



Ticketing | Registration | Memberships

Web | Mobile | Kiosk | POS

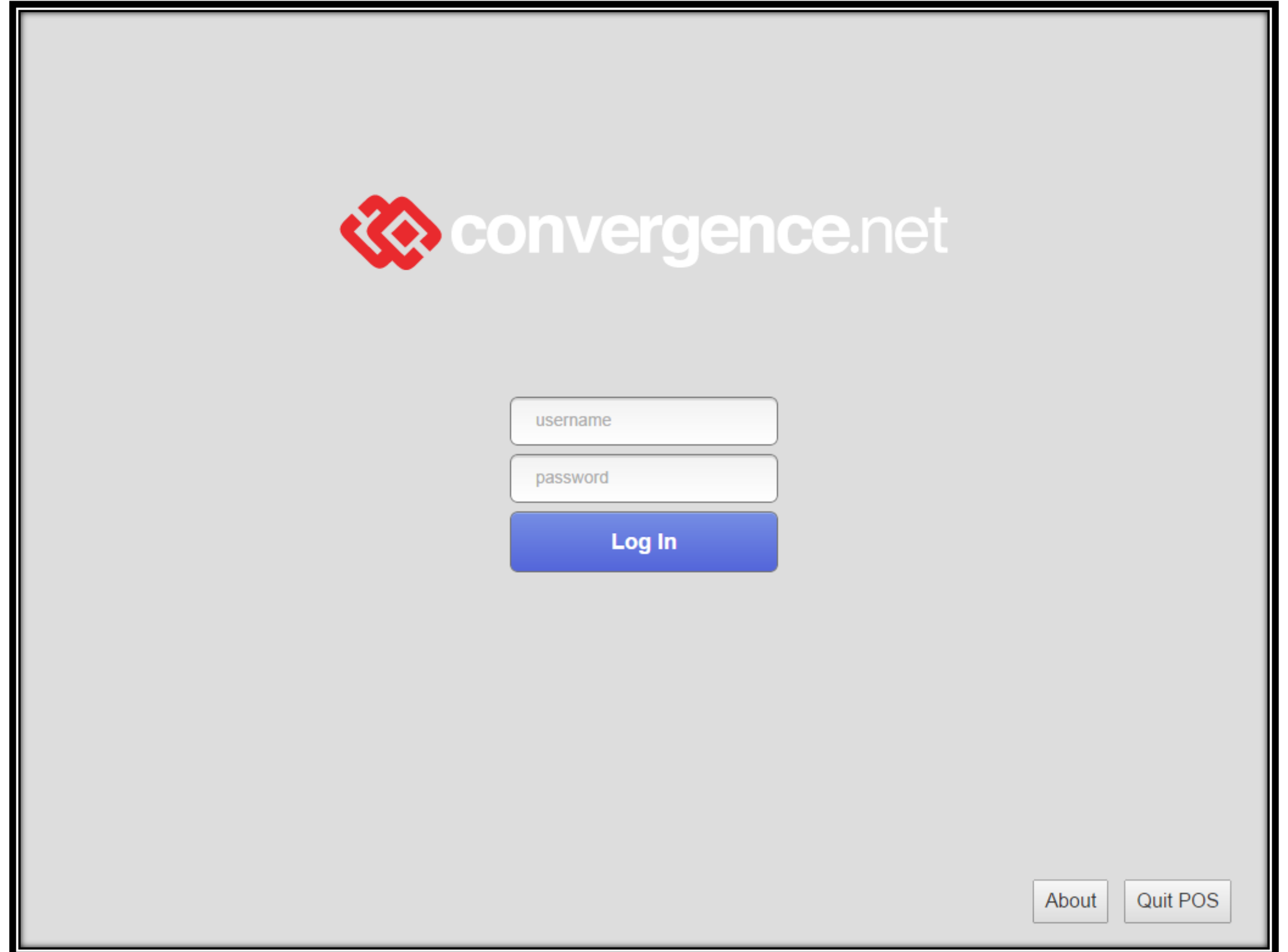
Ticketing/Retail, Food & Beverage POS Staff Training Manual



ADMISSIONS EVENTS GROUPS CAMPS CLASSES TOURS MEMBERSHIPS DONATIONS CONCESSIONS LODGING ASSIGNED SEATING

Login Page:

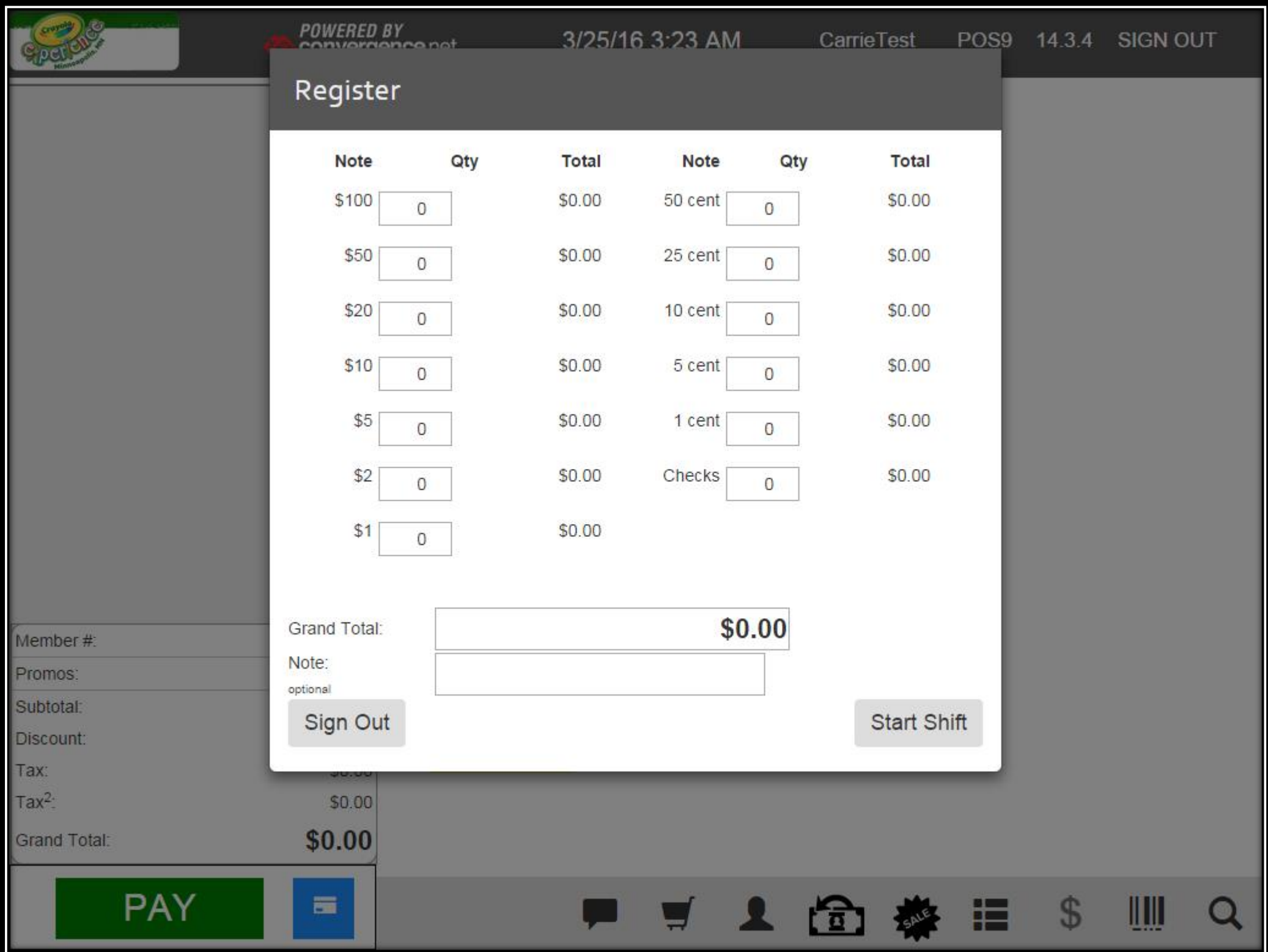
1. Each user will have his/her own sign in credentials.
2. We do not limit the number of user licenses/accounts.
3. Sharing of user accounts is highly discouraged.
4. Each user can be configured with a unique set of permissions according to their role/function.



The screenshot shows the login page for convergence.net. At the top center is the convergence.net logo. Below it are two input fields: one for 'username' and one for 'password'. A blue 'Log In' button is positioned below the password field. In the bottom right corner, there are two small buttons: 'About' and 'Quit POS'.

Open Shift Page:

1. Enter quantity of each denomination that you start with for the day. The Grand Total will be calculated automatically.
2. There is a 'Notes' field for any note that you may like to make (in case of special situations).
3. When you have completed your entry, click 'Start Shift'.
4. Optional - Cash control can be enabled/disabled.




POWERED BY convergence.net 3/25/16 3:23 AM CarrieTest POS9 14.3.4 SIGN OUT

Register

Note	Qty	Total	Note	Qty	Total
\$100	<input type="text" value="0"/>	\$0.00	50 cent	<input type="text" value="0"/>	\$0.00
\$50	<input type="text" value="0"/>	\$0.00	25 cent	<input type="text" value="0"/>	\$0.00
\$20	<input type="text" value="0"/>	\$0.00	10 cent	<input type="text" value="0"/>	\$0.00
\$10	<input type="text" value="0"/>	\$0.00	5 cent	<input type="text" value="0"/>	\$0.00
\$5	<input type="text" value="0"/>	\$0.00	1 cent	<input type="text" value="0"/>	\$0.00
\$2	<input type="text" value="0"/>	\$0.00	Checks	<input type="text" value="0"/>	\$0.00
\$1	<input type="text" value="0"/>	\$0.00			

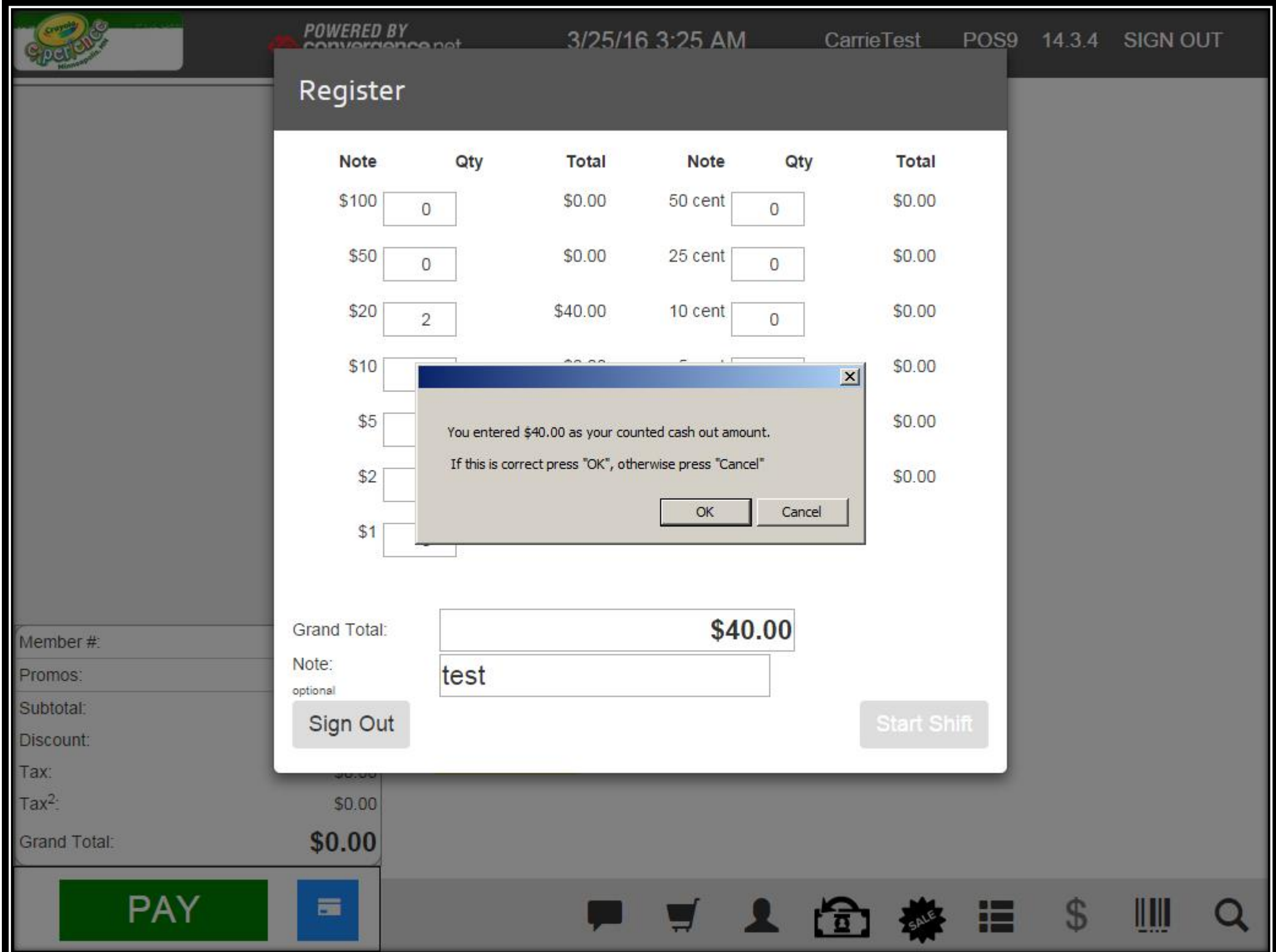
Grand Total:
 Note:
optional

Member #:
 Promos:
 Subtotal:
 Discount:
 Tax:
 Tax²:
 Grand Total:



Cash Open

1. After you click the 'Start Shift' button the system will ask you to confirm the amount you have entered.
2. Verify that you have entered the right amount.
3. Click 'OK' if correct.
4. If incorrect, click 'Cancel' to make changes.
5. Once OK, an open shift receipt will print.




POWERED BY convergence.net 3/25/16 3:25 AM CarrieTest POS9 14.3.4 SIGN OUT










Register

Note	Qty	Total	Note	Qty	Total
\$100	<input type="text" value="0"/>	\$0.00	50 cent	<input type="text" value="0"/>	\$0.00
\$50	<input type="text" value="0"/>	\$0.00	25 cent	<input type="text" value="0"/>	\$0.00
\$20	<input type="text" value="2"/>	\$40.00	10 cent	<input type="text" value="0"/>	\$0.00
\$10	<input type="text" value="0"/>	\$0.00			\$0.00
\$5	<input type="text" value="0"/>	\$0.00			\$0.00
\$2	<input type="text" value="0"/>	\$0.00			\$0.00
\$1	<input type="text" value="0"/>	\$0.00			\$0.00

Grand Total:
 Note:
optional
 Sign Out Start Shift

Member #:
 Promos:
 Subtotal:
 Discount:
 Tax:
 Tax²:
 Grand Total:

PAY 

Open Shift Procedure

POS Activity Page:

1. To enter into the POS, click 'POS'.
2. Note: You cannot be logged on to 2 stations with the same account. You will need to log out of previous sessions.
3. Adjustments & Voids are used by management level users (manager login required).
4. Void button currently disabled from this screen.

