervisor if/when to ask the customer if they want a full size invoice/receipt).¹

The screenshot shows a POS interface with a summary section. It lists 'Sub Total' as \$47.62, 'Tax Total' as \$2.38, and 'Invoice Total' as \$50.00. There is a 'Total (F12)' button with a printer icon. Below the summary are checkboxes for 'Email Customer' and 'Print Full Invoice'. A red arrow points to the 'Print Full Invoice' checkbox. The 'Customer Email' field contains 'j.martin@martinfams.com'.

The option of a full-size invoice/receipt may be based on the items being bought. For example, at your association cashiers ask the customer when anything with a warranty - like batteries - is purchased.

When printing a full-size invoice/receipt **no Merchant Copy** is printed.

¹ Print Full Invoice may be checked by default, but it can be unchecked if needed.

Flip to Full Invoice

If you need to switch the customer's purchase to a full-size invoice, select **Full Invoice**.

All the details you have entered so far will be copied to the full invoice.

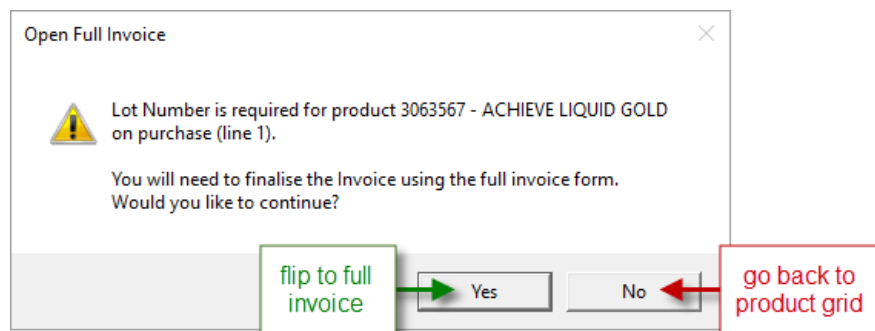
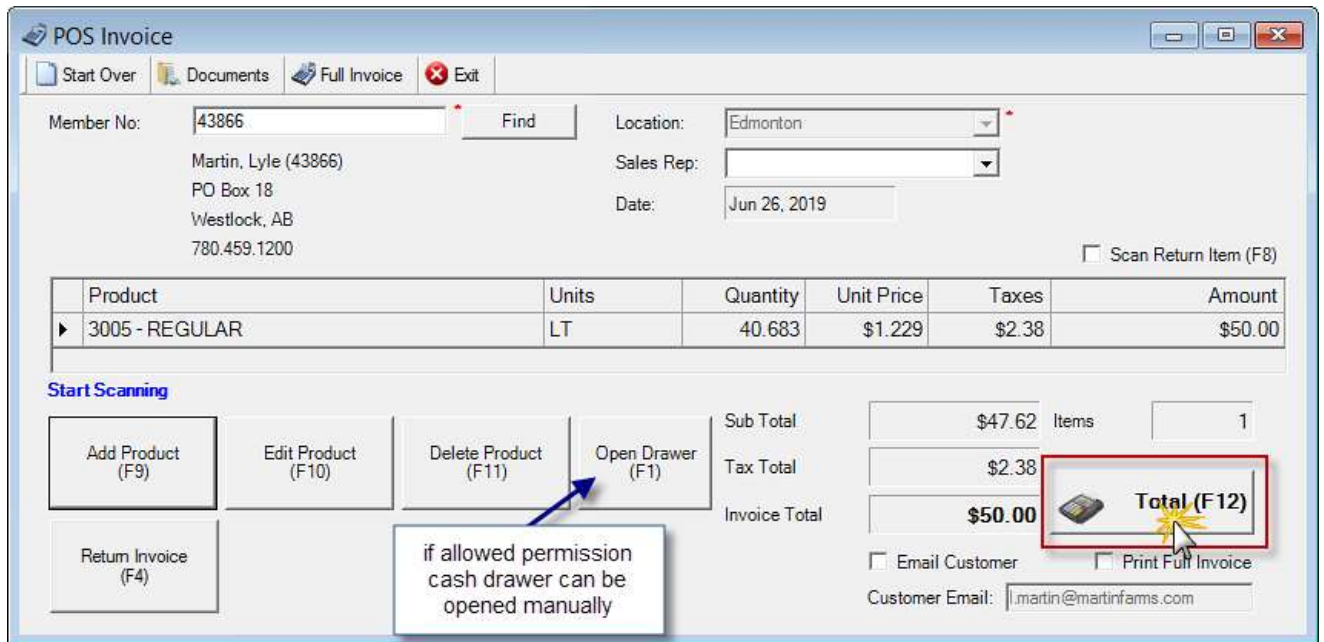


For example, a full invoice is needed to flag a purchase as **Prepaid** or to add a **Lot Number**.

Accepting Payments

Immediate payment is required for all POS Invoices.

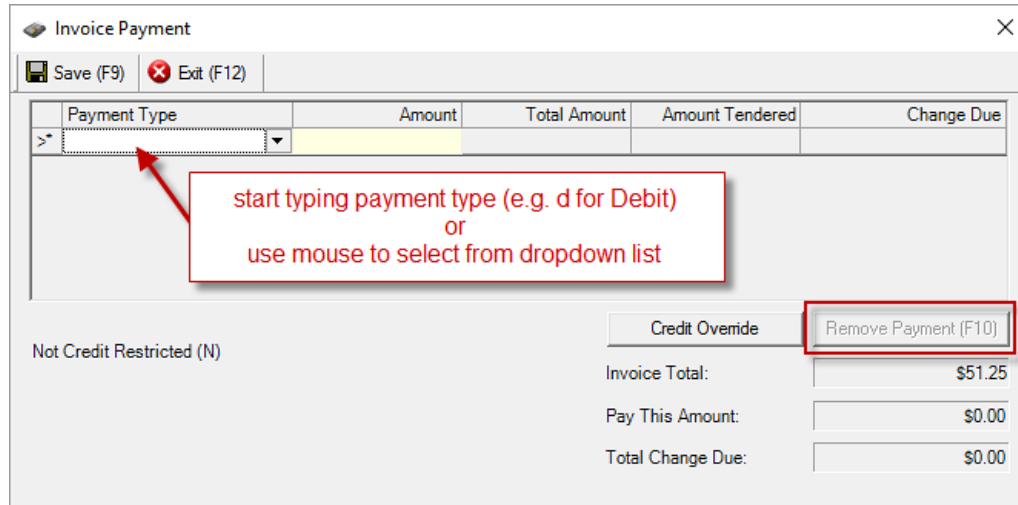
After all items have been added, click **Total** or press **F12** to accept payment.



some customers or products may *require* a full invoice
if prompted, select **Yes/OK** to flip and add the required information

The **Invoice Payment** window opens and defaults to the tender area.

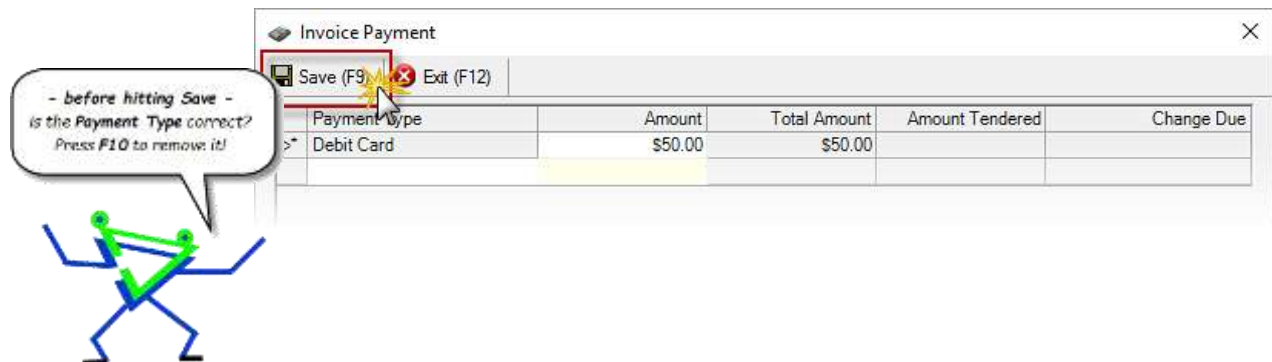
Start typing the 1st letter of the payment type (e.g. “c” for cash) then press “c” again or use the down arrow to scroll through all payment types starting with “c” (like Charge Acct), or use your mouse to select a tender type from the dropdown menu.



