



## Getting Started POS Reference Guide

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## About this manual...

This is a getting started guide. It's purpose is to acquaint new users with basic navigation of the POS-related features of the eRegisterPro system. The behavior of the system can vary for each implementation. That is one of the great accolades of the solution. Because of the modular nature of the solution, this guide has been written from a high-level perspective, focusing only on features that are not likely to vary in any great detail.

For further help and training, or to request changes to your implementation, please contact our support group

support: (631)434-7768  
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# General Navigation

The screenshot shows the 'Main Menu' of the eRegisterPro application. On the left, there are buttons for 'Help', 'Read Mail', and 'Sign Off'. The main area contains nine menu categories: 1. Sales, 2. Inventory, 3. Reports, 4. Employees, 5. Customers, 6. Marketing, 7. Store Management, 8. System Setup, and 9. Help. On the right, there is a numeric keypad with buttons for digits 0-9, a decimal point, a minus sign, a clear (X) button, and a checkmark button. A 'HE' label is above the keypad. A 'Go-Back' button is located below the keypad. A color wheel is visible at the top left of the menu area.

View Printer connection status and other support information

Toggle viewing Function Keys on/off

Personalize the POS by clicking on this color wheel to set the background to match your store décor or mood

Your unique workstation ID

Description of this menu

Available Functions

Available Menu Options

Numeric Keypad for on-screen touch/click entry

Go-Back to the previous screen. F3 will also perform this function

(-) - make your entry negative by pressing this AFTER the number entry

(x) - clear the field that the cursor inhabits

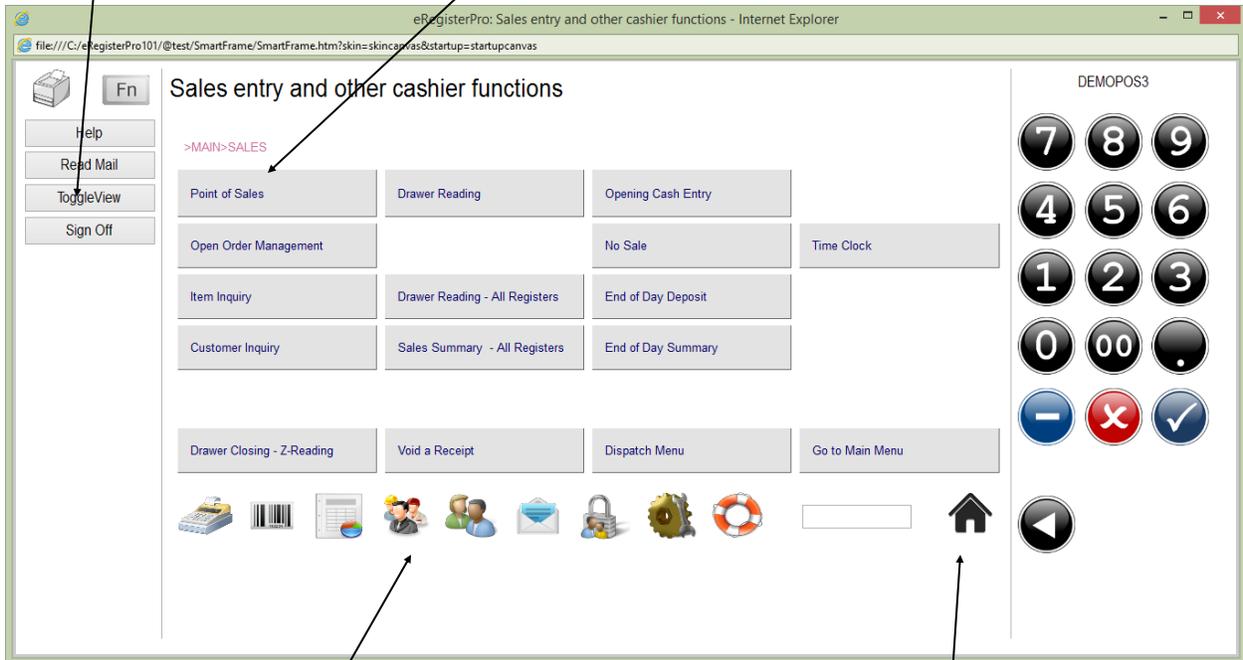
(check mark) - This is your GO! Button. It is the same as pressing your <enter> key

(.) - Use this decimal point to enter a fraction when dealing with quantity entry. This could be used when selling items by the pound or foot. However, **All dollar value entries should be entered without the decimal.** An entry of 1234 = \$12.34 . Alternatively, the system support entry **with** the decimal. If you prefer to enter values with the decimal, contact our support.

# Sales Menu

Note this Toggle View Button. Many screens have this and allow you to view the screen in a different way. Try it when you see it. The system will remember the last view for this workstation

Each Menu Option is a different application. Menus can be customized based on each implementation, so yours may differ slightly. The "Point of Sales" application is the most important, where you can enter sales!



Note that the Main Menu options appear as shortcuts on all of the menus, allowing quick access to different areas throughout the system.

Tapping/clicking on this HOME icon will bring you back to the Home (Main) Menu

# Opening

Requiring your users to enter a beginning cash count is optional. If the system is configured to require it, then it will not allow Sales Entry until an opening cash count is entered. The amount entered here will be included in the Drawer Reading and Sales Summary reports.

