POS USER GUIDE

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Support is provided through the RMH support system: http://support.rrdisti.com/account/login.

RMH Product Website: www.rmhpos.com

Contents

RMH Point-of-Sale

About Retail Management Hero (RMH)

Retail Management Hero is a privately-owned software development company focused on continually innovating retail in ways that empower retailers with intuitive point-of-sale (POS) solutions that simplify and streamline store management. The company's flagship product, Retail Management Hero (RMH) point-of-sale, was launched early 2016 to give small-to-medium retailers a seamless next-generation replacement solution for the end-of-life Microsoft Dynamics Retail Management System (RMS). For more information about RMH, visit www.rmhpos.com.

Getting started

Utilize (and customize) RMH's graphical user interface and handle all the point-of-sale functions at store checkout terminals. Cashiers can perform sales transactions, look up inventory, accept different tenders, and more. The system supports multiple POS devices and payment processors.

Online Training Videos: https://vimeo.com/album/3520470/video/163856318 (shows the user interface and navigation overview for both the RMH Manager and RMH POS applications)

Additional Documentation and Resources: The RMH team is continually publishing additional documentation on the RMH website. To view the latest training docs as well as marketing resources, visit: http://rmhpos.com/resources/

Configuring the Point of Sale

The POS uses the same Database and Register configuration as used by the RMH Store Manager. To make any required changes for the POS, use the RMH Store Administrator.

From either the Login screen or the main user interface, you can customize the POS screen by setting the font size, screen size resolution and also interface skin color (light / dark) by using the options on the top menu bar.
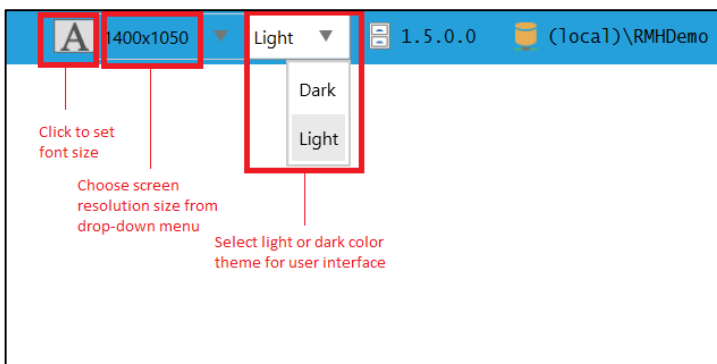
NOTE: For documentation purposes, the majority of subsequent screenshots in this document will utilize the light color scheme.

Starting the POS for the first time

1. Click on the **RMH POS** icon on your desktop, which will launch the POS. *See following figure:*
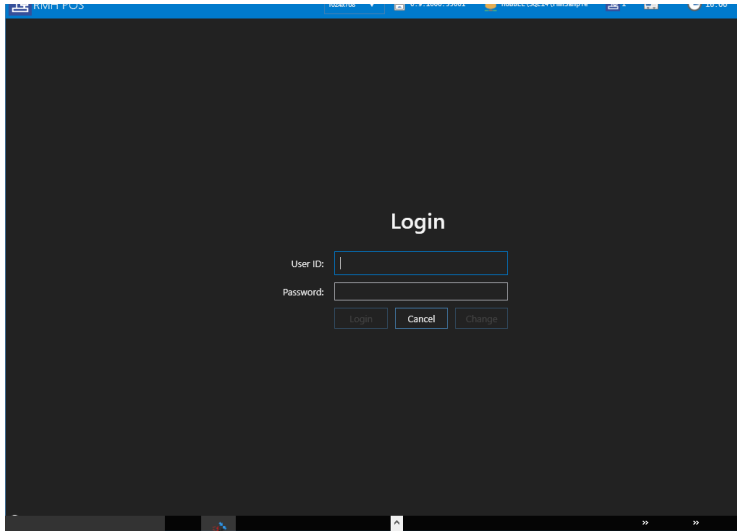
NOTE: Depending on whether you have selected the dark or light color scheme, the POS login screen may appear as follows:
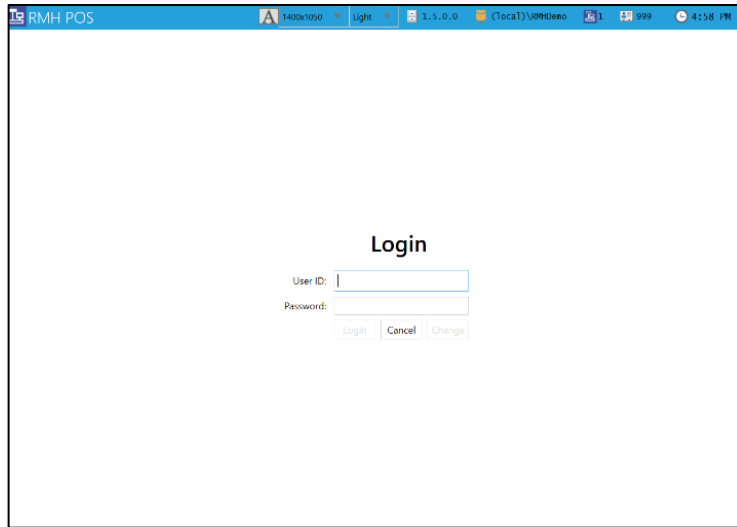
2. Enter the Cashier's **User ID** and **Password**, and then click **Login**. The main transaction screen displays.

> **NOTE:** Depending on your customized settings and your software version, your screen may appear slightly different than the above sample figure.

Setting the password for an existing cashier

The first time RMH POS is used with a Cashier who has not previously used the system, it will prompt for a new password. *See following figure*:

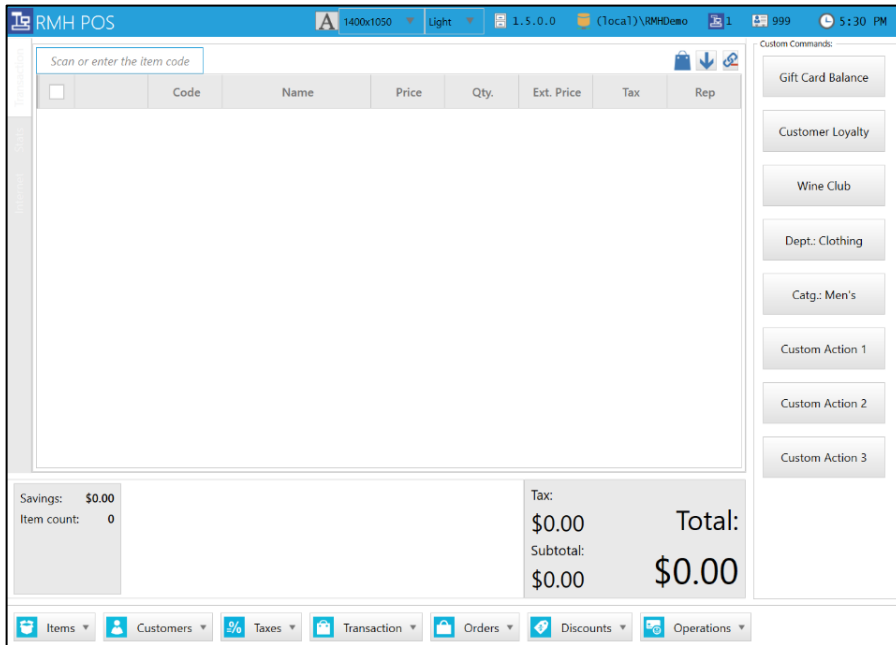The password must include at least one number. For example, "password1." After confirming and saving the password, the Cashier can then log in using the new credentials.

NOTE: Cashier passwords and associated system privileges are set up in the back end using the RMH Store Manager program. Depending on your assigned system security role, you may or may not be able to access the RMH Store Manager.

Navigating the POS user interface

After successfully logging onto RMH POS, the main user interface displays.
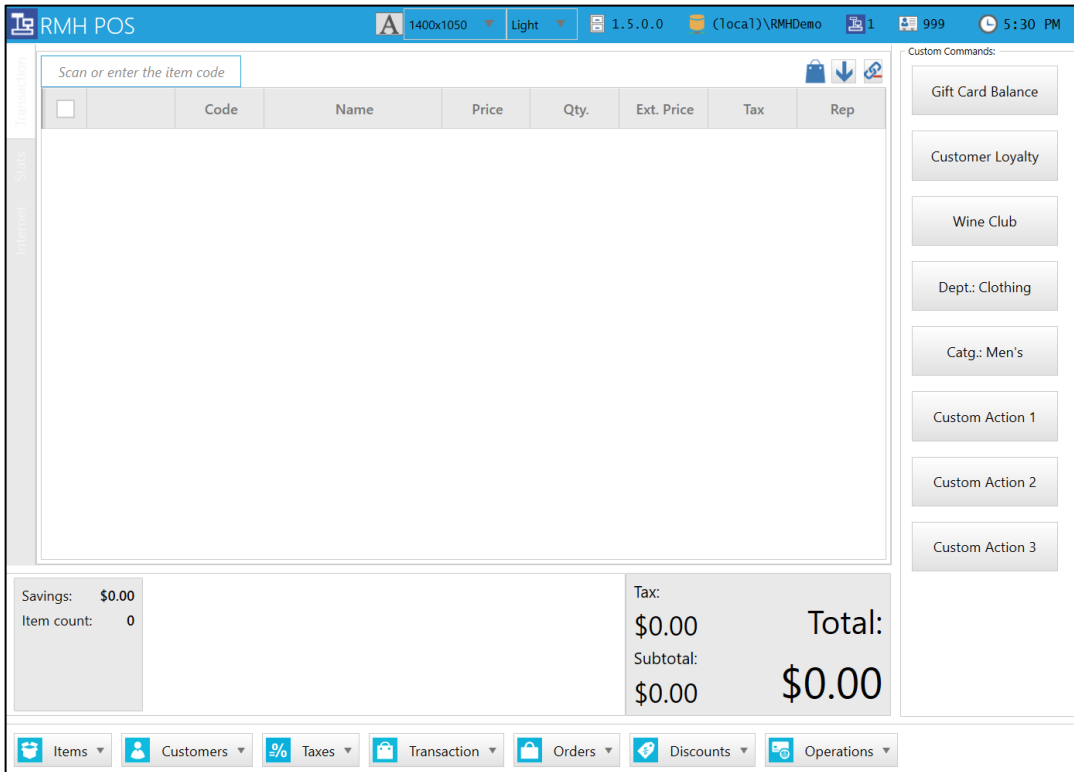
Menu bar

The top menu bar provides customizable tools and information about your RMH system. For example, change the font size, screen resolution and light/dark color scheme. The RMH application version also displays (i.e., 1.5.0.0) and the name of the database you're connected to (local database RMH Demo).