If you selected the wrong payment type, or the member changes their mind about how they want to pay, select **Remove Payment** or press **F10** to remove a payment type.

Saving the Payment

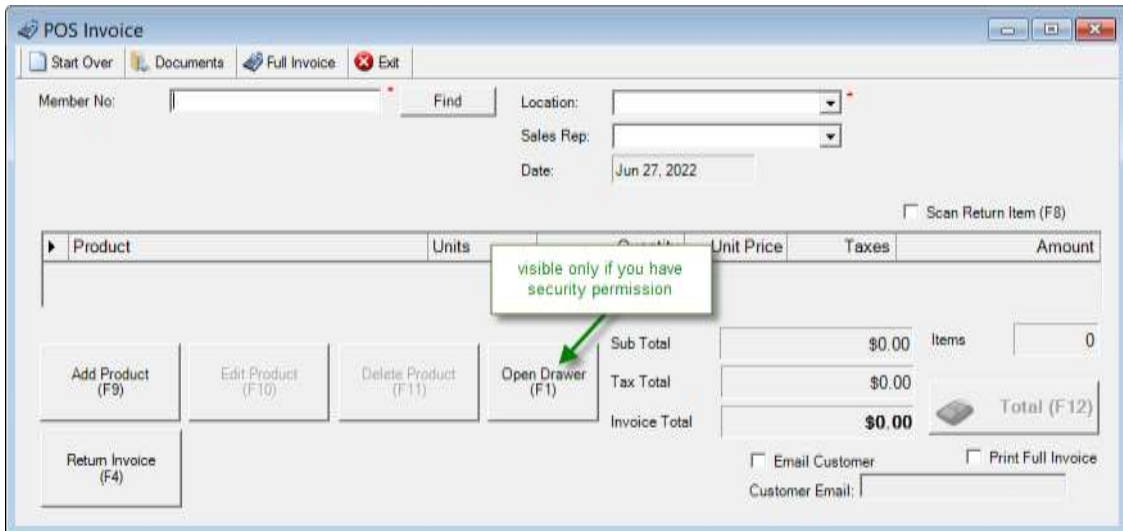
Save the Payment. If applicable to the payment type, the cash drawer will open automatically ...



... and a new POS Invoice pops up so you're ready for the next customer.

Manually Opening the Cash Drawer

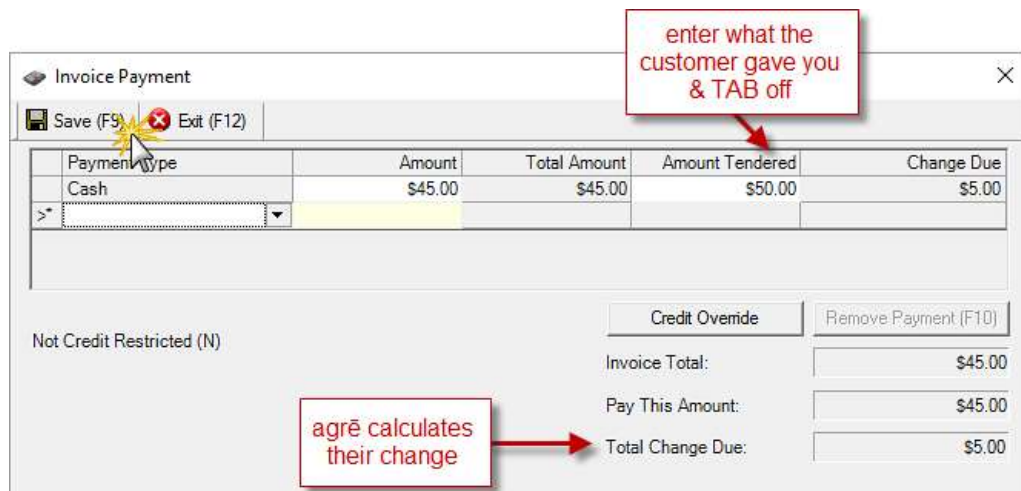
If you accept payment by a tender type that *doesn't* open the cash drawer automatically, it can be opened manually by pressing **F1** or by selecting **Open Drawer**.



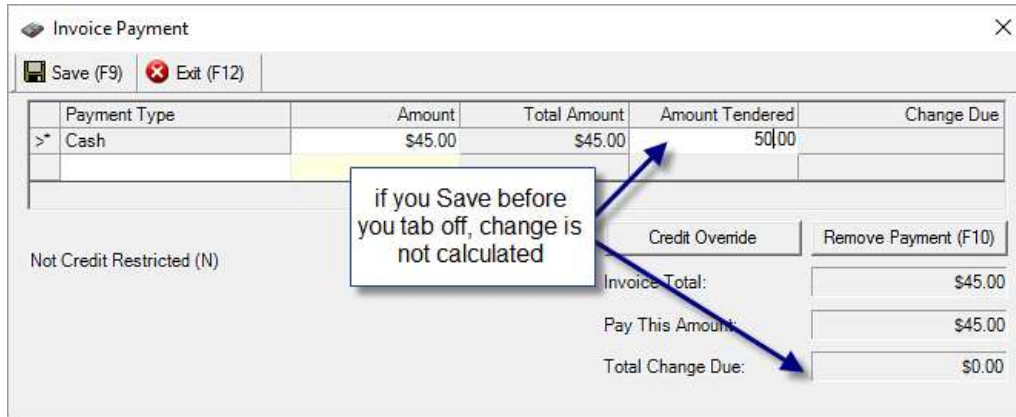
Open Drawer works only if you have security permission *and* a compatible receipt printer set up in your configuration options (at either the company or user level - see Page 34) as it is the printer, not agrē, that sends the signal to the cash drawer to open.

Cash Payments

When the customer is paying with **cash**, tab over to the **Amount Tendered** and type in the amount the customer gave you. Tab once more and agrē will calculate the **Change Due**.



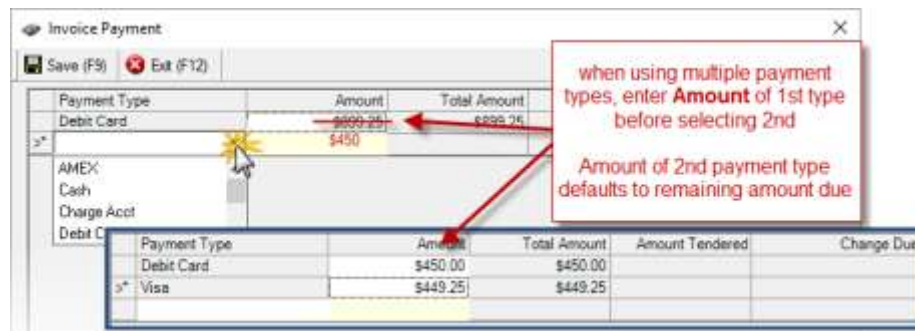
If you **Save** too early (before tabbing off) agrē will not calculate the change.



You'll need to check the receipt and calculate the amount of change to return to the customer.