This Toggle button allows you to switch between entering your count in dollar value or count value

This icon lets you know which mode you are in.  
(#) - enter count  
(\$) - enter dollar value

	Count	Rolls		Count
Pennies	<input type="text"/>	<input type="text"/>	Dollars	<input type="text"/>
Nickels	<input type="text"/>	<input type="text"/>	Fives	<input type="text"/>
Dimes	<input type="text"/>	<input type="text"/>	Tens	<input type="text"/>
Quarters	<input type="text"/>	<input type="text"/>	Twenties	<input type="text"/>
Half Dollars	<input type="text"/>	<input type="text"/>	Fifties	<input type="text"/>
			Hundreds	<input type="text"/>

Total.....\$	.00	Expected.....\$	20.00
		Over/Short....\$	.00

When you have confirmed that you count is correct, tap/click here to post your entry

Calculate/Refresh the total

# Point of Sales - Overview

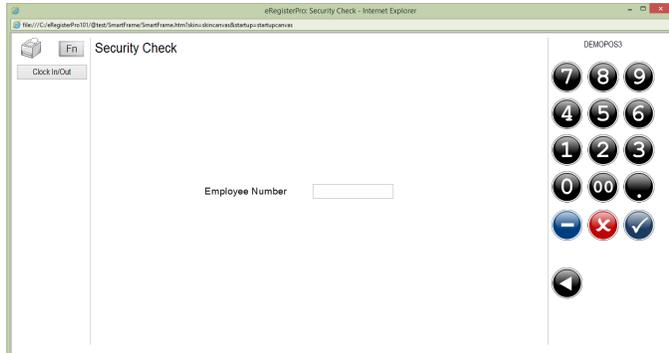
Sales Entry can be broken into 4 basic steps

## Employee Entry

Many features throughout the system will prompt for you employee #.

Sales Entry can be setup to prompt for each sale, or retain the last employee # (if a single cashier will have exclusive access to the register).

Key in your # followed by <enter> or the (check) button

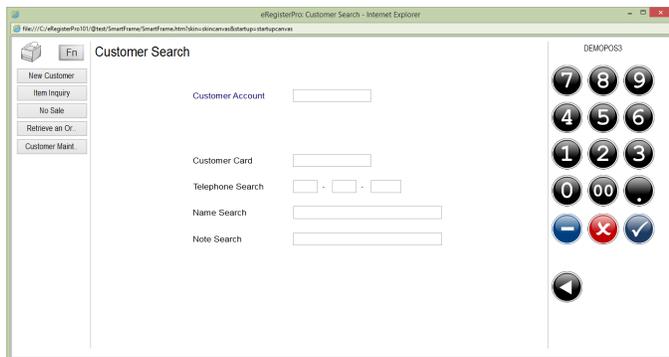


## Customer Lookup

Search for a customer using the fields on screen.

You may also add a new customer

Press <enter> or (check) to skip customer capture.



## Item Entry

Scan items you wish to add to the sale

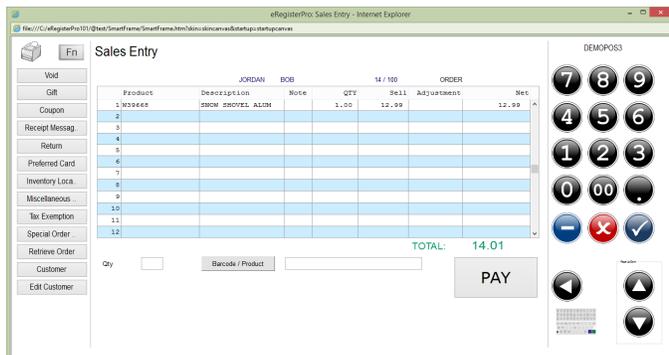
Use the functions to edit the sale

Tap/Click on an item to edit it's price, quantity, or discount

Click on Barcode/Product to search for items

Click on the SpeedKey Map to view item shortcuts

Click on Pay when you are done

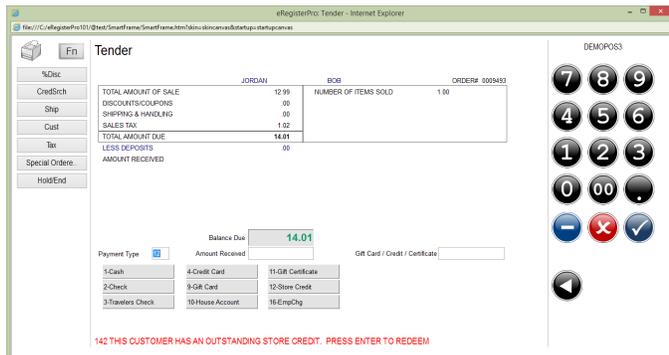


## Tender

Use functions to apply shipping, discounts, and more

Click on the desired payment type

Key in the amount (5000 = \$50.00)



# Point of Sales - Customer Lookup

You can assign a customer to a sale at any stage of the transaction. On the Sales Entry Screen and the Tender/Payment screen you will see a CUSTOMER button in the function panel on the left.

If you already have a customer assigned:

- A) This button will search for a different one.
- B) Additionally, there will be an EDIT CUSTOMER button, allowing you to edit the assigned customer

Each customer is assigned an internal account #. You can also assign a card to a customer (rewards, frequent shopper).