Next, you'll see the register that connects to your system (Register 1) and also the name of the Cashier ('999'). The far right displays the system time.
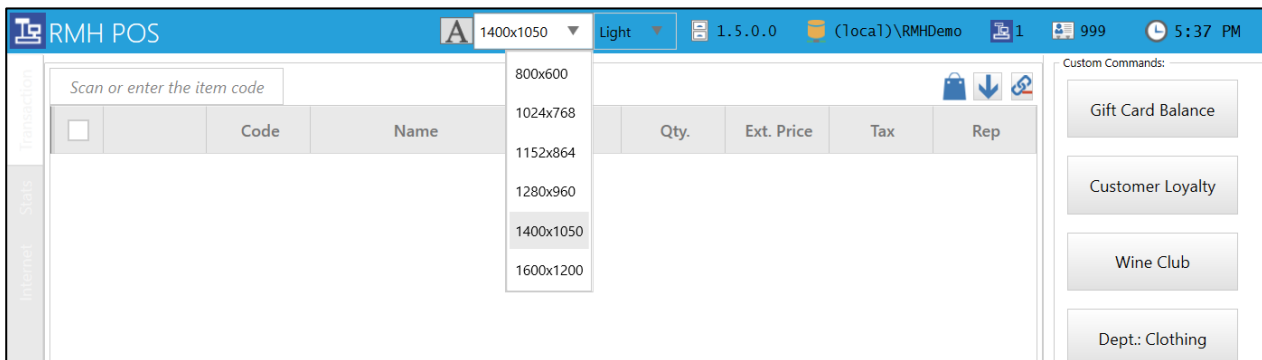
Display options

The bar on the left of the transaction screen provides two display options:

- **Transaction:** Displays the main POS transaction screen (by default)
- **Internet:** Displays internet browser page (for example, look up store websites, product catalogs, etc.)

Custom commands

The right side of the transaction screen is the Custom Commands section that displays the customized POS buttons. This enables you to activate or access any third-party integrations or internal commands. For example, Gift Card Balance or Customer Loyalty. The Custom Action buttons let you develop your own POS action commands.
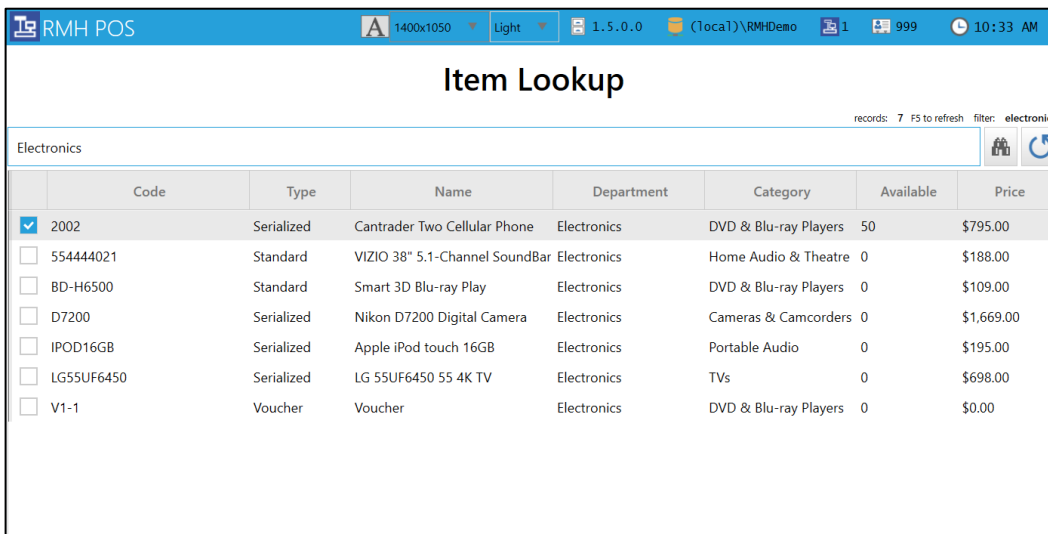
NOTE: The Custom Command functionality is reserved for system administrators. Depending on system configurations, command buttons might not display on the transaction screen.

Item lookup

On the upper left of the transaction screen is the Item Lookup field, which enables you to search items by item code, description, alias, department/category or combination. Whenever you type something or scan an item, the system will automatically put the focus on this field to facilitate the user experience.
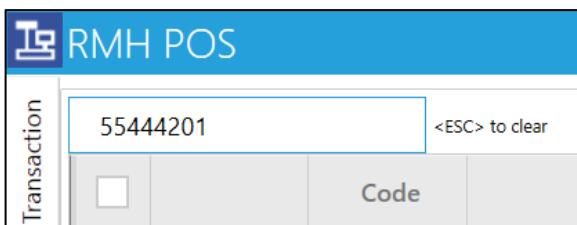
For example, if you enter the 'Electronics' department and press **Enter**, the system will display all the items in the Electronics department. *See following sample figure:*

After selecting the item(s) and clicking the **Select** button (assuming there is sufficient quantity in stock), the system will add them to the transaction screen.

Icons

In the upper right corner of the transaction screen there are various icons that vary depending on the transaction type.

Icon	Description
	Displays the current transaction mode. The default is the 'Sale' mode. The icon will switch accordingly pending the type of transaction. For example, Work Order.
	Allows you to change the order for which the items are added to the transaction. For example, the 'Ascending' option means that new items will be added at the bottom of the screen (each new item will be added *below* the previous item). Clicking the icon again will toggle the order and reverse the way in which items are added. If the 'Descending' option is enabled, the new item will display at the top of the screen *above* the previous item.
	Enables you to 'roll up' items. This is useful for when you've scanned the same item but at different times at the POS. If the icon is set to 'no roll up' then RMH will display that same item on different lines on the POS screen in the order they were added. To configure the system so that it will roll up multiple instances of the item to be displayed only on one line, enable the roll up option and the quantity will be adjusted accordingly.

Keyboard

RMH enables you to use an actual physical keyboard or the onscreen keyboard. To display the onscreen keyboard, click the Keyboard arrow at the bottom left corner of the transaction screen. Clicking it again will toggle the keyboard off.
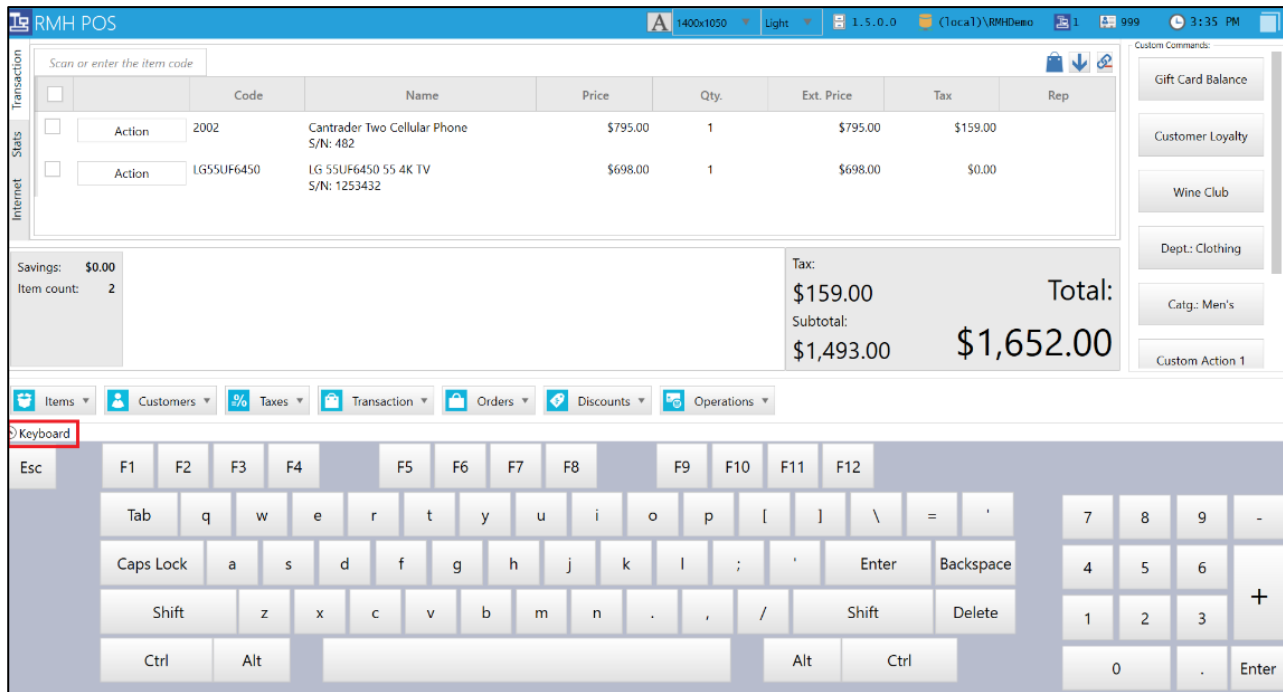
Function keys

At the bottom of the transaction screen are various function keys. Each key acts as a drop-down menu of related functions. This way, you can quickly access desired tasks. For example, clicking the **Transaction** menu displays associated functions (tender sale, hold, transaction comment, recall transaction, etc.).
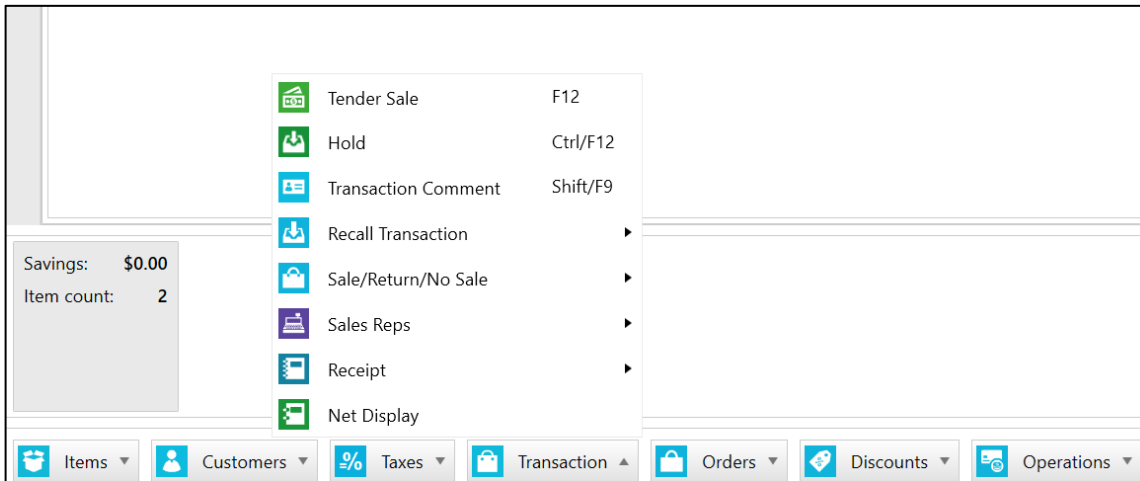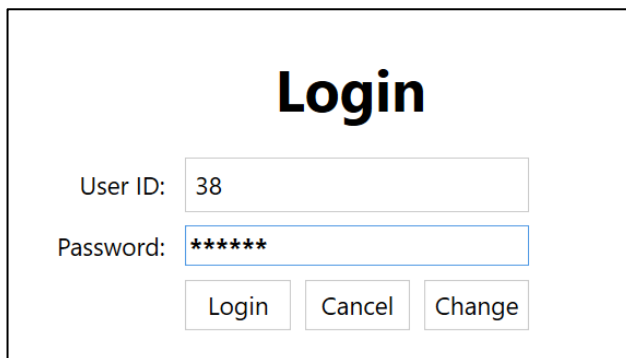
Logging on to POS transaction screen

Once the RMH POS application has been started, cashiers can then log on to process transactions.

