

 **FRED.OFFICE**

 **FRED.POS**

 Microsoft Dynamics™
Retail Management System

TILL

USER MANUAL

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INTRODUCTION TO THE TILL

To the User,

Congratulations on the purchase of Fred Office.

This user guide is your guide to operating the till software. The till is a hands on program so it is recommended that you are in front of the screen when reading this manual, although it is not compulsory.

It begins with basic selling and then gradually introduces you to other commonly performed functions at the till.

We recommend that this guide be introduced to all staff operating the till to ensure that it is being used correctly.

POS Software & Development Team

1. GENERAL SELLING AT THE TILL

There are three parts to processing any sale at the register:

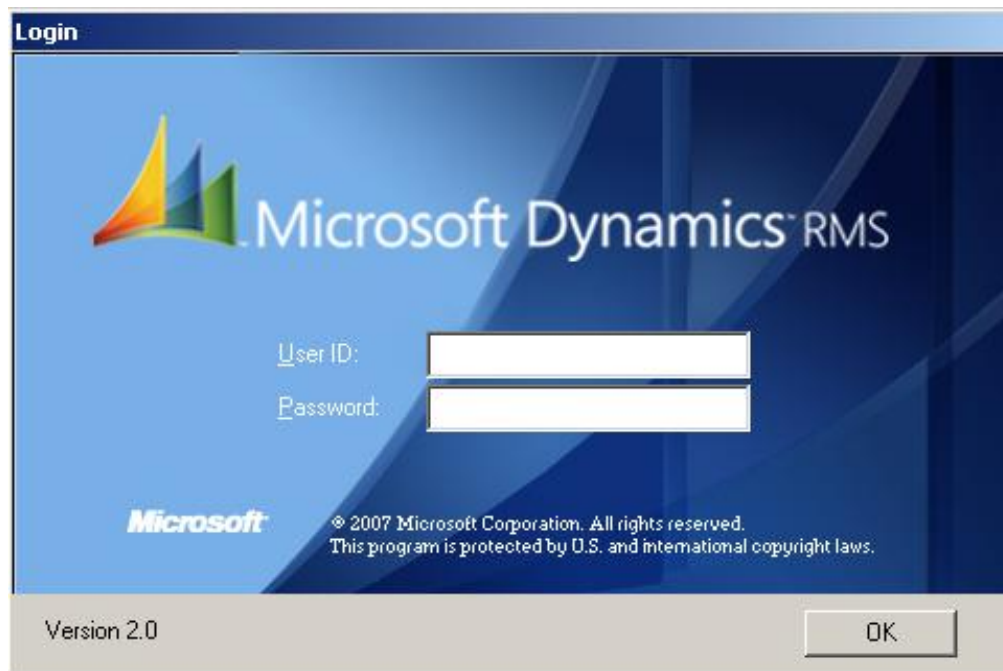
- Logging On
- Selling the items to the screen
- Tendering the money

Listed below are the procedures for processing a basic sale at the register.

Processing variations to the basic sale are covered later in the manual.

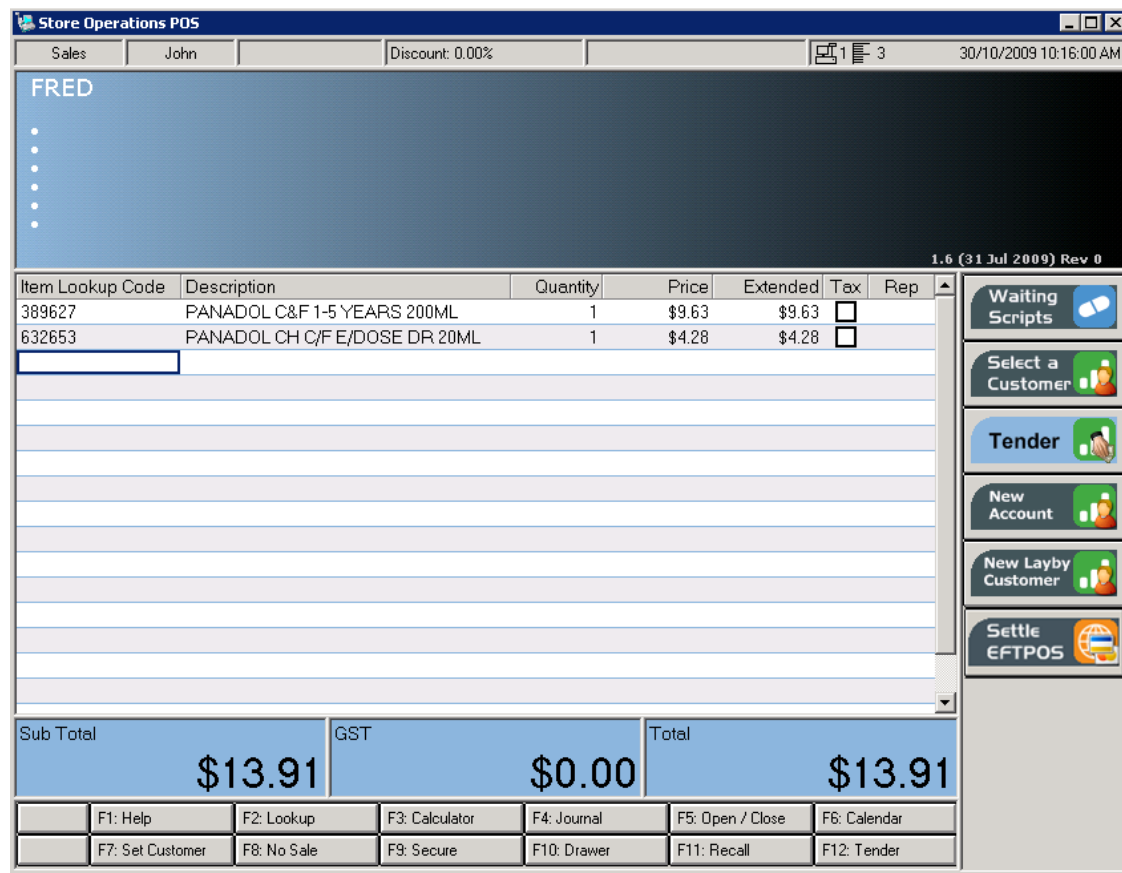
How To Process A Basic OTC Sale

- Log on using your cashier ID number



The Log on Screen

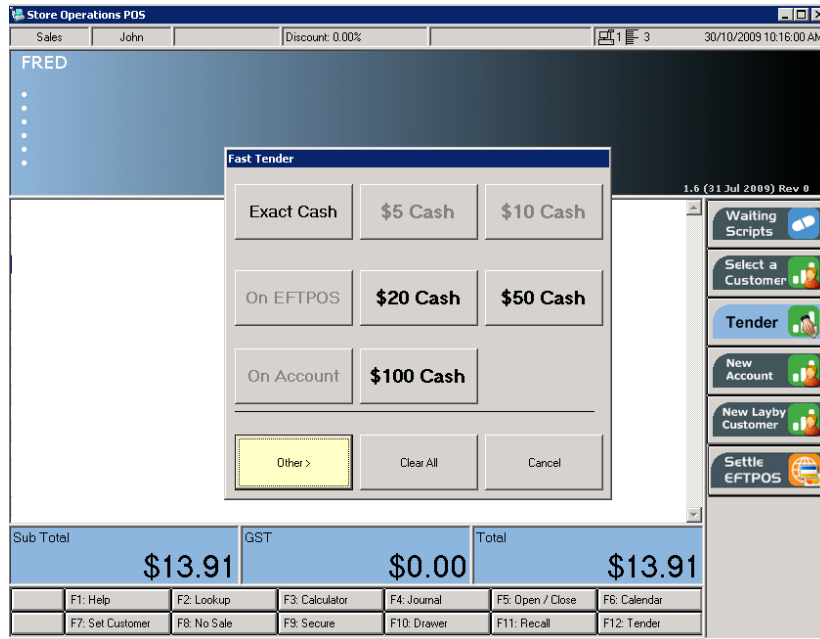
- Scan the items to be purchased



Scanning the items to the screen

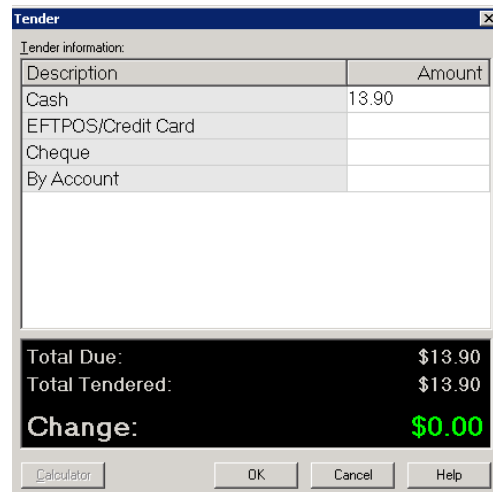
- Select the method of payment for the purchase.

For instance if the customer is paying by cash press the **CASH** hotkey on the keyboard. If they are paying by cheque press the **CHEQUE** hotkey. Alternatively click the **TENDER** button to display the **Fast Tender** screen.



The Fast Tender Screen available when TENDER button clicked

NOTE: If the customer is giving you a different amount than the options displayed on the Fast Tender Screen, click “Other” to be taken to the Total Tender screen (where you can manually type the amount).



The Tender Screen or Total Tended Window

- To finish the sale if paying by cash type the dollar amount the customer is paying followed by **Enter** on the keyboard. If they are paying by any other tender type simply press the **+** button on the keyboard to total the sale, as no change is given with any of these other tenders.

The sale has been processed. A receipt is printed and the cash draw opens.

The + Key And Its Purpose At The Register

The + key has two functions at the register:

1. It is used at the “Tender” screen to complete a sale

Press the + key at the amount tendered screen to finish the sale in one keystroke for Credit Card/ EFTPOS, Cheque and/ or Account sales.

NOTE: It is recommended to NOT use the + key when tendering a Cash sale. In this instance you should type the exact money the customer gives you.

2. Selling multiple quantities of the same product

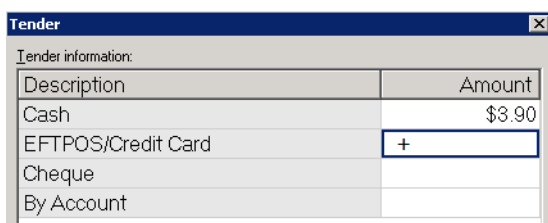
For instance, a customer is purchasing 5 packets of “Purex” toilet paper. Pressing the + key, after scanning it for the first time, 4 times will display the 5 Purex toilet paper to the screen.

How To Split Payments At The Till

It is common when serving a customer that they request to pay for their goods with different tender types. For instance, part cash and part credit card. Outlined below are some examples on how to handle different types of split payments:

Tendering a Part Cash and Part Credit card sale:

- At the **Tender Screen** type the amount in **Cash**
- Arrow down to the **Credit/ EFTPOS** tender type and press **+** to complete the sale



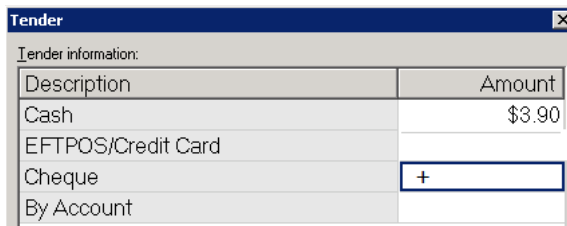
The screenshot shows a window titled "Tender" with a table for "Tender information:". The table has two columns: "Description" and "Amount". The first row is "Cash" with an amount of "\$3.90". The second row is "EFTPOS/Credit Card" with a "+" sign in the amount field. The other rows are "Cheque" and "By Account", both with empty amount fields.