Add a new customer here

Scan the customer card here

Search by phone number here

Search by name here  
Any portion of either first name, last name or both will work

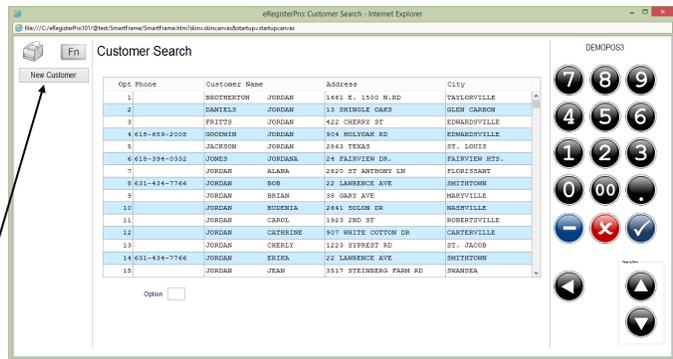
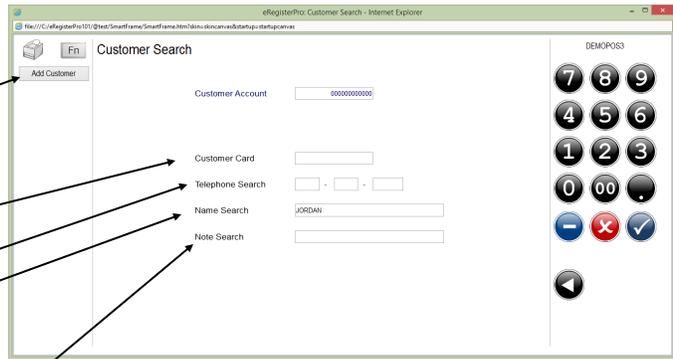
Each customer account has an area for notes. You can also search these here

Press <enter> or (check) to continue

The search may find many results that match. Select the desired one by clicking/tapping on it.

You can also type in the line# of your choice

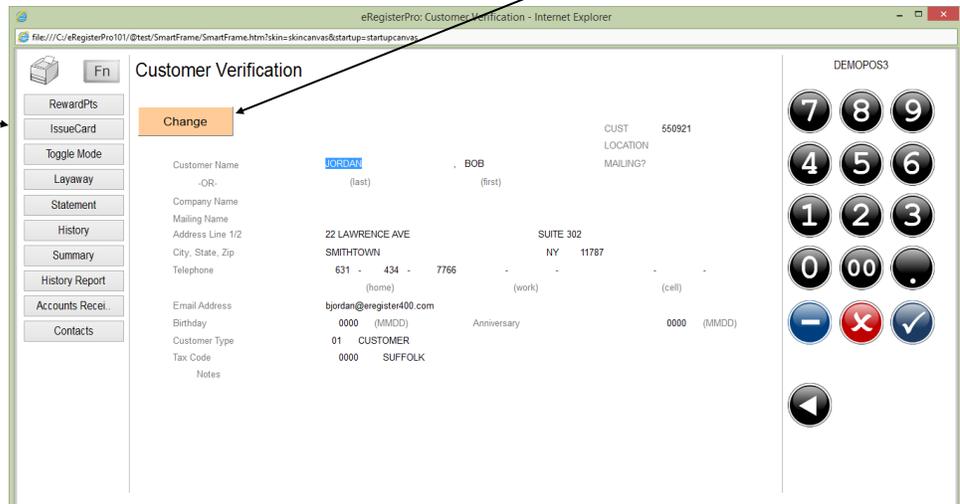
If the customer you are looking for is not found, you can add them here



If you would like to change anything on this account, click here

Use the buttons on the function panel to view sales history, reward point status and more

Press <enter> or (check) to continue



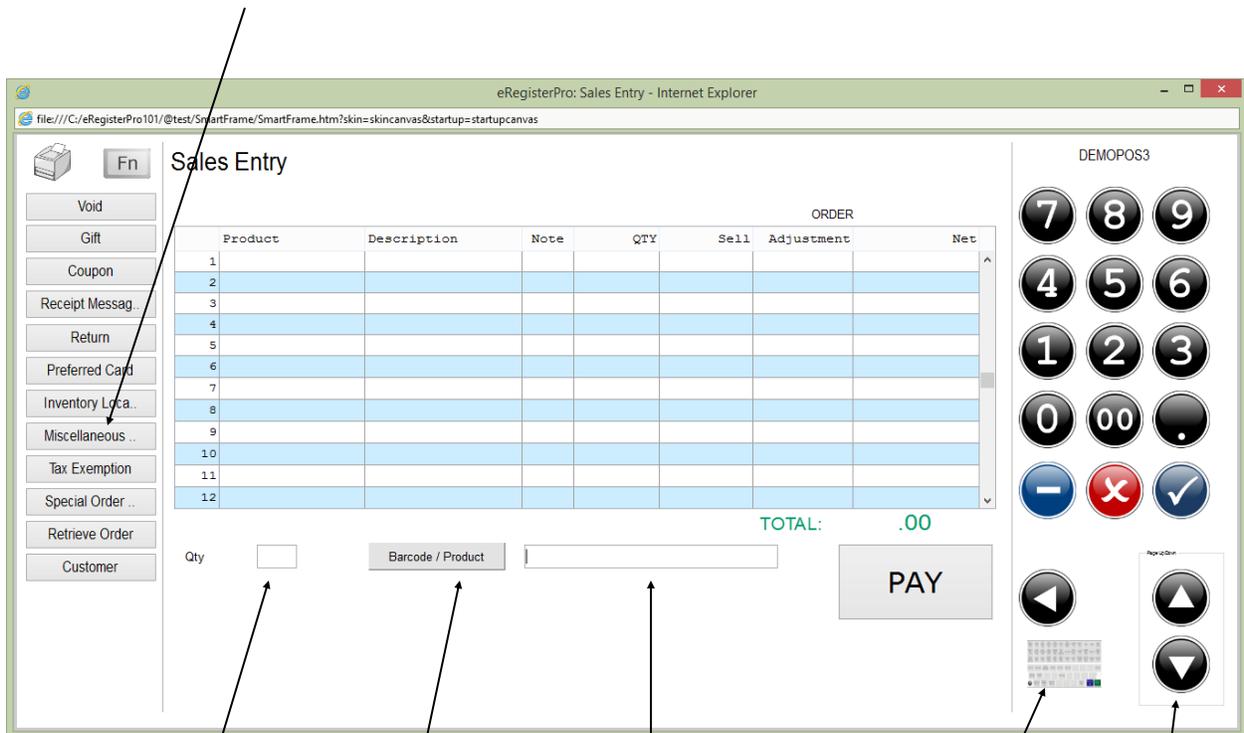
# Point of Sales - Sales Entry (adding items)