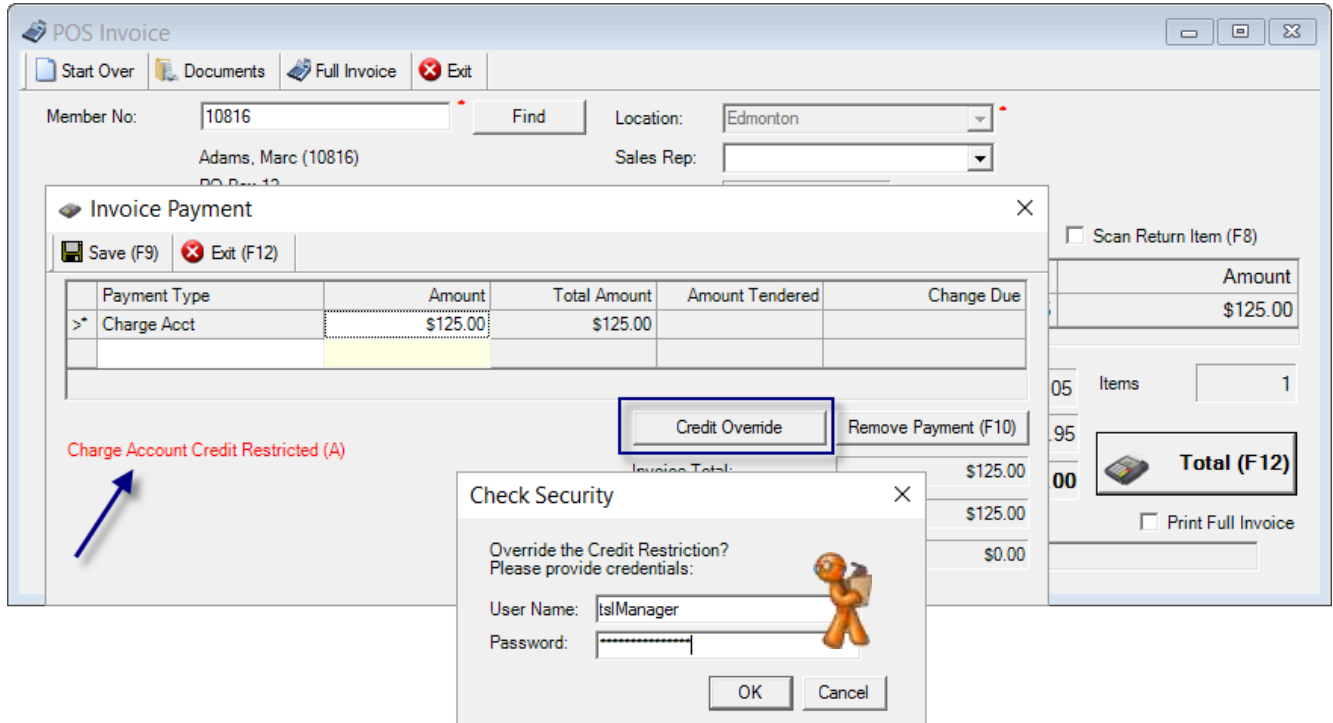
Multiple Tender Types

If the customer is paying with multiple tender types, agrē can do the math for you. Select as many tender types as you need.



Credit Override

If a member who would not normally be able to charge a purchase has received permission to do so, you - or another agrē user with **Credit Override** security permission - can override the credit restriction and allow the member to charge the purchase.




Notes

Members with **Credit Restriction A: Charge account credit restricted** will not be allowed to Charge on Account - payment must be tendered at the time of sale.

Members with **Credit Restriction B: Charge account & cheque credit restricted** will not be allowed to Charge on Account AND payment should not be tendered by Cheque (however this is not enforced by agrē).

Credit Restrictions can be overridden by any user with security permission.

Printing the POS Payment Receipt



TSL Agro Co-op Ltd

Store: Dog River
 Date: Jan 30, 2018
 Reference #: 100024
 Sales Rep:
 Created By: agreU

Sold To: 11123
 Baker, Mike

Quantity	Unit	Price	Amount
REGULAR (3005)			
50	LT	\$1.00	\$50.00 I
STEALTH SLIPSTREAM GLOVES L (4079034)			
1	EA	\$10.00	\$10.00 B
Sub Total:			\$60.00
PST-SK			\$0.60
PST-SK [Incl Pumps]			\$2.83
GST			\$0.50
GST [Incl Pumps]			\$2.38
Total:			\$61.10
Debit Card			\$61.10

GST#: 102023923RT 021
Customer Copy

Printed On: Jan 30, 2018 4:59 PM

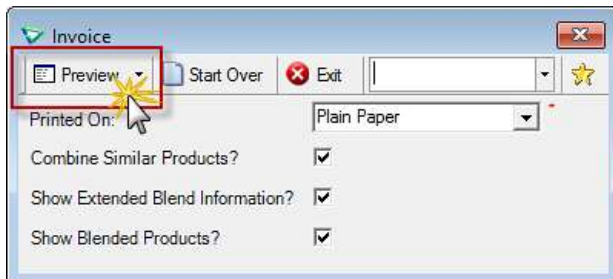
After the payment information has been entered and saved, the receipt will be printed automatically.

The selected **Default Report Printer** config options (see Page34) determine to which printer agrē sends the POS Payment receipt, and whether it displays on-screen first.

Depending on the tender type settings:

- a second Merchant Copy of the invoice may also display
- the **Merchant Copy** may have a **signature line** for the member to sign (for example if the tender type is **Charge on Account** the member must sign it)

Taxes for tax-included items are itemized.



If you chose to **Print Full Invoice** the report criteria window may open.

Select **Preview** and the full invoice will display.

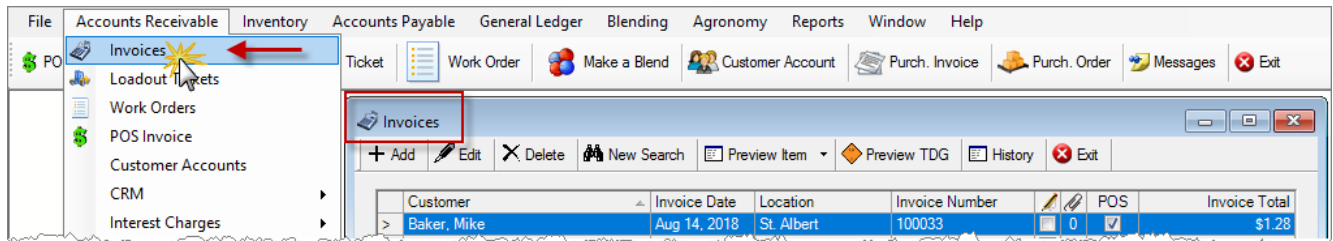


Print the invoice.

An 8½ x 11 full-size combined invoice/payment receipt will print on a regular printer.

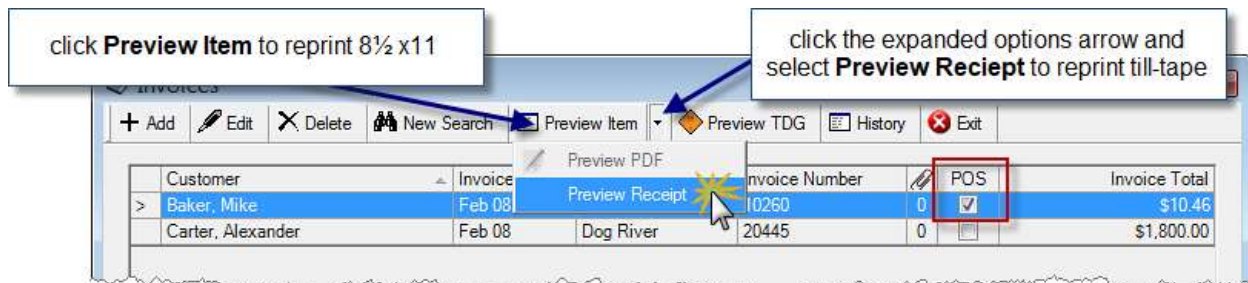
Reprinting the POS Payment Receipt

Payment receipts for POS Invoices are reprinted from the **Invoices** home form.

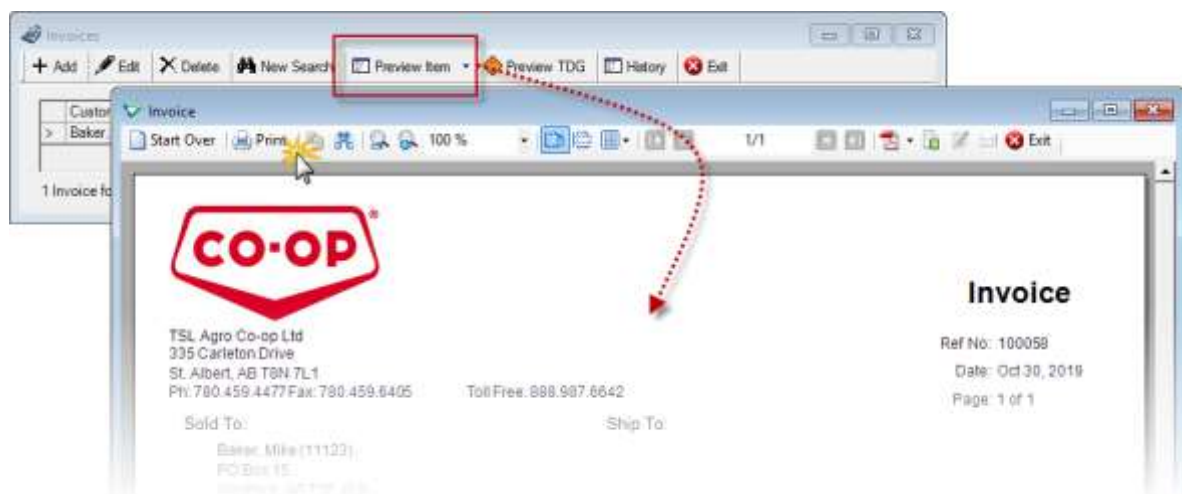


Accounts Receivable > Invoices (or click the Invoices toolbar button)