Description	Amount
Cash	\$3.90
EFTPOS/Credit Card	+
Cheque	
By Account	

The Tender Screen with Partial Cash and Patial Credit Card Sale

Tendering a Part Cash and Part Cheque:

- At the **Tender Screen** type the amount in **Cash**
- Arrow down to the **Cheque** tender type and press **+** to complete the sale



The screenshot shows a window titled "Tender" with a table for "Tender information:". The table has two columns: "Description" and "Amount". The first row is "Cash" with an amount of "\$3.90". The second row is "EFTPOS/Credit Card" with an empty amount field. The third row is "Cheque" with a "+" sign in the amount field. The fourth row is "By Account" with an empty amount field.

Description	Amount
Cash	\$3.90
EFTPOS/Credit Card	
Cheque	+
By Account	

The Tender Screen with Partial Cash and Patial Cheque Sale

Tendering a Part Cash and Part Account sale:

NOTE: This should NOT be completed in a single transaction as it will create confusion with statements. Instead complete a total **Account Sale** and then log back in and complete an **Account Payment** for the **Cash** amount given.

Manually Selling An Item At The Till

There are a number of reasons why products don't scan at the register:

- The product exists in the system but the barcode has recently changed and hasn't been added to the system
- The product does not exist in the system and needs to be added
- The product is not meant to be scanned it is sold using a department key

As a general guide products that are supplied by your general wholesaler are products that should be sold by scanning them.

Products that are not supplied by your general wholesaler and are purchased direct can also be added to the database manually using AppCAT.

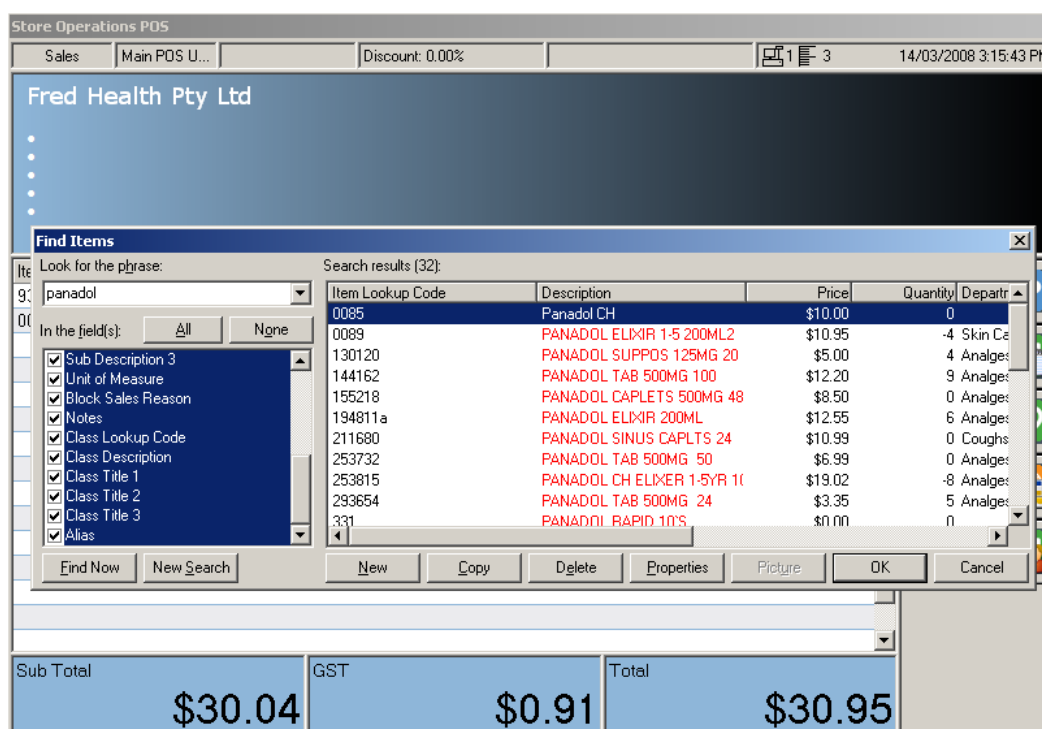
Selling policies should be set up for staff to ensure selling consistency when items don't scan.

NOTE: All staff should be trained to sell items correctly to ensure stock on hand is kept accurate.

Procedures For Quickly Selling Items Manually At The Register That Won't Scan

Option 1 – The product is in the system but won't scan

- Press the **PRODUCT SEARCH** hotkey on the keyboard to list the Item database.
- Search for the product in the **Look for the phrase** field, select the **All** option to give you more flexibility when searching for the items (see below)



Searching for a product manually at the till

- Highlight the product to select it and press **Enter** to sell it to the screen
- Tender the sale as per regular procedure (see page 3 for assistance)

NOTE: Speak to your POS Manager on how to handle future sales of the same nature at your pharmacy. For instance, is it an item that needs to be added to the system? Or, is it an item that should be sold by a department key at the register?

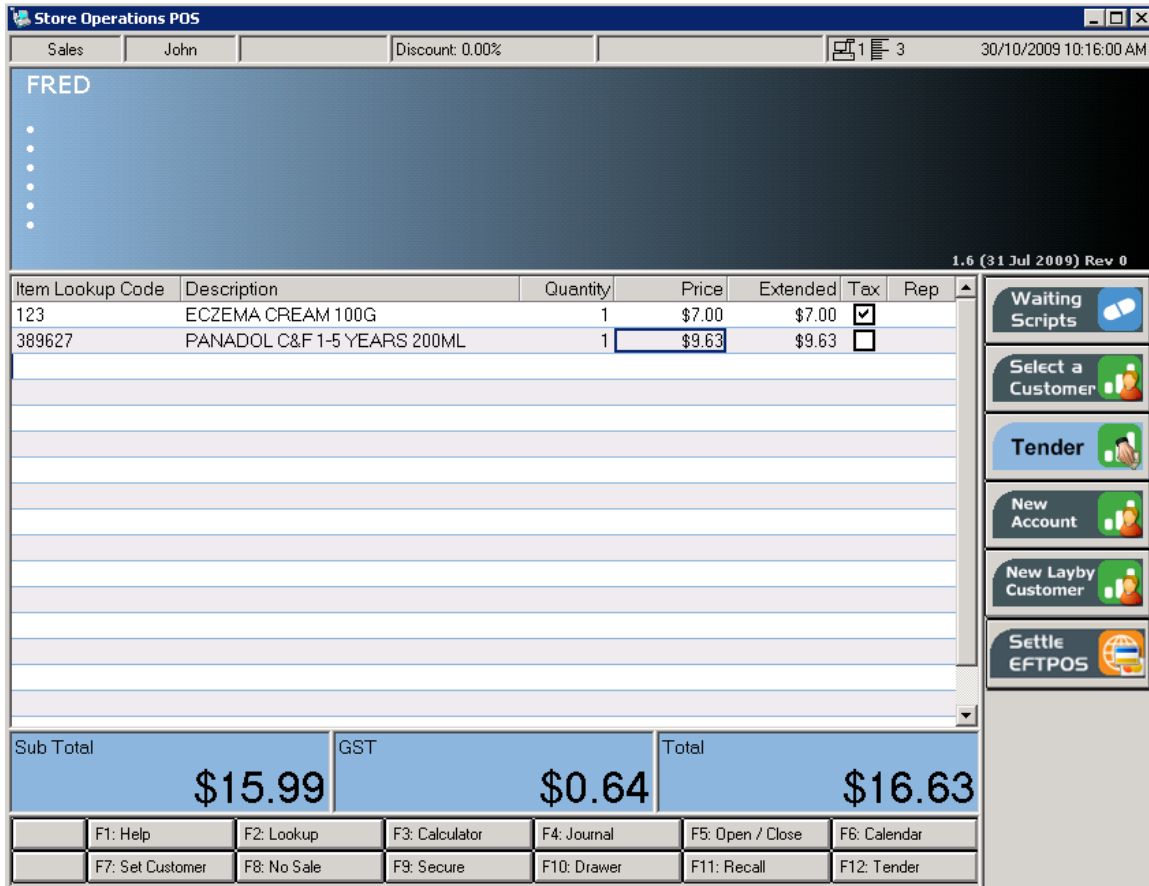
Option 2 – The product isn't in the system

When selling an item that does not scan and does not exist in the items database it can be quickly sold using one of the “**MISC**” hotkeys on the keyboard. This of course is not an ideal way of selling regular stock items, because it will make stock control for these items impossible, as well as reducing effectiveness of reports.


Whenever a situation like this arises, it is important that the sale is finished as quickly as possible, as well as followed up with POS Manager, to ensure the product is added to the system for future sales.

How To Make A Temporary Price Override

- Place the cursor over the **Price** field. This can be done by clicking with the mouse or highlighting the product and then pressing the **TAB** key until the cursor is selected on the price field



The cursor highlighted on the Price for a Temporary price override

- Type over the existing price and press **Enter** until you reach the next free line. This will also put a red lightning bolt beside the price  \$12.00 which indicates this price has been modified for this sale only
- Tender the sale as per regular procedure (see page 3 for assistance)

How To Remove A Single Item

Option 1:

- Ensure the cursor is directly below the item to be cancelled
- Press the **VOID ITEM** hotkey on the keyboard to remove the item

Option 2:

- Ensure the cursor is on the **itemlookupcode** field of the item you wish to remove
- Press the spacebar on the keyboard to clear the item

How To Cancel The Entire Sale

- Press the **VOID SALE** hotkey on the keyboard

NOTE: Depending on your receipt settings a docket will be printed with description 'Transaction Aborted'

How To Reprint A Receipt That Was Just Printed

- Log on using your cashier ID number
- Press the **REPRINT RECEIPT** hotkey

The last receipt on that till is reprinted

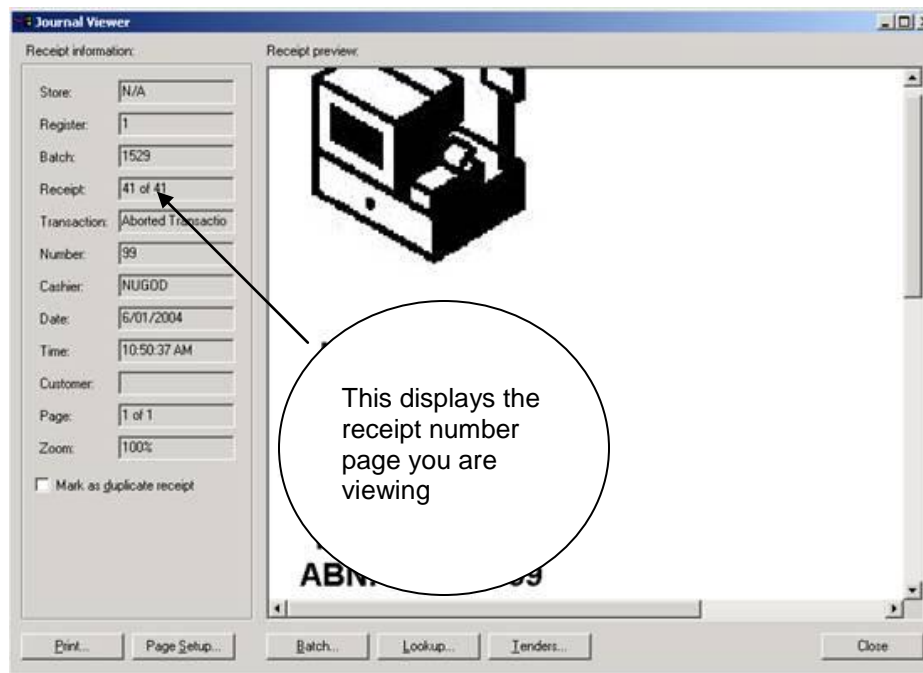
How To Reprint A Receipt For A Previous Sale

- Log on using your cashier ID number
- Press the **F4 Journal** function key on the keyboard to display the **Journal viewer** (see figure below).
- Click the **Batch** option to show the current date.