You can add items to a transaction a number of ways. Most commonly:

- Scan a barcode
- Type in a product # or barcode
- Perform an item lookup
- Use the Speed Key shortcut map
- Add a miscellaneous item

The next few pages cover these processes

Use this function to sell a miscellaneous item. This could be used to sell something that is not in the system, to add a service charge, or other miscellaneous fee.



Key in a quantity if you want to sell more than 1. If you leave this blank it will default to 1. You can also edit the quantity after the fact

Scan or Type in the item barcode or product # here. You can also precede your entry with quantity and an "\*". Typing the following will result in selling 5 of item XYZ.  
5\*XYZ

These buttons allow you to Page Up or Page Down, performing the same action as those on your keyboard

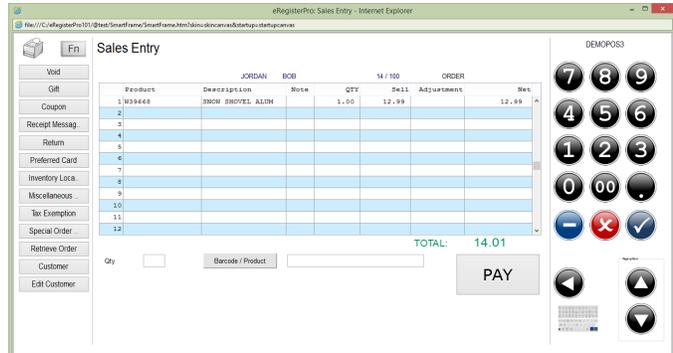
Click/Tap here to do an item search by description, vendor and more

Click/Tap here to open up your Speed Key Map. These are shortcuts to selling items without the need for a barcode. Great for non-barcodables like food and services.

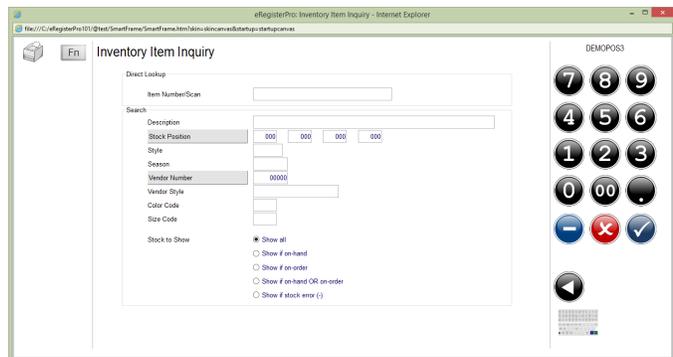
# Point of Sales - Item Search/Inquiry

If you would like to search for an item by description, vendor, or other criteria, tap/click on Barcode/Product

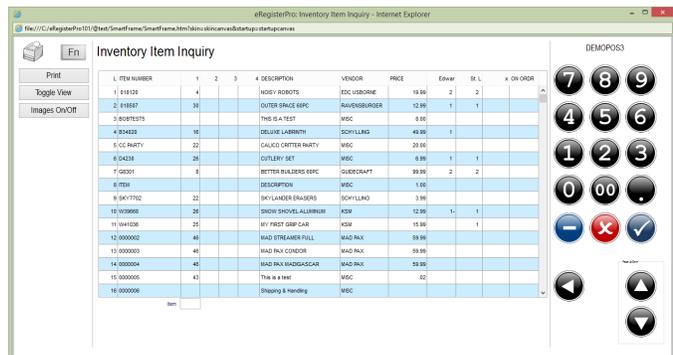
There are many places in the system where you can do “searches”. Basically, if a prompt field is preceded by button, the button will help you search. So, on the Sales Entry screen, you can click on Barcode/Product to enter an item search



Search screens vary. You can search for an item by various fields. Again, if you don't know a vendor #, you can click/tap on Vendor to launch the Vendor search. If you fill in more than one field, they will be treated as an “AND” search, wherein, all entered criteria must be met.