POWERED BY convergence.net 3/25/16 3:26 AM CarrieTest POS9 14.3.4 SIGN OUT

Open Shift POS

Activity

	User	Action	Note	Amount
03/25/2016 12:26:52 AM	CarrieTest	Open Shift	test	--

Adjustment Close Shift Void

Open Shift POS

Adjustment

Add Remove

Amount:
 Note:

Adjust Cancel

Grand Total: \$0.00

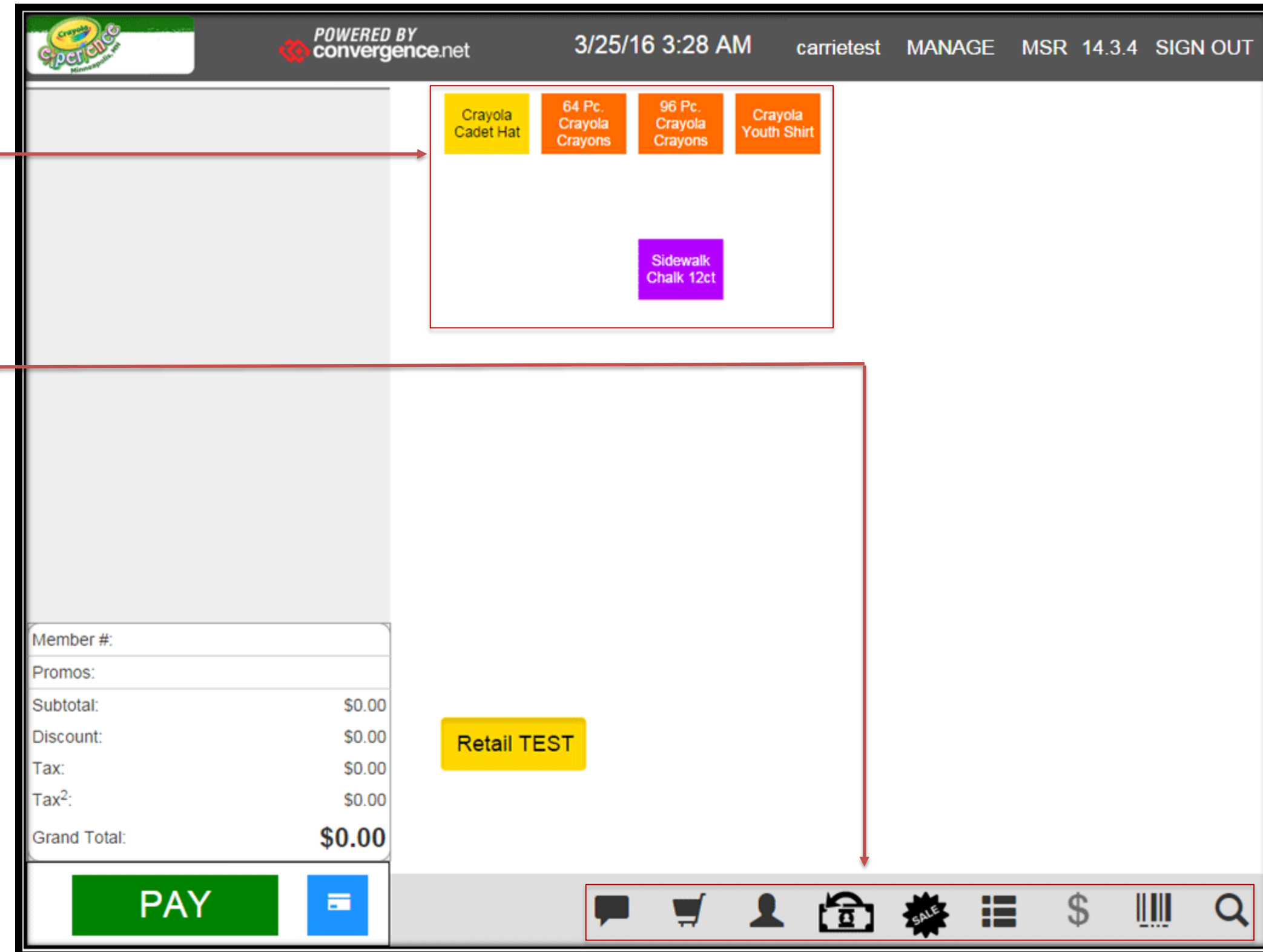
Open Shift POS

Adjustment

This action requires a Manager to login.
 Username:
 Password:
 Login Cancel

Main Product Page:

1. This is where you see all of the products available for sale. You simply click the button to add that item to your cart. Click the product button to increase quantity.
2. The Main Menu task bar has your main action/activity buttons. These are explained in detail on the following page.
3. There is a green 'Pay' button that you select when all items have been added to the cart for an order. Payment options will be explained on subsequent slides.
4. The blue 'Credit Card Icon' button is a fast credit card button. It is a way of bypassing selecting both the 'Pay' and 'Credit Card' buttons.
5. The "Manage" button in the top bar is where you can upsell or activate an Annual Pass.
6. There is a 'Sign Out' button in the top right. Select to suspend or close your shift.



Task bar icons:

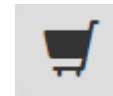
1. The talk bubble icon allows you to enter a customer's name. This will print on the receipt.
2. The shopping cart icon starts a new order.
3. The person icon allows you to scan a member card or manually enter a member number. This will automatically apply any member discounts to the order.



Customer Name Close

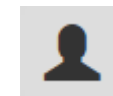
Enter Customer Name (prints on receipt)

Enter



Are you sure you want to start a new order?

OK Cancel



Members Close

Member Number

Check Close

Members Close

Valid Member ID. Updating cart with member prices. ×

Member Number
1007

Close

Task bar icons continued:

4. The dollar bill icon is for voids and refunds (manager login required).
5. The sale icon is for promo codes. If you see a promo code in the list of available promos, then you can select that code. Once entered, any discounts associated with that promo code will be applied to that product in the shopping cart.
6. The list icon displays options: Adjustment, Close Shift, and Void, plus a return to 'POS' button.



Close

VOID and Refund POS Orders
 [User permission profile: allow VOIDS (False), allow PARTIAL REFUNDS (False)]

Login: Password: Manager Login

Search for order by orderID or Name:
 OrderID: LastName: Search

Or alternatively select from recent orders on this station today:

OrderID	Time	Name	Amount	Payment Type	Order Status	Payment Action



Promos

CLOSE



Register POS

Activity

User	Action	Note	Amount

Adjustment
Close Shift
Void

Task bar icons continued:

7. The dollar icon allows you to discount an item once it has been added to the cart. Select the item in the cart, click the dollar icon, enter the percent discount and a reason for the discount. (Manager login required.)
8. The barcode icon allows you to scan or manually enter in any barcoded item.
9. The search icon allows you to search for products. Type in a keyword, select from the options, then confirm add to cart.

The image shows a sequence of screenshots from a POS system interface:

- Product Discount:** A modal window for 'Crayola Cadet Hat' with a '5%' discount and a text box for 'Enter Discount Reason:'. It shows 'Current Price: \$5.00' and 'Discounted Price: \$4.75 (\$0.25 off)'. Buttons for 'Apply' and 'Cancel' are present.
- Scan UPC:** A modal window with a 'UPC' input field and 'Add' and 'Close' buttons.
- Product Search:** A modal window with an 'Enter keywords' input field and a 'Search Q' button.
- Product Search Results:** A modal window showing search results for 'crayon':
 - + 64 Pc. Crayola Crayons - \$5.50
 - + 96 Pc. Crayola Crayons - \$6.99
- Select One:** A modal window overlaying the search results, highlighting the '96 Pc. Crayola Crayons' option with a '+ 96 Pc. Crayola Crayons' button.

Once you have added all items for the order, the system calculates any discounts and tax to produce a grand total owed by the customer.

Next you will select the payment type – either the blue “fast” ‘credit card’ or the green ‘Pay’ button. Payment types explained on the following slides.

The screenshot shows a retail POS interface. At the top, it says "POWERED BY convergence.net" and displays the date and time "3/25/16 3:36 AM". The user is identified as "CarrieTest" at "POS9" with version "14.3.4" and a "SIGN OUT" option.

The cart contains three items:

1	Crayola Cadet Hat	\$5.00	X
1	64 Pc. Crayola Crayons	\$5.50	X
1	Sidewalk Chalk 12ct	\$5.99	X

Visual representations of these items are shown as colored boxes: Crayola Cadet Hat (yellow), 64 Pc. Crayola Crayons (orange), 96 Pc. Crayola Crayons (orange), Crayola Youth Shirt (orange), and Sidewalk Chalk 12ct (purple).

A summary table at the bottom left shows:

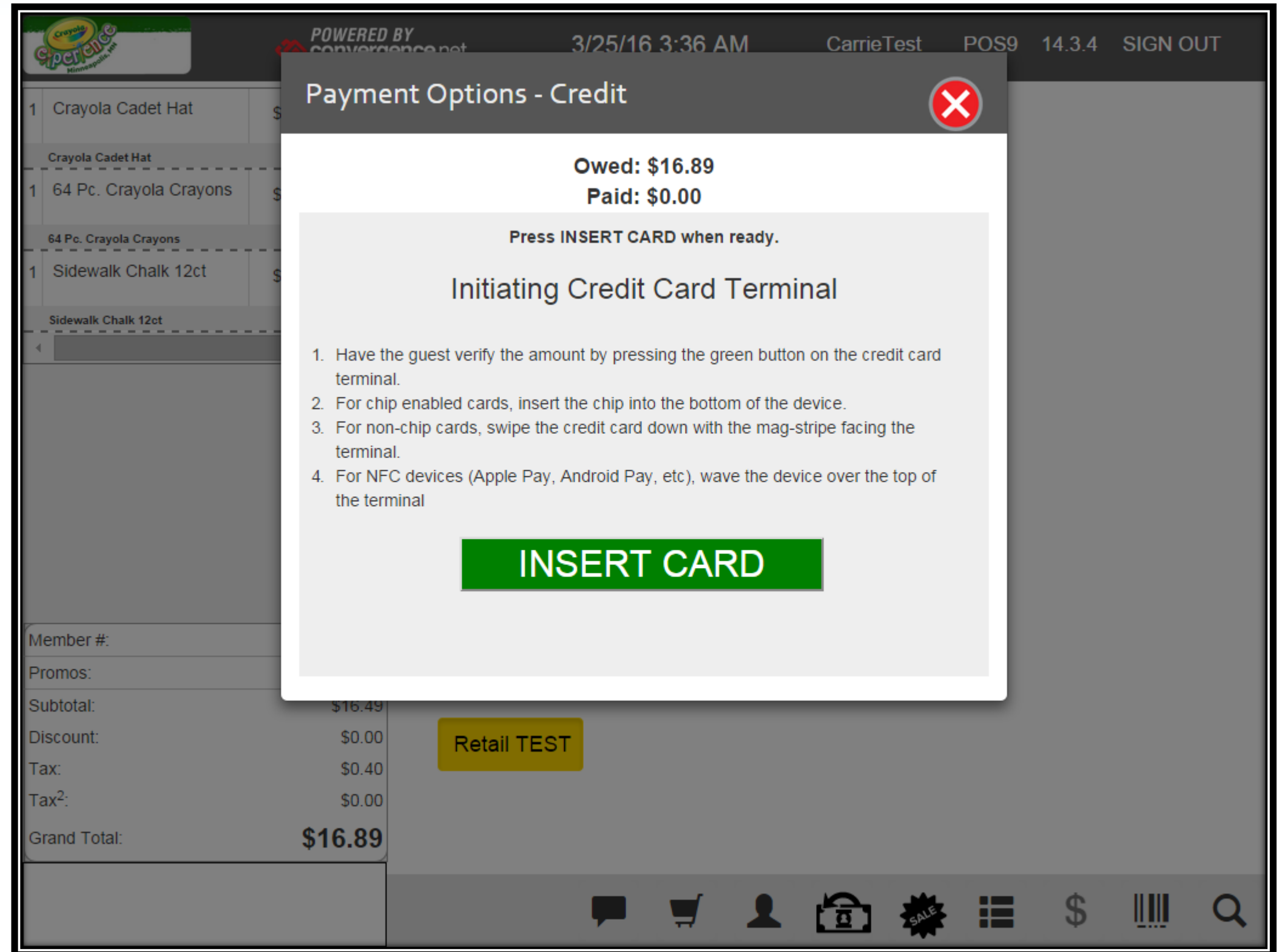
Member #:	0
Promos:	
Subtotal:	\$16.49
Discount:	\$0.00
Tax:	\$0.40
Tax ² :	\$0.00
Grand Total:	\$16.89

A yellow "Retail TEST" button is visible. At the bottom, there is a navigation bar with a green "PAY" button and a blue credit card icon. A red arrow points from the text on the left to the "PAY" button.

When you select the blue 'Credit Card Icon' button, it temporarily hides other payment options and opens the credit card processing window.

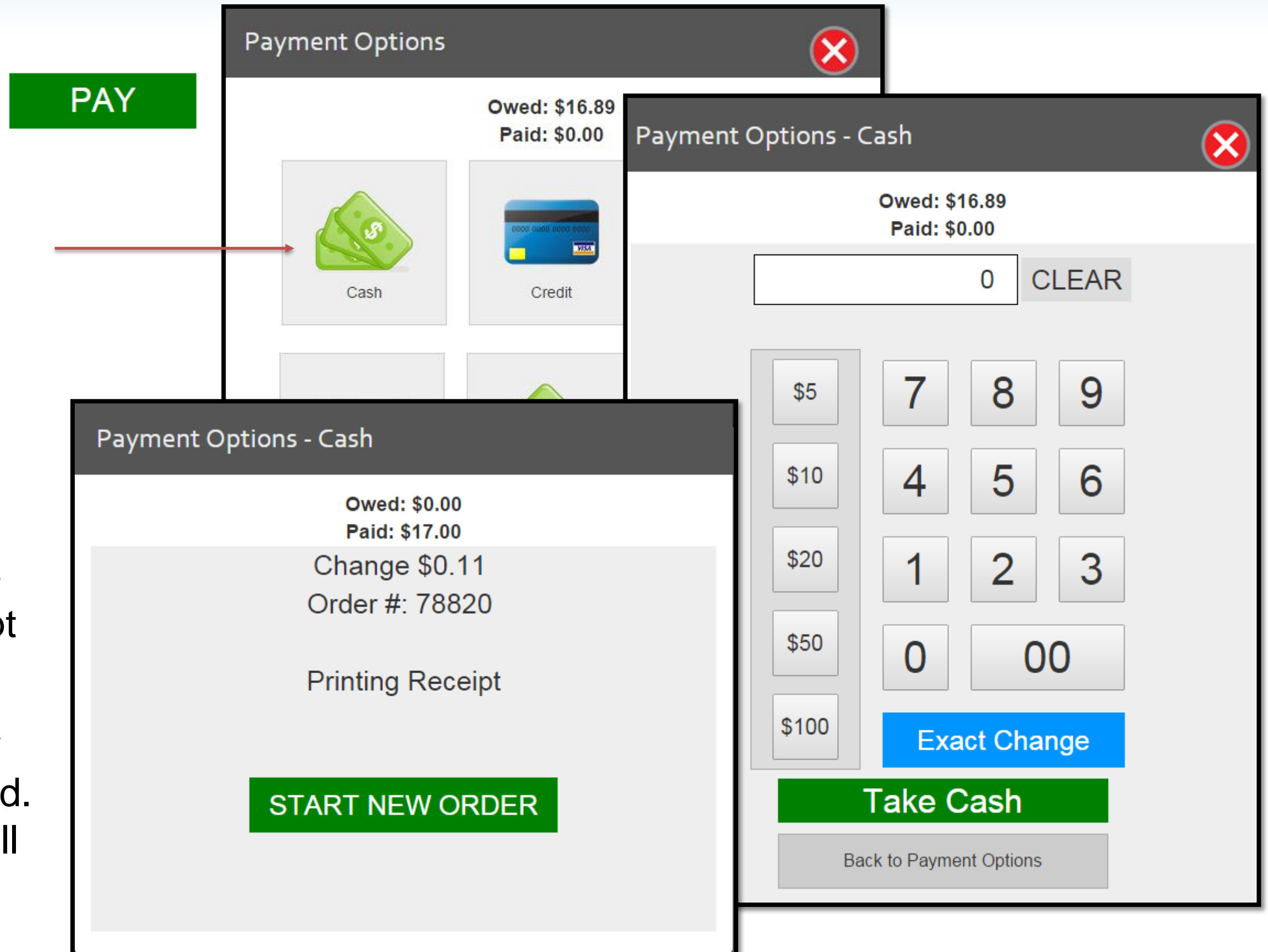
Follow the instructions on the screen:

1. When the customer is ready, click on the 'Insert Card' button.
2. The customer will then be prompted to swipe or insert their credit card.
3. There is encryption on the credit card device - our software never sees the credit card number.
6. After swiping their card on the previous page, they will sign on the Verifone screen and press the green button.
7. **BEST PRACTICE is that employees should not handle the customer's credit card.**
8. A receipt will print on the Epson and a 'Start New Order' button will appear.