NOTE: If the transaction occurred on another day select the date it occurred between

- Press the **Page up** and **Page down** keys on the keyboard to scroll through all receipts. The **Home** and **End keys** can also be used at the till to take you to the start and end of the list.

NOTE: If at the Till doing this press the **NUMLOCK** key to enable the number pad on the keyboard.

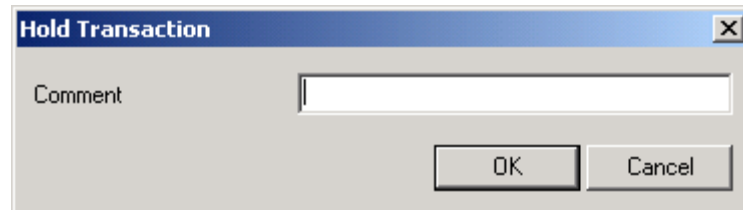


The Journal Viewer Window

- Ensure the receipt is displayed on the screen, left click the Print option and answer **YES** to the question 'Do you wish to print this docket?'

How To Place A Transaction On Hold

- Logon and Scan the products
- Press the **HOLD** hotkey or **Ctrl F12** on the keyboard
- Type the customer name in the description box, refer to figure 10



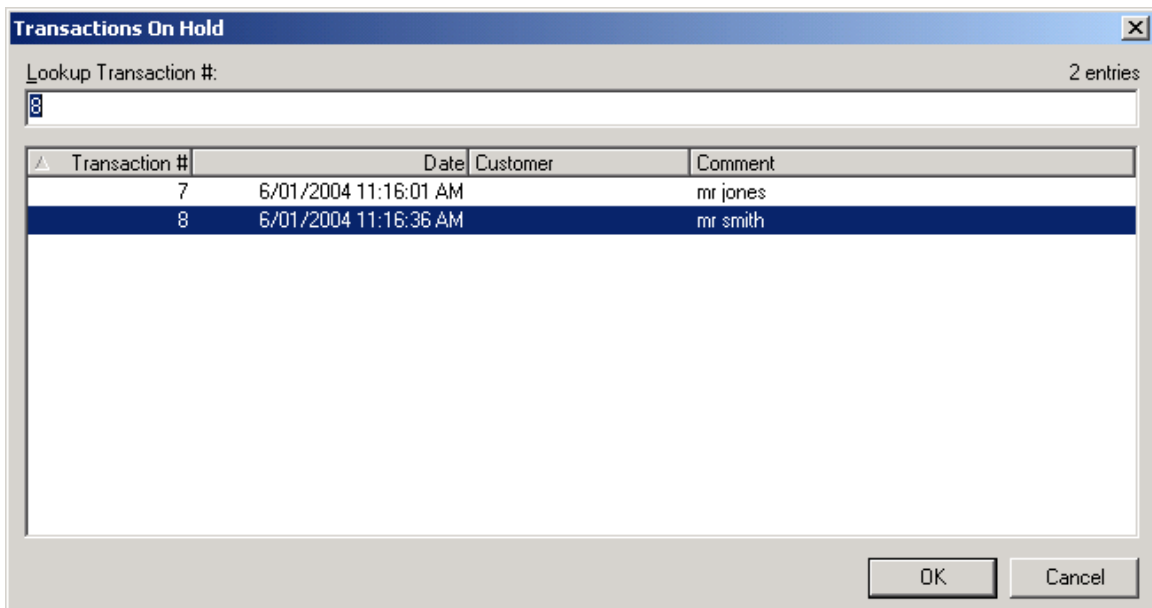
Entering a Customer name for a transaction on hold

- Press **Enter**, to finish
- Press the **LOG ON** hotkey or **F9** to secure the till selling screen

The sale has been placed on hold

How To Retrieve A Sale That Has Been Placed On Hold

- Log on using your cashier ID number
- Press the **RECALL** hotkey on the keyboard
- Select the option to **recall transaction placed on hold**
- Highlight the customer name from the list and press **Enter** to select them

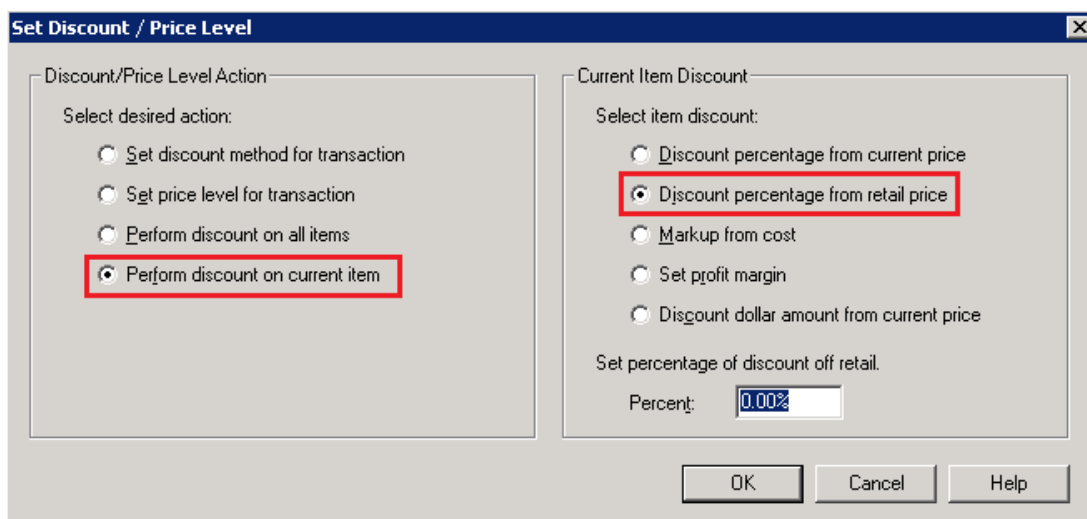


The List of Sales that have been placed on hold

- Press **Enter** to continue with the sale.
- Items are sold to the screen.
- Tender the sale as per regular procedure (see page 3 for assistance)


How To Discount A Single Item

- Logon and Scan the products
- Ensure the cursor is below the item look up code of the item you wish to discount.
- Press the **DISCOUNT ITEM** hotkey. This will automatically default to the **Perform discount on current item** option in the discount window (see below)



The Set Discount/ Price Level Window with Discount Item defaults

- Type the discount percentage to be applied in the **Percent** field and then press **Enter** three times to continue.
- The red lightning bolt beside the item indicates that there has been a price change for that item only (see figure over page).

Item Lookup Code	Description	Quantity	Price	Extended	Tax	Rep
9300673435637	PANADOL SUPPOS 250MG 20	1 	\$18.86	\$18.86	<input type="checkbox"/>	
0085	Panadol CH	1	\$10.00	\$10.00	<input checked="" type="checkbox"/>	
Sub Total			\$27.95			
GST			\$0.91			
Total			\$28.86			

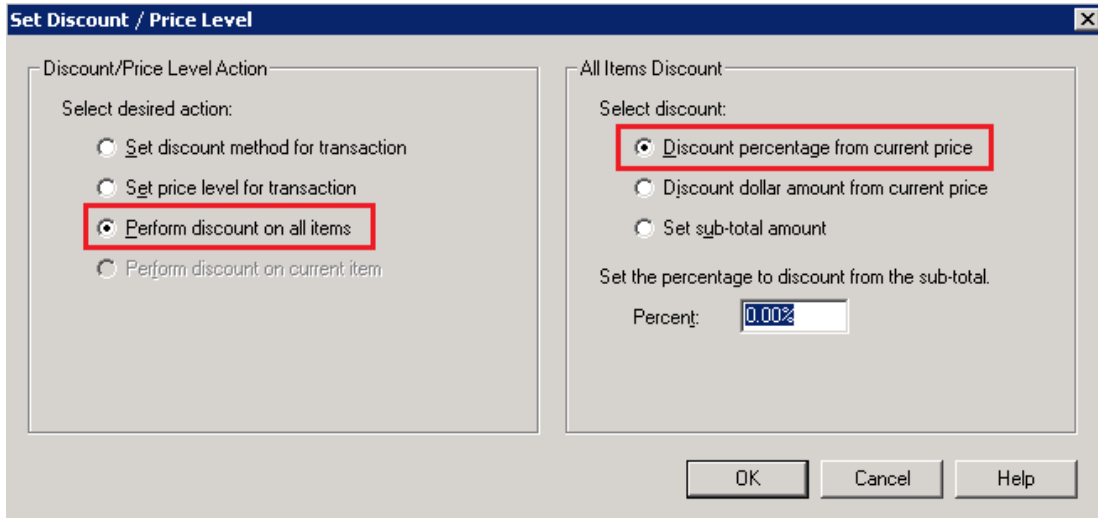
The lightning bolt indicates a change in price has occurred. The bold indicates a reduction in price.

Lightning Bolt indicates a discount applied to one of the items scanned

NOTE: You can scan any other items that don't attract a discount after completing this step.

- Tender the sale as per regular procedure (see page 3 for assistance)

- Press the **DISCOUNT SALE** hotkey. This automatically defaults to the **Perform discounts on all items** option in the discount window (see below).