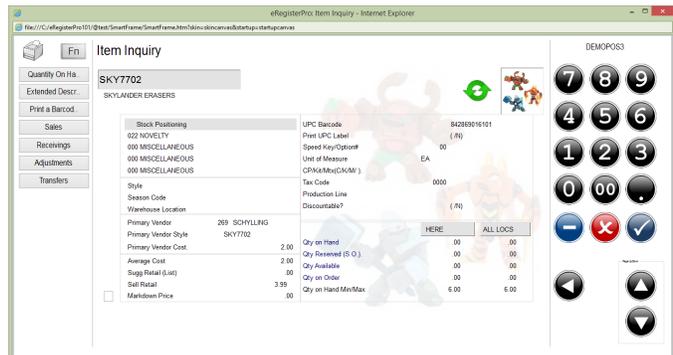


Upon pressing <enter> or (check), you will be presented a result screen. Note the Toggle View button again here. These results can be presented in many ways. Try pressing this button to find your preferred view. Click/Tap on the item you wish to select. Also, typing in the line# of the item will work as an alternative.



Once you make a choice, the full item information will appear.

Simply pressing <Enter> or (check) at this point will return you to the Sales Entry, allowing you to sell the item.



On the next page we will explore the options on this page further.

# Point of Sales - Item Search/Inquiry

These functions allow you to view Sales, Adjustment, Transfer and Receiving history for this item.

Clicking/Tapping here will refresh the page. Sometimes required after updating the item image

Click/Tap here to view the item image or search for one on the internet.

The screenshot shows the 'Item Inquiry' window for item SKY7702 (SKYLANDER ERASERS). The interface includes a left sidebar with navigation buttons (Quantity On Ha., Extended Descr., Print a Barcod., Sales, Receiving, Adjustments, Transfers), a central data table, and a right sidebar with a numeric keypad and navigation controls. A 'Refresh' icon is located above the item image.

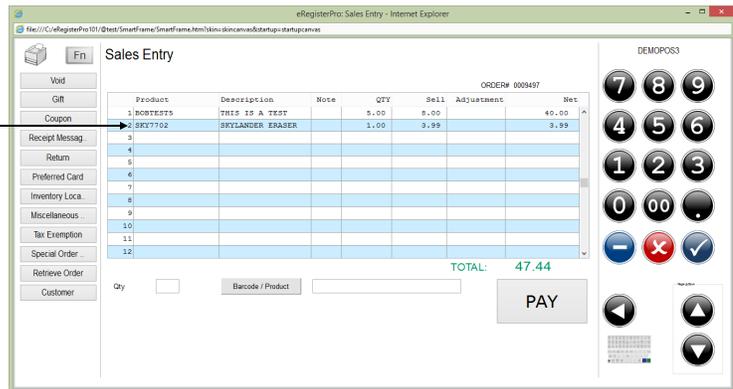
Stock Positioning		UPC Barcode	
022 NOVELTY		842869016101	
000 MISCELLANEOUS		Print UPC Label	( /N)
000 MISCELLANEOUS		Speed Key/Option#	00
000 MISCELLANEOUS		Unit of Measure	EA
000 MISCELLANEOUS		CP/Kit/Mtx(C/K/M/ )	
Style		Tax Code	0000
Season Code		Production Line	
Warehouse Location		Discountable?	( /N)
Primary Vendor	269 SCHYLLING		
Primary Vendor Style	SKY7702		
Primary Vendor Cost.	2.00		
Average Cost	2.00		
Sugg.Retail (List)	.00		
Sell Retail	3.99		
Markdown Price	.00		

	HERE	ALL LOCS
Qty on Hand	.00	.00
Qty Reserved (S.O.)	.00	.00
Qty Available	.00	.00
Qty on Order	.00	.00
Qty on Hand Min/Max	6.00	6.00

If you are running multiple stores/locations, you can use the "Here" or "All Locs" button to view the on hand detail across the store chain

# Point of Sales - Item Edit

Click/Tap on an item to edit it.  
Alternatively, you can type the line # of the item followed by <enter> or (check)