1. When the Login window displays, enter the assigned cashier number in the **User ID** field and then enter the associated **Password**.

    NOTE: For security purposes, the password characters are masked as "*".

2. Click **Login**.

    The POS transaction screen then displays. If the login info was not correct, the system will display a notification.

    NOTE: To log off the current cashier and display the Login window, press **F9**. Or, from the transaction screen's menu bar, click **Operations**, click **Secure** and then click **Logout**. RMH will remain in shut-off mode until the next casher logs on.

Drawer activities

Assuming that the RMH database has been set up using the RMH Store Manager program, store clerks can use the RMH POS program to process transactions at the register(s). Note that all major database changes in terms of inventory are made in the RMH Store Manager program.

NOTE: The following guidelines assume you have successfully logged into the RMH POS program.

Entering opening amounts

Typically, before processing sales transactions, you would enter your opening cash drawer amount. This will enable the Store Operations team to accurately track your cash-flow throughout the day.

1. On the POS transaction screen, click **Operations**, click **Batch**, and then click **Enter Opening Amounts**. *See following figure.*
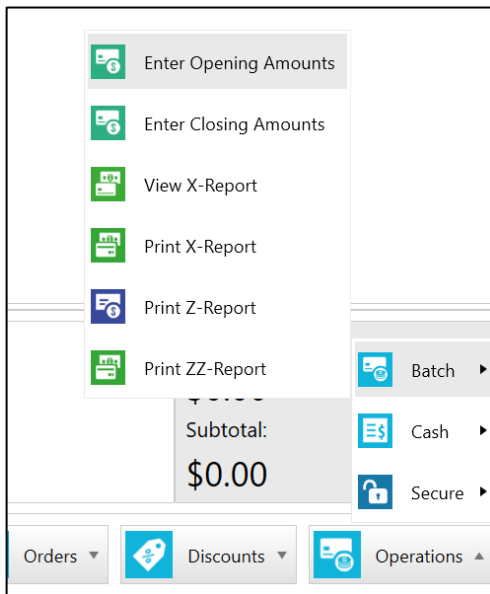
      NOTE: If opening amounts have already been entered, RMH will display a pop-up window confirming you want to overwrite the existing opening amounts. To enter new amounts, click **Yes**.

2. On the Opening amounts screen, enter the amount for each tender type that is currently in your register's cash drawer. *See following sample figure.*

Opening amounts

Description	Amount
Cash	$150.00
Credit Card	
Debit Card	
Gift Voucher	
Euro Forex (1.0600)	
UK Pound (1.51)	
EFT	

Total : $150.00
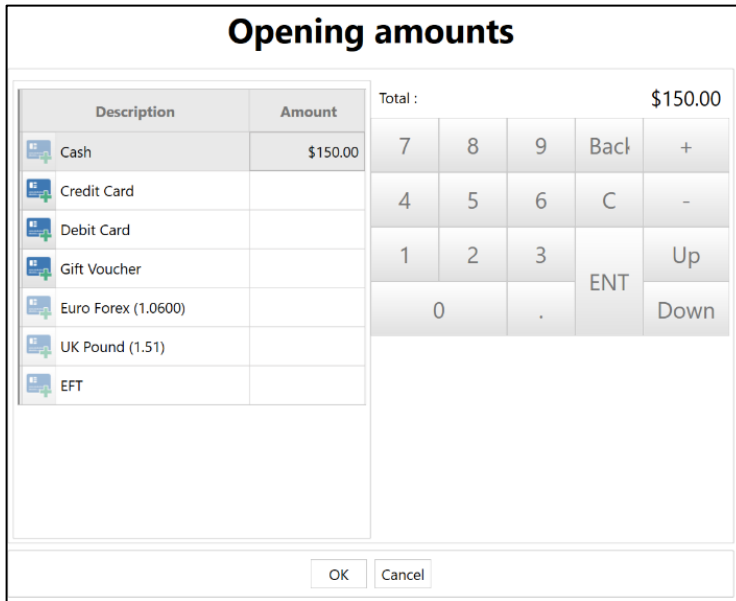
3. Click **OK**, and then close the register.

NOTES:

- After entering the opening amounts, you can then enter closing amounts at any time.

- If your Opening amounts window was blank, you need to generate the Z report, which accounts for all the defined tender types. You can then enter the amounts in the applicable tender fields on the Opening amounts window.

Entering closing amounts

The closing amounts process is similar to opening your drawer.

1. On the POS transaction screen, click **Operations**, click **Batch**, and then click **Enter Closing Amounts**. *See following figure*.

RETAIL MANAGEMENT **HERO**
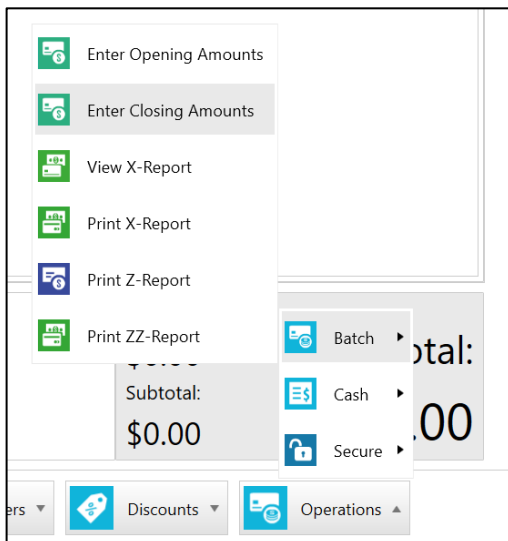
2. On the Closing amounts screen, enter the amount for each tender type that is currently in your register's cash drawer. *See following sample figure.*

Closing amounts

Description	Amount					
Cash	$4,200.00					
Credit Card	$654.99					
Debit Card	$441.88					
Gift Voucher						
Euro Forex (1.0600)						
UK Pound (1.51)						
EFT						

Total : $5,296.87

7	8	9	Back	+
4	5	6	C	−
1	2	3	ENT	Up
0	.			Down

OK   Cancel

3. Click **OK**, and then close the register.

Performing a blind closeout

There may be times when you do not want to count the drawer in public view and would rather do so in the back office. In this case, you would perform a blind closeout, which enables you to close the current batch at your POS station without generating a Z report.

After closing the batch, the applicable person in the back office can then use the RMH Store Manager program to complete the closing process, enter closing (and opening) amounts, and generate X and/or Z reports.

1. Click the **Operations** menu, click **Batch**, and then click **Blind Closeout**.

2. When RMH displays the confirmation prompt, click **Yes** to continue.

3. Take the contents in the cash drawer to the store's back office and use the RMH Store Manager program to complete the closing process.

Performing a cash drop

Whenever you want to remove a certain amount of cash from your drawer and put it in a safer place (i.e. bank), you can perform a cash drop. Although the cash is no longer in your drawer, RMH will still include that amount in your total sales for the day and will display this amount on your Z report.

Before performing a cash drop, ensure that (1) there are no item entries in the POS screen and (2) the cashier has the privilege to perform cash drops.

1. From the POS transaction screen, click the **Operations** menu, click **Cash**, and then click **Cash drop** option.

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2. In the **Amount** text box, type the amount of cash that you are dropping, and then press the **Tab** key.

3. Enter the **Reason Code** by clicking the binoculars icon and selecting the code from the list.

4. In the **Comment** text box, type any applicable comment.

5. Click **OK**.

6. On the Drop window, enter the appropriate tender amount(s).

7. Click **OK**. The cash drawer will pop open, and the receipt will print. Remove the correct amount of cash from the drawer.

Performing a cash payout

A cash payout enables you to remove cash from your drawer. This is ideal, for example, when you need petty cash to buy more printer paper. Even though you have not performed an actual sales transaction, you still need to account for the decrease in available cash. Note that the total amount for "cash pay out" is displayed on the Z report.

To perform a cash payout, be sure that the POS transaction screen does _not_ have any item entries and that the casher has the authorization to perform the cash payout.

1. From the POS transaction screen, click the **Operations** menu, click **Cash**, and then click **Cash pay out** option. The Pay out screen will display similar to the following:

2. In the **Amount** field, enter the amount of cash that is being paid out, and then press the **Tab** key.

3. In the **To** field, enter the recipient's name, and then press the **Tab** key.

4. Select the applicable **Reason Code**. Click the binoculars icon to select from the predefined reason code list.

5. In the **Comment** field, enter a desired note or description.

6. Click **OK**.

7. On the Tender window, enter the amount for the appropriate tender(s), and then click **OK**.

8. When the cash drawer pops open (and the receipt prints if you selected it to), remove the correct amount of cash paid out from the drawer.

Sales transactions

For regular sales transactions, you will need to 1) ring up (scan or manually enter item lookup codes) on the transaction screen, 2) tender the sale (enter the applicable tenders, such as cash, credit card, etc.), and then, as applicable, 3) generate the receipt.

Ringing up items

Ring up (enter) items onto the transaction screen any of the following ways, depending on your current equipment setup: 1) using the barcode scanner, 2) manually entering the item lookup codes, and/or 3) pressing **F2** to display the list of database items.

NOTE: These guidelines show how to add items to the transaction screen by selecting them from the item list. Steps will vary depending on item types (serialized, check, etc.) and tenders (credit cards, debit cards, etc.).

1. Press **F2** to display a list of all the items in the database. *See following sample figure*:

2. Scroll through the list, select the applicable item, and then click **Select** or press **Enter**. After entering the item(s), the transaction screen will update to display the items.

NOTE: To view item details from the POS transaction screen, click the arrow on the applicable line item. This will drop down a list of item fields. *See following sample figure:*

			Code	Name	Price	Qty.	Ext. Price	Tax	Rep
▼	☑	Action	1002	Vivo Galaxy S6 Edge S/N: RMX2252L53	$619.00	1	$619.00	$123.80	

Qty On Hand	Current Price	On Sale?	Retail Price	Price Source
26	$619.00	☐	$619.00	Retail price

			Code	Name	Price	Qty.	Ext. Price	Tax	Rep
▶	☐	Action	20000	Gel Syrup Energy Booster	$50.00	443	$22,150.00	$1,661.25	
▶	☐	Action	7001204	Trider Cycle Kids 12 Inch 12 Pink	$1,195.00	1	$1,195.00	$89.62	

Deleting items

Sometimes customers will change their mind about what items they want to purchase. Or, you might accidentally ring up an item twice or scan the wrong item code. In these situations, you can easily remove the items from the transaction.

To remove an item that has already been entered on the transaction screen, position the cursor on the line to remove and either press the **Delete** key on your keyboard, or right-click and select the **Delete** option.