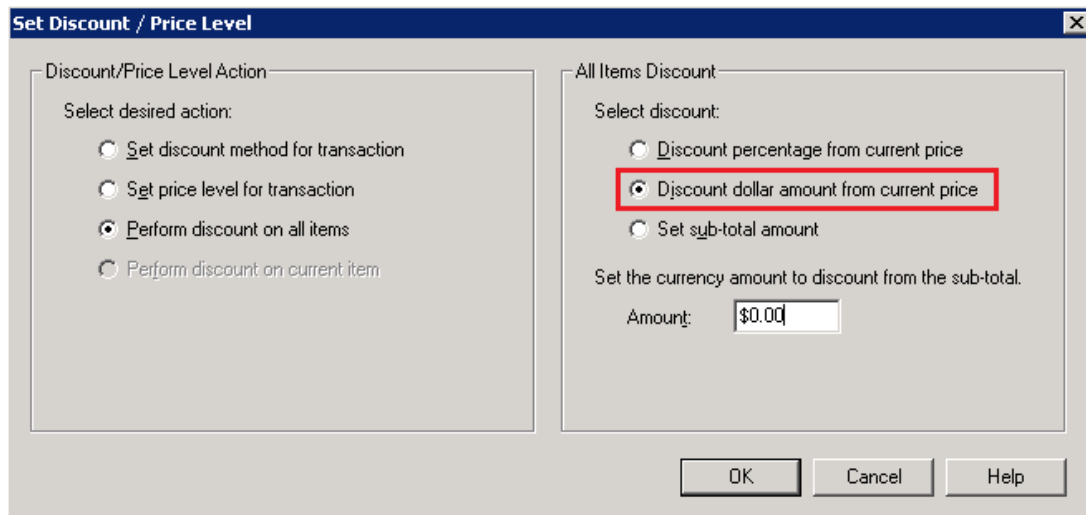
The Set Discount/ Price Level Window with Discount Sale defaults

- Type the discount percentage to be applied in the **Percent** field and then press **Enter** twice to continue.
- The red lightning bolt beside the items indicates that there has been a price change for all items, the discount applies to any future items added to the same sale

NOTE: To reverse the discount on the entire sale press **DISCOUNT SALE** hotkey on the keyboard and select the “No Discount” option, press **Enter** to continue

How To Discount The Retail Price By Dollar Value

- Logon and Scan the products
- Ensure the cursor is directly below the last scanned item
- Press the **DISCOUNT SALE** hotkey
- Select the option **discount dollar amount from current price**

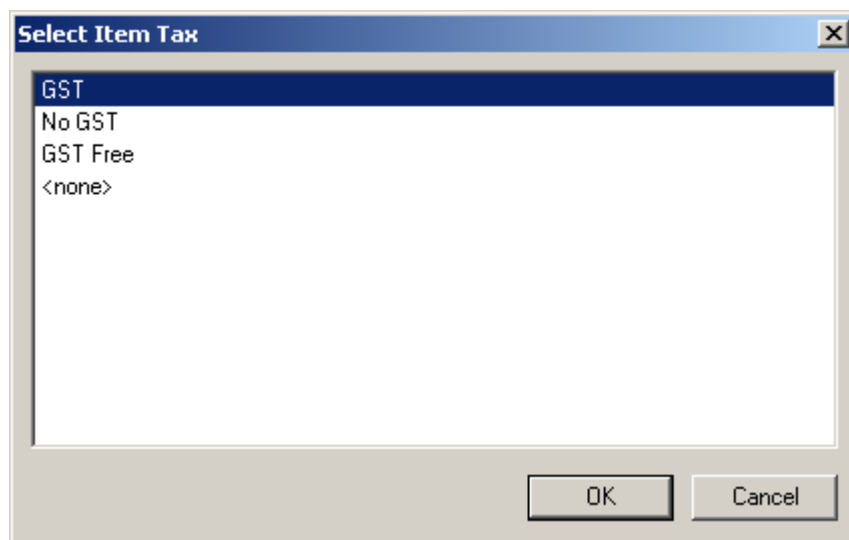


Selecting "Discount dollar amount from current price"

- Type the dollar amount the sale is to be reduced by and then press **Enter** to continue
- Tender the sale as per regular procedure (see page 3 for assistance)

How To Temporarily Change The GST Status Of An Item

- Logon and Scan the products
- Place the cursor over the **Tax** field. This can be done by clicking with the mouse or highlighting the product and then pressing the **TAB** key until the cursor is selected on the Tax field
- Press **F2** on the keyboard
- Use the arrow keys to highlight the GST status required (as shown below) and press **Enter** to continue



Select Item Tax Window

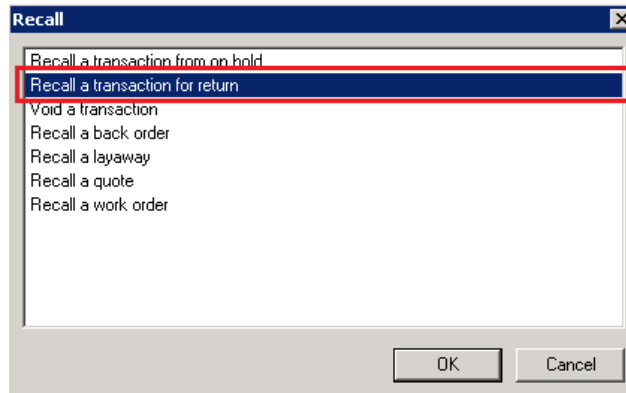
- Tender the sale as per regular procedure (see page 3 for assistance)

NOTE: Changing the Tax status for an item in this manner is only a change valid for the sale being made not a permanent tax change. A permanent Tax status change can only be made via the Item Stockcard in Fred Office.

How To Perform Returns

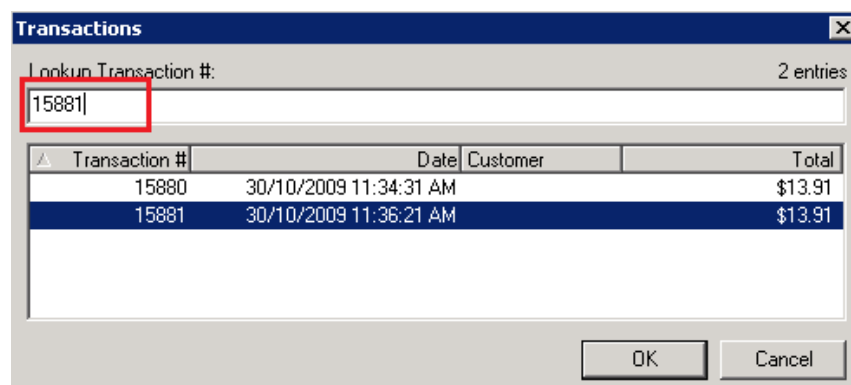
Option 1: Return with Receipt (Recommended)

- Log on using your cashier ID number
- Press the **RECALL** hotkey on the keyboard
- Select **Recall a transaction or return** and press **Enter**



Select Recall a transaction for return

- Select the date range the transaction occurred between (or **Enter** if today's date)
- Type or Scan the transaction number found on the receipt then press **Enter**



Find Transaction Window

NOTE: The entire sale is displayed on screen, marked in red to indicate they are being returned (as shown below).



Returning Items from Receipt

- Remove any items not being returned from the transaction.
- Tender the sale as per regular procedure (see page 3 for assistance)

Option 2: Return Individual Item

- Log on using your cashier ID number
- Press the **RETURN ITEM** hotkey on the keyboard

The return symbol appears when the till is in return mode

Code	Description	Quantity	Price	Extended	Tax	Rep
9300673435637	PANADOL SUPPOS 250MG 20	-1	\$20.95	-\$20.95		<input type="checkbox"/>
0085	Panadol CH	-1	\$10.00	-\$10.00		<input checked="" type="checkbox"/>

Sub Total	GST	Total
-\$30.04	-\$0.91	-\$30.95

The Till in Return mode

- Scan the items to be returned
- Tender the sale as per regular procedure (see page 3 for assistance)

Option 3: Perform an Exchange (Sale & Return in a single transaction)

- Log on and Scan items to be sold
- Press the **RETURN ITEM** hotkey on the keyboard
- Scan the items to be returned

The screenshot shows the 'Store Operations POS' interface for 'Fred Health Pty Ltd'. The top status bar includes 'Sales', 'Main POS U...', 'Discount: 0.00%', a printer icon, '4', and the date/time '14/03/2008 4:10:30 PM'. The main display area shows a list of items with columns for 'Item Lookup Code', 'Description', 'Quantity', 'Price', 'Extended', 'Tax', and 'Rep'. The items listed are:

Item Lookup Code	Description	Quantity	Price	Extended	Tax	Rep
9300673435637	PANADOL SUPPOS 250MG 20	-1	\$20.95	-\$20.95	<input type="checkbox"/>	
0085	Panadol CH	-1	\$10.00	-\$10.00	<input checked="" type="checkbox"/>	
749218	CHEM/OWNCOLD SORE CREAM 5G	1	\$12.99	\$12.99	<input checked="" type="checkbox"/>	

At the bottom of the screen, a summary bar shows:

Sub Total	GST	Total
-\$18.23	\$0.27	-\$17.96

On the right side of the interface, there are several buttons: 'Waiting Scripts', 'Order Pad', 'Loyalty', 'Settle EFTPOS', and 'Select a Customer'.

An example of a return sale and purchase occurring within the one sales

- Tender the sale as per regular procedure (see page 3 for assistance).
This will result in either a refund or payment of the difference.

NOTE: Once the sale is processed the return mode will automatically turn itself off, so as to not affect the next transaction.

How To Setup A Short Term Credit Account For A Customer At The Till

A **Work Order** can be used to set up a short-term credit for a customer but it is not a permanent account.

Creating the short term credit using the Work Order function:

- Log on using your cashier ID number
- Scan the items to be purchased on credit
- Press **WORK ORDER** hotkey on the keyboard

This sale is converted into a work order

Comment	Prev. Deposit	Add'l Deposit	Balance	Due Date	Reference
	\$0.00	\$0.00	\$20.95	14/03/2008	

Item Lookup Code	Description	R.T.D.	On Order	Price	Extended	Tax	Rep
9300673435637	PANADOL SUPPOS 250MG 20	0	1	\$20.95	\$20.95	<input type="checkbox"/>	

Sub Total	\$20.95	GST	\$0.00	Total	\$20.95
-----------	---------	-----	--------	-------	---------

Creating a Work Order

- Press **DEPOSIT** hotkey to display the **Details** screen (see below)

Work Order Information

General Details

Reference number:

Comment:

Order Details

Due Date:

Override deposit:

Order history:

Date	Cashier	Comment	Deposit
------	---------	---------	---------

View... OK Cancel Help

Work Order information window

- Type the customer's name in the **Comment** field
- If the customer is paying for some of the goods enter the amount they are paying in the **Override Deposit** field
- Tender the sale as per regular procedure (see page 3 for assistance)

How To Retrieve A Short Term Credit For A Customer At The Till

- Log on using your cashier ID number
- Press the **RECALL** hotkey or **F11** key on the keyboard
- Highlight the option **Recall a Work Order** and press **Enter**
- Highlight the **Work Order** to be recalled and press **Enter** to continue

The screenshot shows a software window titled "Work Orders". At the top, there is a "Lookup Order #" field containing the number "755". To the right of this field, it says "9 entries". Below the field is a table with the following data:

Order #	Date	Reference	Customer	Comment
755	4/10/2002 3:17:16 PM			o'leary marelene
871	20/12/2002 1:59:04 PM			MARY PHIN
903	17/01/2003 3:35:21 PM			timothy schragg
908	4/03/2003 12:04:11 PM			MC MINN
1040	15/04/2003 5:04:26 PM			KATRIB
1041	16/04/2003 4:41:09 PM			VALETINE
1045	29/04/2003 12:04:04 PM			LILLIAN DRAGOJEVIC
1051	5/05/2003 3:07:30 PM			fay hickford
1055	7/05/2003 2:00:25 PM			campangna

At the bottom of the window, there are "OK" and "Cancel" buttons.