Click/Tap here to void/remove the item form the sale

Clear and type over the price for a manual override

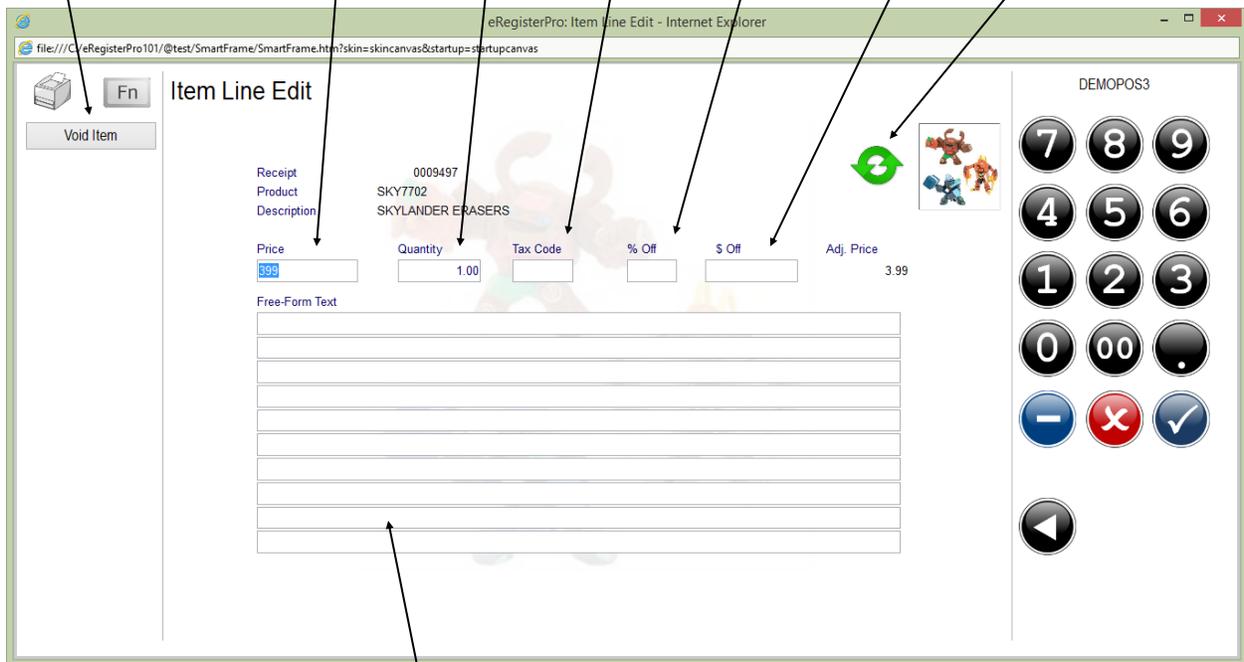
Clear and type over the quantity

Tax codes vary, but typically  
0 = taxable  
9999 = non-taxable

Type in a % off discount amount here

Type in a \$ amount to reduce this item

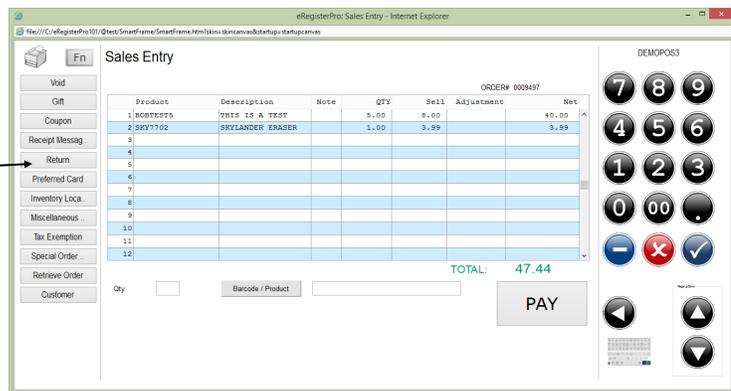
Optionally, after keying in a % or \$ discount, click/tap here to see the new adjusted price



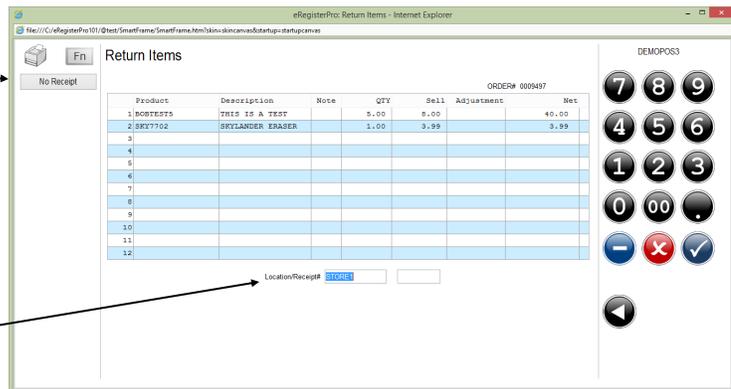
Type in any text to be associated with this item for this particular sale. This will print on the receipt

# Point of Sales - Returns

Click/Tap on the Return function to return items. Returns and sales can be combined in a single transaction.

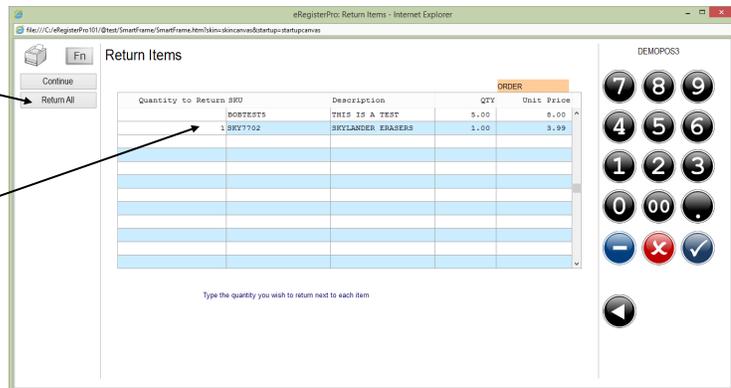


Click/Tap here if the customer does not have a receipt. The following screen will simply prompt to scan or type in the barcode/product #. Item lookup will also be available.



Scan the barcode on the original receipt. The barcode contains BOTH the store and receipt#

Click/Tap here to return ALL of the items on the original order



Click/Tap on the item(s) you wish to return. Each click will add 1 to the return column.