Payment Options - Cash Payment

1. If the customer is paying with a cash, select the 'Pay' button under the order total.
2. Select 'Cash' from the payment options window.
3. Enter the amount tendered in the field provided (select 'Exact Change' to populate the field with the amount of the order).
4. Click the 'Take Cash' button to complete the transaction and be sent to the receipt print page.
5. The cash drawer will open automatically allowing you to deposit the cash received. If any change is owed the customer it will be displayed in the receipt print window.
6. A receipt will print on the Epson and you may select the 'Start New Order' button.



The screenshot illustrates the payment process for a cash transaction. It shows a 'PAY' button, a 'Payment Options' window with 'Cash' and 'Credit' options, a 'Payment Options - Cash' window with a numeric keypad and 'Exact Change' button, and a receipt print window with a 'START NEW ORDER' button. A red arrow points from the 'PAY' button to the 'Cash' option in the 'Payment Options' window.

PAY

Payment Options
Owed: \$16.89
Paid: \$0.00
Cash
Credit

Payment Options - Cash
Owed: \$16.89
Paid: \$0.00
0 CLEAR
\$5 7 8 9
\$10 4 5 6
\$20 1 2 3
\$50 0 00
\$100
Exact Change
Take Cash
Back to Payment Options

Payment Options - Cash
Owed: \$0.00
Paid: \$17.00
Change \$0.11
Order #: 78820
Printing Receipt
START NEW ORDER

Payment Options - Check Payment

1. If the customer is paying by check, select the 'Pay' button under the order total.
2. Select 'Check' from the payment options window.
3. Enter the name on check, check number, and date in the fields provided and hit the 'Take Check' button to complete the transaction.
4. A receipt will print on the Epson and you may select the 'Start New Order' button.

PAY

Payment Options

Cash

Check

Payment Options - Check

Owed: \$10.90
Paid: \$0.00

Amount:

First Name:

Last Name:

Check #:

Date:

Take Check

Back to Payment Options

Payment Options - Check

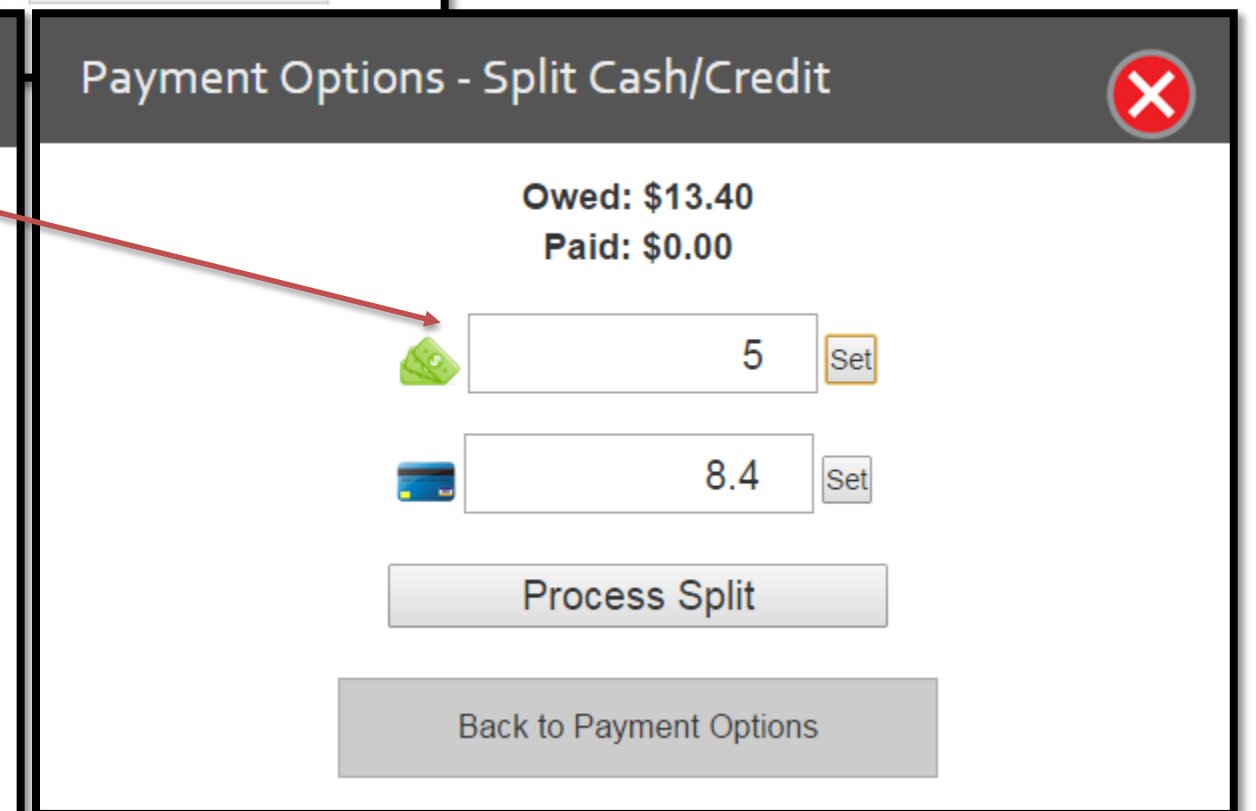
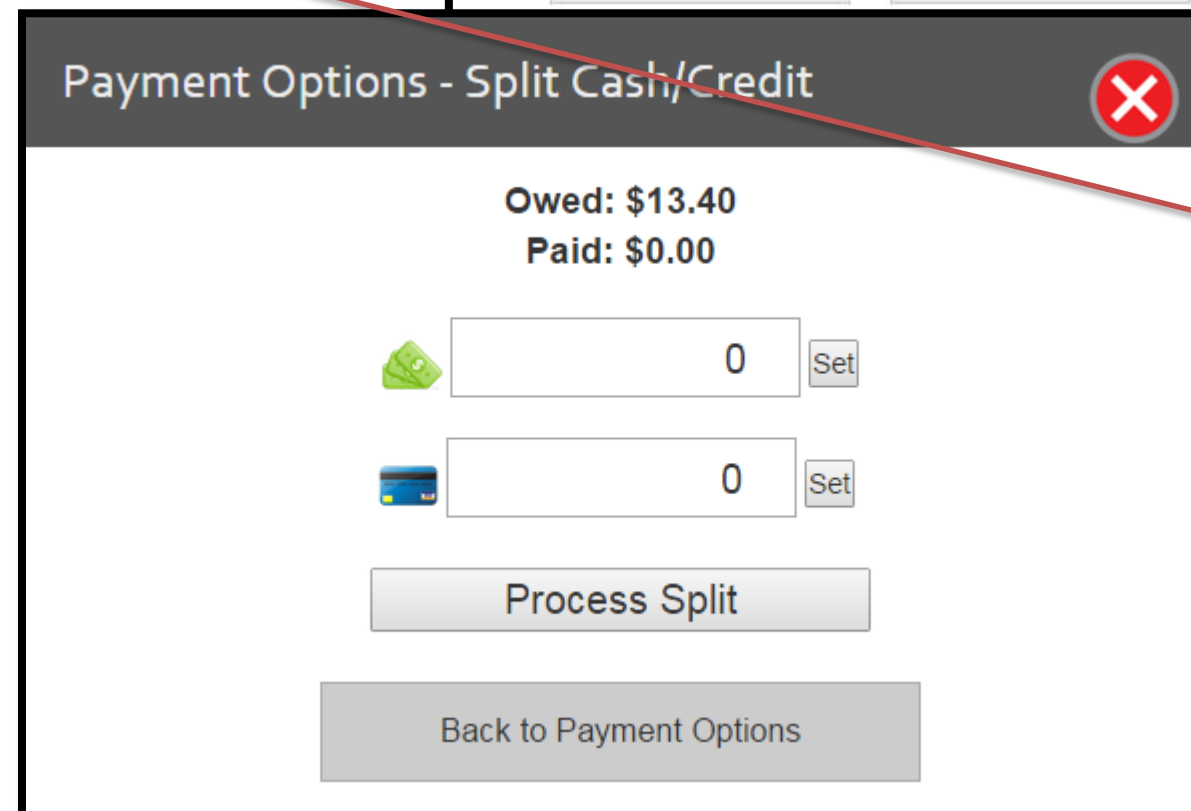
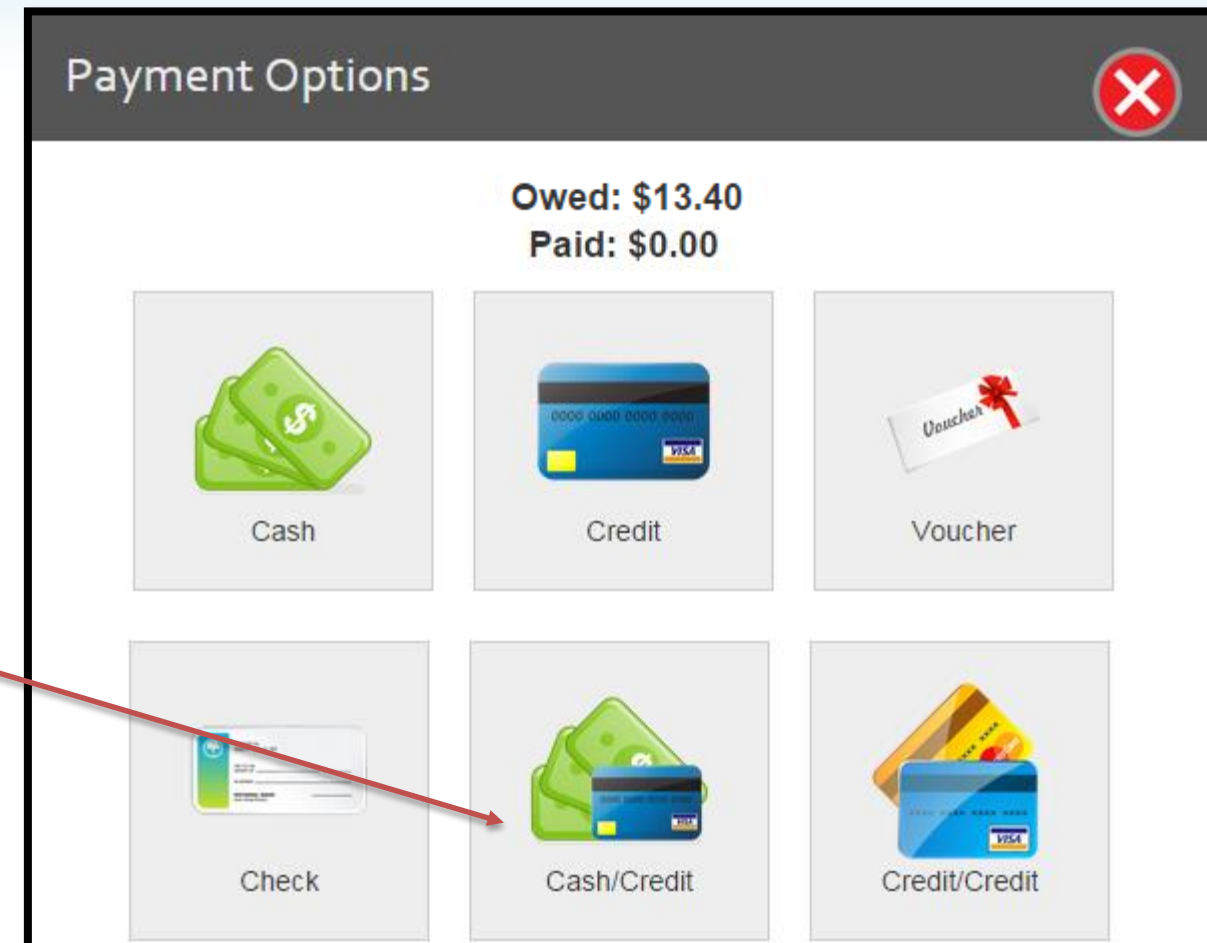
Owed: \$0.00
Paid: \$10.90