The Work Order window

- Highlight the option to **Pickup entire work order**, press **Enter** to continue
- Tender the sale as per regular procedure (see page 3 for assistance)

How To Do A 'Cash Out' As Part Of A Sale Purchase

- Log on using your cashier ID number
- Sell the items to the screen
- Press the **CASH** hotkey on the keyboard
- Enter the cash out amount as a negative amount and then press **Enter**,.
For instance if it was a fifty dollar cash out it would be entered as -50.00
- Arrow down to the **EFTPOS** tender type and press **+** to finish the sale

Tender information:	
Description	Amount
Cash	-\$50.00
EFTPOS/Credit Card	+
Cheque	
By Account	

Total Due: \$7.00
Total Tendered: -\$50.00
Balance: \$57.00

Calculator OK Cancel Help

Note the total amount due

Tendering Cash Out with Sale

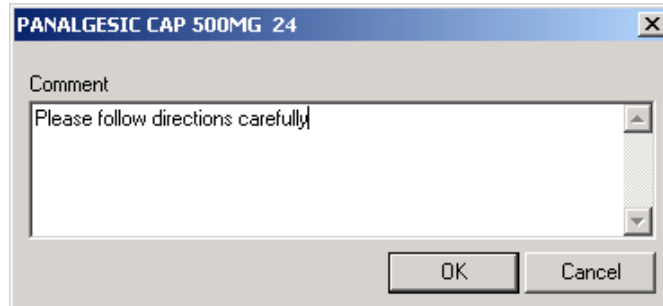
How Do I Open The Till Without Putting A Sale Through

- Log on using your cashier ID number
- Press the **NO SALE** hotkey or **F8** on the register to open the till draw
- Press the **LOG ON** hotkey to secure the screen before walking away

NOTE: All No Sales that are performed at the till are logged and recorded for security.

How To Record A Comment On A Receipt For An Item

When an item is sold on the screen a comment can be added to appear on the customer receipt by pressing the **ADD COMMENT** hotkey or **Ctrl F10** on the keyboard (if multiple items make sure you are underneath the item you wish to record a comment against).



Item Comment Example

NOTE: Transaction comments are different to item comments. Transaction comments are not designed to print on account statements they are an administrative functionality used by account staff.

How To Exit The Till Program:

- Log on using your cashier ID number
- Press the **EXIT** hotkey on the register

2. HANDLING CUSTOMER LAY BY

How To Create A Customer Lay By

- Log on using your cashier ID number

NOTE: Account customers are treated different to Lay by customers. Therefore, if the customer already exists as an account customer, the same details can be used for the Lay by account without adding the customer details again, press the **SELECT CUSTOMER** hotkey on the keyboard, to check if they exist before adding their details in again.

- Press the **NEW CUSTOMER** hotkey on the keyboard.
- Ensure “Layby Customer” is selected.
- Enter the customer details via the “Name”, “Address” and “Contacts” tabs.

The screenshot shows a software interface for creating a new layby customer. The window title is "New Layby customer". At the top, there are three tabs: "Name", "Address", and "Contacts". The "Name" tab is active and contains the following fields: "Account Number" with the value "0001671", "Title" with a dropdown menu showing "Mr" and buttons for "Mr", "Mrs", "Miss", and "Ms", "First name" with the value "Fred", and "Last name" with the value "Fredrickson". Below these fields is a "Charge Account" section with a radio button for "Layby Customer" selected. A message box below the radio button says "Layby customer" and "Layby customers don't require further details to be entered". At the bottom of the form are three buttons: "Create", "Create and Select", and "Cancel".

Creating a Lay by customer

- Once details have been entered, click “Create and Select”.

Proceed with the sale once customer details appear in the top left hand corner of the Till screen:

- Scan the items to be put on Lay by
- Press **LAYBY** hotkey on the keyboard to activate the lay by

Store Operations POS

Layaway John Discount: 0.00% 3 27/10/2009 3:12:45 PM

FRED
 Bill To:
 • Fred Fredrickson [Layby]
 • 20 Trenerry Crescent
 • Abbotsford, 3067
 • No Charge Account

1.6 (31 Jul 2009) Rev 0

Comment	Prev. Deposit	Add'l Deposit	Balance	Expiration Date	Reference
	\$0.00	\$2.40	\$23.95	27/10/2009	

Item Lookup Code	Description	R.T.D.	On Layaway	Price	Extended	Tax	Rep
123	ECZEMA CREAM 100G	0	1	\$7.00	\$7.00	<input checked="" type="checkbox"/>	
25907	SNIBS FASTENER 2 BABY PKT20	0	1	\$16.95	\$16.95	<input checked="" type="checkbox"/>	

Sub Total	GST	Total
\$21.77	\$2.18	\$23.95

F1: Help F2: Lookup F3: Calculator F4: Journal F5: Open / Close F6: Calendar
 F7: Set Customer F8: No Sale F9: Secure F10: Drawer F11: Recall F12: Tender

Waiting Scripts
 Select a Customer
 Tender
 New Account
 New Layby Customer

“Layaway” notice appears in the top left hand corner of the till screen

- Press **DEPOSIT** hotkey to add more details to the lay by
- Enter the deposit amount in the **Override Deposit** window. For instance, if they gave you \$5.00 cash (see figure below)

Layaway Information

General Details

Reference number: 123

Comment: FREDRICKSON LAYBY

Order Details

Expiration Date: 27/10/2009

Override deposit: \$5.00

Order history:

Date	Cashier	Comment	Deposit

View... OK Cancel Help

The Override Deposit Window when creating a new Lay By

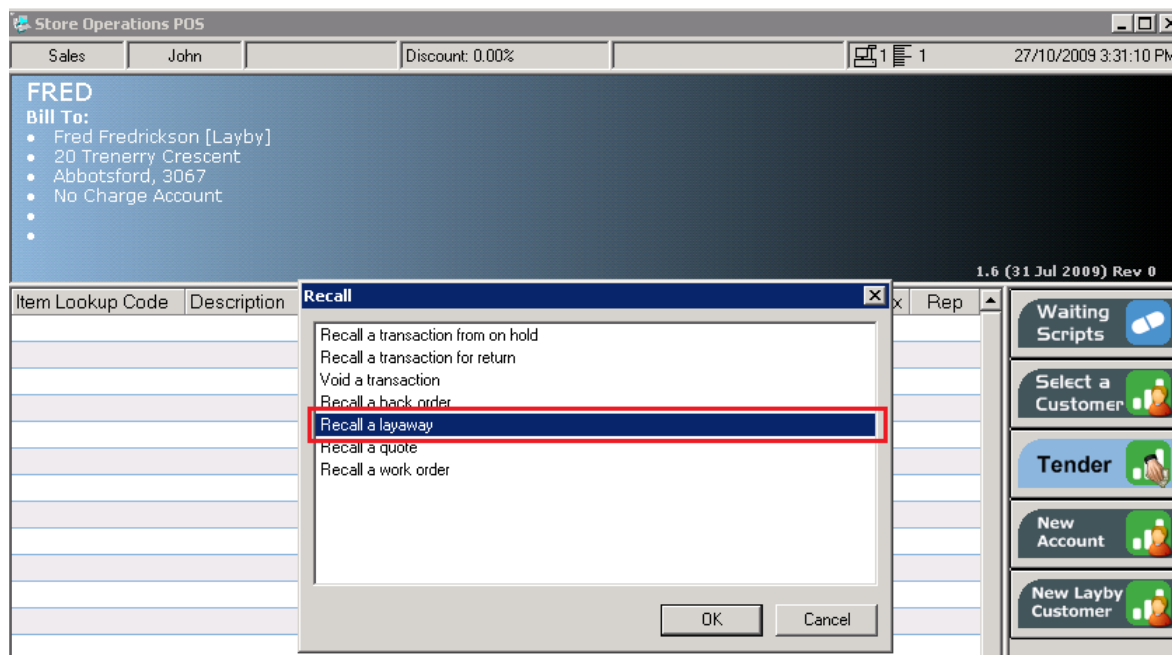
- Press **Enter**
- Tender the sale as per regular procedure (see page 3 for assistance)

The lay by has been completed and a lay by voucher is printed

How To Make A Lay By Payment/ Pickup

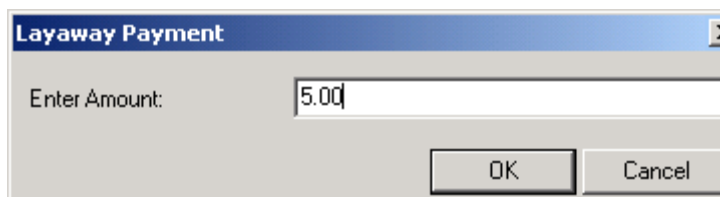
Payment:

- Log on using your cashier ID number
- Press the **RECALL** hotkey on the keyboard.
- Select **Recall a layaway** then press **Enter**.



Select Recall a layaway

- Highlight the customer name and then press **Enter** to continue.
- Press **PAYMENT** hotkey to bring up the lay by payment window
- Type the payment amount refer to the figure and then press **Enter**

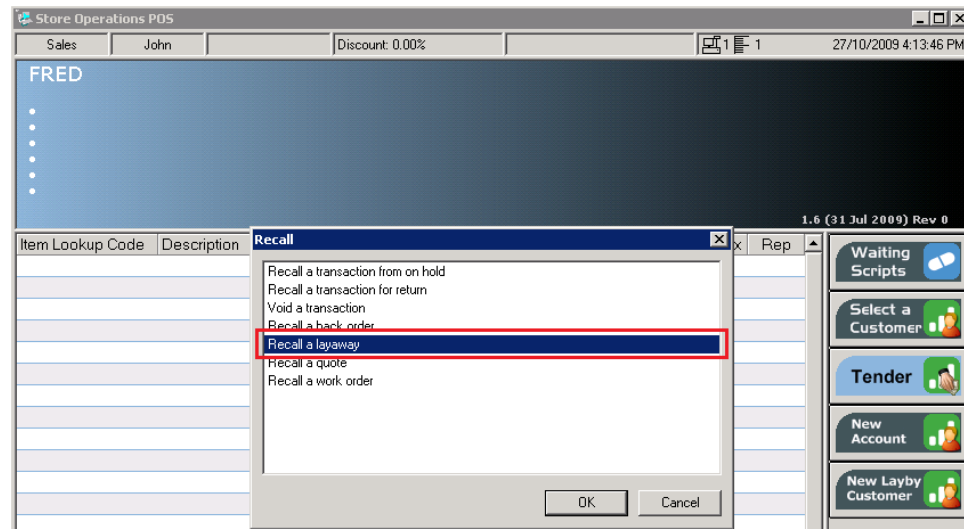


Making a Lay by payment

- Type the **Tendered amount** & press **Enter**
- Tender the sale as per regular procedure (see page 3 for assistance)

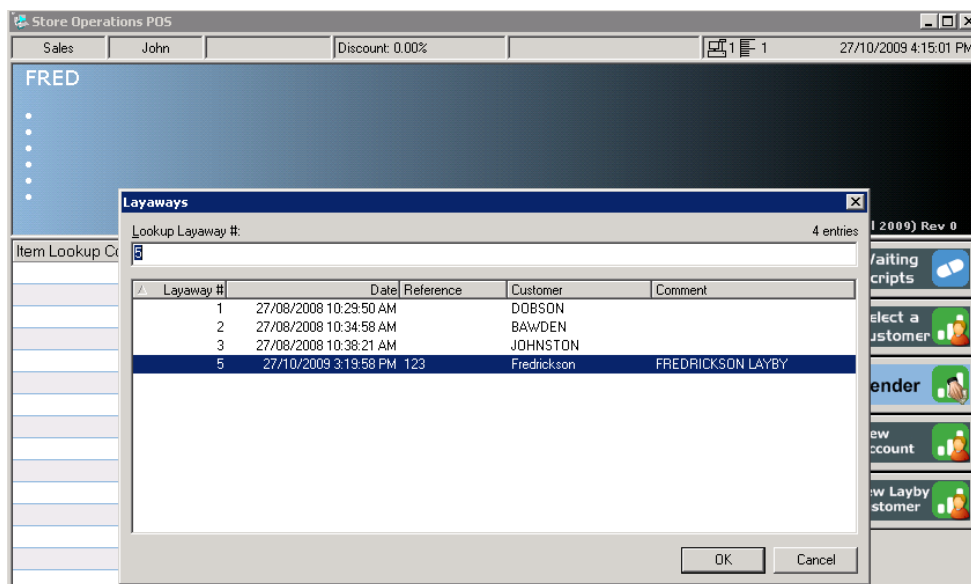
Pickup:

- Log on using your cashier ID number
- Press the **RECALL** hotkey or **F11** key on the keyboard.
- Select **Recall a layaway** then press **Enter**.