Entering serialized items

Ringing up serialized items may require additional steps pending configuration options, if the item already has an assigned serial number, etc. The following provides guidelines for entering serialized items.

1. From the POS screen scan the item (via barcode scanner or manually entire item lookup code), or press **F2** to select from the item list. Note the word "Serialized" in the Type column. *See following sample figure:*

2. When the Select Serial Number window displays, either select an existing serial number, use the lookup field to find a serial number, or click **Add New #** to create a serial number. *See following sample figure:*
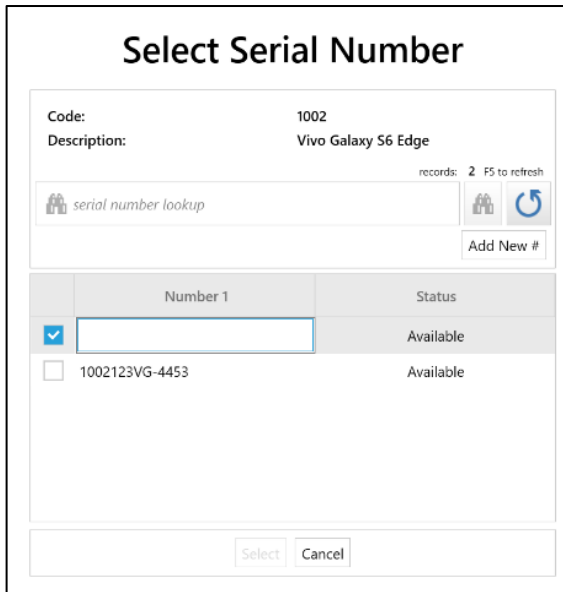
3. When RMH displays a prompt asking you to confirm serial number creation, click **Yes**. Note that this option will be enabled only if the necessary privileges were set up in the RMH Store Manager program. The POS transaction screen will update to display the item's serial number.
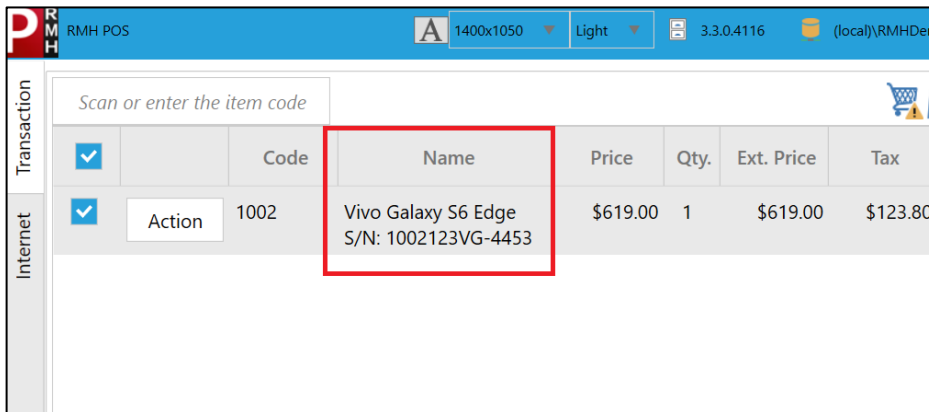
4. Continue adding items and/or tender and complete the transaction.

Tendering the sale

1. After entering the item(s) onto the POS transaction screen, tender the sale by pressing **F12** (or selecting the **Tender Sale** option from the on-screen **Transaction** menu).

2. On the Tender window, enter the applicable tender(s).

Tender

Description	Amount
Credit Card	1,499.62
Debit Card	
Cash	
Euro Forex (1.0600)	
UK Pound (1.51)	
Gift Voucher	
EFT	

Total Due: $1,499.62
Total Tendered: $1,499.62
Change: $0.00

7	8	9	Back	+
4	5	6	C	-
1	2	3		Up
0		.	ENT	Down

OK Cancel

3. Click **OK** or press **Enter**. The system will then display a window confirmation the sale and the change owed. *See following sample figure:*

Status

Transaction completed.

Change:

$0.00

Close

Cancelling a transaction

At any time during the transaction process, you can cancel the sale. There are a couple ways to stop the transaction:

- From the main POS screen, press **Esc** and confirm the transaction cancellation

- Press **F8** and confirm the transaction cancellation

NOTE: You cannot cancel a transaction if you have already tendered the sale. If you have already completed the transaction and need to void it, perform a post-void transaction.

Voiding a transaction

Sometimes you'll need to cancel a past transaction. For example, you realize that after tendering the sale, you accidentally rang up an extra item.

NOTE: Before voiding a transaction, confirm there are not items entered in the current transaction.

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1. From the POS transaction screen's menu, click the **Transaction** menu, click **Recall Transaction**, and then click **Recall for Void** option. Note that pressing **F11** will allow you to Recall for Return instead of voiding the transaction.

2. On the Recall for Void window, select the specific transaction you want to void.

3. Press **Enter**.

4. If the Select Reason Code window displays, select the applicable code that describes the reason for voiding the transaction. *See following sample figure*:

5. Click **OK** or press **Enter**.

   The transaction screen will update with the item(s) and their minus quantities.

6. If the Tender window is not already displayed, press **F12**.

7. Choose the correct tender, and then click **OK** or press **Enter** to complete the void.

8. When RMH displays a window confirmation completion of the transaction, click **Close**.

NOTES:

- Voided debit card transactions are processed as returns. The funds have already been deducted from the customer's bank account and cannot be voided.

- The difference between voiding a transaction and recalling a transaction for return (*see following topic*) is that voiding a transaction does not allow you to edit any transaction information. For example, you cannot delete items or edit their quantities.

Processing returns

RMH enables you to return items your customers have purchased.

1. Press **F11** to activate the Return mode, or from the POS transaction screen's on-screen menu, click **Transaction**, click **Recall Transaction**, and then click **Recall for Return**.

2. Select or scan the item to return.

3. As applicable, enter the reason code associated with the return.

    The POS transaction screen will be updated with the items displayed in red with negative quantities.
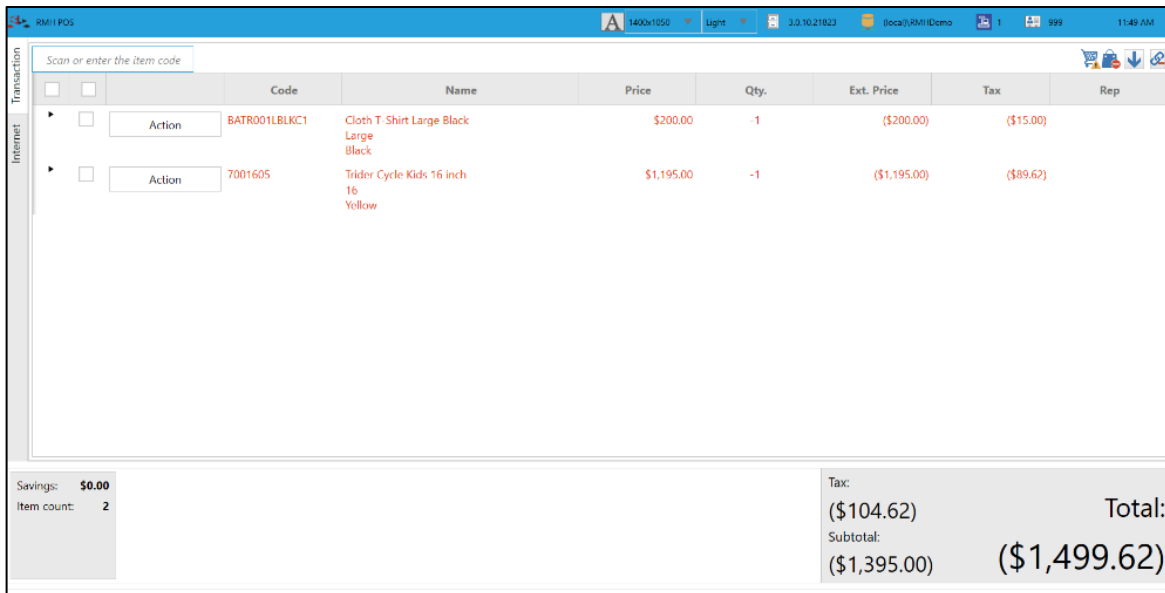
4. Press **F12** to tender the transaction. On the **Tender** window, you will see the total refund amount.

5. Enter the amount for the appropriate tender, and then press **Enter**.

    RMH will display a confirmation message that the transaction was completed. You are now ready to begin a new transaction.

Discounting a sale

You can discount either individual items or the entire sale. Note that there must be at least one item on the transaction screen.

To discount individual items

1. Select (or place the cursor on) the item line entry.

2. Perform any of the following:

    -   Right-click to select **Apply Item Discount** or press **Shift F4**, or

    -   Click the row's **Actions** button and then click the **Discount** button on the Item Action screen, or

    -   Click the **Discounts** menu, select **Current Item Discount**, and then select the type of discount you want to make (i.e. % of retail price, etc.)

3. On the Discount screen, enter the percentage by which to reduce the price. See following figure:

4. Click **OK**.

5. Specify the **Reason Code**. For example, clearance or employee discount.

Select Reason Code

	Code	Description	
☑	CD01	CLEARANCE SALE DISCOUNT	Customer Discount
☐	CD02	DAMAGED GOODS DISCOUNT	Customer Discount
☐	CD03	MANAGERS DISCOUNT	Customer Discount
☐	CD04	STAFF DISCOUNT	Customer Discount
☐	CD05	BIRTHDAY DISCOUNT CODE	Customer Discount
☐	CD06	PLATINUM MEMBER	Customer Discount
☐	CD07	PRODUCT GIVE AWAY	Customer Discount
☐	CD08	PRICE CORRECTION	Customer Discount
☐	CD09	LOYALTY CARD DISCOUNT 25%	Customer Discount
☐	CD10	LOYALTY CARD DISCOUNT 50%	Customer Discount
☐	CD11	WEEKEND PROMOTION	Customer Discount
☐	CD12	WEEKLY PROMOTION	Customer Discount
☐	CD13	WRUP WEDNESDAY	Customer Discount

NOTE: The Reason Code screen will display only if the store is configured to require reason codes.

6. After returning to the transaction screen, proceed with the sale as usual.

NOTE: RMH will display the discount savings in the lower left corner of the transaction screen.