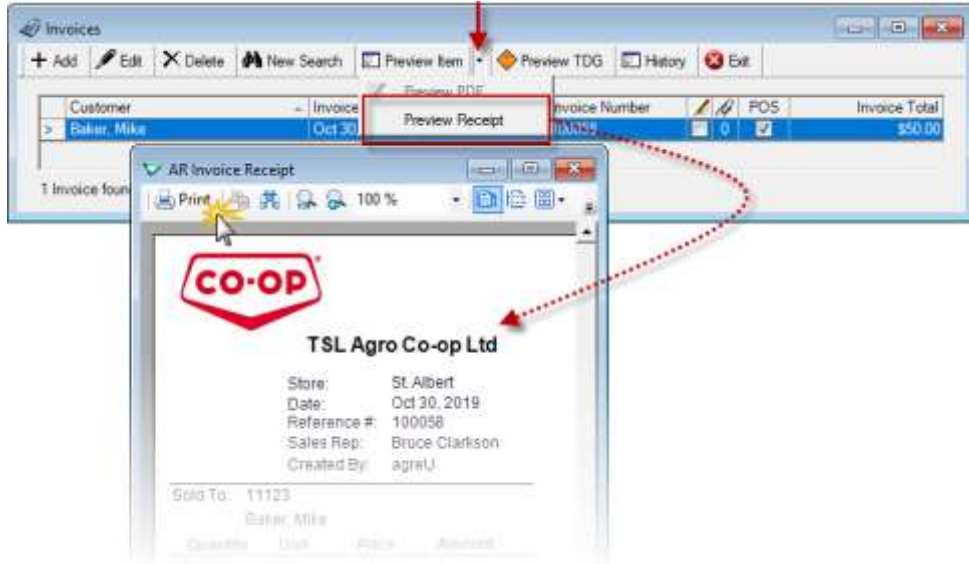
All invoices created today are listed by default. You can **Search** for invoices created on other dates if you need to reprint one that is not shown.



To reprint the invoice at full-size (8½ x 11) select **Preview Item**, then **Print**.



To reprint the invoice on till-tape, select **Preview Receipt**, then **Print**.





Fixing Mistakes

If a mistake is made or details of the sale need to be changed, please consult with your supervisor for specific instructions on how to correct that particular error. Additional **security permission** may be required to correct some types of mistakes.

Any changes in agrē must match mainframe so additional steps outside of agrē may be required.

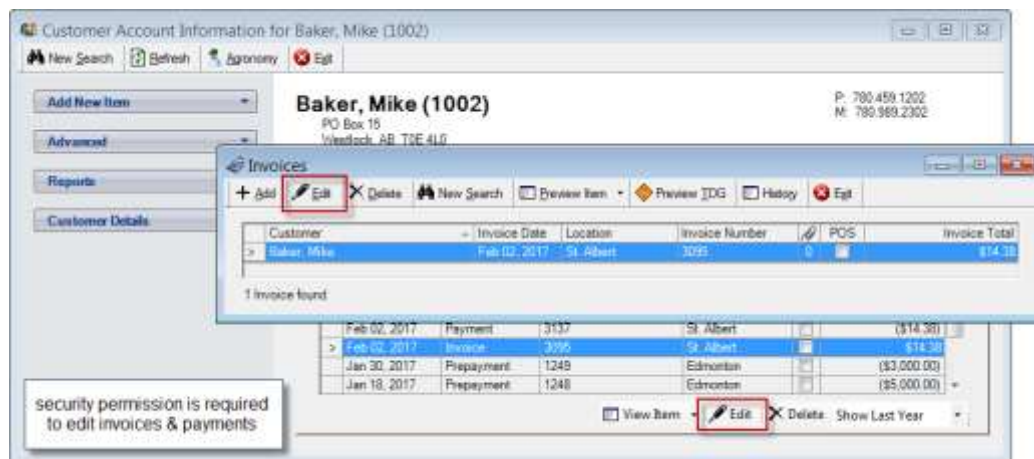
Here are some guidelines (retails may have their own specific policies):

SAME DAY Invoice Edits

An invoice can be edited only on the same day it was created. TLog data is sent to the mainframe every night, and once the mainframe receives an invoice it cannot be edited.

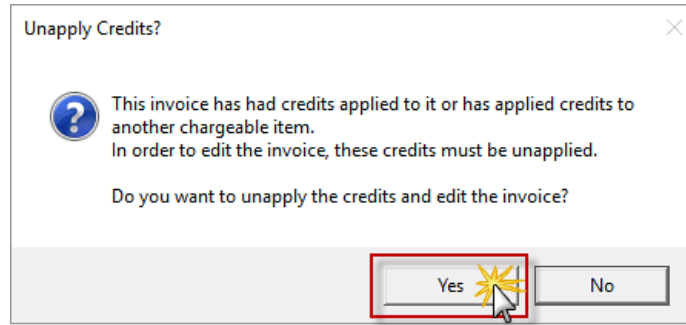
Note If the error isn't found until the NEXT DAY and the POS invoice has already been received by the mainframe, it cannot be edited. You'll need to "return" the wrong product and "exchange" it for the right one (see Page 31 for more details about POS Returns).

POS Invoices are edited from the **Invoices** window or from the **Customer Account**.

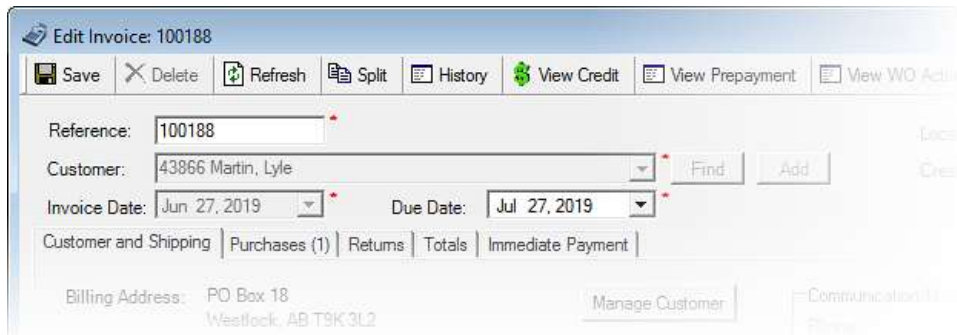


Customer Account or
Accounts Receivable > Invoices (or click the Invoices toolbar button)

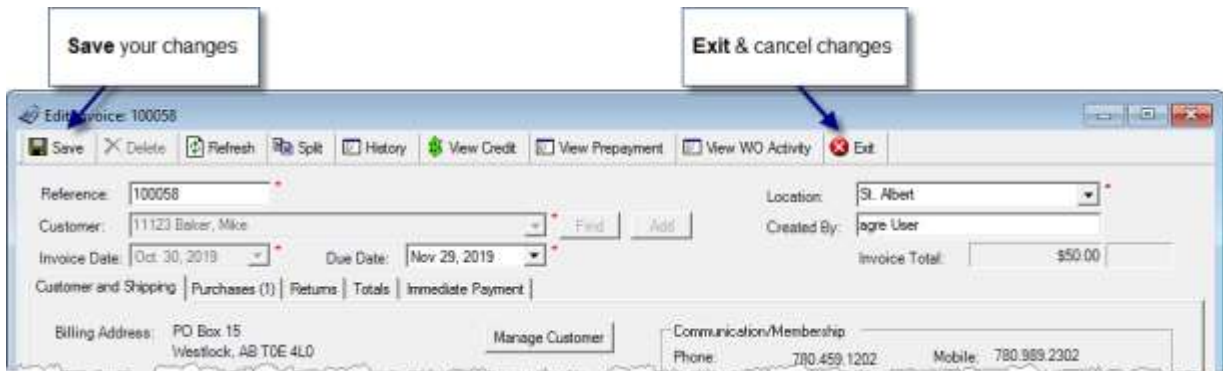
Before an Invoice can be edited, you must **Unapply Credits** from the immediate payment.