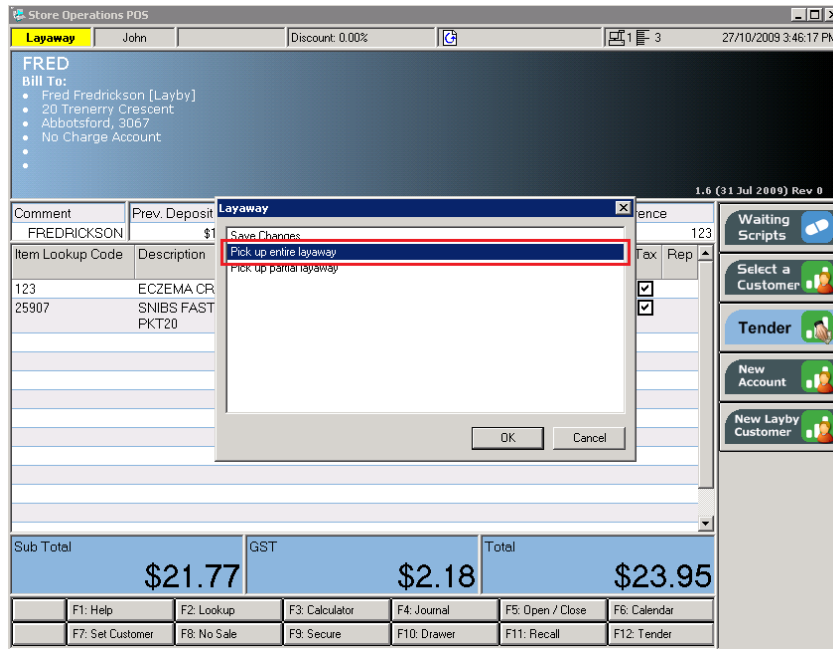
Select Recall a layaway

- Select customer and press **Enter**



Select Customer

- Press **Enter** once again.
- Select **Pick Up entire lay away** option and press **Enter**



Select Pick up entire layaway

- Tender the sale as per regular procedure (see page 3 for assistance)

How To Cancel A Lay By

- Log on using your cashier ID number
- Press the **RECALL** hotkey or **F11** key on the keyboard.
- Select **Recall a layaway** then press **Enter**.
- Select customer and press **Enter**
- Change the “On Layaway” quantities to zero, refer to figure below;

The screenshot shows the 'Store Operations POS' window. At the top, it displays 'Layaway' and 'John'. Below that, the customer name 'FRED' is shown, along with 'Bill To:' information: Fred Fredrickson [Layby], 20 Trenerry Crescent, Abbotsford, 3067, No Charge Account. A table below shows transaction details:

Comment	Prev. Deposit	Add'l Deposit	Balance	Expiration Date	Reference
FREDRICKSON	\$10.00	\$0.00	-\$10.00	27/10/2009	123

Below this is an item list table:

Item Lookup Code	Description	R.T.D.	On Layaway	Price	Extended	Tax	Rep
123	ECZEMA CREAM 100G	0	0	\$7.00	\$0.00	<input checked="" type="checkbox"/>	
25907	SNIBS FASTENER 2 BABY PKT20	0	0	\$16.95	\$0.00	<input checked="" type="checkbox"/>	

On the right side of the interface, there are buttons for 'Waiting Scripts', 'Select a Customer', and 'Tender'. A red box highlights the 'On Layaway' column in the item list table.

Change “On Layaway” Quantity to Zero

- Press **Enter** twice
- Select the **Pick Up entire lay away** option and press **Enter**
- Enter the **Deposit to keep** dollar value and press **Enter**


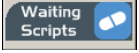

The 'Deposit To Keep' dialog box is shown with a text input field containing '\$4.00'. Below the input field are 'OK' and 'Cancel' buttons.

Deposit To Keep


NOTE: If you wish to return the full dollar value to the customer, enter **Zero (\$0.00)** at this screen).

- Tender the sale as per regular procedure (see page 3 for assistance)

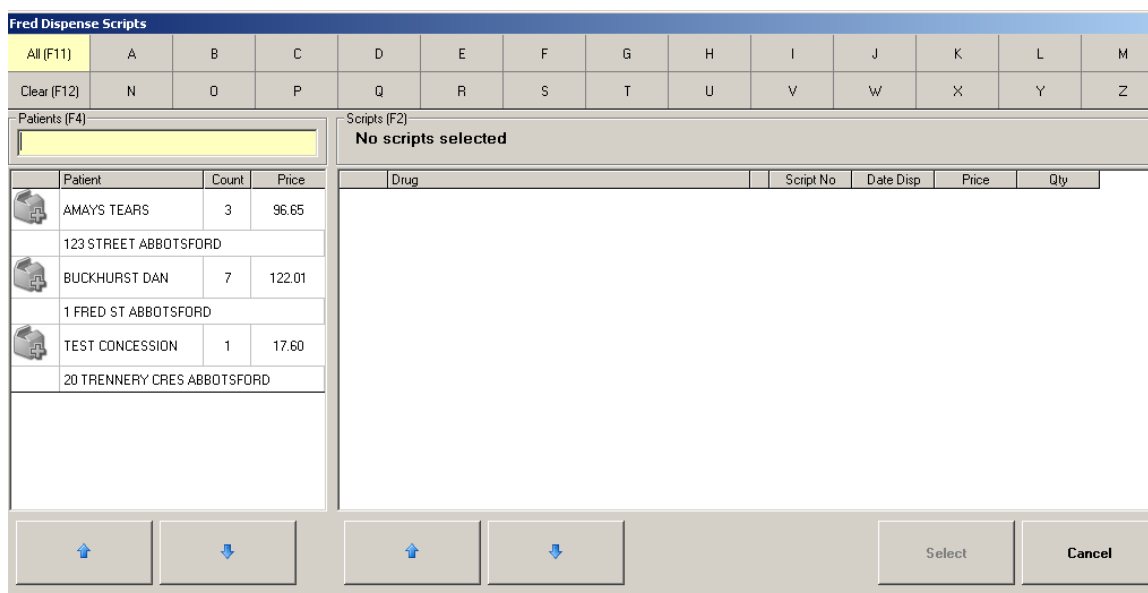
3. SELLING PRESCRIPTIONS AT THE TILL

Processing a prescription sale is the same as processing a basic OTC sale the only difference is an extra step because there is a direct link between the **Fred Dispense** dispensing program and the **Till** program. It is therefore important that all prescription items processed at the register are processed using the **Waiting Script Hotkey**  or **Waiting Scripts Button**  to ensure sales are recorded for reordering purposes. Please note older keyboards may have the **Guild script key**  instead of those displayed above.

How To Sell A Prescription Item At The Till

- Log on using your cashier ID number
- Press the **Waiting Scripts** hotkey 

A list of customer's names are listed that are waiting to collect their prescriptions (as shown below)



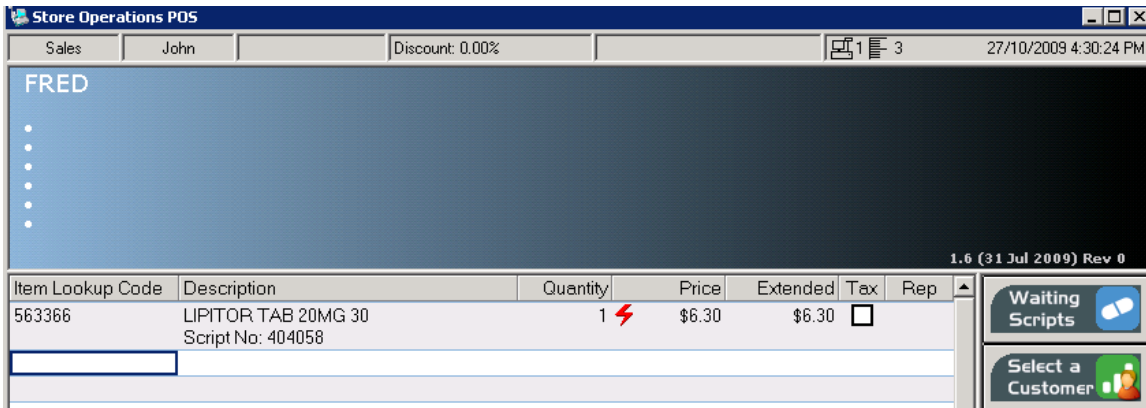
The screenshot shows the 'Fred Dispense Scripts' interface. At the top, there are function keys: 'All (F11)', 'Clear (F12)', 'Patients (F4)', and 'Scripts (F2)'. Below these are two main panels. The left panel, titled 'Patients (F4)', contains a table with columns 'Patient', 'Count', and 'Price'. The right panel, titled 'Scripts (F2)', shows 'No scripts selected' and a table with columns 'Drug', 'Script No', 'Date Disp', 'Price', and 'Qty'. At the bottom, there are navigation buttons (up/down arrows) and 'Select' and 'Cancel' buttons.

Patient	Count	Price
AMAYS TEARS 123 STREET ABBOTSFORD	3	96.65
BUCKHURST DAN 1 FRED ST ABBOTSFORD	7	122.01
TEST CONCESSION 20 TRENNERY CRES ABBOTSFORD	1	17.60

List of Customer Names

- Type at least the first 3 letters of the customer's name to filter out all other names listed in the list, or using the mouse click the first letter of their surname

- Highlight their name using the directional arrow keys and press **Enter** to sell the items to the till screen (as shown below)



An example of a prescription item sold to the till screen

- If the customer is purchasing other items, scan the items to add to the sale
- Tender the sale as per regular procedure (see page 3 for assistance)


The sale has been processed and a docket should be printed

NOTE: If a script was previously sold through the POS and then is edited in Fred Dispense a red “return” item may appear when the script is selected (as shown below). If this occurs, sell both items together to ensure your stock figures are updated; and the sale difference is able to be quickly calculated.



Script edited after sale – script to be returned and new script to be sold display

How To Put The Customer Back Into The List If They Were Wrongly Selected And The Sale Is Not Completed

- Whilst the cursor is directly below the item to be removed press the **VOID ITEM** hotkey or while the cursor is on the item press the **Spacebar** on the keyboard
- Press the **Waiting Scripts** hotkey  to search for the right customer, highlight their name and then press **Enter** to continue


NOTE: The previously voided name in the list of prescriptions will reappear again when the **Guild** key is selected even though the items were voided.