To discount all items in a sale

1. Ring up all the applicable items.

2. Perform either of the following:

   - Press **Shift F4**, or
   - Click the **Discounts** menu, click **Transaction Discount**, and then select the type of discount

3. Specify the type of discount.

Set Discount/Price Level

Current Item Discount	All Item Discount	Transaction Discount
% from Current Price	% from Current Price	% from Minimum Price
% from Retail Price	$ from Current Price	% from Retail Price
$ from Current Price	Set Subtotal Amount	Markup from Cost
Markup from Cost		Set profit margin
Set profit margin		Default Price
No discount		Price Level A
		Price Level B
		Price Level C
		No discount

Cancel

4. When the Discount screen displays, enter the percentage by which to reduce the total transaction price.

5. Specify the **Reason Code**. For example, clearance or employee discount.

Select Reason Code

	Code	Description	
☑	CD01	CLEARANCE SALE DISCOUNT	Customer Discount
☐	CD02	DAMAGED GOODS DISCOUNT	Customer Discount
☐	CD03	MANAGERS DISCOUNT	Customer Discount
☐	CD04	STAFF DISCOUNT	Customer Discount
☐	CD05	BIRTHDAY DISCOUNT CODE	Customer Discount
☐	CD06	PLATINUM MEMBER	Customer Discount
☐	CD07	PRODUCT GIVE AWAY	Customer Discount
☐	CD08	PRICE CORRECTION	Customer Discount
☐	CD09	LOYALTY CARD DISCOUNT 25%	Customer Discount
☐	CD10	LOYALTY CARD DISCOUNT 50%	Customer Discount
☐	CD11	WEEKEND PROMOTION	Customer Discount
☐	CD12	WEEKLY PROMOTION	Customer Discount
☐	CD13	WRUP WEDNESDAY	Customer Discount

NOTE: The Reason Code screen will display only if the store is configured to require reason codes.

6. After returning to the transaction screen, proceed with the sale as usual.

NOTE: RMH will display the discount savings in the lower left corner of the transaction screen.

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Selling a voucher

In the RMH POS program you can ring up vouchers (i.e. gift cards, gift certificates) on the transaction screen. The guidelines for selling a voucher will depend on whether the vouchers have pre-defined amounts, voucher configuration settings and store privileges. After selling a voucher, the customer can redeem it at any time.

1. Scan or enter the item code for the voucher(s) you want to sell.

2. When the Serial Number window displays, enter the applicable voucher serial number. Click the binoculars icon to look up voucher numbers. If the voucher number is not in the RMH database, RMH will notify you and then, depending on the store's privileges, display a prompt asking if you would like to create a serial number.

3. Perform either of the following:

   ▪ If the voucher has a pre-defined amount, that amount total will appear on the transaction screen. In this case, review/confirm the value is correct

   ▪ If the voucher does not have a pre-defined amount, click the **Action** button, and then enter the applicable voucher price in the **Change Price** field. *See following sample figure:*

4. Press **F12** to tender the sale.

   NOTE: Do NOT use the Voucher tender type on the Tender window to sell the voucher. You will use this tender type only when the customer redeems the voucher or when you want to add more credit to an existing voucher.

5. Complete the sale.

   After you sell a voucher, you can review its history any time by pressing **Ctrl-Shift-F3**, entering the applicable voucher (serial) number, and then clicking **Details**. Use this feature to check the customer's voucher balance.

Checking the voucher balance

Use the **Ctrl-Shift-F3** keys to display the balance for a particular voucher. *See following sample figure:*

You can also click the **Details** button to view the transaction history details for that voucher.

Redeeming a voucher

After you sell a voucher (gift card, gift certificate), the customer can then use it for purchasing items in your store. Ring up the voucher just like a serialized item, however, use the voucher tender type to tender the sale.

1. Scan or manually enter the item(s) the customer wants to purchase.

2. Press **F12** to display the Tender window.

3. In the **Voucher** tender type box, you can enter either a partial or entire amount of the voucher that will be used towards the sale. If the customer wants to pay with both cash and voucher, enter the applicable amount in the appropriate tender type boxes.

4. Press **Enter** to display the **Voucher Verification** window.

5. Enter the applicable voucher number, and then press **Enter**. *See following sample figure:*

**Voucher Verification**

Tender: Coupon
Amount: $18.61
Number: 300309 [Search]

Voucher #	Description	Balance	Expiration Date	Status
300309	Promotional Coupon	$100.00	3/8/2017 11:34:21 AM	Sold

[Select] [Cancel]

NOTE: At any time, you can press **Ctrl-Shift-F3** to display the Voucher Details window on which you can enter the applicable voucher (serial) number and press **Enter**. You will then see that voucher's history. Use this feature to check the customer's voucher balance.

Adding money to a voucher

You can only add money to a voucher that has been already sold.

1. To select a sold Voucher to add money to, you can either scan the voucher or manually enter the item lookup code for the voucher and then find the serial number.

2. When looking up a Voucher by serial number, scroll/select or look up the applicable voucher number using the *Serial Number Lookup* search box. When the exact serial number match is found, only the voucher whose number is matched appears in the grid.

3. Select the found voucher. A pop-up window appears, displaying the voucher balance and prompting you to confirm that you want to add money:
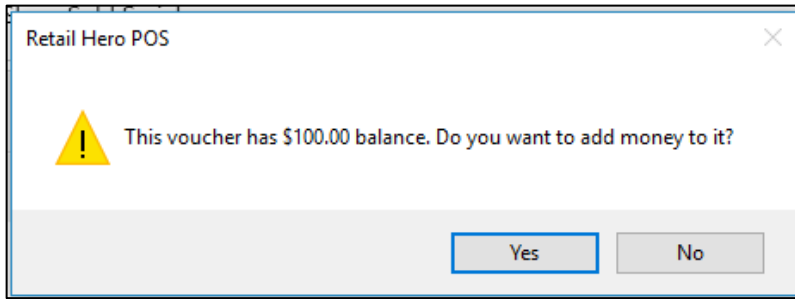
4. Enter the amount you would like to add:
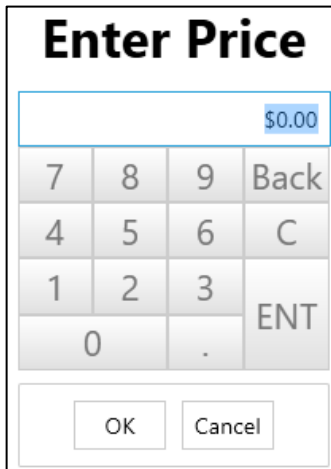
5. Tender the transaction.

Refunding to a voucher

When processing a return, you can refund all or part of the funds to a voucher. The following workflows exist:

Refunding to an existing voucher:

1. Select **Recall for Return (F11)**, select the sale you would like to return, and then click **Add.**

2. Select the **Reason Code**, and then click **OK**.

3. Select **Tender the Transaction (F12)**.

4. Enter the full or partial amount against the Voucher Tender type associated with the Voucher you would like the refund to go to.

5. When the Voucher Refund Verification screen displays, scan or enter the serial number of the voucher you would like to refund to.
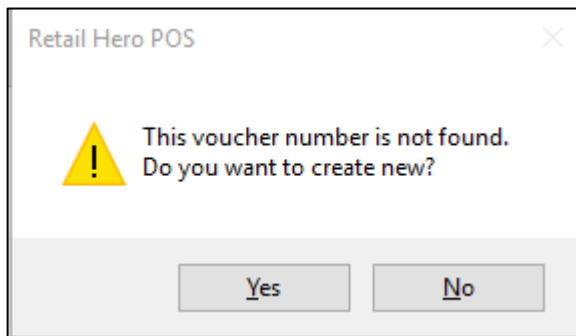
NOTES:

▪ If there are multiple voucher items linked to that tender, the user will be prompted to select the correct voucher item

- If the voucher has not been already sold, the transaction will automatically change the status of the voucher item to sold

Refunding to a voucher that has not been created:

1. Select **Recall for Return (F11)**, select the sale you would like to return, and then click **Add**.

2. Select the **Reason Code**, and then click **OK**.

3. Select **Tender the Transaction (F12).**

4. Enter the full or partial amount against the Voucher Tender type associated with the Voucher you would like the refund to go to.

5. When the Voucher Refund Verification screen displays, scan or enter the serial number of the voucher you would like to refund to.

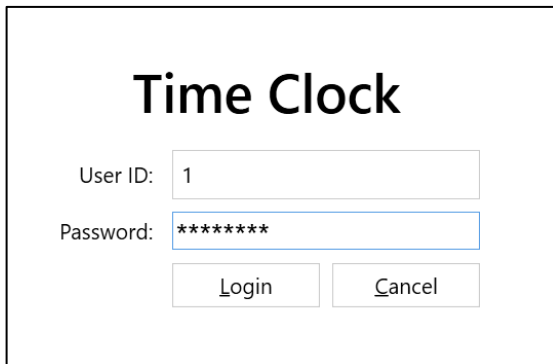6. When the confirmation pop-up window displays, click **Yes**.

Retail Hero POS ✕

⚠ This voucher number is not found.
Do you want to create new?

[Yes]   [No]

NOTE: If there are multiple voucher items linked to that tender, the user will be prompted to select the correct voucher item after the last step above.

RETAIL MANAGEMENT **HERO**

Daily POS tasks

In addition to generating sales transactions, there may be additional tasks you will perform at the POS. The following provides guidelines for common POS tasks.

Clocking in

1. At any time, cashiers and sales reps can clock in via the POS program by pressing **Ctrl-Shift-F4**, or clicking the **Operations** menu and then clicking **Time Clock**.

2. When the Time Clock screen displays, enter the unique **User ID** and **Password**.

3. Click the **Login** button.

4. On the next Time Clock screen, click the **Punch In** button.

   RMH will record the exact time you clocked in.

Clocking out

1. At any time, cashiers and sales reps can clock out via the POS program by pressing **Ctrl-Shift-F4**, or clicking the **Operations** menu and then clicking **Time Clock**.

2. When the Time Clock screen displays, enter the unique **User ID** and **Password**.

3. Click the **Login** button.

4. On the next Time Clock screen, click the **Punch Out** button. RMH will record the exact time you clocked out and display the time elapsed.

## Assigning a sales rep to the transaction

1. From the POS screen, click the **Transaction** menu, click **Sales Reps**, and then click **Transaction Sales Rep**.

2. When the Sales Rep Lookup screen display, select the **Number** for the applicable sales rep, and then click the **Add** button.

   This action will update the Rep field(s) on the POS transaction screen. *See following sample figure:*
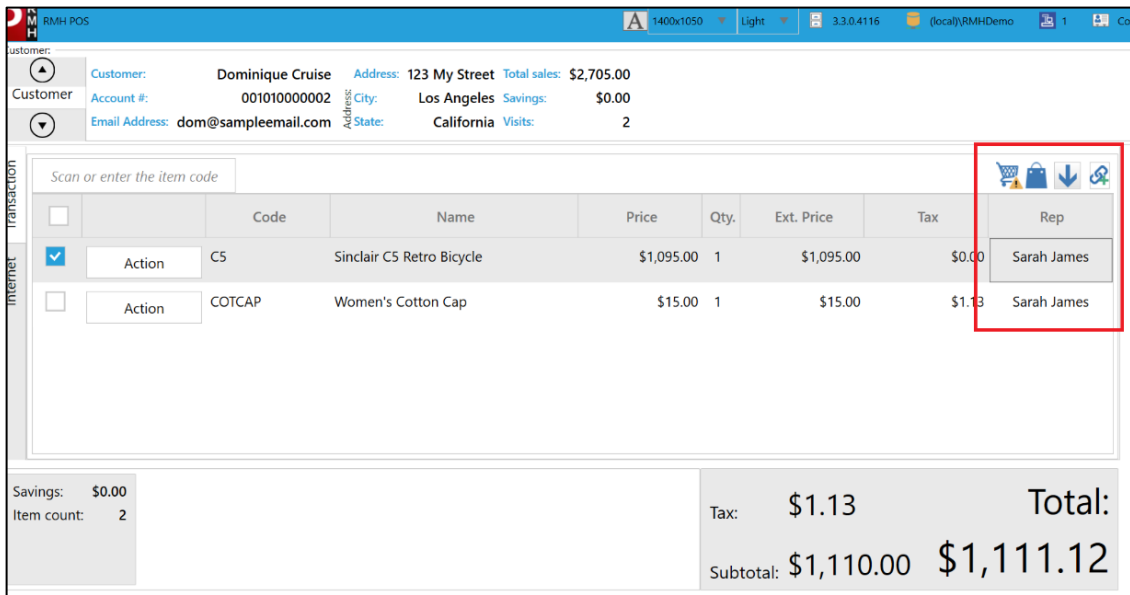
3. Proceed with the sales transaction.