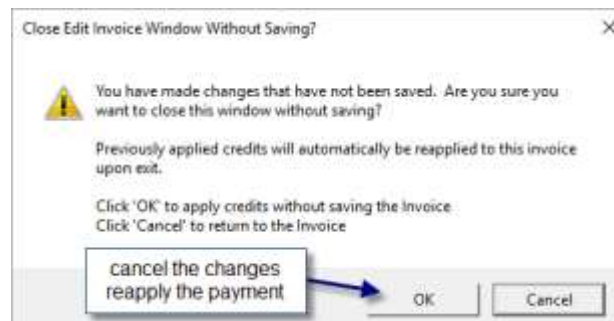
The **Edit Invoice** window opens. Make your changes.



You will be unable to change the **Invoice Date** or the **Customer**, and any payments or credits applied originally will be reapplied automatically when **Saving** your changes.



If you change your mind about making changes, click **Exit**. Then click **OK** to confirm.



1. SAME DAY Product Correction

If the incorrect product error is caught on the SAME DAY the POS Invoice was entered, it can be edited (see *Same Day Invoice Edits* above), and the product corrected.

1 select the product row

Product	Quantity	Unit Price	Taxes	Line Total	Prepay?	Location	WO Ref	LOT Ref
> 3053923 - ROUNDUP TRANSORB HC 11	1.0	\$510.00	\$0.00	\$510.00	<input type="checkbox"/>	Dog River		
DEPOSIT - Drum Deposit (EA)	1.0	\$100.00	\$0.00	\$100.00	<input type="checkbox"/>	Dog River		

2 Edit Row

The correct product may have different pricing so the customer may have over- or under-paid. Please confirm how to handle any pricing difference with your supervisor.

Find the right product

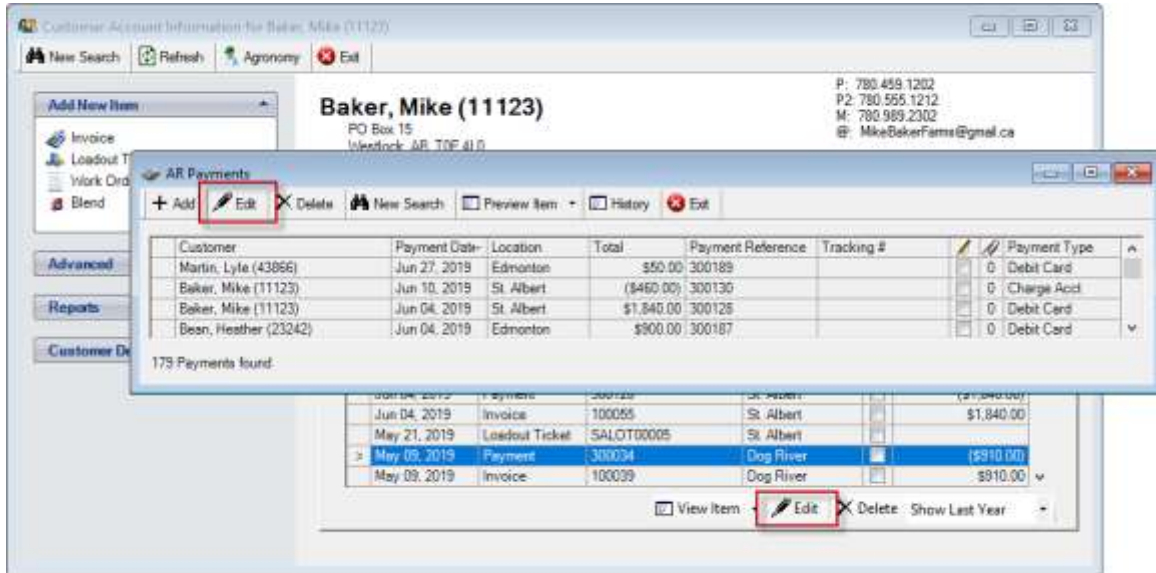
if there is a price difference, consult your supervisor

If the error isn't found until the NEXT day the POS invoice will have already been received by the mainframe and cannot be edited. You'll need to "return" the wrong product and "exchange" it for the right one on a new POS Invoice (see *Page 31 for more details about POS Returns*).

2. SAME DAY Payment Type Correction

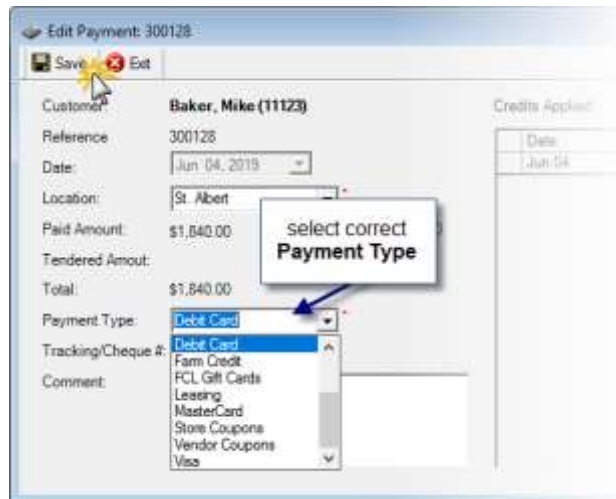
Credits from a payment don't need to be unapplied from the invoice before correcting the **Payment Type**.

Payments can be edited from the **Customer Account** or from the **Payments** window.



Customer Account
or
Accounts Receivable > AR Payments

Select the correct **Payment Type** and **Save** the payment.



3. SAME DAY Invoice Delete

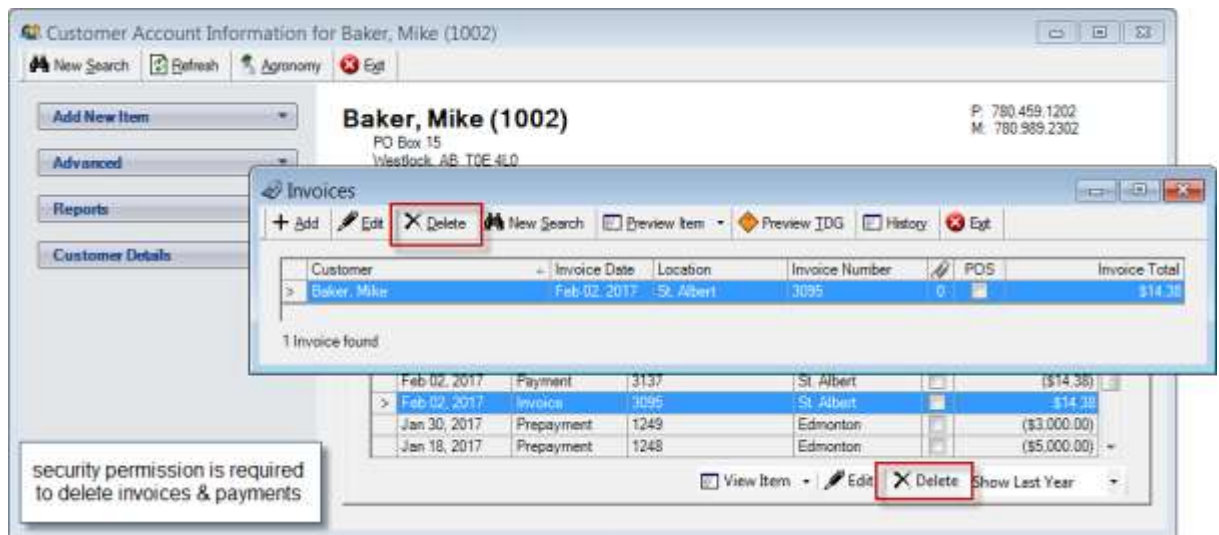
CAUTION Deleting an invoice is *not* recommended!

Processing a return (see page 31) is the preferred process to correct mistakes. Please consult with your supervisor before deleting any transactions.



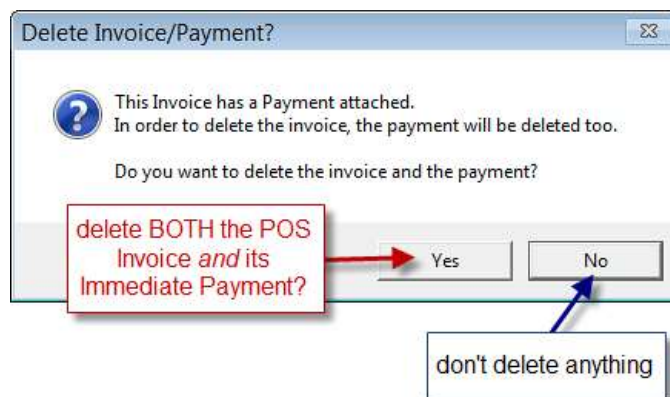
An invoice can be deleted only on the same day it was created. TLog data is sent to the mainframe every night, and once the mainframe has received an invoice it cannot be deleted.