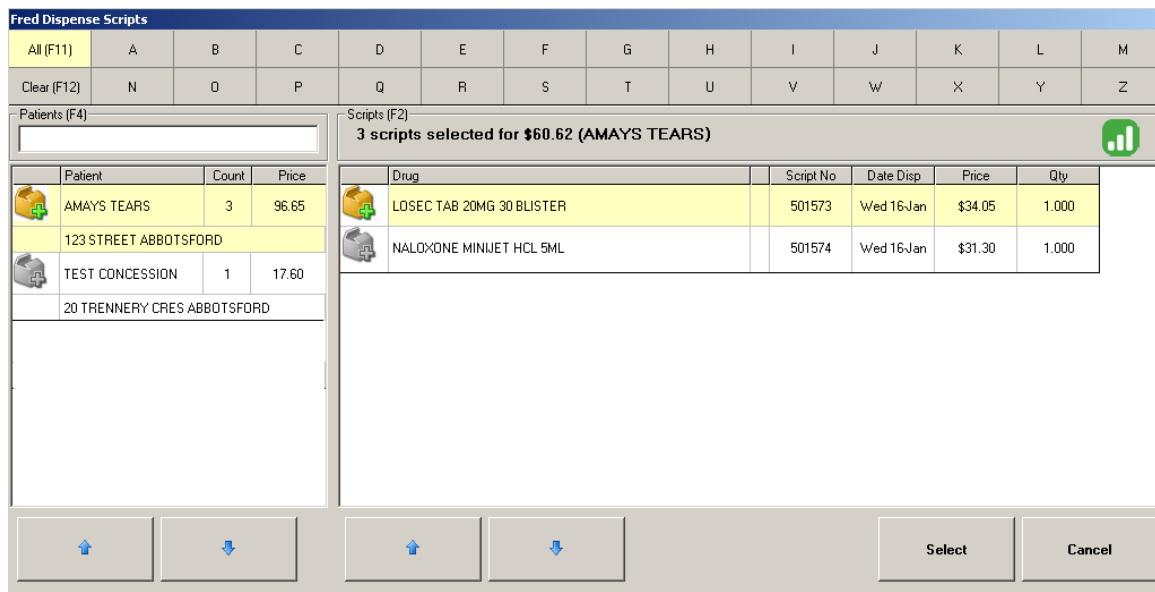
How To Put The Customer Back Into The List If They Were Wrongly Selected And The Sale Is Completed

The sale cannot be returned into the script list unless resent from Fred Dispense. However the item must be returned into stock if it has been sold at the till.

- Log on using your cashier ID
- Press the **RETURN ITEM** hotkey on the keyboard
- Scan the items to be returned
- Tender the sale as per regular procedure (see page 3 for assistance)

How To Sell Prescription Items That Are Only Partially Picked Up

- Log on using your cashier number
- Press the **Waiting Scripts** hotkey 
- Type the first 3 or 4 letters of their surname and highlight their name
- To look at the prescription items to be purchased click the **+** symbol using the mouse or use the left and right directional arrow keys to expand and collapse the items
- Highlight the prescription items they are purchasing
- Press the spacebar to put a tick beside that item.
- Spacebar any other items they are purchasing, refer to figure 36
- Press **Enter** and then **Enter** again to sell the items to the till selling screen
- Tender the sale as per regular procedure (see page 3 for assistance)



The screenshot shows the 'Fred Dispense Scripts' interface. At the top, there are keyboard shortcuts: All (F11), Clear (F12), Patients (F4), and Scripts (F2). Below these are two main panels. The left panel, 'Patients (F4)', shows a list of patients with columns for Patient, Count, and Price. The right panel, 'Scripts (F2)', shows a summary '3 scripts selected for \$60.62 (AMAYS TEARS)' and a table of selected items with columns for Drug, Script No, Date Disp, Price, and Qty. At the bottom, there are navigation arrows and 'Select' and 'Cancel' buttons.


Patient	Count	Price
AMAYS TEARS 123 STREET ABBOTSFORD	3	96.65
TEST CONCESSION 20 TRENNERY CRES ABBOTSFORD	1	17.60






Drug	Script No	Date Disp	Price	Qty
LOSEC TAB 20MG 30 BLISTER	501573	Wed 16-Jan	\$34.05	1.000
NALOXONE MINIJET HCL 5ML	501574	Wed 16-Jan	\$31.30	1.000

Selecting the items to be purchased

NOTE: The Item(s) that are not picked up remain in the list until the customer returns to pick them up or until the script are cancelled in Fred Dispense

How To Sell Prescriptions For More Than One Customer Simultaneously

- Log on using your cashier ID number
- Press the **Waiting Scripts** hotkey 
- Type the first 3 or 4 letters of their surname
- Highlight one of the family members name
- Press the spacebar to highlight their name and their scripts
- Highlight the other family member name and press the space bar to also highlight their scripts
- Press **Enter** and then **Enter** again to sell the selected items to the till selling screen

Fred Dispense Scripts														
All (F11)	<Space>	A	B	C	D	E	F	G	H	I	J	K	L	M
Clear (F12)	New Search	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Patients (F4), Search (F5)				Scripts (F2)										
				4 scripts selected for \$38.50 (FREDRICKSON JANE, FREDRICKSON FRED)										
	Patient	Count	Price		Drug	Script No	Date Disp	Price	Qty					
	FREDRICKSON FRED	3	25.45		HOLDTITE PwD 40G	404060	Tue 27-Oct	\$23.00	1.000					
	20 TRENERRY CRESCENT ABBOTSFORD				LIPITOR TAB 80MG 30	404050	Tue 27-Oct	\$6.30	1.000					
	FREDRICKSON JANE	1	15.50		LIPITOR TAB 20MG 30	404058	Tue 27-Oct	\$6.30	1.000					
	20 TRENERRY ALTONA NORTH													

The Prescriptions window showing multiple Patient Scripts selected

- Tender the sale as per regular procedure (see page 3 for assistance)

4. CUSTOMER ACCOUNTS AT THE TILL

How To Sell Products To An Account At The Till

- Log on using your cashier ID number
- Press the **FIND CUSTOMER** hotkey on the keyboard. Alternatively you can also click the **Select a Customer** button with your mouse.
- Search for the customer account, highlight their name and then press **Enter**
- Scan the items as you would in a normal sale
- Press the **ACCOUNT** hotkey on the keyboard and then press **+** on the keyboard.

NOTE: The **ACCOUNT** hotkey will place the cursor directly into this **Tender** field.

Description	Amount
Cash	
CreditCard/EFTPOS	
By Account	<input type="text"/>
Cheque	

Total Due: \$83.85
Total Tendered: \$0.00
Balance: \$83.85

The total Tender window

The sale has been completed and depending on your receipt format settings, 1 or 2 dockets will be printed

How To Make An Account Payment At The Till

- Log on using your cashier ID number
- Press either the **FIND CUSTOMER** hotkey on the keyboard or click on the **Select a Customer** option on the till screen
- Highlight the customer name and then press **Enter**
- Press the **ACCT P/MENT** hotkey to load the payment window

Store Operations POS

Sales Main POS U... Discount: 0.00% 1 14/03/2008 4:24:43 PM

Fred Health Pty Ltd

Receive Payment

Account number: [] Total owed: \$0.00 Selected customer: No Customer Selected

Payment received: \$0.00 Total Credit: \$0.00

Apply local credit: Balance: \$0.00

Open account receivables:

Orig Date	Due Date	ID	Reference	Amount	Balance Due	Payment	Pay
-----------	----------	----	-----------	--------	-------------	---------	-----

Payment received plus applied credit: \$0.00

Amount applied to account receivables: \$0.00

Over/Under payment amount: \$0.00

Sub Total \$0.00 \$0.00 \$0.00

Waiting Scripts

Order Pad

Loyalty

Settle EFTPOS

Select a Customer

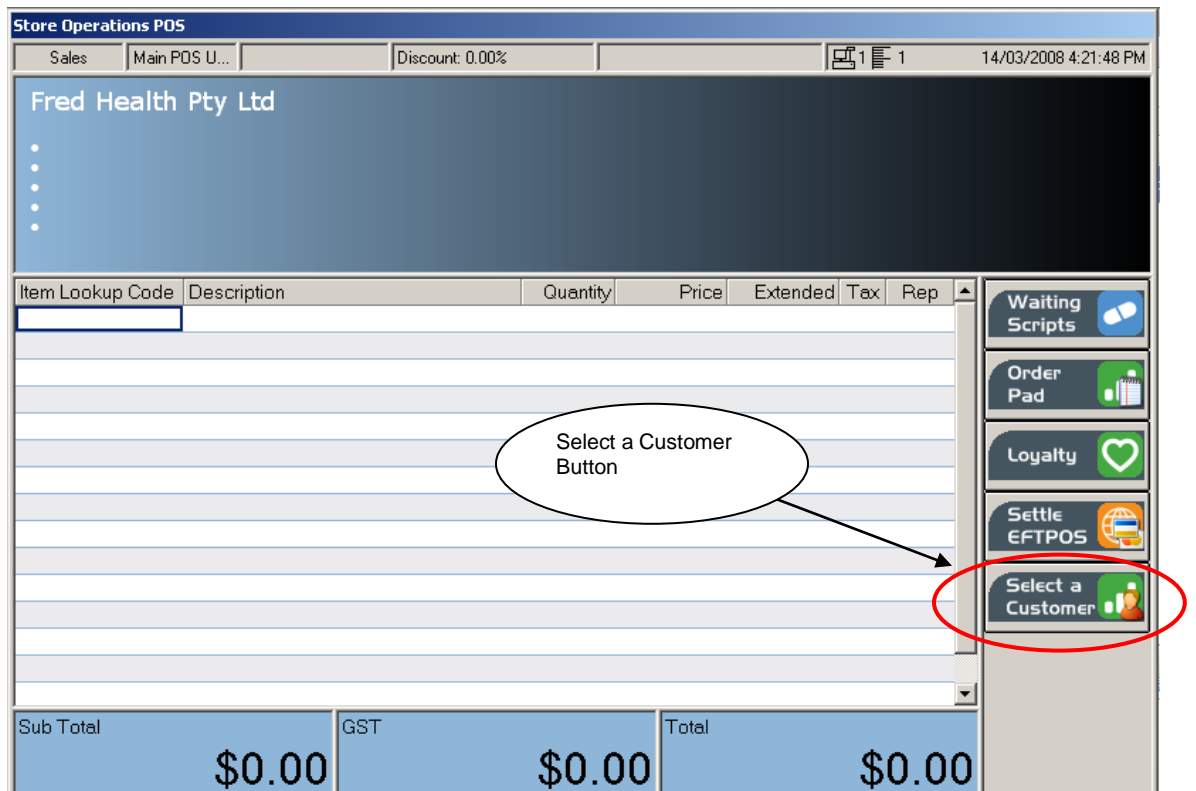
Payment on Account window

- Press **Tab** to move to the **Payment received** Field. Enter the amount to be paid.
- Press **Tab** to move to the **OK** button and then press **Enter**
- Tender the sale as per regular procedure (see page 3 for assistance)

NOTE: The details in the tender window “by account” field may auto populate based on how the system was set up.

How To Check For Account Balances At The Till

- Log on using your cashier ID number
- Press either the **FIND CUSTOMER** hotkey on the keyboard or click on the **Select a Customer** button on the till screen
- Search for the customer account highlight their name and press Enter
- The account balance is displayed in the top left hand corner of the screen.