Order #: 78823

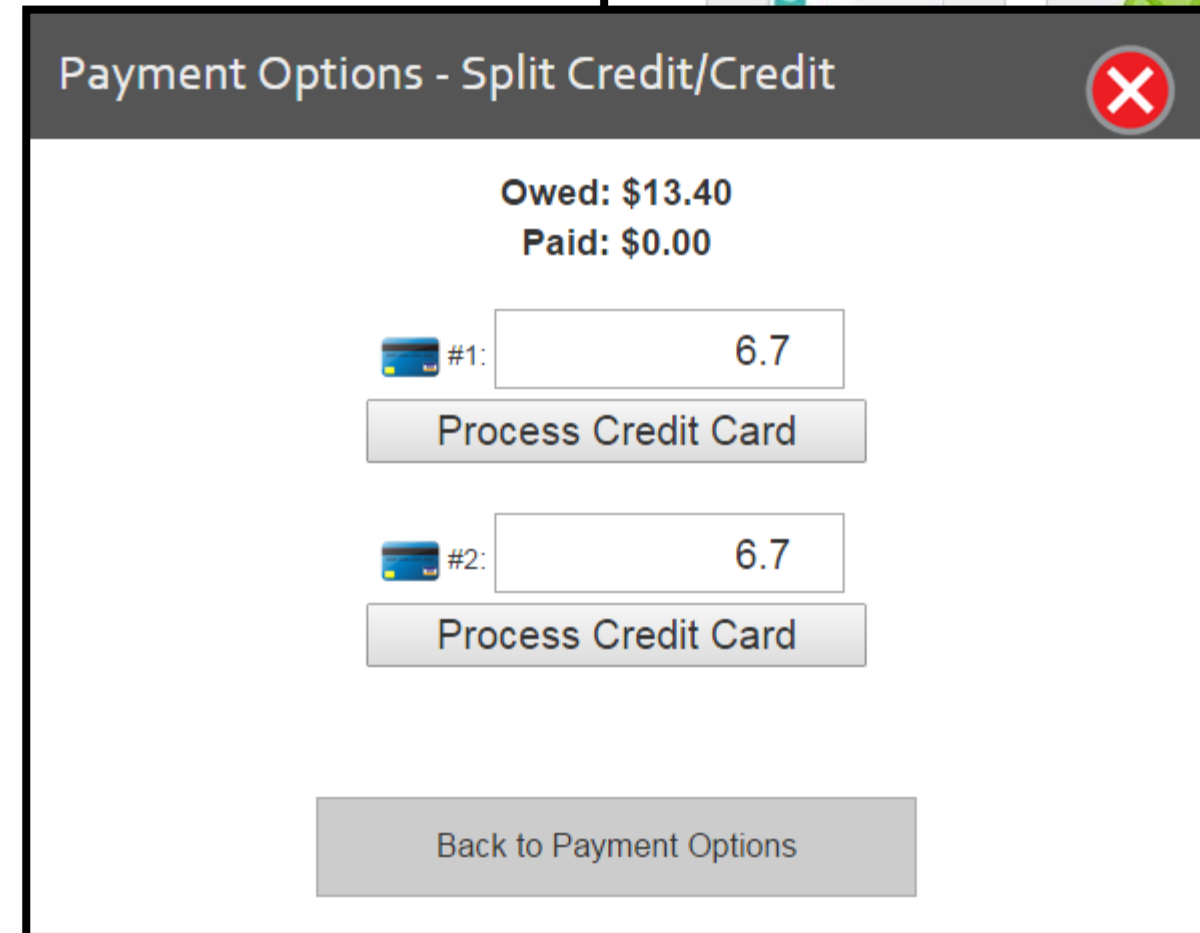
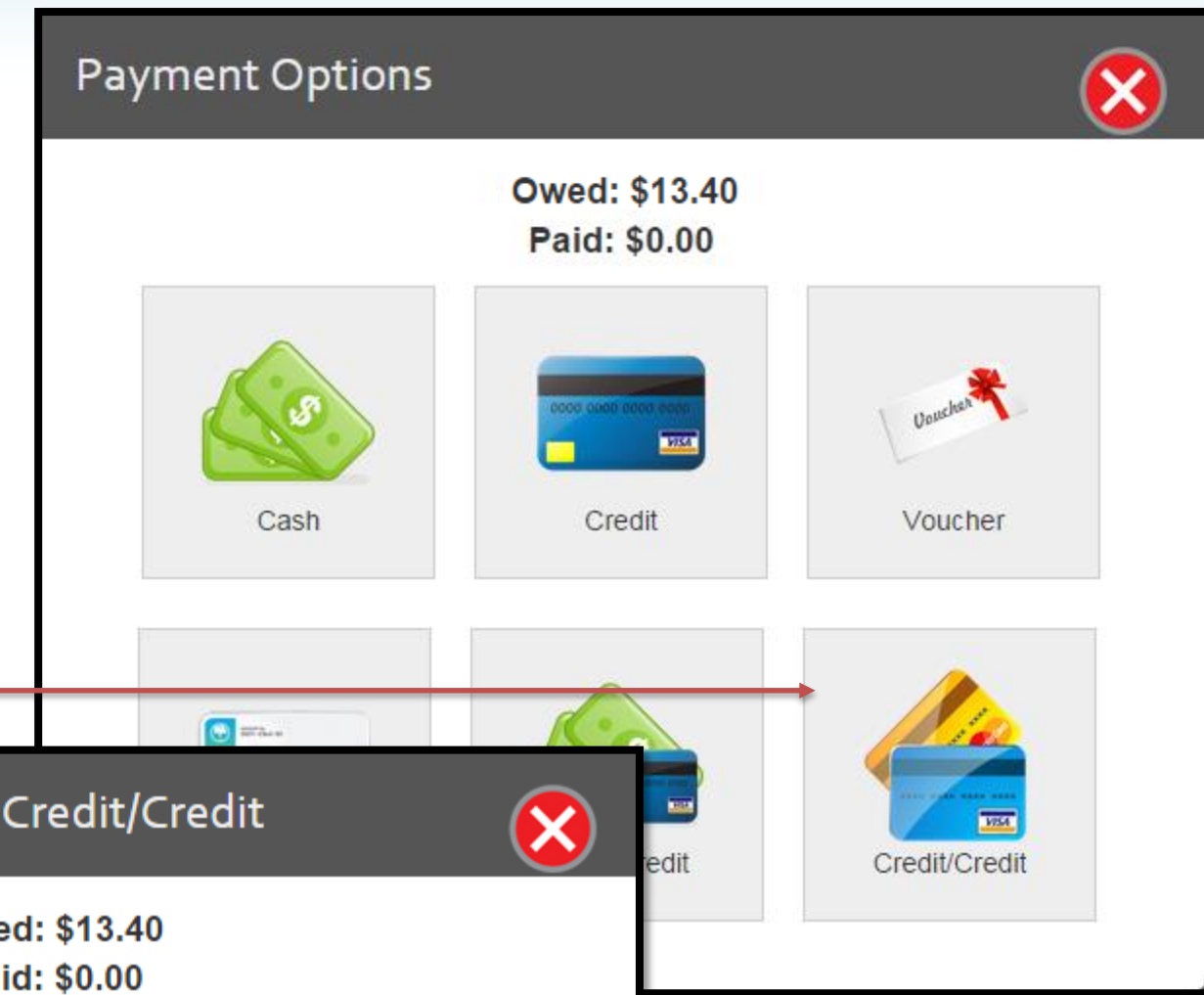
Printing Receipt

START NEW ORDER

1. You may take a split payment of part cash and part credit card. This allows you to use both payment types for the same order.
2. Click on the 'Cash/Credit' button and it will take you to the next screen.
3. You will be prompted to enter the cash amount first.
4. The balance will auto-fill in the credit card field.
5. Select 'Process Split' to complete the order.
6. Your drawer will open to accept the cash and a credit processing window will open for the credit payment.
7. A receipt will print on the Epson and a 'Start New Order' button will appear.



1. You may take a split payment of two different credit cards. This allows you to use two credit cards for the same order.
2. Click on the 'Credit/Credit' button and it will take you to the next screen.
3. The system will automatically split the payment evenly between the two cards.
4. You can change the amount for either card by selecting the first field and entering a new amount. The balance will auto-fill in the other credit card field.
5. Select 'Process Credit Card' for the first card and follow the credit payment prompts.
6. Select 'Process Credit Card' for the second card and follow the credit payment prompts.
7. A receipt will print on the Epson and a 'Start New Order' button will appear.



Refunds and Voids

- To issue a refund or void a sale click on the dollar bill icon.
 - If your user account is not enabled to do refunds you will need a manager to login where prompted.
 - Note: Cashier does not need to sign out.
 - Refund from the manager's end is for 1 refund ONLY. Subsequent refunds will require the manager to log in again.
 - Refunds can be done at any station.
 - Select the order from the most recent list or enter Order ID in the field provided.
 - Select 'Void with Refund' or 'Partial Refund'.
 - A window will appear (from the back end) where you will be able to issue a refund or void.
 - After the manager clicks 'Back To POS', the cashier selects 'Print Receipt' button to issue a receipt on the Epson printer and open the cash drawer.
 - Note: There are no refunds for online orders. The customer has to go through Customer Service.
- Convergence August 2016



Void/Refunds Close

VOID and Refund POS Orders
 [User permission profile: allow VOIDS (False), allow PARTIAL REFUNDS (False)]

Login: Password: Manager Login

Search for order by orderID or Name:
 OrderID: LastName: Search

Or alternatively select from recent orders on this station today:

OrderID	Time	Name	Amount	Payment Type	Order Status	Payment Action
79516	15:24		\$5.90	Cash	ordered	VOID with Refund PARTIAL REFUND

VOID and Refund POS Order:79516
 [User **CarrieTest** permission profile: allow VOIDS (False), allow PARTIAL REFUNDS (False)]
 [User **Convergence** permission profile: allow VOIDS (True), allow PARTIAL REFUNDS (True)]

OrderID	Time	Name	Amount	Payment Type	Order Status	Payment Action
79516	15:24		\$5.90	Cash	ordered	VOID with Refund PARTIAL REFUND

Enter New Payment Record Information

Payment Type: *

CREDIT CARD REFUNDS WILL ONLY BE ALLOWED IF WITHIN THE TIME SPECIFIED BELOW
 60 Days MAX from Settled Date

Refund Type: *

Refund Note:
Never put a CREDIT CARD, SOCIAL SECURITY, or DRIVER'S LICENSE number in this field. It is a security risk to do so, as these numbers are NOT to be stored in your database. Please help us safeguard your customers' privacy.

Amount:

'Purchase Order' entry is only allowed as the first payment type entered for this order from this management page AND if the initial payment type at time of order is 'PENDING/UNKNOWN' or 'PAY AT THE GATE'. Only one (1) purchase order number per order is allowed.

VOID and Refund POS Order:79516
 [User **CarrieTest** permission profile: allow VOIDS (False), allow PARTIAL REFUNDS (False)]

Login: Password: Manager Login

OrderID 79516 has a refund of type Cash of amount (\$2.00) applied to its payment history.

OrderID	Time	Name	Amount	Payment Type	Order Status	Payment Action
79516	15:24		\$5.90	Cash	ordered	

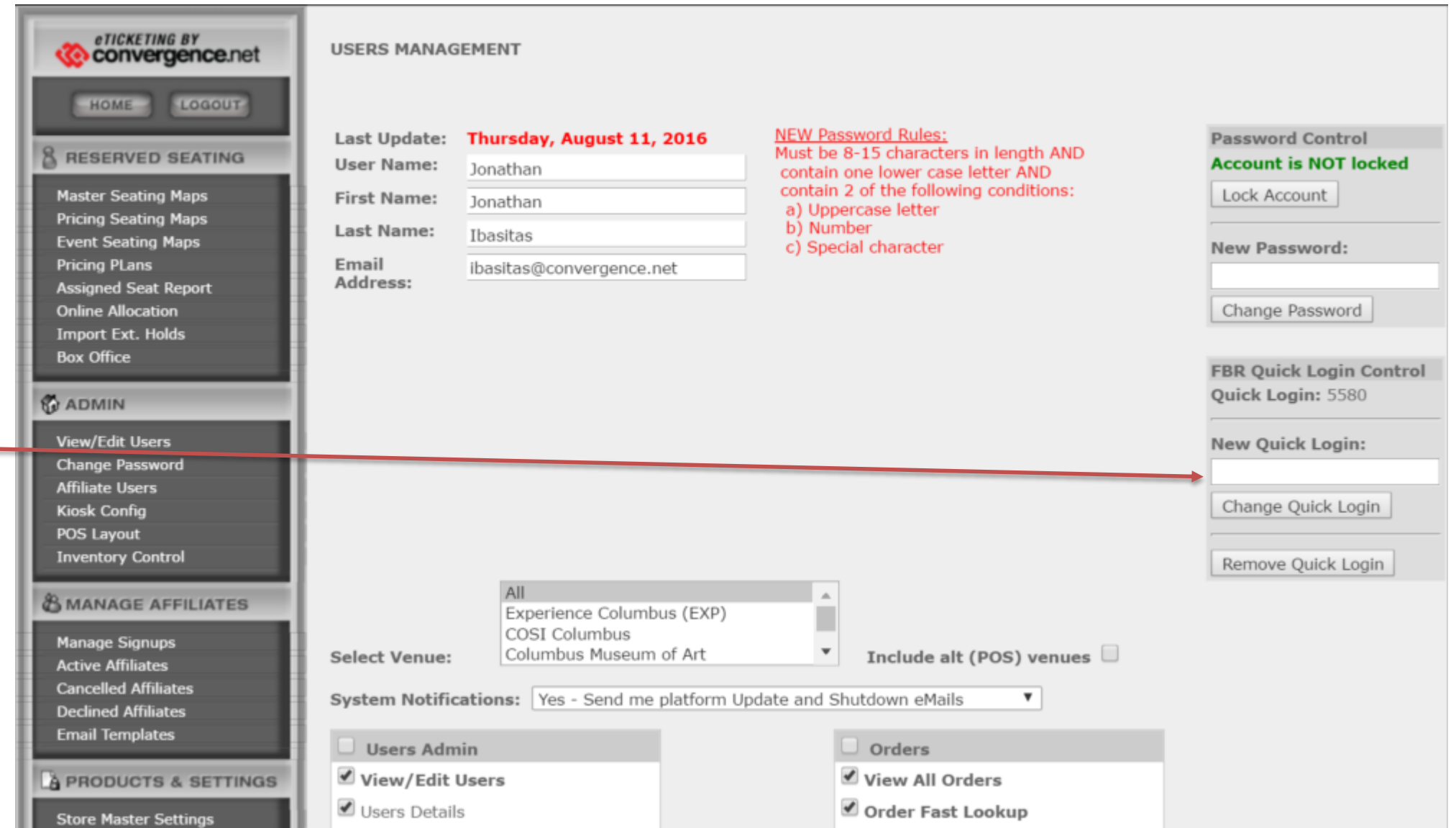
1. Each POS station may be configured to allow quick login.
2. Instead of entering the user's username and password, they can input their numeric code to log into the POS Station. This is useful for those that must constantly access the station as well as log out.
3. There is a configurable timer on the POS that will close down a session and the cashier must relogin with their quick login.



The screenshot shows the convergence.net quick login interface. At the top left is the convergence.net logo. Below it is a text input field labeled "quick login". Underneath the input field is a numeric keypad with buttons for digits 1 through 9, 0, and a "Clear" button. Below the keypad is a blue "Log In" button. At the bottom of the interface are two buttons: "Standard Login" and "Quick Login".

