ACTIVE Net Quick Reference Guide: Point of Sale

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Sell products

1) Click the **Point of Sale/Equipment Lending** banner tab
   Tip: Alternatively, click the Front Desk banner tab, then click POS>**Sell**

OPTIONAL: Load a customer account with steps 2-4

2) Click **Customer Search**
3) Enter customer search criteria and click **Search**
4) Click the name of the desired customer account
   Tip: If the customer is not found, click **Add New** to create a new customer account
5) Click the product button(s)
   Tip: To sell multiples, click the product button(s) times or click the numeric digit(s) representing the quantity before clicking the product button
   Tip: To find a product and add it to the transaction, click **Product Search**, enter product search criteria, click **Search**, then click the name of the desired product
6) Click the method of payment (**Payment Cash**, **Payment Charge**, **Payment Check**, etc.)
7) Enter the amount to be paid
   Tip: If using cash as a payment type, the numeric digit buttons or the pre-determined figure buttons (i.e. **$5**, **$10**, **$20**) can be used
8) Click **OK**
   Tip: Repeat steps 3-5 as necessary to select multiple methods of payment
9) Click **Tender**
   Tip: The system will not complete the transaction unless the balance is ≥ 0
   Tip: To put the current receipt on hold and alternate to a second receipt, click **Alternate Receipt**

Refund products

1) Click the **Point of Sale/Equipment Lending** banner tab

OPTIONAL: Load a customer account with steps 2-4

2) Click **Customer Search**
3) Enter customer search criteria and click **Search**
4) Click the name of the desired customer account
5) Click **Refund**
6) Click product button
   Tip: To refund multiples, click the numeric digit(s) representing the quantity before clicking the product button
7) When prompted with **Refund this item to inventory?** click **Yes** or **No**
8) Click the method of payment (**Payment Cash**, **Payment Charge**, **Payment Check**, etc.)
9) Click **OK**
10) Click **Tender**

Sign-out equipment

A customer account is required to sign out equipment

1) Click **Customer Search**
2) Enter customer search criteria and click **Search**
3) Click the name of the desired customer account
4) Click the equipment **Sign-out** button
5) Enter quantity if prompted, then click **OK**
   Tip: If not prompted for a quantity, click the equipment **Sign-out** button multiple times to sign-out multiples
6) Click **Tender**

Sign-in equipment

1) Click **Customer Search**
2) Enter customer search criteria and click **Search**
3) Click the name of the desired customer account
4) Click **Sign-in**
5) In the Unreturned Equipment Loans popup, check the box(es) next to the equipment to be signed in

OPTIONAL: Mark signed-in equipment as damaged with steps 6-7

6) Find the equipment to be marked as damaged, click on the status, then select **Damaged**
   Tip: Damaged equipment will no longer be available to be signed out
7) Click on the charge and select a **Damage Charge**
8) Click **OK**
9) Click **Tender** to complete the transaction if no damage charges were assessed, otherwise, skip to step 10
10) Click the method of payment (**Payment Cash**, **Payment Charge**, **Payment Check**, etc.)
11) Enter the amount to be paid

12) Click **OK**
13) Click **Tender**

Display unreturned equipment

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Equipment Loans>**Unreturned Equipment**
3) Select filters and options as necessary
   Tip: Clear all filters and options to see all unreturned equipment
4) Click **Search**
   Tip: In the Unreturned Equipment widget, equipment can be signed in, have its status changed, and charges can be assigned

POS function button definitions

Add Charge – allows the addition of pre-defined charge(s) to the current transaction

Alternate Receipt – alternates between two different receipts/transactions

Change Price* – allows the user to change product prices

Delete Last Item – deletes last item

Delete Selected Items – deletes selected items

Finish/Tender – completes a transaction and issues a receipt

Open Cash Drawer* – opens the cash drawer if there is one connected

Over/Short – allows the correction of discrepancies between cash actually received and cash reported

Payment Cash – selects cash as a payment method

Payment Charge – selects credit card as a payment method

Payment Check – selects check as a payment method

Payment Debit Card – selects debit card as a payment method (available in Canada only)

Payment from Account – when a customer account contains a credit and has been selected, selects account credit as a payment method

Payment Memo – selects 3rd party form of payment as a payment method

Print Daily Close Report – prints Daily Close Report if a thermal receipt printer is connected

Product Search – find a product that is not on the layout

Refund Item – initiates refund process

Scan Customer – allows user to swipe a customer's membership card or manually enter a customer's ID number

Select Customer – allows user to search for or add a new customer account

Sign-In – signs in borrowed equipment

Sign-Out – signs out equipment to be borrowed

Void Receipt – voids receipt, removes all pending items, and resets customer

***** – with permission only