POS Invoices are deleted from the **Invoices** window or from the **Customer Account**.



Customer Account
or
Accounts Receivable > Invoices

A POS Invoice cannot be deleted until its immediate payment has been deleted so you'll be prompted to delete both at the same time.



All deleted *invoices* are included automatically in the **Deleted Invoices data export**.

All deleted *payments* are included automatically in the **Deleted Payments/Prepayments data export**.

Returns & Correcting Past Transactions



Please consult with your supervisor for your retail's specific policy on returns.

When a member is returning an item, you can easily look up their sales history and find the last price they paid.

Create a new POS Invoice and select **Return Invoice**.

POS Invoice

Member No: 11123 Find Location: St. Albert
 Baker, Mike (11123) Sales Rep: Bruce Clarkso
 PO Box 15 Date: Aug 09, 2021
 Westlock, AB
 780.459.1202

leave UNchecked when checking sales history

Scan Return Item (F8)

Product	Units	Quantity	Unit Price	Taxes	Amount
Start Scanning					
Add Product (F9)	Edit Product (F10)	Delete Product (F11)	Open Drawer (F1)	Sub Total	\$0.00
Return Invoice (F4)				Tax Total	\$0.00
				Invoice Total	\$0.00

Items: 0

Total (F12)

Email Customer Print Full Invoice
 Customer Email: MikeBakerFams@gmail.ca

For Items Purchased from Your Association

1. Customer Return by Date Range/Sales History

Date Range is the default. Details about products purchased in the last 30 days are displayed.

Optionally change the **Location** if the product being returned was purchased elsewhere (click **Refresh List** to update). Check the item(s) being returned, enter the **Quantity**, then click **Use Selected Rows**.

POS Invoice Return

Use Selected Rows Preview Item Start Over

Location: St. Albert

Date Range: Jul 10, 2021 to []
 This Product <Start typing or use find> Find

Include Associated Products Scan Product

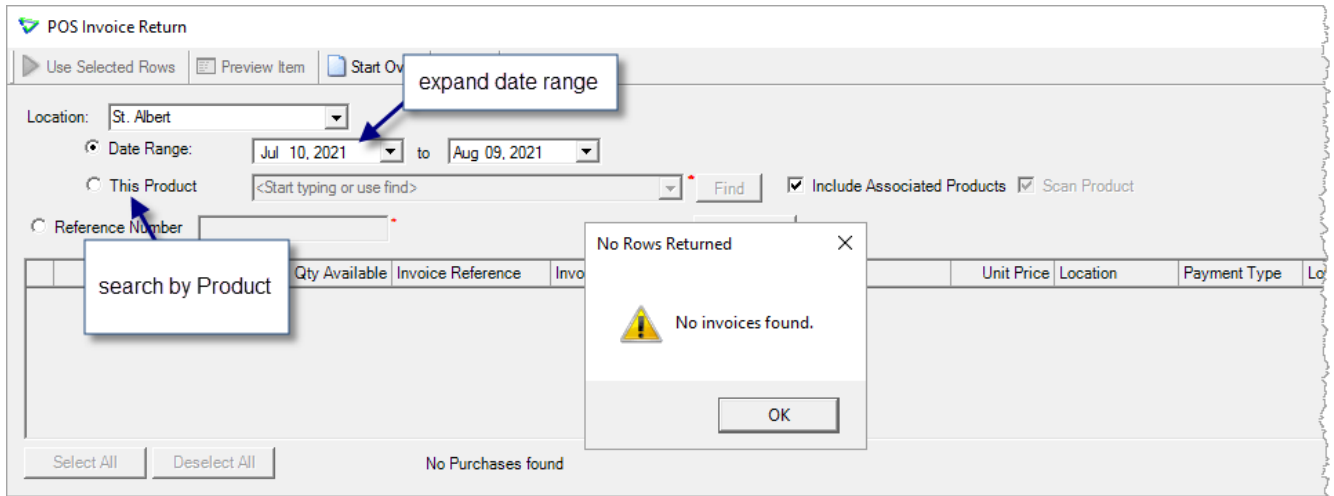
Reference Number Refresh List

	Quantity	Purchase Qty	Qty Available	Invoice Reference	Invoice Date	Product	Unit Price	Location	Payment Type	Lot#
<input type="checkbox"/>	0.0	3.0	3.0	100251	Jul 29, 2021	3015849 - LIBERTY 108 L (DR)	\$637.50	St. Albert		
<input checked="" type="checkbox"/>	1.0	3.0	3.0	100251	Jul 29, 2021	DEPOSIT - Drum Deposit (EA)	\$100.00	St. Albert		
>	0.0	0.0	0.0	100250	Jul 27, 2021	3063567 - ACHIEVE LIQUID GOLD (JU)	\$230.00	St. Albert	Farm Credit	
<input type="checkbox"/>	0.0	10.0	10.0	100250	Jul 27, 2021	3016847 - PROMESSE TIMOTHY (EA)	\$370.00	St. Albert	Farm Credit	

Select All Deselect All 4 Purchases found

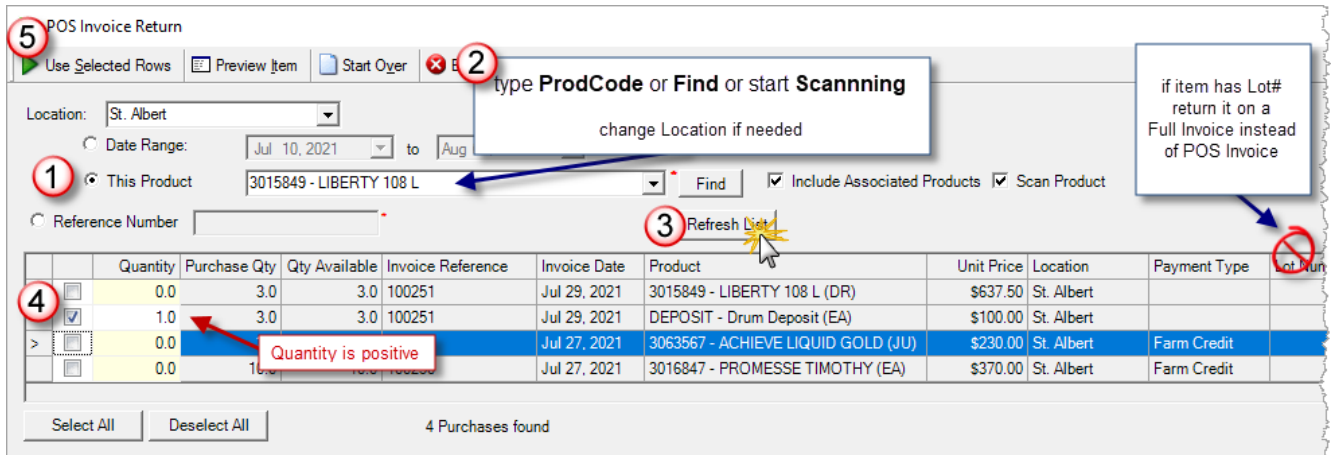
The price, prepay status, taxes, cost, etc. of the return will match the sale but may be changed (to edit the price due to a restocking fee, for example). If you make changes you will be prompted to enter your override credentials (see #4 below).

If the item was not purchased in the last 30 days, expand the date range or return by **Product**.



2. Return by Product

Choose **This Product** and scan the item (or type the **Product Code/Item Number** - use **Find** if you need to look it up), then click **Refresh List**. Check the item(s) being returned, enter the **Quantity**, then click **Use Selected Rows**.