    NOTE: In addition to assigning a sales rep to the entire transaction, you can also assign different sales reps to items in the same transaction. Simply click in the Rep field for the applicable sales rep and right-click. *See following sample figure:*
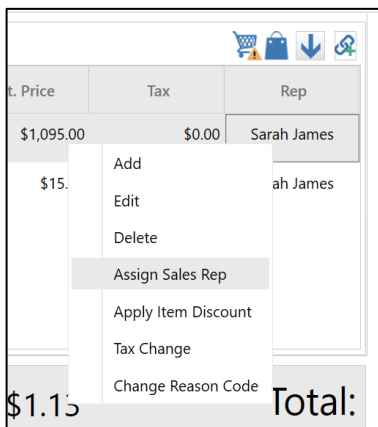
    You can then select a different sales rep for that particular item. After adding the sales rep, the POS transaction screen will update the Rep field accordingly. *See following sample figure:*
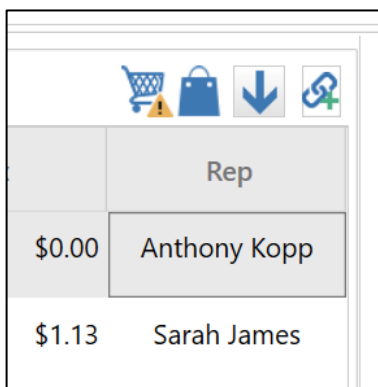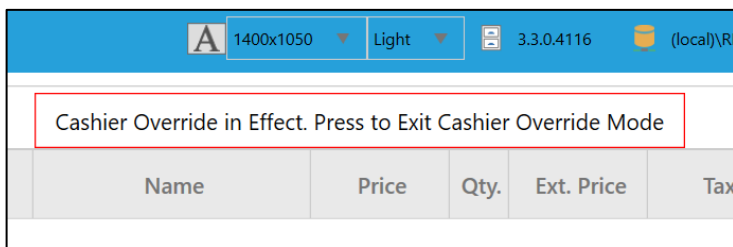
Performing cashier override

For various reasons, there may be times when cashiers are prevented from performing certain POS actions because the system first requires a manager's review/approval. Depending on how cashier POS privileges are configured in the RMH Manager program, the RMH POS program will require a 'cashier override' before a specific transaction is completed. For example, a manager's approval (override) could be required for specific item/sales discount percentages.

1. From the POS screen, either press **Ctrl-Shift-F8**, or click the **Operations** menu, click **Secure**, and then click **Cashier Override**.

2. When the Login screen displays, enter the applicable cashier **User ID** and **Password**, and then click **Login**.

   RMH will update the transaction screen with the following notification in the top bar:

A	1400x1050 ▼	Light ▼	🗄 3.3.0.4116	🛢 (local)\RM

   Cashier Override in Effect. Press to Exit Cashier Override Mode

 | Name | Price | Qty. | Ext. Price | Tax |
   | --- | --- | --- | --- | --- |

3. Perform either of the following:

   - Edit or process the desired action (i.e. discount, etc.), and then press Exit to exit the Cashier Override Mode, or

   - Edit or process the desired action, and do not exit the Cashier Override Mode

4. Tender and complete the sale.

   NOTE: If you forget or decide not to exit Cashier Override Mode, RMH will automatically exit the Cashier Override Mode <u>after</u> the transaction is completed and revert subsequent transactions to the previous cashier.

Creating an item comment

After you ring up an item on the transaction screen, you have the option to insert a comment underneath it.

1. After entering the item on the POS screen, click **Items** and then click **Item Comment**.

2. When the Item Comment screen displays, enter applicable note in the **Comment** field, and click **OK**.

   # Item Comment

   Comment:

   Slight tear in corner; customer accepts

   OK   Cancel
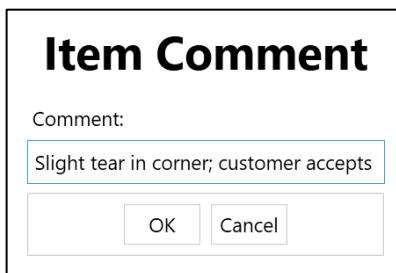
The comment will then display under the item line on the transaction screen in the Name column:

☑		Code	Name	Price	Qty.
☑	Action	BATR001LBLKC1	Cloth T-Shirt Large Black Slight tear in corner; customer ac	$200.00	1

3. Proceed with the transaction.

Adding details to a transaction

In addition to adding comments for individual items on the transaction screen, you can also create a comment for the entire transaction, such as a delivery time or special offer. The comment will display on the customer receipt.

1. Ring up the item(s) onto the POS transaction screen.

2. From the **Transaction** menu, click **Transaction Comment** (or click **Shift F9**).

3. When the Transaction Comment screen displays, in the **Ref#** field assign an applicable an identification code that can reference the transaction.

4. In the **Comment** field, enter any description/explanation that relates to the transaction. Note that this comment will display on the receipt.

Transaction comment

General Details

Ref #:   RST4433

Comment: Special Delivery 10/17

OK   Cancel

5. Click **OK** to add the comment to the transaction. Note that the comment will display on the upper right corner of the transaction screen. *See following sample figure:*

	Qty.	Ext. Price	Tax	Rep
Special Delivery 10/17				
200.00	1	$200.00	$15.00	
495.00	1	$1,495.00	$112.13	

6. Proceed with the sale as usual.

RETAIL MANAGEMENT **HERO**

Looking up item quantity

1. After ringing up the item on the transaction screen, position the cursor on the line item, and then click **F2** (or from the **Items** menu, click **Lookup Item**.

2. On the Item Lookup screen, note the quantity in the **Available** column.

3. To return to the transaction screen, click the **Esc** button.

Changing the item quantity

1. If the item as already been rung up on the screen and you want to change the quantity, click the **Action** button on the applicable item row (or in the applicable line item, right-click, and select **Edit)**.

Name	Price	Qty.	Ext. Price
T-Shirt Large Black tear in corner; customer ac	$200.00	1	$200.00
Cycle Mens 24 Inch	$1 495 00	2	$2,990.00

Add

Edit

Delete

Assign Sales Rep

Apply Item Discount

Tax Change

Change Reason Code   Tax:

2. When the Item Action screen displays, enter the new quantity in the **Change Quantity** field, and then click **OK**.

Item Action

Trider Cycle Mens 24 Inch

9002402

Price:	$1,495.00	Change Quantity:		2	+	-
Available:	2	Change Price:		$1,495.00		
Committed:	0	Override Description:		Trider Cycle Mens 24 Inch		

| Delete | Sales Rep | Tax | Duplicate | Discount | OK | Cancel |

7	8	9	Back	+
4	5	6	C	-
1	2	3	ENT	Up
0		.		Down

The POS transaction screen will be updated with the adjusted quantity for that line item.

RETAIL MANAGEMENT | HERO
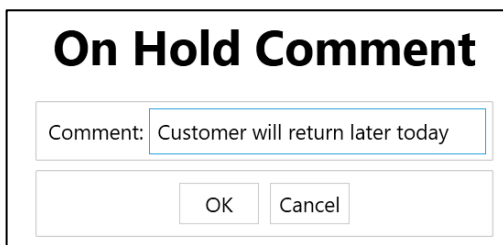
Deleting items on transaction screen

Before processing the sale, you can remove items entered on the transaction screen. For example, if the customer changes his mind and decides not to purchase the item.

1. Select the line item you want to remove from the POS transaction screen.

2. Either press the **Delete** key on your keyboard, or click the **Items** menu, and then click **Delete Item(s).**

Placing transaction on hold

1. Ring up the item(s) on the transaction screen, and then press **Ctrl-F12**.

2. When the On Hold Comment screen displays, enter an applicable reason for the hold in the **Comment** field.

3. Click **OK**.
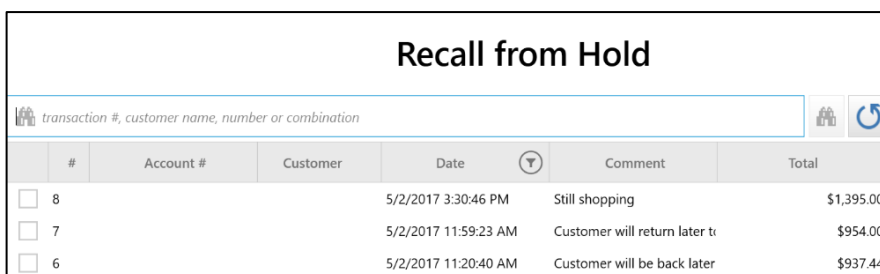
You can retrieve the transaction at any time.

NOTE: Whenever you place transactions on hold, RMH will display a notification icon at the top right corner of the transaction screen. *See following figure:*
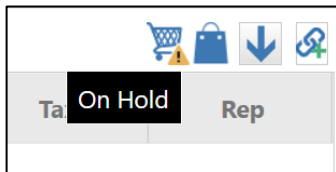
Retrieving item(s) on hold

1. Ensure there are no items currently on the transaction screen.

2. Click the **Transaction** menu, select **Recall Transaction**, and then click **Recall from Hold**. The Recall from Hold screen displays, listing the transaction(s) that are currently on hold.

3. Select the transaction you want to recall, and then click the **Add** button.

4. Proceed with the sale as usual.

Customer accounts and order management

The following provides guidelines for various customer management activities at the POS. Note that these guidelines may vary depending on how customers are configured in the RMH Manager program.

Selecting a customer

1. Select an existing customer account by either pressing **F7** or clicking the **Customers** menu and then clicking **Lookup Customer**.

2. On the Find Customer window, use the available filter fields to locate the customer. Note that clicking the binoculars icon will update the list with all the records that match the defined filter criteria.

3. Select the applicable customer by checking the box for the customer, and then clicking the **Select** button. The transaction screen will update to display the customer's information at the top of the transaction screen. *See following sample figure*:

4. Proceed with the sales transaction as usual.

Creating a new customer account at the POS

RMH lets you easily create customer accounts at the POS. Note that customer account creation is only allowed if the configuration option is enabled in the RMH Store Manager program.