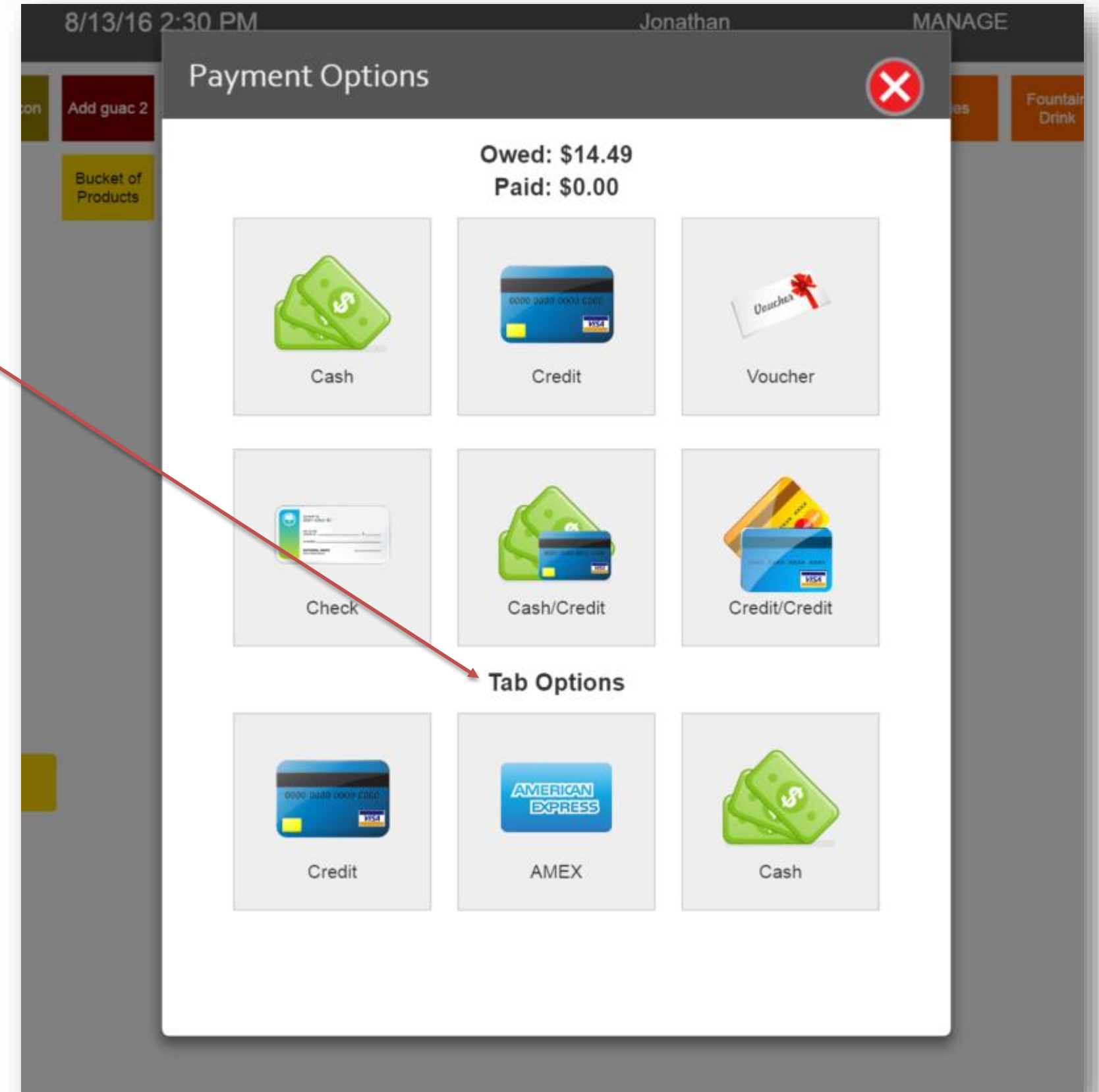
Assigning Quick Login Code

1. A management user with the 'View/Edit Users' feature enabled may assign quick login codes to other users.
2. Simply log into the management dashboard and go to 'View/Edit Users'.
3. Select the user that you want to assign a code to.
4. Enter a numeric value in the Quick Login field. Numeric value must contain 1-20 digits. Typically, 4 digits should be sufficient.



The screenshot displays the 'USERS MANAGEMENT' interface. On the left is a navigation menu with sections: RESERVED SEATING, ADMIN, MANAGE AFFILIATES, and PRODUCTS & SETTINGS. The 'ADMIN' section includes 'View/Edit Users', which is highlighted. The main content area shows user details for 'Jonathan Ibasitas' with fields for User Name, First Name, Last Name, and Email Address. A 'Last Update' timestamp is shown as 'Thursday, August 11, 2016'. To the right, 'NEW Password Rules' are listed: 'Must be 8-15 characters in length AND contain one lower case letter AND contain 2 of the following conditions: a) Uppercase letter, b) Number, c) Special character'. Below this is a 'Password Control' section with a 'Lock Account' button and a 'New Password' field with a 'Change Password' button. The 'FBR Quick Login Control' section shows 'Quick Login: 5580' and a 'New Quick Login' field with 'Change Quick Login' and 'Remove Quick Login' buttons. At the bottom, there are 'Select Venue' and 'System Notifications' dropdowns, and checkboxes for 'Users Admin' (with 'View/Edit Users' checked) and 'Orders' (with 'View All Orders' and 'Order Fast Lookup' checked).

1. You may start a tab for a customer by clicking on the Pay button and choosing one of the tab options
2. Choosing 'Credit' will prompt you to do a 'Zero Auth' through the EMV device.
 1. Take the customer's credit card.
 2. Follow instructions on EMV device
 3. You may keep the card and process later after customer closes tab.



1. TIP: You can add a note to the tab to remember which customer the tab belongs to. If no note is entered, the tab will be given a two-digit number (last two digits of the order number generated). This note will be printed at the bottom of the receipt so be careful what you write!



Three overlapping 'Customer Name' input forms. Each form has a title bar with 'Customer Name' and a 'Close' button. The first form has the text 'Man with baseball cap' in the input field. The second form has the text 'Seat #7' in the input field. The third form has the text 'Veronica' in the input field. Each form also has an 'Enter' button and the instruction 'Enter Customer Name (prints on receipt)'.

Looking up a Tab

1. You may have multiple tabs open at one time. To pull one up, click on the 'Manage' link in the top bar
2. Next, click on the 'My Tabs' button
3. Select the tab you want to go to by clicking on it's 'Load' button.



POWERED BY convergence.net Jonathan BACK TO POS EMV_FB1 SIGN OUT

Pending Orders Include All Users

OrderID	Order Total	Qty	Seat	User	
25680	\$14.49	7	80	Jonathan	Load
25677	\$17.50	8	77	Jonathan	Load
25672	\$57.45	20	72	Jonathan	Load
25671	\$4.50	2	70	Jonathan	Load
25670	\$8.50	3	70	Jonathan	Load
25661	\$33.61	4	61jon	Jonathan	Load

Actions

[SCAN](#)

Orders

[Previous Orders](#)

[My Tabs](#)

Tab Details

1. When you click on the 'Load' button you will be presented with the details of the tab.
2. You can see the payment record of the tab as well as the items currently ordered.
3. Click the 'Back To POS' link at the top to enter the products screen. From there, you can make a payment using the 'Pay' button.
4. You can print the 'check' or 'bill' for the customer by clicking on the printer icon next to order information

Order 25680


Qty	Product	Price	Subtotal	Actions
1	Fries	\$2.50	\$2.50	Actions ▾
2	Fountain Drink	\$2.00	\$4.00	Actions ▾
1	Cheeseburger	\$4.00	\$4.00	Actions ▾
1	No onions	\$0.00	\$0.00	Actions ▾
1	Hot Dog	\$1.99	\$1.99	Actions ▾
1	Add Bacon	\$2.00	\$2.00	Actions ▾

Order Totals

Subtotal	\$14.49
Tax	\$0.00
Tax2	\$0.00
Fees	\$0.00
Total	\$14.49
Due	\$14.49

Payments

Name	Type	Amount	Tip
N/A	Pending - Unknown	\$0.00	\$0.00

Order Information 

Venue: Crayola Experience POS

Total (Pending - Unknown): \$14.49

Order Status: pending

Payment Status: pending

Order Date: 08/13/2016 @ 2:34PM

Customer: *** POSFB Cash ***

Looking up Orders

1. You may want to look up completed tabs and orders. This will allow you to adjust and add any tips given by the customer
2. Next, click on the 'Previous Orders' button
3. Select the order you want to review by clicking on it's 'Select' button



OrderID	Order Total	Payment Method	
25669	\$8.49	Check	Select
25659	\$6.49	Cash	Select
25658	\$6.00	Cash	Select
25656	\$4.00	Cash	Select
25653	\$54.92	Cash	Select
25650	\$4.00	Cash	Select
25622	\$26.47	Cash	Select
25593	\$3.99	Credit Card	Select

Order Details

1. When you click on the 'Load' button you will be presented with the details of the tab.
2. You can see the payment record of the tab as well as the items currently ordered.
3. You can add a tip to the order by clicking on the 'Adjust Tip' button

POWERED BY convergence.net Jonathan BACK TO POS EMV_FB1 SIGN OUT

Order 25593

Qty	Product	Price	Subtotal	
1	Hot Dog	\$1.99	\$1.99	Actions ▾
1	Fountain Drink	\$2.00	\$2.00	Actions ▾

Order Totals

Subtotal	\$3.99
Tax	\$0.00
Tax2	\$0.00
Fees	\$0.00
Total	\$3.99
Due	\$0.00

Payments \$3.99

Name	Type	Amount	Tip
TestCard01	Visa - (x0010)	\$3.99	\$2.00

Actions

SCAN

Orders

Previous Orders

My Tabs

Order Information

Venue Crayola Experience POS

Total (Credit Card) xxxx0010 \$3.99

Order Status ordered

Payment Status complete

Order Date 08/12/2016 @ 1:45PM

Customer

Notes

[08/12/2016 @ 1:47PM by Jonathan Ibasitas]: Adjusted Tip Amount from \$0.00 to \$2.00 at EMV_FB1

Name	Type	Amount	Tip
N/A	Cash	\$14.49	\$0.00

Adjust Tip

Update Tip Amount - Payment 17413

Name	Card	Amount
N/A	Cash	Authorized: \$14.49

Tip:

Total Amount: \$16.49
Tip Amount: \$2.00

Accept Cancel

Transfer Tabs

- When you want to transfer a Tab to another user.
- You hit the “Transfer” Button
- You get to the Transfer A Tab Screen
- Here you hit the “Complete Transfer” button against the name that you want to transfer the Tab to and the Transfer is complete.

Order 12040

Qty	Product	Price	Subtotal
1	Lancilo Bow Tie	\$90.00	\$90.00
1	5 Dots Necklace	\$36.00	\$36.00

Order Totals

Subtotal	\$126.00
Tax	\$12.10
Tax2	\$0.00
Fees	\$0.00
Total	\$138.10

Actions: SCAN, Previous Orders, My Tabs

Transfer A Tab

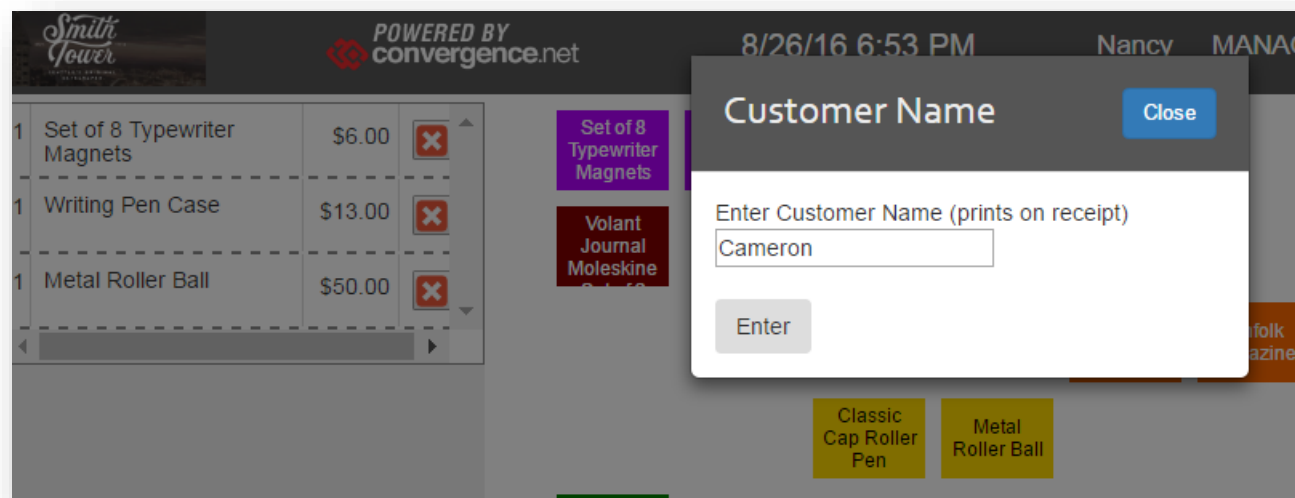
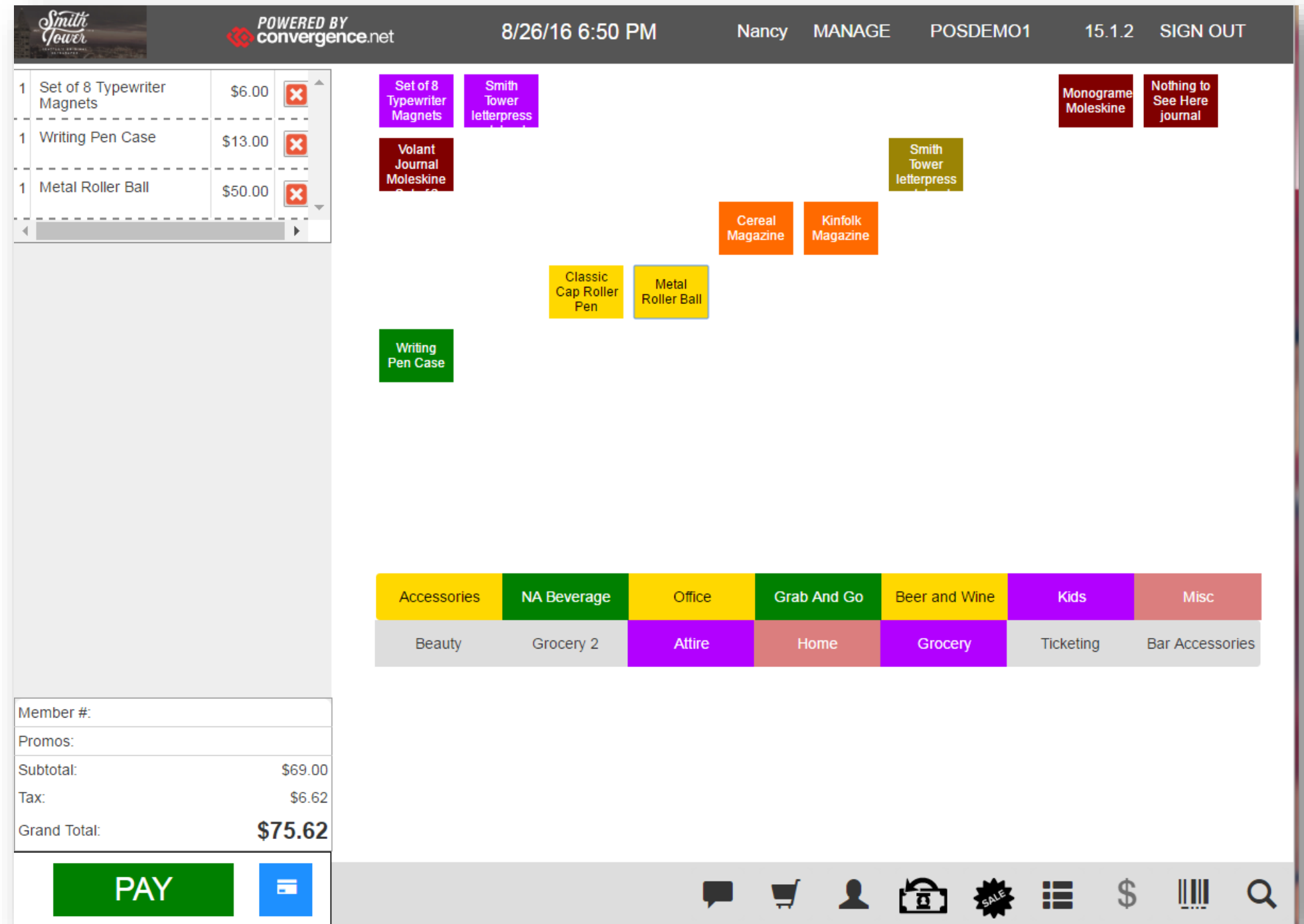
Jonathan	Complete Transfer
Marissa	Complete Transfer
dkeogh	Complete Transfer
acrowley	Complete Transfer
hshank	Complete Transfer

Cancel

The next part of this training we will go through a complete flow of transaction that a Cashier will come across at the POS.