Press <enter> or (check) to continue

For each item being returned, you will be prompted the following:

Re-Sellable

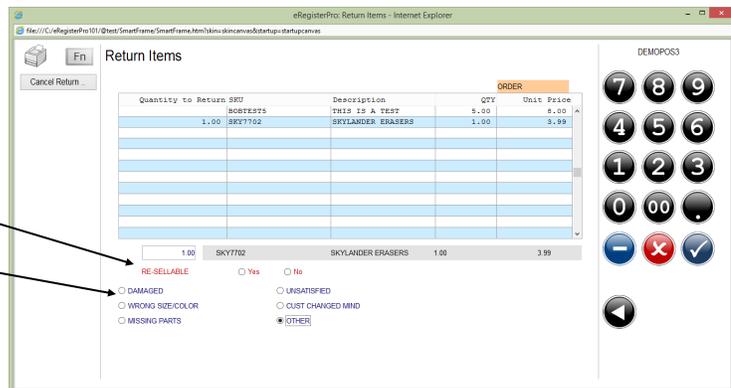
Yes = It goes back into inventory

No = It does not

Return Reason

Select the reason

Press <enter> or (check) to continue



# Point of Sales - Tender / Payment

Note the buttons on the function panel.  
Here you can perform such functions as:

- Apply a discount that affects the entire sale
- Lookup a store credit or gift certificate
- Set to ship and apply shipping charges
- Make the order tax exempt
- Hold (suspend) the order for payment at a later time

A summary of the sale appears at the top of the tender screen

Order # (aka receipt #) assigned to this transaction

Fill in this prompt with the appropriate tender type. Simply Clicking/ Tapping on the desired payment type button will fill this field and tab over to the Amount Received field

Type in the amount received here.

When entering in dollar values, the decimal is assumed: 7000 = \$70.00

On certain payment types (Credit Card, Gift Card, House Account, or any credit to the customer), entering a value received is optional, and should only be done on certain circumstances (split tenders).  
If no entry is made, the system will default to the appropriate amount.

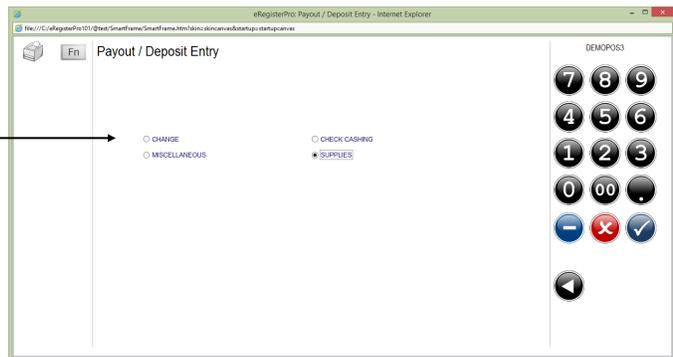
Some tenders require validation. If so, you will be prompted to fill in this field. Typically you will scan or swipe the gift card/credit, but manual entry is also allowed.

# Point of Sale - No Sale (drawer adjustments)

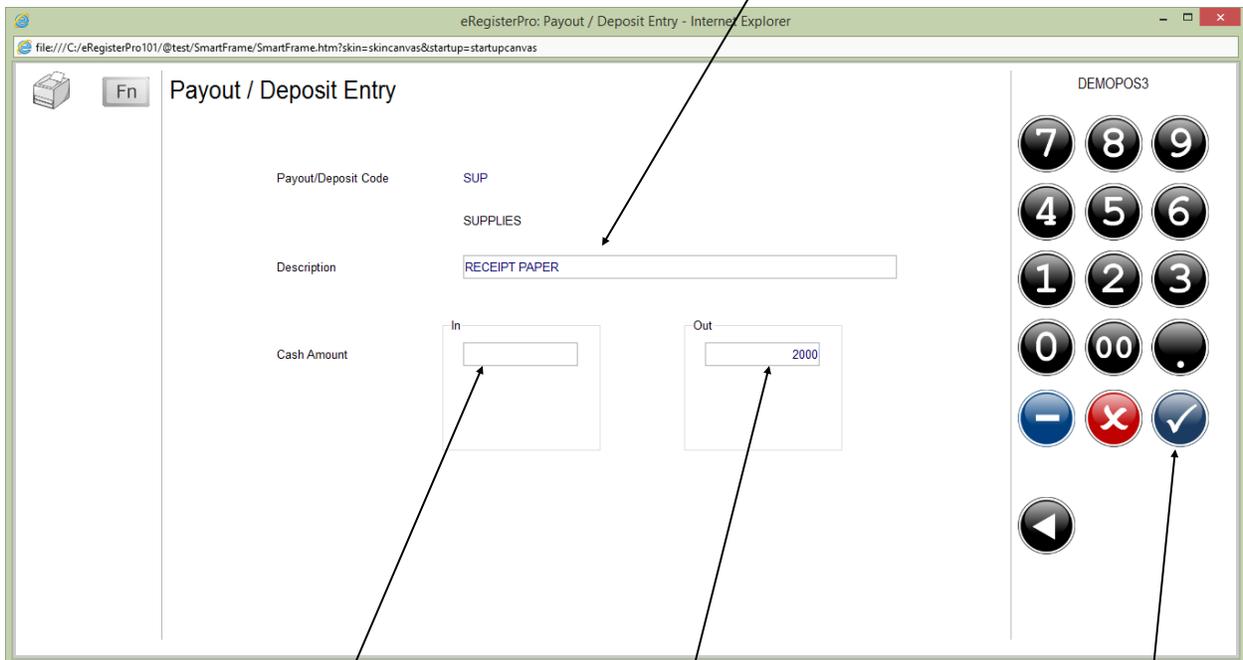
If you need to adjust the contents of your drawer, you can perform a "No Sale". This application is on the Sales Menu



Select the reason for the adjustment. Press <enter> or (check) to continue



Type in a description for this no sale. This is optional



If you are putting cash into the drawer, enter it here. As usual, the decimal is assumed.