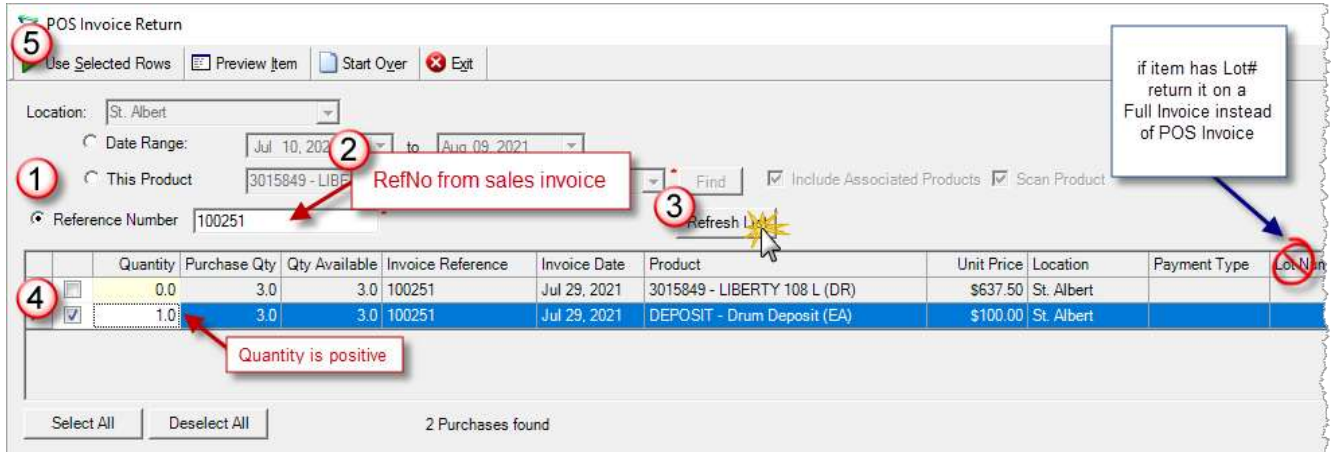
If the customer has no sales history for the item AND it is not an item that can be returned without proof of purchase, kindly tell the customer you are sorry but it appears that the item was not purchased from your association. You may want to consult with your supervisor.



3. Customer Return with Receipt

If the customer is returning an item with the receipt, cross-reference the price shown on the sales receipt with the price of the return.

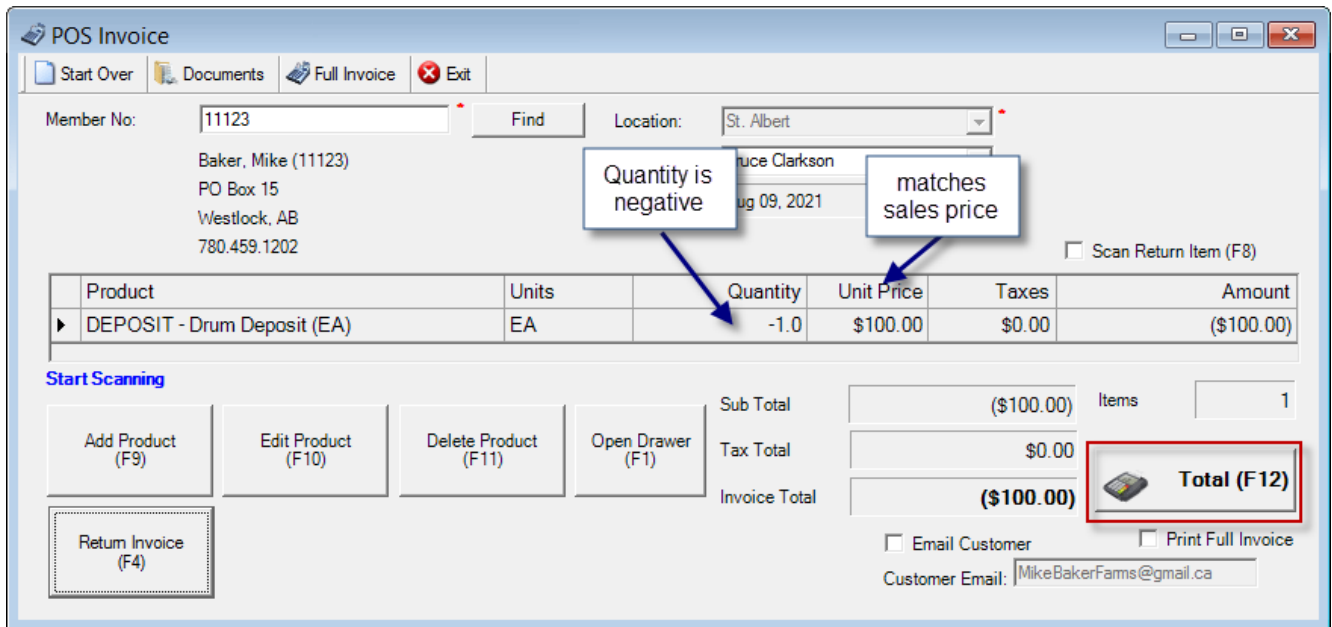
Type the **Reference Number** from the original sales invoice and select **Refresh List**.
Check the item(s) being returned, enter the **Quantity**, then click **Use Selected Rows**.



For all Returns

The item(s) are added with a **negative Quantity** and the return **Price** matches the sales price automatically.

Select **Total** to issue a refund.



Match the **Payment Type** to the tender type on the original sale.

Invoice Payment

Save (F9) Exit (F12)

Payment Type	Amount	Total Amount	Amo
>* Visa	(\$100.00)	(\$100.00)	

Not Credit Restricted (N)

CO-OP
TSL Agro Co-op Ltd

Store: St. Albert
Date: Jul 29, 2021
Reference #: 100039
Sales Rep: Bruce Clarkson
Created By: agreU

Sold To: 11123
Baker, Mike

Quantity	Unit	Price	Amount
Total:			\$910.00
	Visa		\$910.00

GST#: 102023923RT 021

match return tender type to original sales tender type

All returns require a customer signature on the Merchant Copy.

Please consult with your supervisor before putting returned items back into inventory as not all returned or exchanged products will be suitable for resale.



Exchanges

If the customer is exchanging the returned item for another, add the additional item manually or by scanning so that the transaction balances to \$0 (returning an item and scanning the same item from off the shelf).

The **Return Receipt** includes the sales invoice number.

CO-OP
TSL Agro Co-op Ltd

Store: St. Albert
Date: Oct 07, 2020
Reference #: 100137
Sales Rep: Bruce Clarkson
Created By: agreU

Sold To: 11123
Baker, Mike

Quantity	Unit	Price	Amount
-1	EA	\$10.00	(\$10.00) G
Original Invoice: 100136			
1	EA	\$10.00	\$10.00 G
Sub Total:			\$0.00
GST			\$0.00
Total:			\$0.00

GST#: 102023923RT 021

Customer Copy


4. Customer Return with No Proof of Purchase - Requires Override

If the customer did not purchase the item from you, it can be added manually. You may need to consult with your supervisor.

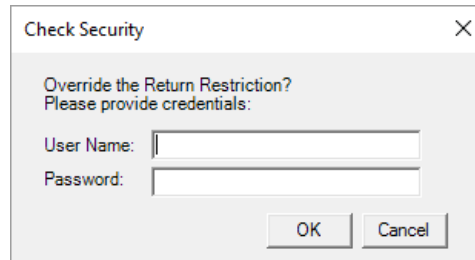


These types of items may be:

- drums or totes purchased elsewhere for return of deposit
- **Private Label** items and your retail's policy states those items can be returned without question
- your retail's policy is to return all **items you know you stock** without question

Start a new POS Invoice and check  before scanning the item.

A user with permission to return unpurchased items must enter their agrē **User Name** and **Password**. Override permission must be granted *each time* a return product row is added.



The dialog box is titled "Check Security" and contains the following text: "Override the Return Restriction? Please provide credentials:". Below this text are two input fields: "User Name:" and "Password:". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

- If you have override permission, enter your own credentials (this is required due to common use of devices - agrē needs to confirm the logged in user is the same user processing the return)
- If you do not have override permission, another user with override permission (e.g. your supervisor) must enter their credentials.

Scan the item. It will be added to the POS Invoice with a *negative* quantity.

You will also be prompted to enter Override Credentials if you **Add Product** with a negative quantity.

5. Defective Product to be Returned to Supplier/Manufacturer

Please consult your supervisor.



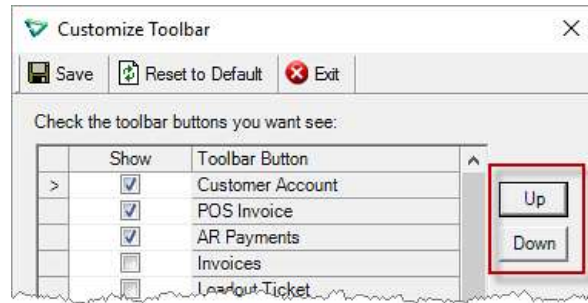
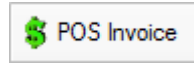
6. Returned Product to be Excluded from Inventory

Please consult with your supervisor .