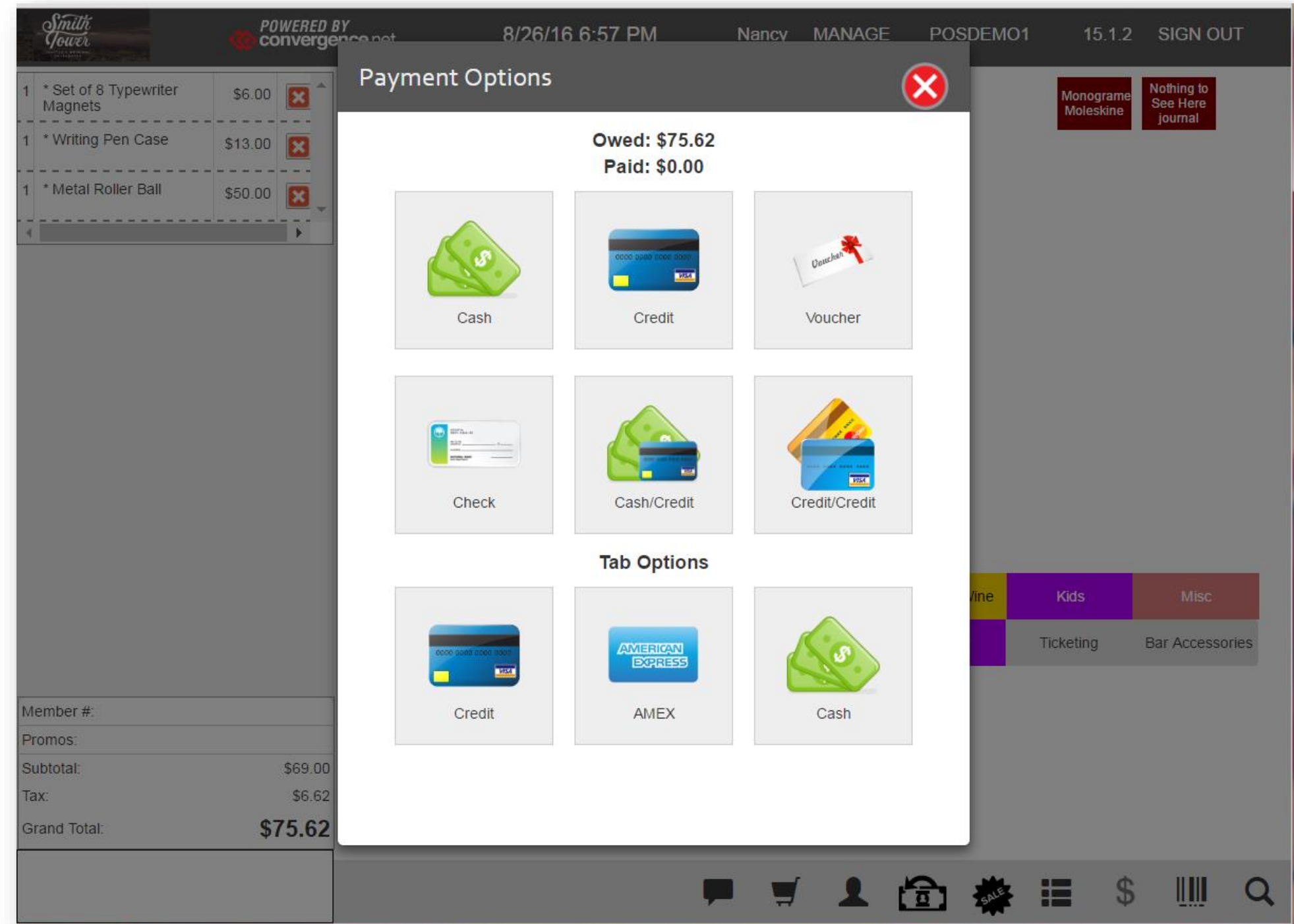
Product Page/Main Screen

- This is the Main Screen.
- You put the items that the Guest is looking for in the Cart.
- If the Guest wants to start a “Tab” you can put in the guest name or Table number in the “Customer Name” pop up
- You hit the “Pay” button at the Bottom of the screen.



Transaction Flow

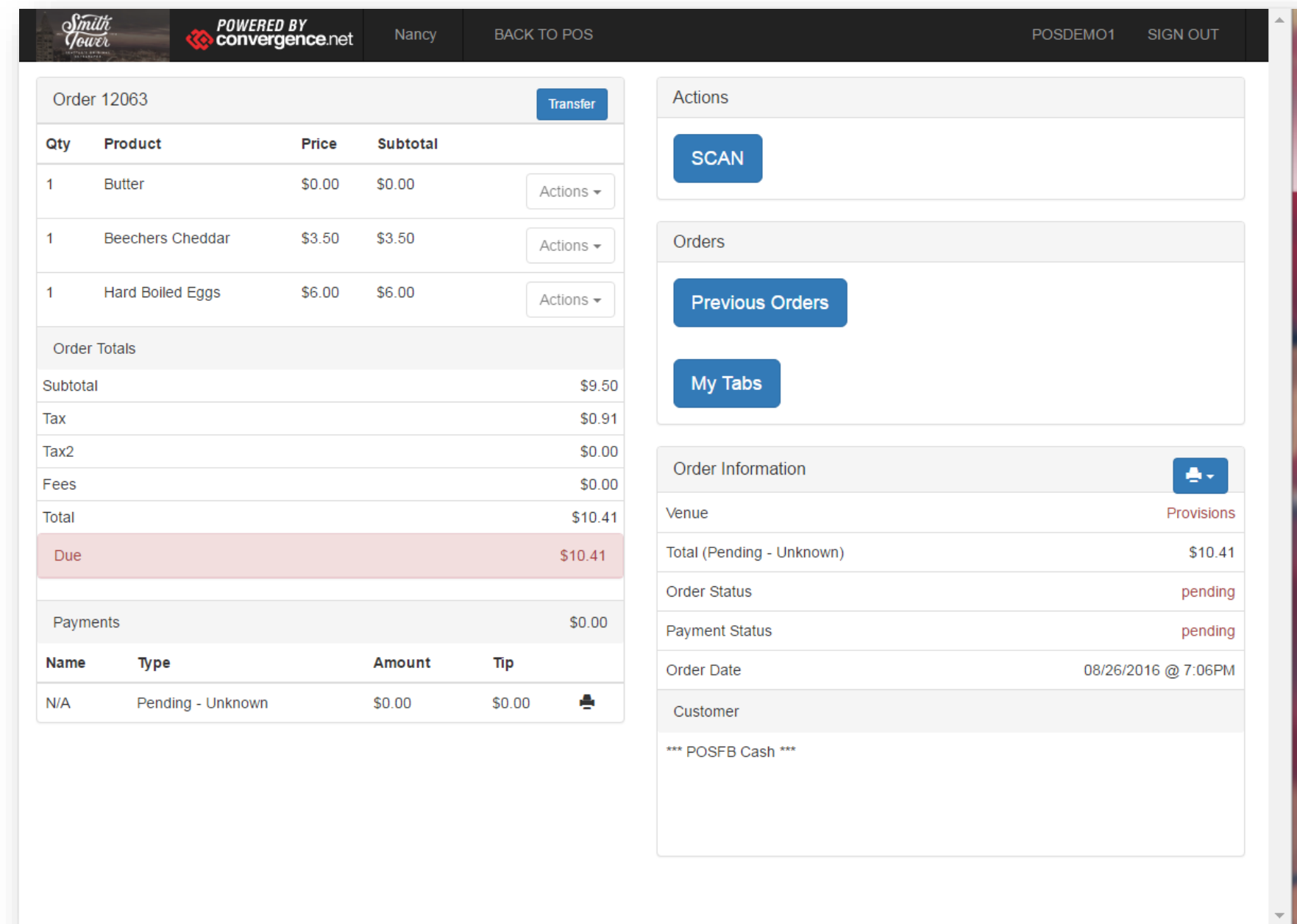
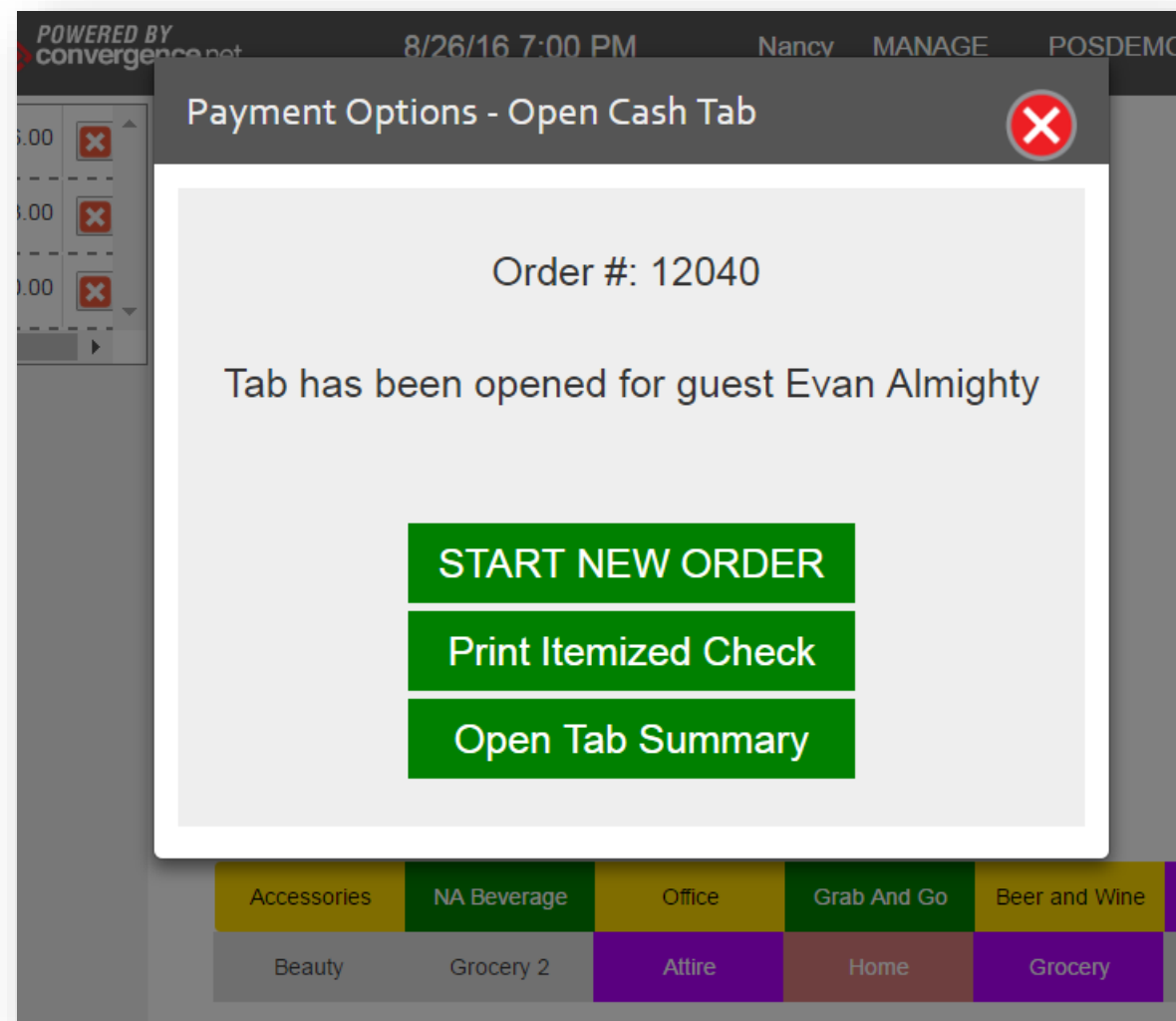
- You are taken to the payment screen with the “Tab Option”
- From here you may continue with completing the transaction by choosing one of the payment options, if your guest so wishes, or you could open a Tab for the guest by choosing one of the “Tab Options” that the guest decides that he wishes to use as payment type at the end of the day.
- Choosing one of the Tab Options will open a Tab for the Guest.



Transaction Flow

After a Tab is opened for the Guest your working with you may either –

- Start a New order- This will take you back to the Main Products Screen
- Print itemized check for your guest
- Or look at the Open Tab Summary for the Guest that you are working with by clicking on the Open Tab Summary option.



Transaction Flow

This is the details of your guests tabs for the day.

Once here, you have a lot of options.

- You can either go “Back to POS” and continue adding items to this tab.
- You can Scan a barcode by using the Scan button.
- You can look up Previous Orders for you
- Or you may hit the “My Tabs” button and it will take you to the list of the Tabs you are handling at present.
- You could also transfer the tab to another user from here if you wish to do so, if you hit the “Transfer” button.