1. At the POS, either press **Shift-F7**, or click the Customers menu and then click **New Customer**.

2. When the 'Create new customer wizard' screen displays, enter the applicable information for the customer. Note that this screen includes various information tabs (i.e. Billing, Shipping, etc.) that contain additional fields.

3. Click the **Save** button. This action will return you to the POS transaction screen and display the customer account info at the top of the screen.

Viewing a customer's history at the POS

If a customer has already been selected at the POS, you can quickly look up their purchase history at any time.

1. Click the **Customers** menu and then click the **Display History** option.

2. Click the **Purchases** tab.

3. After reviewing the purchases, click the **Cancel** button to return to the POS transaction screen.

Creating a sales quote

1. Either press **Ctrl-F1**, or click the **Orders** menu and then click **Quote**.

   NOTE: This action will prompt RMH to display the Quote notification icon at the top right corner of the transaction screen.
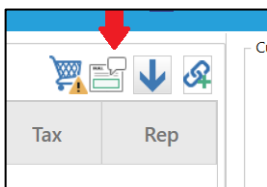
2. Press **F7** to display the Find Customer screen, select the applicable customer account, and then press the **Select** button.

3. Scan / enter the item(s) on the transaction screen.

4. To add an order comment or order due date, either press **Shift-F9**, or click the **Orders** menu and then select the **Order Comment** or **Order Due** option. The Comment will display on the icon toolbar towards the top right corner of the POS transaction screen; the Due date displays towards the bottom of the screen. *See following sample figure:*

5. Tender the transaction by pressing **F12**. The balance will be zero.

When you complete the transaction, RMH creates a sales quote containing all the items and prices displayed on the transaction screen for that customer.

Picking up a sales quote

1. Click the **Orders** menu, click **Recalls**, and then click **Recall a Quote**.

2. When the Recall a Quote screen displays, select the applicable sales quote by checking the box.

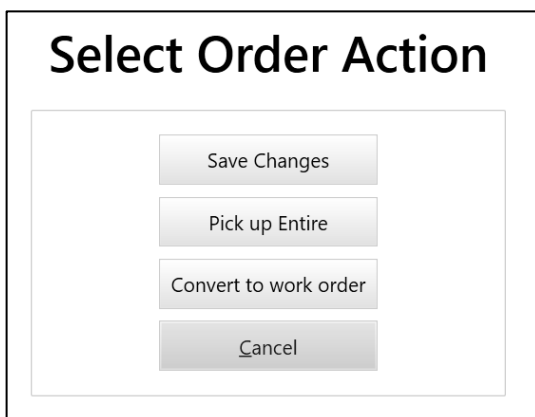3. Click the **Add** button. RMH will then update the transaction screen with the items contained in the quote, as well as display the detailed quote information including customer information, comments, deposits, etc.

4. Press **F12**.

5. When the Select Order Action prompt displays, click the **Pick up Entire** button. Note that you can also convert to a work order instead.
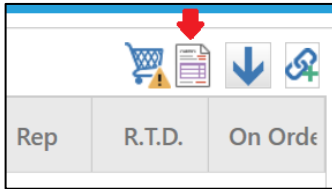

6. Tender the transaction.

Creating a work order

1. Press **Ctrl-F2**, or click the **Orders** menu, and then click **Work Order**.

   This action will prompt the transaction screen to display the Work Order notification the icon toolbar.

2. Select the customer account (press **F7**, or click the **Customers** menu and click **Lookup Customer**).

3. Scan or enter the item(s) on the transaction screen.

4. To add a work order reference number, comment and/or due date, either press **Shift-F9**, or click the **Orders** menu and then select the **Order Comment** or **Order Due** option. The Comment will display on the icon toolbar towards the top right corner of the POS transaction screen; the Due date displays towards the bottom of the screen.

5. Press **F12** to display the Tender window.

6. In the applicable tender type field, enter the amount given as the required deposit payment and then complete the transaction. RMH will create the work order containing the item(s) and log the deposit amount.

Picking up item(s) on a work order

1. Click the **Orders** menu, click **Recalls**, and then click **Recall a Work Order**.

2. When the Recall Work Order window displays, select the applicable order by checking the box. *See following sample figure:*


3. Click the **Add** button. This will return you to the transaction screen and display the work order.

4. Press **F12**.

5. When the Select Order Action prompt displays, perform either of the following:
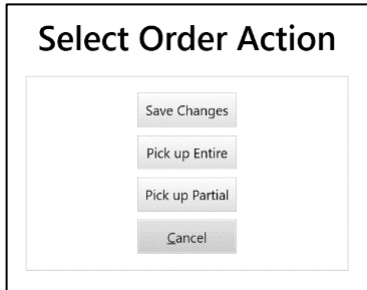
- If the customer wants to pick up all the items in the order, click the **Pick Up Entire** button. Then press F12 to tender and then complete the transaction.

- If the customer want to pick up a partial order, click the **Pick Up Partial** button. On the **Pick Up Order** window, select the appropriate item for which the customer wishes to pay by checking the box.
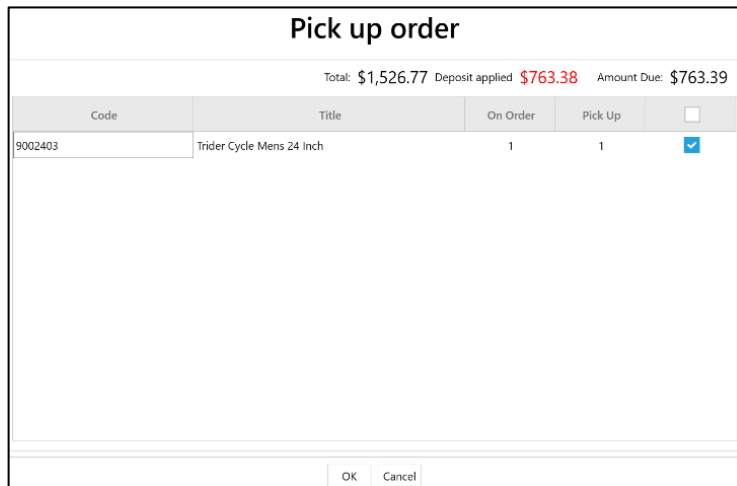

6. If there are two or more of the same item on the work order, enter the applicable quantity number in the **Quantity** field.

7. Click **OK** to display the **Tender** window, enter the applicable tender amounts, and then complete the transaction.

Creating a layaway

RMH's layaway functionality enables customers to pay for items in increments and then receive those items once payment is made in full. As the cashier, you would first create the layaway on the customer's account and could then require him to place the minimum deposit. The next time this customer returns, you would simply look up his account and recall the layaway. The customer would then either make a payment towards the layaway, or pick up items on the layaway.

1. Press **Ctrl-F8**, which puts RMH into 'Layaway' mode. (Pressing this key again will revert it back to 'Sales' mode.) The system will display a layaway notification icon in the upper right corner of the transaction screen.
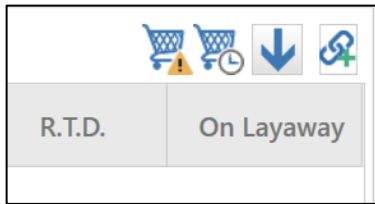
2. Press **F7** (or click the **Lookup Customer** option in the **Customers** menu) and select the applicable customer account.

3. Scan or manually enter the item(s) that the customer wants to put on layaway.

4. Press **Shift-F9**.

5. On the Order Comment screen, enter any applicable information, such as the **Ref #** and/or **Comment**, and then click **OK**.

   This comment will then display on the upper right corner of the transaction screen. See the following sample figure and also note that the **On Layaway** column has been updated with the quantity of the item that will be on layaway.

6. Press **F12** (or click the **Tender Sale** option from the **Transactions** menu) to display the Tender window.

7. Collect from the customer the minimum deposit payment due, and then enter the amount in the appropriate tender field.

8. Click **OK** to tender the transaction and apply the amount.

Processing payments towards a layaway

1. Press **F7** (or click the **Lookup Customer** option from the **Customers** menu), select the applicable customer, and then click **Select**.

2. From the **Orders** menu, click **Recalls**, and then click **Recall a Layaway**.

3. Select the applicable layaway from the list, and then click **Add**.

   NOTE: If you selected a customer, then only the layaways for that customer will display. If you did not select a customer, you will see that the list includes all the customer accounts that currently have items on layaway.

   The layaway details will then display on the POS transaction screen, and show any previous deposit as well as the balance and due date. *See following sample figure*:

4. Press **Shift-F4**.

5. When the Layaway Payment screen displays, enter the amount the customer is paying and then click **OK**.

6. When the Tender window displays, enter the amount received in the applicable tender field, and then click **OK**.

Picking up partial items on layaway
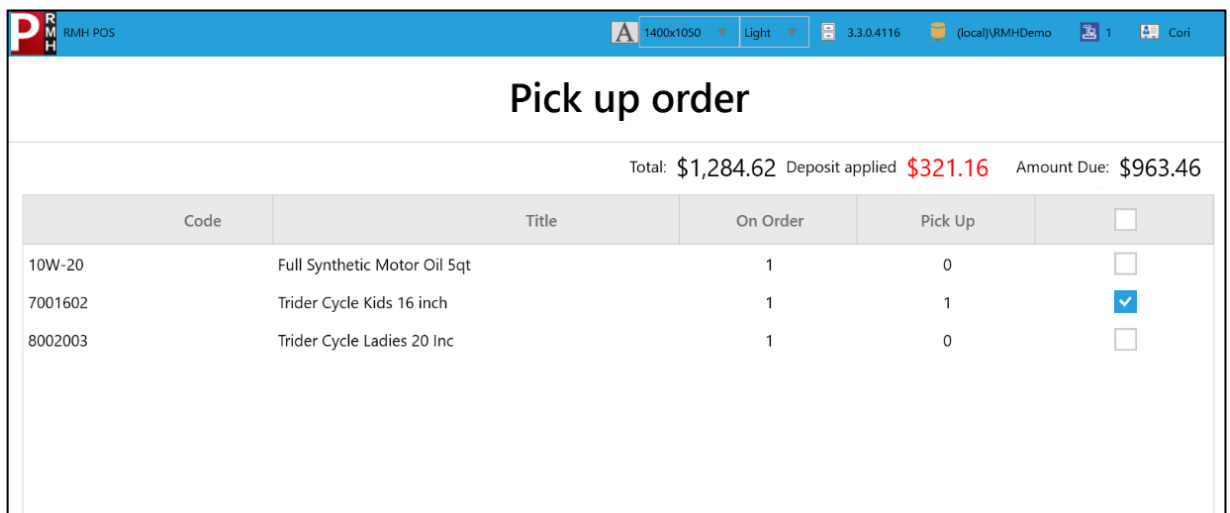
Customers can pay for any combination of items on the layaway. As soon as the customer picks up an item on layaway, that item comes out of your inventory.

1. Press **F7** (or click the **Lookup Customer** option from the **Customers** menu), select the applicable customer, and then click **Select**.