The Till Select a Customer Button

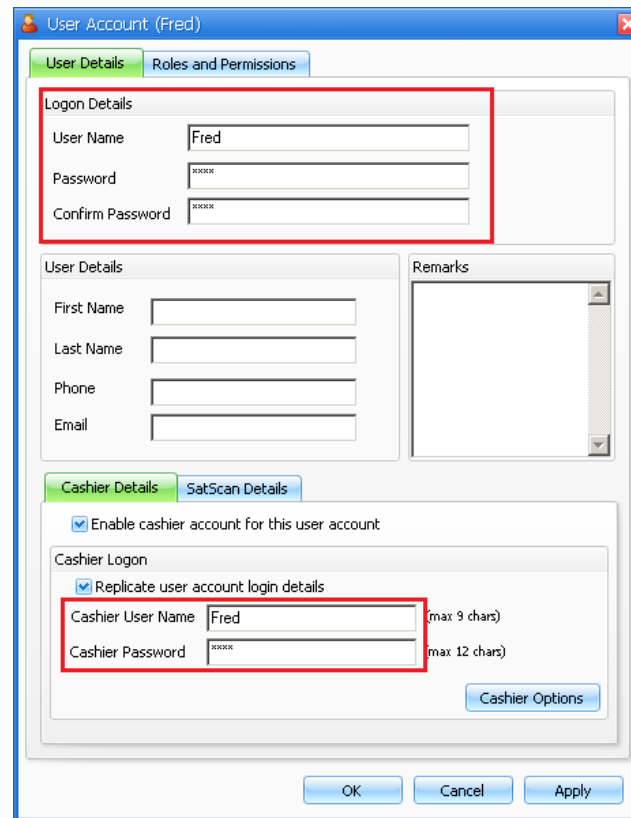
There are two ways to clear the customer:

- Press the **VOID SALE** hotkey on the keyboard.
- Press the **CLEAR CUSTOMER** hotkey on the keyboard and then secure the screen by pressing the **LOG ON** hotkey

5. ADDING NEW CASHIERS

- Log into Fred Office.
- Go to “Contacts”, then “Users” and click “New”.
- Enter the “Logon Details”.

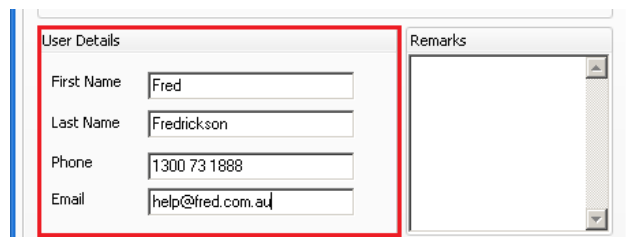
*This refers to the logon details to Fred Office, however as you fill this area the “Cashier Details” replicates this information.



The screenshot shows a window titled "User Account (Fred)" with two tabs: "User Details" (selected) and "Roles and Permissions". The "Logon Details" section is highlighted with a red box and contains three input fields: "User Name" (Fred), "Password" (masked with asterisks), and "Confirm Password" (masked with asterisks). Below this is the "User Details" section with fields for "First Name", "Last Name", "Phone", and "Email", and a "Remarks" text area. The "Cashier Details" section is also highlighted with a red box and contains a checked checkbox "Enable cashier account for this user account", a checked checkbox "Replicate user account login details", and two input fields: "Cashier User Name" (Fred, max 9 chars) and "Cashier Password" (masked, max 12 chars). A "Cashier Options" button is located below these fields. At the bottom of the window are "OK", "Cancel", and "Apply" buttons.

Enter the Logon Details to the User Card

- Enter the “User Details”.



The screenshot shows a close-up of the "User Details" section of the dialog box, which is highlighted with a red box. It contains four input fields: "First Name" (Fred), "Last Name" (Fredrickson), "Phone" (1300 73 1888), and "Email" (help@fred.com.au). To the right of these fields is a "Remarks" text area.

Enter User Details

- Remove the tick beside “Replicate user account login details”.
- Enter the “Casher User Name” and “Casher Password” (which can be blank) to be used at the POS till.

Setting Cashier Logon details

- Click “Roles and Permissions” tab.
- Click “Cashier”.

Click “Cashier” role from the Roles and Permissions tab

- Click “OK”.

6. RUNNING AN END OF DAY Z REPORT AT THE TILL

Listed below are a couple of options on how to run the **End of Day** procedure at the till. You only need to select **ONE** of these options and then follow the same instructions daily:

Option 1: Not Entering Open Amounts

At the end of trading:

- Log on using your cashier log in
- Press the **NO SALE** hotkey to open the Till Draw
- Log on using your cashier log in
- Press the **END OF DAY** hotkey on the keyboard
- Highlight the **Z reading** option and press **Enter**
- A message will appear:

“Opening Amounts have not been entered. Would you like to close this batch anyway?” Yes/No

- Answer **Yes** to go ahead with the Z report
- The report will print on the receipt printer
- Remove the takings from the till and put this with your z reading printout.
- Press **Enter** on the confirmation and then press the **LOG ON** hotkey or **F9** to secure the Till screen before walking away.

NOTE: **Leave the daily float in the till**

Option 2: Entering Open Amounts

First thing in the morning:

- Log on using your cashier log in
- Press the **END OF DAY** hotkey on the keyboard
- Highlight the **Enter opening amounts** option and press **Enter**
- Enter the opening float amount
- Press **Enter** when this has been entered

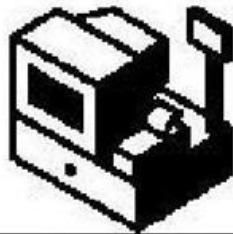
At the end of trading:

- Log on using your cashier log in
- Press the **END OF DAY** hotkey on the keyboard
- Highlight the **Enter closing amounts** option and press **Enter**
- Count all the money in the till
- Press the **END OF DAY** hotkey on the keyboard
- Highlight the **Z reading** option and press **Enter**
- The report will print on the receipt printer
- Remove the takings from the till and put this with your z reading printout.
- Press **Enter** on the confirmation and then press the **LOG ON** hotkey or **F9** to secure the Till screen before walking away.

NOTE: Leave the daily float in the till

7. MAKE SENSE OF THE Z REPORT

The image below outlines the most important figures on the Z report. Please note the F1 Fred Office Integrated Help includes where to find the same on the Batch Entry and Sales Banking Summary report.



Z REPORT

Report Date 23/04/2009
Report Time 5:39:23 PM

Register # 1
Batch # 3523
Batch Status Closed

Start Date 22/04/2009
Start Time 5:33:57 PM
Date 23/04/2009
Time 5:39:19 PM

Amount entered before opening (ie Float)	Opening Total	\$0.00	Total Sales (inc Account Sales, Closed Laybys)
	Sales	\$1,924.80	
	Returns	\$0.00	
	Tax	\$22.36	Total Tax paid on sales
	Shipping	\$0.00	
	Debit Surcharge	\$0.00	
Total Layby deposits and payments	Cash Back Fee	\$0.00	
	Paid on Layaway	\$0.00	Total Account Payments
Total received on Work Orders	Paid to Account	\$10.30	
	Deposit Made	\$0.00	
Money taken out of till (ie Petty Cash)	Total	\$1,957.46	Total Sales taking into account above variables (ie \$1957.46 = \$1924.80 + \$22.36 + \$10.30)
	Paid Out	\$0.00	
	Dropped	\$0.00	
Total of completed Laybys (inc previous payments)	Layaway Closed	\$0.00	Total Sold onto Accounts
	Paid on Account	\$61.70	
	Deposit Redeem e	\$0.00	
Closing Total (relevant only if till opening amounts are used)	Closing Total	\$0.00	
	Total	\$61.70	Total of variables "Paid Out" to "Closing Total"
Related to Opening Total/ Closing Total	Over / Short	-\$1,895.76	
	Total Tendered	\$2,347.06	Total amount tendered (before change etc)
	Total Change	-\$389.60	
Total cost amount for goods sold	Discounts	\$7.64	Total of discounts given
	Cost of Goods	\$2,650.46	
	Commission	\$2,217.83	Gov recovery amount
Number of customers	Customer Count	86	
	No Sales	0	Number of times <NO SALE> used
	Aborted Trans	0	Number of times <VOID SALE> used
	Tax Collected:		
	GST	\$22.36	
	GST FREE	\$0.00	
	NO GST	\$0.00	
	Cash	\$0.00	(open)
	CreditCard/EFTP	\$0.00	(open)
	Cheque	\$0.00	(open)
	Plus Points Redee	\$0.00	(open)
	EFT Manual ONL	\$0.00	(open)
Integrated EFTPOS relevant figures	Cash	\$905.65	(shift)
	CreditCard/EFTP	\$990.11	(shift)
	Cheque	\$0.00	(shift)
	Plus Points Redee	\$0.00	(shift)
Non-Integrated EFTPOS relevant figure	EFT Manual ONL	\$0.00	(shift)
	Cash	\$0.00	(close)
	CreditCard/EFTP	\$0.00	(close)
	Cheque	\$0.00	(close)
	Plus Points Redee	\$0.00	(close)
	EFT Manual ONL	\$0.00	(close)
	Cash	-\$905.65	(short)
	CreditCard/EFTP	-\$990.11	(short)
	Cheque	\$0.00	(even)
	Plus Points Redee	\$0.00	(even)

NOTE: After this, the Z report displays Department and Hourly breakdowns.

9. HOW TO SHUTDOWN THE COMPUTERS AT THE END OF THE DAY

At the end of each day it is important that the correct procedures are carried out, to ensure that the machines are kept at their optimum performance levels and that the backup works correctly. Store Operations is installed with two different types of backup which are scheduled to run automatically:

1. A data folder backup copied from one machine to another using a program called **Ecopy**.
2. Backup to a removable media. For instance a compact disc or DVD.

Having more than one backup increases the chance of data recovery should something go wrong and backup data needed. To ensure the backup is successful ensure the following at the end of each day:

1. Exit all programs on all machines to the main windows desktop. Check that there are no programs opened on the windows task bar
2. Turn all printers off on all machines (Fred Dispense and Store Operations)
3. Turn the monitors/screens off on all machines (Fred Dispense and Store Operations)
4. Leave all machines running, it is a lot better for the machines (temperature is kept consistent) to be left running over night rather than shutting down and having to start them up from scratch each morning. If you choose to shut down the machines it is important that the following machines are left running to ensure the backup works:
 - Store Operations Server machine
 - Fred Dispense main Server machine

NOTE: Fred Installer is the best person to consult with on how to perform a shutdown at the end of the day should you have any queries

10. FAQs ABOUT THE TILL

What happens if a script is edited in Fred Dispense?

Whilst dispensing if a script is dispensed and then needs to be edited before the customer has picked up the Items, the items will be changed across to the POS. If the Items were picked up & then the customer returned the prescription this adjustment would not be done on the POS. You need to edit the prescription in Fred Dispense. This will re-send the prescription along with the item to be returned.

What is the correct way to scan a product at the till?

Hold the product about 30cm away from the scanner and then in a straight line move the product toward the scanner until the item is scanned on to the screen. If it fails to scan the first time try it again.

Why do some prescription items transfer with the format '999999 Prescription'?

When dispensing a blank item in Fred Dispense or a drug that is not matched to an item in Fred Office, it will treat this item as unknown, so the item does not have all information at the till.

What do I do if I want to discount a prescription in Fred Dispense?

If a private prescription is subject to a discount, the price needs to be adjusted in the Fred Dispense program.

Where do I order my till paper from?

Store Operations till paper can be ordered through Fred Shop via www.fred.com.au. To find out more about our product range or prices contact Fred on 1800 888 828 or email sales@fredhealth.com.au

What if I have further questions?

From any screen within Fred Office or the Store Operations POS till you can push F1 to access the program help. If you still require further assistance please contact Fred Help on 1300 73 1888.