Order 12063

Qty	Product	Price	Subtotal
1	Butter	\$0.00	\$0.00
1	Beechers Cheddar	\$3.50	\$3.50
1	Hard Boiled Eggs	\$6.00	\$6.00

Order Totals

Subtotal	\$9.50
Tax	\$0.91
Tax2	\$0.00
Fees	\$0.00
Total	\$10.41
Due	\$10.41

Payments

Payments		\$0.00	
Name	Type	Amount	Tip
N/A	Pending - Unknown	\$0.00	\$0.00

Actions

Orders

Order Information

Venue Provisions

Total (Pending - Unknown) \$10.41

Order Status pending

Payment Status pending

Order Date 08/26/2016 @ 7:06PM

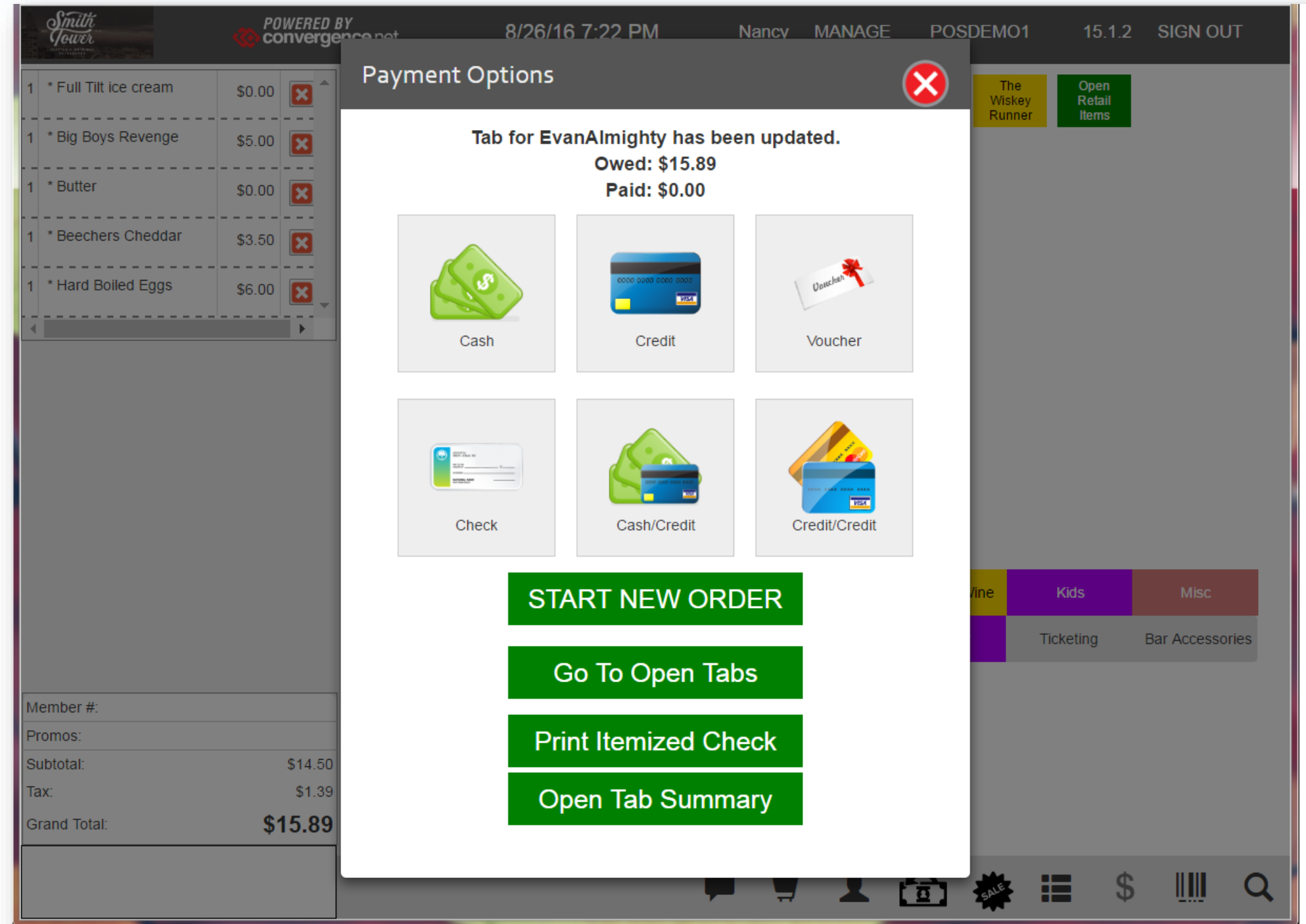
Customer

*** POSFB Cash ***

Transaction Flow

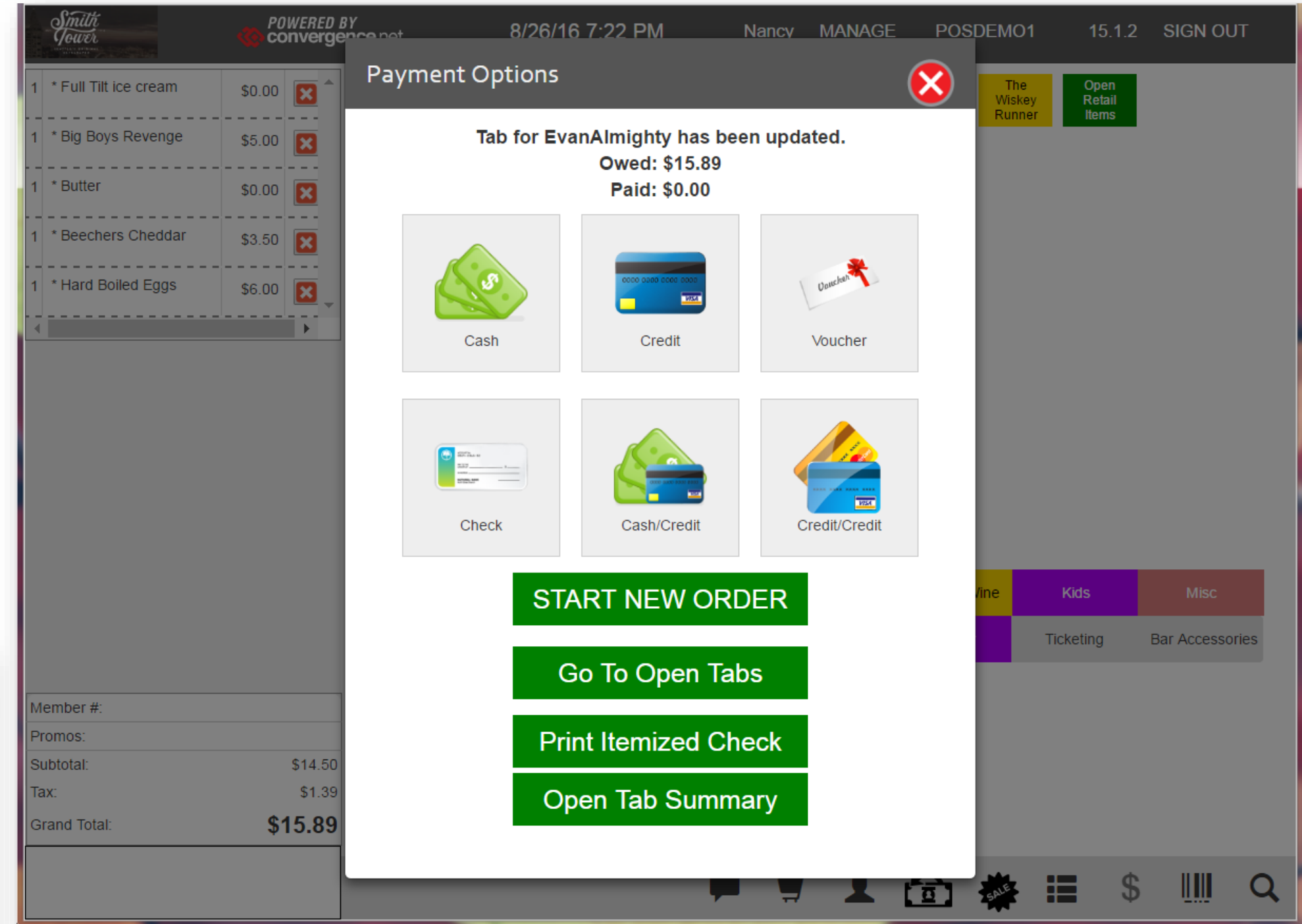
When you hit the “Back to POS” button you can either

- Add to the cart if the guest wishes to continue a Tab, in which case you may click the “Open Tab Summary” to view his summary, or you may “Start a new Order” to move to the next guest.
- If the Guest is ready to pay and wishes to close the Tab, you click on the “Print itemized check” button, this will print out an itemized receipt for the guest.
- You may hand this to the guest and when he is ready to make a payment you can complete the transaction.



Transaction Flow

- To complete the transaction you will have to click on the Pay button once again and choose the mode of payment that the guest has requested.
- Should the guest choose a split type of payment please use the "Printer Icon on the Tab of the Guest to print out the 2 receipts.

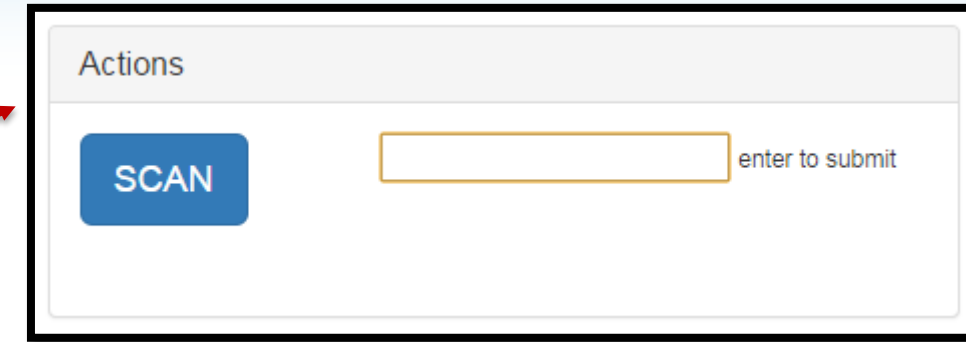


Total	\$5.21	Order Information	
Due	\$5.21	Venue	
Payments	\$0.00	Total (Pending - Unknown)	\$5.21
Name	Type	Amount	Tip
N/A	Pending - Unknown	\$0.00	\$0.00
		Order Status	pending
		Payment Status	pending
		Order Date	08/26/2016 @ 5:44PM
		Customer	

This would complete the transaction for you guest with all the receipts printed.

Manage Feature

- To upgrade a General Admission (GA), redeem a promo, return an item or activate an Annual Pass (AP), select the 'Manage' button at the top of the screen.
- A small action window opens - click 'Scan' and either scan a BOCA ticket, receipt, or UPC, or manually enter an order number and then hit 'Enter'.
- All of the items from that order will appear in the window. Identify the product from the list that you want to modify, and click the 'Actions' button.
- You will see four options:
 - 'Upgrade' allows you to apply the cost of a GA ticket to an AP.
 - 'Redeem' allows you to redeem a promotional item.
 - 'Return' allows you to refund an item.
 - 'Activate' allows you take a photo and print a member card.



The screenshot shows the POS interface for 'Crayola Experience Minneapolis MN'. The main order summary for Order 86054 includes:

Qty	Product	Price	Subtotal
1	General Admission	\$24.99	\$24.99
1	Senior Admission	\$20.99	\$20.99
1	Military Admission	\$20.99	\$20.99
Order Totals			
Subtotal			\$66.97
Tax			
Tax2			
Fees			
Total			
Payments			
Due			

The 'Actions' window is open for the 'Senior Admission' item, showing the following options:

- Upgrade (green button with up arrow)
- Redeem (blue button with checkmark)
- Return (orange button with circular arrow)
- Activate (blue button with camera icon)

Manage Feature - Upgrade

1. To upgrade a General Admission (GA) ticket to an Annual Pass (AP), select 'Upgrade' from the Actions menu.
2. A small window opens where you can select the type of AP (manager login required for Comp AP).
3. Another small window will open where you will enter the name and DOB of the AP holder and click 'Enter.'
4. You will see a message that says "Upgrade Complete" at which time you may click 'Return to POS' at the top of the screen.
5. In the cart you will see the AP, minus the GA amount already paid, and a new grand total.
6. You may now process the payment like any other transaction.

Select an Upgrade

Annual Pass (\$34.99)	Upgrade Price: \$10.00
Comp Annual Pass (\$0.00)	Upgrade Price: -\$24.99

Upgrade to Annual Pass

Credit: \$24.99
Amount Due: \$10.00

Upgrade **Cancel**

Annual Pass Close

First Name Last Name

Date of Birth

Enter

Order 86054

Upgrade Complete. Return to POS to Complete Transaction.

Qty	Product	Price	Subtotal	
1	General Admission	\$24.99	\$24.99	Actions ▾
1	Senior Admission	\$20.99	\$20.99	Actions ▾
1	Military Admission	\$20.99	\$20.99	Actions ▾

POWERED BY convergence.net

1	Annual Pass	\$34.99	X
-1	General Admission	-\$24.99	X

Member #:

Promos:

Subtotal:	\$10.00
Discount:	\$0.00
Tax:	\$0.73
Tax ² :	\$0.30
Grand Total:	\$11.03

PAY

Manage Feature - Upgrade

7. After the payment is complete, the window prompts you to start a new order or activate a card.
8. Select 'Activate Card' to print a member card.
9. A small window opens where you can enter a keyword to find the member you would like to activate.
10. The member you select will appear in a highlighted row.
11. Scroll to the right and down to 'Start Webcam' and take the member photo.
12. If the photo is acceptable, click 'Choose File' and then 'Print Card'.
13. A member card will print on the DataCard printer.
14. Note: A memo will appear in the account once a GA has been upgraded to an AP.

Payment Options - Cash

Owed: \$0.00
Paid: \$11.03

Order #: 86615

Printing Receipt

START NEW ORDER

Activate Card

Print/Activate Card

Cardholder Fast Lookup

Keyword: test

purchaser last name, household last name, last 4 digits of phone number, street address, order ID, or member no

Show expired cardholders

Search

ID	PassNo	Name	Purchase	OrderID	Activate/Print
3294	10206	test, carrie	4/26/2016		
3275	10189	test, cameron	4/24/2016		
3276	10190	test, cameron	4/24/2016		
3277	10191	test, cameron	4/24/2016		
3278	10192	test, cameron	4/24/2016		
3279	10193	test, cameron	4/24/2016		
3281	10195	test, cameron	4/24/2016		
3282	10195	test, caneron1	4/24/2016		
3283	10196	test, cameron	4/24/2016		
3284	10196	test, cameron	4/24/2016		
3285	10197	test, cameron	4/24/2016		
3287	10199	test, cameron	4/24/2016		
3288	10200	test, cameron	4/24/2016		

Print/Activate Card

Member Processing

Passes in OrderID 86615

ID	PassNo	Name	Level/Type	Purchase
3294	10206	test, carrie	Annual Pass	4/26/2016

Update Current Cardholder Info

First Name: carrie, Last Name: test

Address: _____, Suite/Apart: _____

City: _____ or Select local city

ST: _____, Zipcode: _____, Amount: 34.99

Print/Activate Card

Take New Photo

Start Webcam

Upload Existing Photo

Choose File No file chosen Upload

carrie test
Member Since: Tuesday, April 26, 2016

300 South Avenue
Bloomington, MN 55425

10206

Print Card

Manage Feature - Redeem

1. To redeem a promotional item, select 'Redeem' from the "Actions" dropdown next to the product.
2. A small window opens where you can adjust the quantity. Then click 'Redeem'.
3. A note shows that the redemption is complete.
4. You may redeem other products from that order, or return to POS to complete the transaction.