2. From the **Orders** menu, click **Recalls**, and then click **Recall a Layaway**.

3. Select the applicable layaway from the list, and then click **Add**.

4. Click **F12** to display the Select Order Action screen.
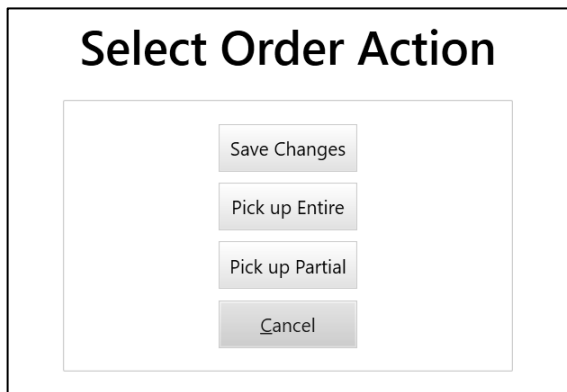
5. Click the **Pick up Partial** button.

6. On the Pick up order window, select the item(s) the customer wants to pick up by clicking in checkbox for the applicable item line(s), and then click **OK**.

   NOTE: If the customer has put two or more of the same item on layaway, enter the applicable quantity number.

7. Tender the transaction. RMH will track the layaway payment(s).

Picking up all items on layaway

A customer can pick up a combination of items, or all items, on layaway. The following shows how to pick up an entire layaway (all items).

1. Press **F7** (or click the **Lookup Customer** option from the **Customers** menu), select the applicable customer, and then click **Select**.

2. From the **Orders** menu, click **Recalls**, and then click **Recall a Layaway**.

3. Select the applicable layaway from the list, and then click **Add**.

4. Click **F12** to display the Select Order Action screen.
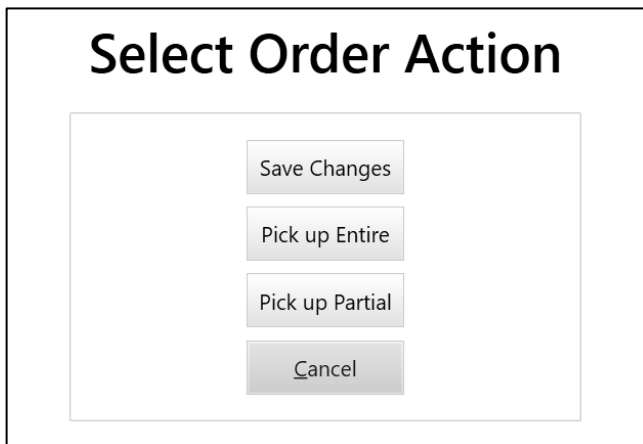
5. Click the **Pick up Entire** button.

6. When the Tender window displays, tender the transaction.

Canceling an item on layaway

1. Press **F7** (or click the **Lookup Customer** option from the **Customers** menu), select the applicable customer, and then click **Select**.

2. From the **Orders** menu, click **Recalls**, and then click **Recall a Layaway**.

   NOTE: If you selected a customer, then only the layaways for that customer will display. If you did not select a customer, you will see that the list includes all the customer accounts that currently have items on layaway.

3. Select the applicable layaway from the list, and then click **Add**.

4. On the transaction screen, select the item you want to remove from the layaway.

5. Either right-click and click the **Delete** option (*see following sample figure*), or press the **Delete** key on your keyboard.
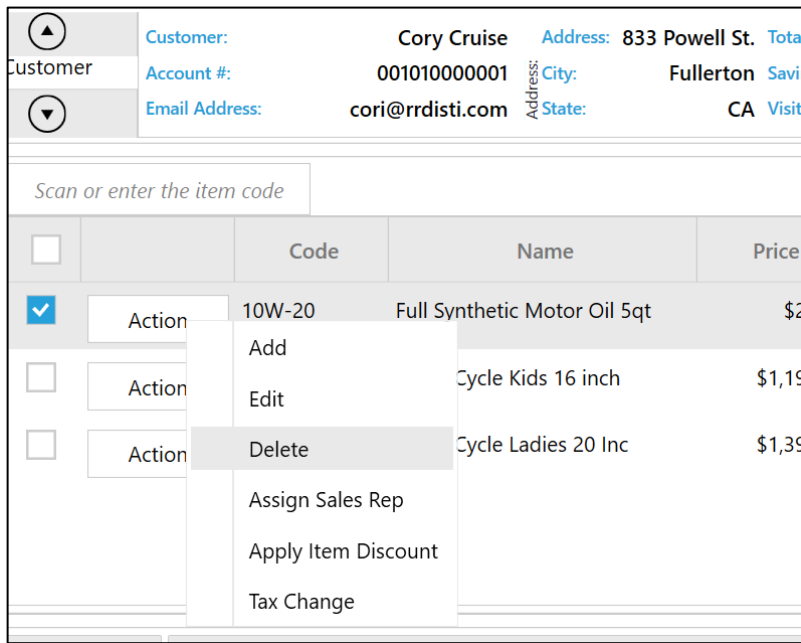
6. Press **F12**, and then perform either of the following:

   ▪ When the Select Order Action screen displays, click the **Save Changes** option, or

   ▪ When the Select Order Action screen displays, pick up either the partial or entire layaway

   NOTE: RMH may display notification messages, noting deposit refunds. *See following sample notification:*
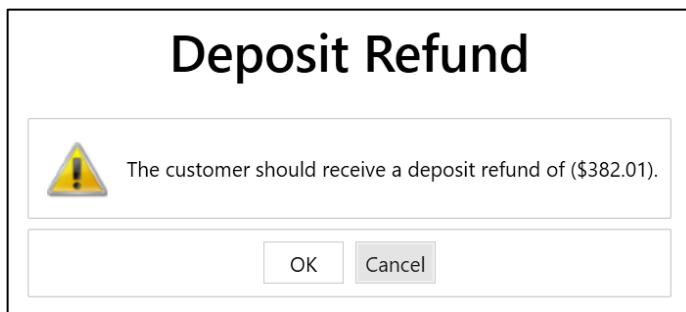
7. Press **F12** to tender the sale and refund the customer's deposit as needed.

Creating a back order

If your store is properly configured to process back orders, you can create back orders at the POS. You can create back orders for specific items as well as associate the orders with customer accounts.

1. Scan or manually enter the item on the transaction screen. Whenever you try to add an item to the transaction that does not have on-hand quantity available, RMH will automatically display the item out of stock notification similar to the following:
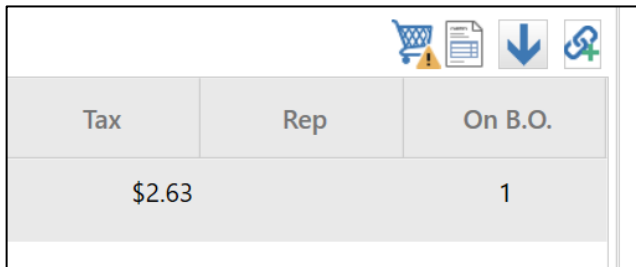
Item Out of Stock

Code:	3WHSCOO	Accept
Title:	3-Wheel Scooter	Substitutes
Requested:	1	
On Hand:	0	Back Order
Available:	0	Cancel

NOTE: Depending on how your store is configured, this notification window may vary in terms of available options.

2. If you do not want to suggest an alternate item, or do not want to sell the item if it's not available in stock, click the **Back Order** button.

   The transaction screen will then display the Back Order notification status and the 'On B.O.' column.

Tax	Rep	On B.O.
$2.63		1

3. To associate a **Reference #** and/or order **Comment**, press **Shift-F9**, enter the applicable details, and then click **OK**. This information will display at the top of the transaction screen.

4. Press **Enter** or press **Shift-F12** to display the Tender screen.

5. Enter the applicable amount, and then complete the transaction.

You can then recall the back order at any time.

Picking up items on back order

1. From the transaction screen's **Orders** menu, click **Recalls**, and then click **Recall a Back Order**.

2. When the Recall Back Order screen displays, select the applicable Back Order from the list by clicking in the checkbox, and then clicking the **Add** button. The item(s) will display on the transaction screen.

3. Press **F12**.

4. On the Select Order Action window, perform any of the following by clicking the available button:

   - **Save Changes** – Saves any edits you made to the transaction screen regarding back order items; for example, if you removed an item from the back order

- **Pick up Entire** – Lets you pick up all the items on the back order; in this case, you'll then need to tender the tender and complete the transaction

- **Pick up Partial** – Lets the customer pay for specific item(s) on the back order; in this case, simply select the applicable item(s), and then tender the transaction. RMH will track the payments towards the customer's back order

POS reports, receipts and journals

RMH provides various reports that show summary details of your POS register's activity.

- **X report** – Displays up-to-the-minute sales statistics of the register; generating the X report does not close the current batch

- **Z report** – Similar to the X report, but does close the current batch; typically generated at the end of each shift or daily at closing time

- **ZZ report** – Similar to the Z report, but it includes all the Z reports generated since the last ZZ report

Printing X reports

Use the X report to view the register's current sales info. You can view and/or print the report.

1. From the POS transaction screen, click the **Operations** menu, click **Batch**, and then click either **View X-Report** or **Print X-Report** option.

2. Review the report and/or press **Enter** to generate the report. RMH will print the X report to the receipt printer designated for the current register.

Printing Z reports

Use the Z report to review the end-of-day statistics of a particular register. Generating the Z report closes the current batch number and opens the next available batch number.

1. From the POS transaction screen, click the **Operations** menu, click **Batch**, and then click the **Print Z-Report** option.

   NOTE: If opening amounts were not entered, RMH will display a pop-up window asking you to confirm closing the batch.

2. Press **Enter** to generate the report. RMH will print the Z report to the receipt printer designated for the current register and close the current batch number.

Printing ZZ reports

The ZZ report displays the register's Z report statistics of the register as well as shows all the Z reports generated since the last ZZ report. Generating the ZZ report closes the current batch number and opens the next available batch number.

1. From the POS transaction screen, click the **Operations** menu, click **Batch**, and then click the **Print ZZ-Report** option.

   NOTE: If opening amounts were not entered, RMH will display a pop-up window asking you to confirm closing the batch.

2. Press **Enter** to generate the report. RMH will print the Z report to the receipt printer designated for the current register and close the current batch number.

Reprinting receipts

1. From the POS transaction screen, click the **Receipt** menu, then click the **Reprint** option.

2. Select the applicable **Receipt Printer**, and then click **OK**.

Previewing receipts

From the POS transaction screen, click the **Transaction** menu, click **Receipt,** click the **Preview Receipt** option, and then select the applicable printer option.

Viewing the journal

The RMH journal stores all the transactions that have processed on the current register since the last Z report was processed.

1. Either press **F4**, or from the POS transaction screen, click the **Transaction** menu, click **Receipt**, and then click the **Journal** option. The Journal will display. *See following sample figure:*

2. Perform any of the following:

  ▪ Click **Batch** to display the Batch list allowing you to select which batch you want to view

  ▪ Use the available buttons (previous, next, etc.) to browse receipts within the journal

  ▪ Click **Print** to select the printer and print the receipt

  ▪ Click **Search (F4)** to browse receipts by receipt number, account number, name, etc.