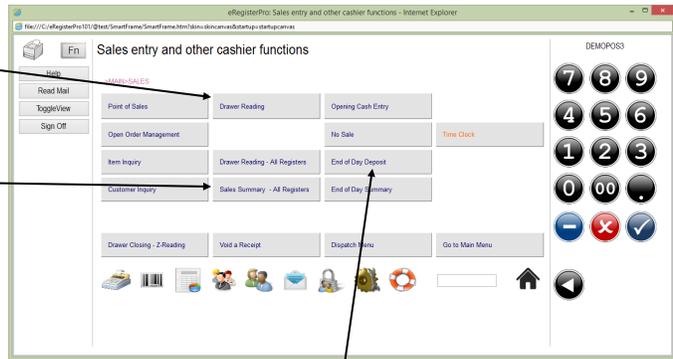
If you are taking cash out of the drawer, enter it here. As usual, the decimal is assumed. This entry of 2000 means I am taking \$20.00 out of the drawer

Press <enter> or (check) to continue

# Point of Sales - End of Day Deposit (Closing)

Drawer Reading - See what is in this workstation's drawer

Sales Summary - Get a full recap of the days business. This can also be run for prior days or date ranges

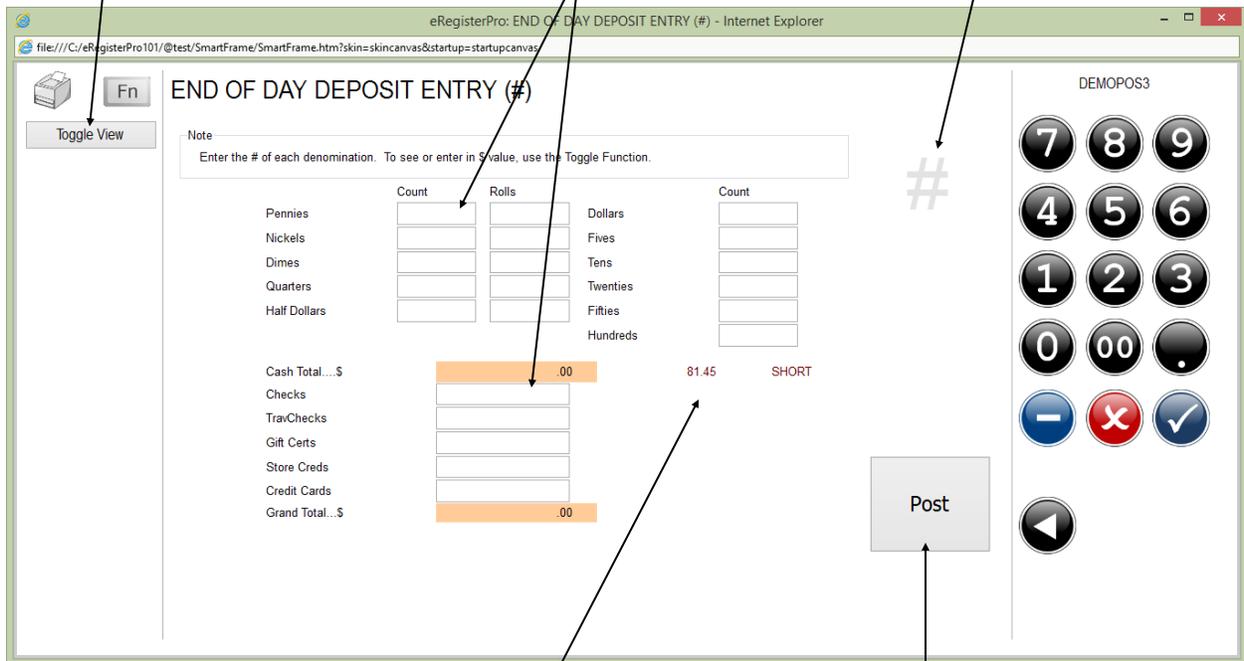


End of Day Deposit - This is a utility to ensure and record any differences between your actual drawer contents and what is expected from the system. Typically this is performed for each register at the end of the day. Completion of this option is OPTIONAL. It does not affect sales information in any way. Likewise, failing to do this will have no adverse affect on the store's ability to open the next business day.

This Toggle button allows you to switch between entering your count in dollar value or count value

Enter the amount for each denomination of cash, as well as other tenders below. The requirement to count these "other" tenders is optional. Contact a support representative to have any of these removed if desired.

This icon lets you know which mode you are in. (#) - enter count (\$) - enter dollar value



For each tender type, the system will display the over or short amount here

When you are done Click/Tap this POST button