

F103: A First Pass through Point of Sale

(Covers the Point of Sale process which is automatically opened immediately after a new membership is entered.)

1. Overview
2. Shopping Cart
3. Payment Receipt
4. Check Out

Overview

1. This is a quick course covering a first pass through the Point of Sale process.
2. This course demonstrates one specific example: the Point of Sale process as it is automatically opened immediately after a new membership is entered.
3. Plenty of additional training is available on Point of Sale - don't worry about trying to understand every option/setting your first time through.

Shopping Cart

After entering a new membership, the Shopping Cart will appear similar to the following:

POS/Add Invoice ?

Please click on Add Product/Service button to select Product or Service.

John Smith

Inventory Item

PT Service

Additional Service

Item Name	Category	Type	QTY	Price(\$)	Tax (%)	Total(\$)	Edit	Delete
Single - Reciprocal	Reciprocal	Membership Plan	1	19.29	Sales Tax(6.8750%)	20.62		
Membership Plan Sign up	Reciprocal	Membership Plan Sign up	1	29.00	Sales Tax(6.8750%)	30.99		
						Subtotal(\$)	48.29	
						Tax Total(\$)	3.32	<input type="checkbox"/> No Tax
						Grand Total(\$)	51.61	

Check Out

- The sign-up fee and initial dues (if any) are displayed in the Shopping Cart.
- Click **Check Out** at the lower-right corner.

Check Out

1. The Check Out screen will look like this:

Check Out ?

Sales Person *

John Smith Dues Amount (\$) 51.61 Add Payment Method

Payment Method	Amount Paid(\$)	Payment Status	Delete
Total(\$)		0.00	

Back Process

2. Click **Add Payment Method** in the upper-right corner. You will see the following screen:

Add Payment Method

- Account On File
- Credit Card
- Bank Account
- Cash
- Check
- On-Acct (Unpaid)
- Credit Memo (Owner Comp)
- Gift Certificate
- Discount
- Credit Card Terminal
- Close

Payment Method

Select Payment Method(s) to the left and then enter amount paid below.

3. Select the payment method at the left, and enter the amount paid. In the example below, we have chosen cash:

Add Payment Method

Payment Method

Fields marked with * are required.

Cash Payment

Amount (\$) *

Save and Close Save and Add Another Cancel

Close

3. Click **Save and Close**.
4. Click **Process**.

Payment Receipt

1. You will receive the Payment Receipt, which looks like this:

Payment Receipt

Invoice Number : INV59528063

Date : Tuesday, February 16, 2016 11:18:38 AM

Receipt Number : 51900238

John Smith [61291602773]

Chanhassen [957]

2411 Galpin Court,

Chanhassen,

Minnesota,

55317,

United States

Contact Email : chanhassen@snapfitness.com

Contact Phone : 952-567-5800

No.	Items	Quantity	Amount(\$)	Discount(\$)	Total Amount(\$)
1	Single - Reciprocal	1	19.29	0.00	19.29
2	Single - Reciprocal Membership Plan Sign up	1	29.00	0.00	29.00

Tax Category	Tax Rate	Amount(\$)
Sales Tax	6.8750	3.32

Payment Method	Amount(\$)	Amount(\$)
Cash	51.61	
		Tax 3.32
		Total Paid 51.61
		Remaining Payment 0.00

Sales Person : Ariel Lindahl

Finish

3. Click the print icon in the menu bar at the top if you wish to print the receipt.
4. Click **Finish** in the lower-right corner when done.