Toolbar Customization

As you'll be using Point of Sale invoices on a regular basis, add the **POS Invoice toolbar shortcut** if it is not already there.



Window > Customize Toolbar

Use **Up/Down** to change the order of the shortcuts.

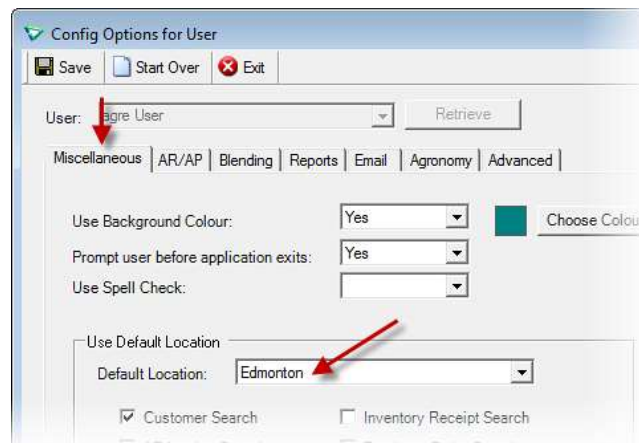
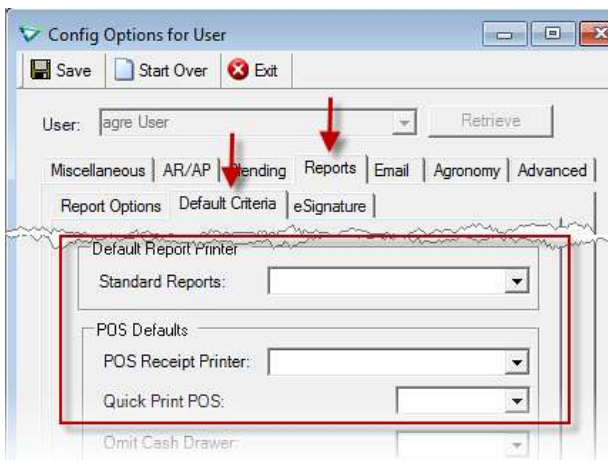
Configuration Options for POS Invoices

There are a few POS Invoice configuration options that can be set at the **user level** to make agrē work more like you do.

Printers & Default Location

agrē needs to know which printer *each user* will use for printing **POS Invoices** on till-tape and which one will be used for printing **Standard Invoices** (the 8½ x 11 ones).

Note When **Quick Print POS** is selected, POS Invoices will be sent directly to the receipt printer – they will NOT display on screen before printing.

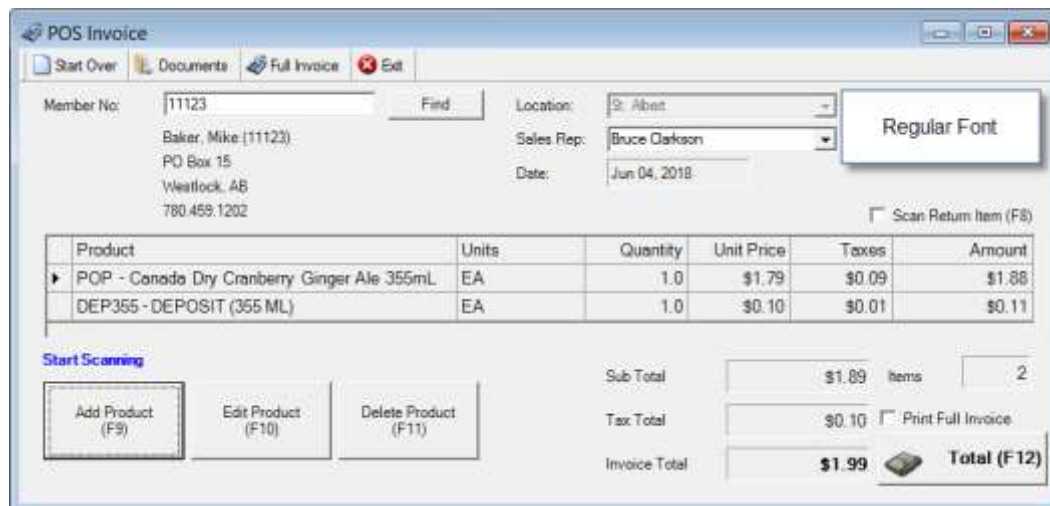
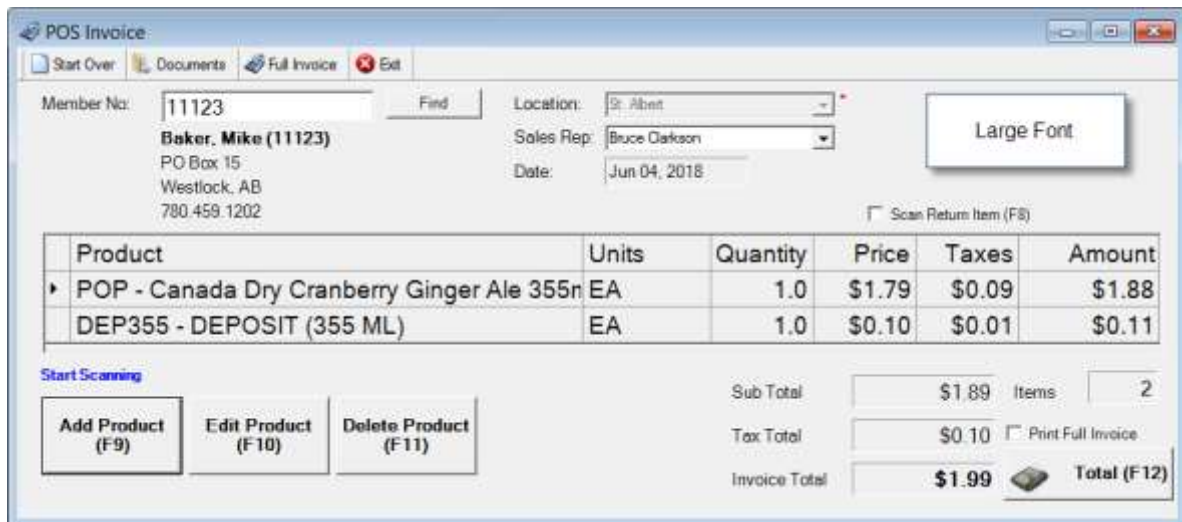
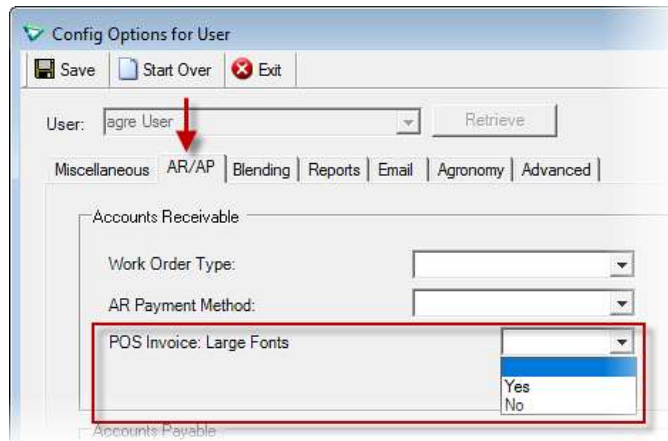


Also set a **Default Location** so agrē will fill that in automatically on each POS Invoice.

File > Config Options > User

Font Size

Select **POS Invoice: Large Fonts = Yes** if you'd like the fonts and buttons to display a little larger.



POS Invoice

Start Over Documents Full Invoice Exit

Payment Type	Amount	Total Amount	Amt Tendered	Change Due
>* Debit Card	\$1.99	\$1.99		

Large Font

Debit Override Remove Payment (F10)

Invoice Total: \$1.99

Pay This Amount: \$1.99

Total Change Due: \$0.00

POS Invoice

Start Over Documents Full Invoice Exit

Payment Type	Amount	Total Amount	Amount Tendered	Change Due
>* Debit Card	\$1.99	\$1.99		

Regular Font

Debit Override Remove Payment (F10)

Invoice Total: \$1.99

Pay This Amount: \$1.99

Total Change Due: \$0.00