Select Redemption Amount

Qty Senior Admission (1 Available)

POWERED BY convergence.net

4/26/16 5:12 PM carrietest RETURN TO POS MSR SIGN OUT

Order 86054

Redemption complete. Qty: 1 redeemed

Qty	Product	Price	Subtotal	
1	General Admission	\$24.99	\$24.99	Actions ▾
1	Senior Admission	\$20.99	\$20.99	Actions ▾
1	Military Admission	\$20.99	\$20.99	Actions ▾

Order Totals

Subtotal	\$66.97
Tax	\$9.74
Tax2	\$0.00
Fees	\$0.00
Total	\$73.85
Payments	\$73.85
Due	\$0.00

Actions

SCAN

enter to submit

Order Information

Venue	Crayola Experience, Minneapolis, MN POS
Total	\$73.85
Order Status	ordered
Payment Status	complete
Order Date	04/24/2016 @ 2:45PM

Customer

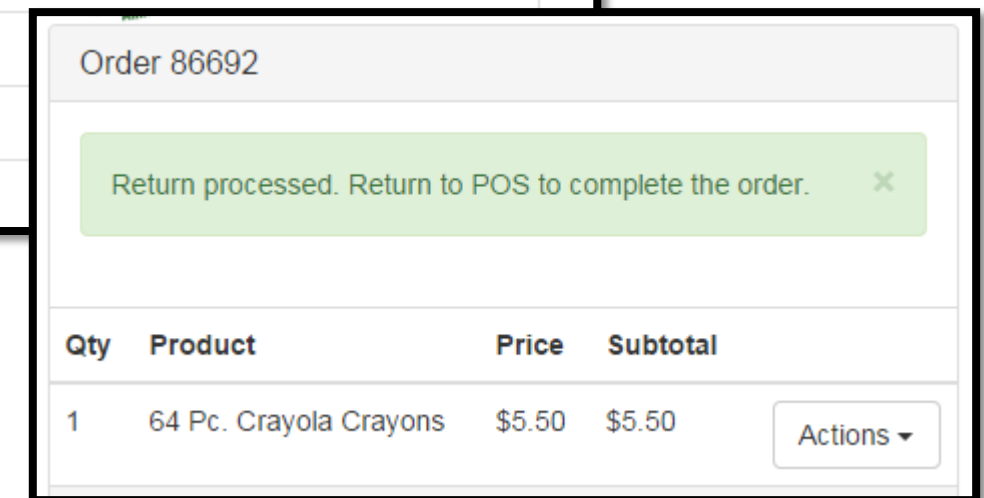
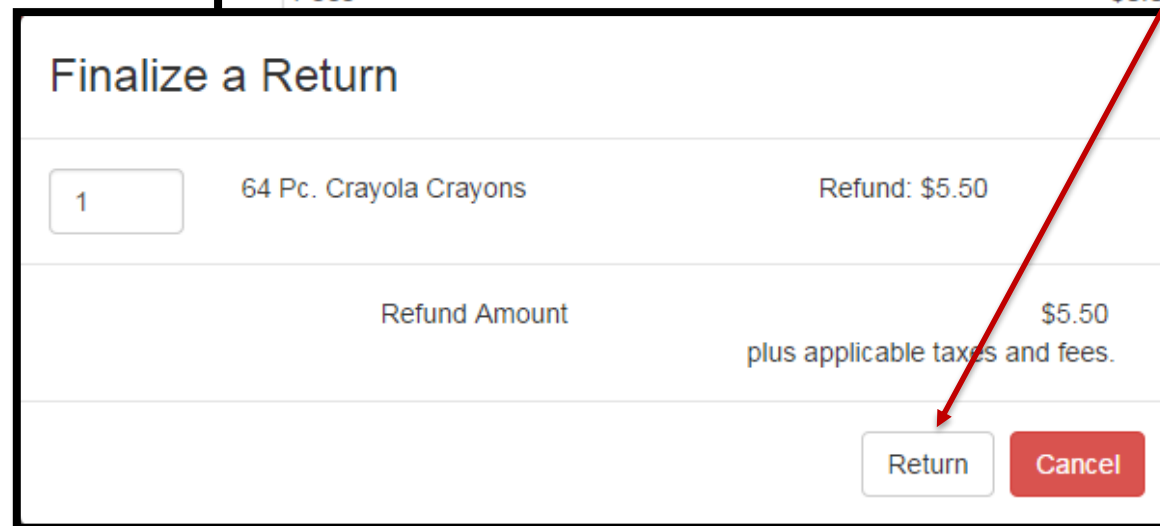
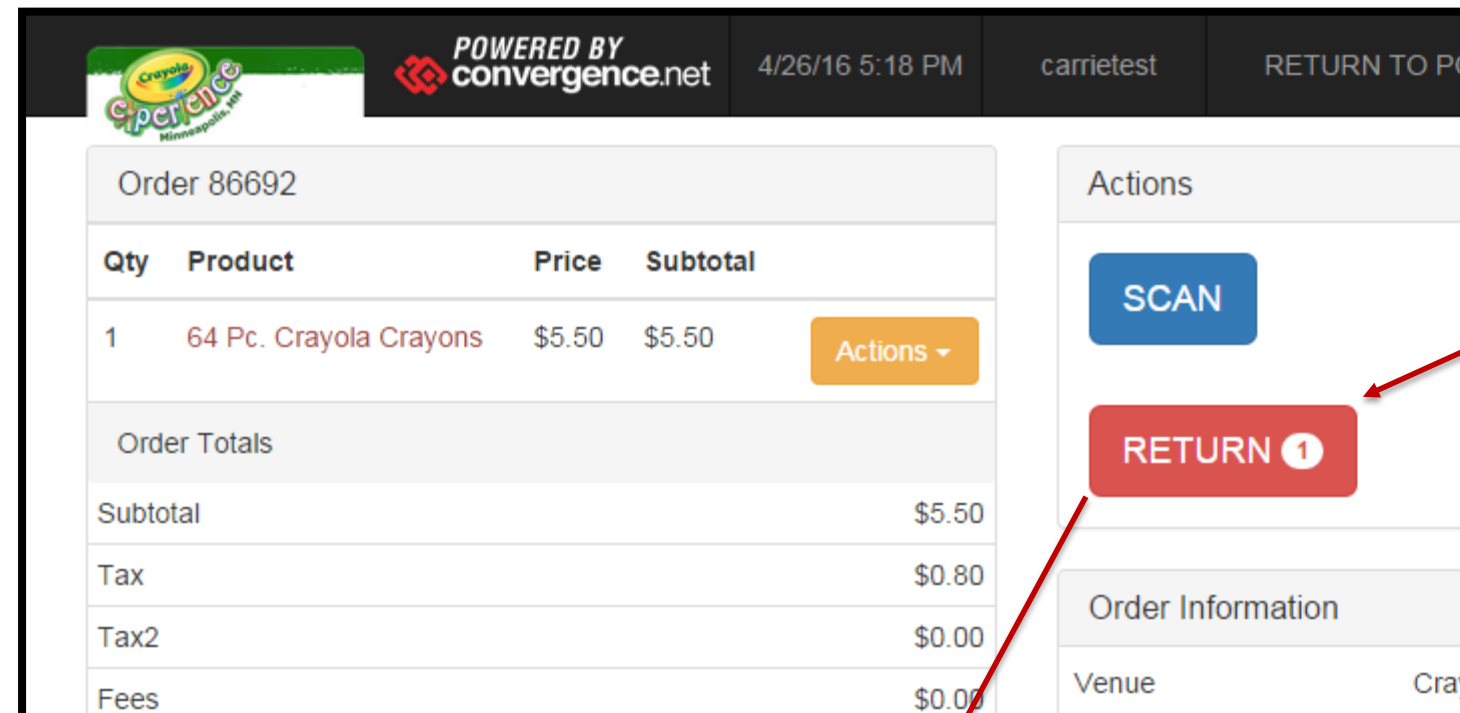
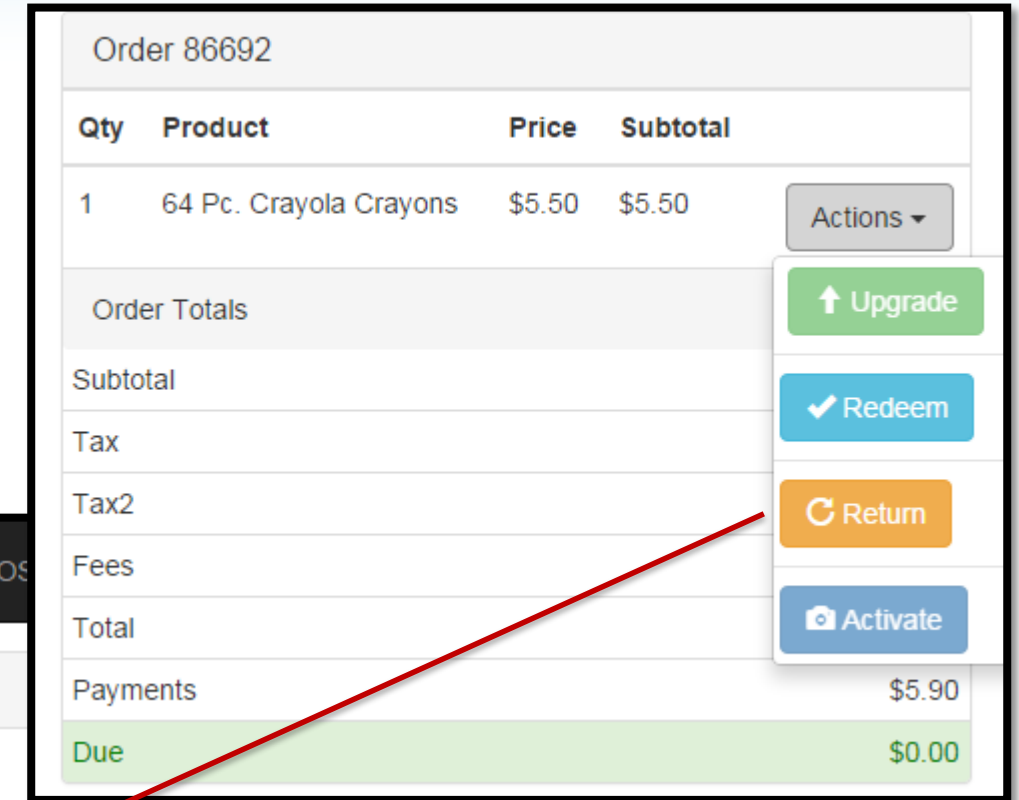
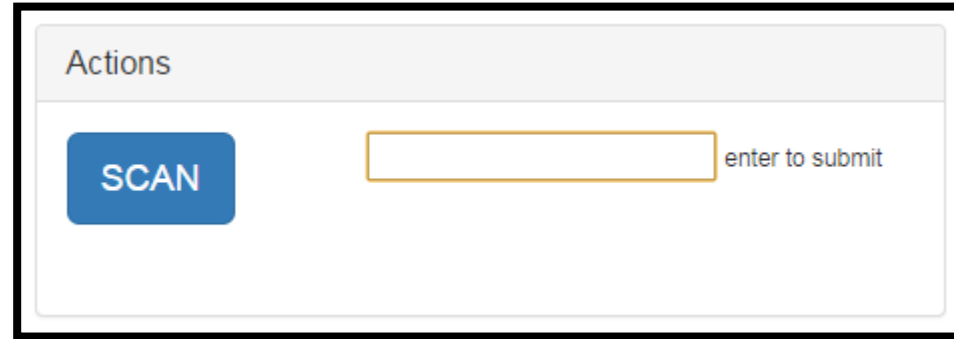
12345

Notes

[04/26/2016 @ 10:08AM by Carrie POS Test]: <Audit Note> Product upgraded in order 86615 from product 1056

Manage Feature - Return

1. To return an item, either scan the receipt or the UPC in the “Scan” box, then “Enter”.
2. Select ‘Return’ from the “Actions” dropdown next to the product.
3. Click the “Return” button, and a small window opens where you can adjust the quantity, if necessary. Then click ‘Return’.
4. You will see a message that says “Return processed” and you click ‘Return to POS’ to complete the transaction.



Manage Feature - Return

- The return shows in the cart. You may add other items to the cart, if desired.
- If processing only a return, go to 'Pay' and another window opens indicating a cash return.
- Click 'Cash' and in the next window 'Return in Full'.
- If processing a return and a purchase, select 'Pay' and the return will be subtracted from the total due. All payment options will be available.

Member #:	0
Promos:	
Subtotal:	-\$5.50
Discount:	\$0.00
Tax:	-\$0.40
Grand Total:	-\$5.90

Manage Feature - Activate

1. When a member has already purchased an AP but hasn't activated it yet, scan the receipt or enter the order number into the "Scan" field.
2. Select 'Activate' from the "Actions" dropdown.
3. The order populates in the "Print/Activate Card" window.
4. Scroll to the right and down and click 'Start Webcam' to take a picture. If the picture is clean, click 'Choose File' and then 'Print Card'.

POWERED BY convergence.net 4/26/16 6:12 PM carrietest RETURN TO POS MSR SIGN OUT

Order 86701

Qty	Product	Price	Subtotal
1	Annual Pass	\$34.99	\$34.99

Order Totals

Subtotal	\$34.99
Tax	\$5.10
Tax2	\$0.00
Fees	\$0.00
Total	\$38.59
Payments	\$38.59

Actions

SCAN enter to submit

Order Information

Venue	Crayola Experience, Minneapolis, MN POS
Total	\$38.59
Order Status	ordered
Payment Status	complete

Print/Activate Card Close

Member Processing

Passes in OrderID 86701

ID	PassNo	Name	Level/Type	Purchase
3298	10210	test, car	Annual Pass	4/26/2016

Update Current Cardholder Info

First Name	Last Name
car	test
Address	Suite/Apart
street	

Print/Activate Card Close

Take New Photo

Start Webcam

Upload Existing Photo

Choose File No file chosen Upload

Crayola Experience Discover the Magic of Color

carrie test
 Member Since: Tuesday, April 26, 2016

300 South Avenue
 Bloomington, MN 55425

10206

Print Card

1. When you are done with your shift click on 'Sign Out' at the top right of your screen.
2. This will take you to the page where you will enter the quantities for each denomination. **You will be doing a 'Blind Close' (you will not see the amount you SHOULD have at the end of day).**
3. Once you have entered all the money you will hit 'Close Shift' and confirm the amount you entered.
4. Clicking 'OK' will print out your complete close shift receipt. You may then click the 'Sign Out' button.
5. **Suspend Shift** enables you to take a break and suspend your shift for a period of time. You will be able to log back in and resume your shift like normal. You can resume your shift on any other POS station (when this is done you typically take your till with you to the new station).
6. Note: Logging back in will prompt you to "Resume" - it is good practice to enter a reason in the 'Notes' section (break, lunch, etc.).

SIGN OUT

Close Shift POS

Note	Qty	Total	Note	Qty	Total
\$100	<input type="text" value="0"/>	\$0.00	50 cent	<input type="text" value="0"/>	\$0.00
\$50	<input type="text" value="0"/>	\$0.00	25 cent	<input type="text" value="0"/>	\$0.00
\$20	<input type="text" value="0"/>	\$0.00	10 cent	<input type="text" value="0"/>	\$0.00
\$10	<input type="text" value="0"/>	\$0.00	5 cent	<input type="text" value="0"/>	\$0.00
\$5	<input type="text" value="0"/>	\$0.00	1 cent	<input type="text" value="0"/>	\$0.00
\$2	<input type="text" value="0"/>	\$0.00	Checks	<input type="text" value="0"/>	\$0.00
\$1	<input type="text" value="0"/>	\$0.00			

Grand Total:

Note: optional

Suspend Close Shift Cancel

You entered \$90.00 as your counted cash out amount.
 If this is correct press "OK", otherwise press "Cancel"

OK Cancel

Start Shift

Activity

User	Action	Note	Amount
Printing Receipt			

Your shift has closed. Please sign out by clicking the button below.

Sign Out