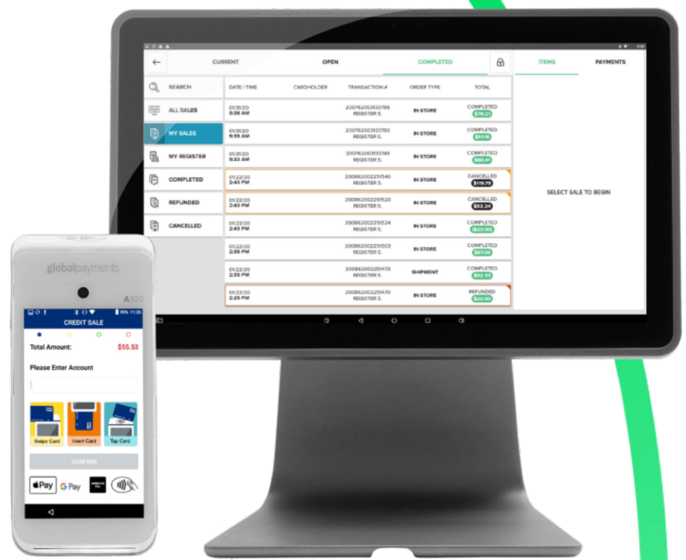
Quick Reference Guide

Global Payments Register



Quick script reference guide for common features for the **Global Payments Register**. For help using other features, visit poshelp.globalpaymentsinc.com

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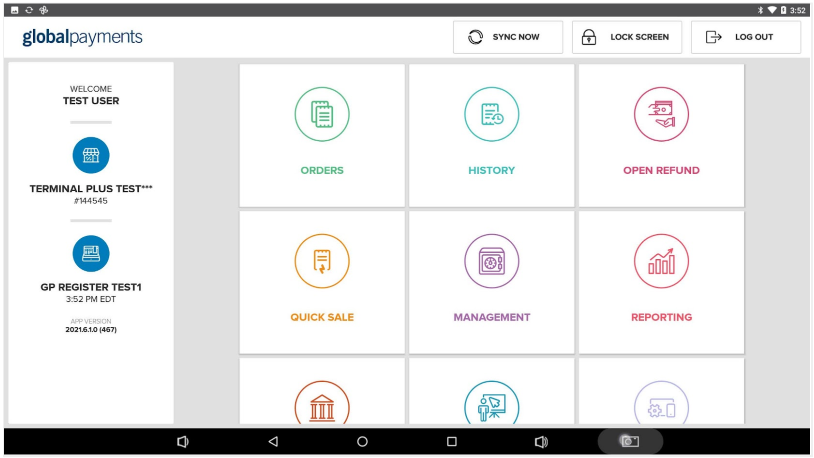
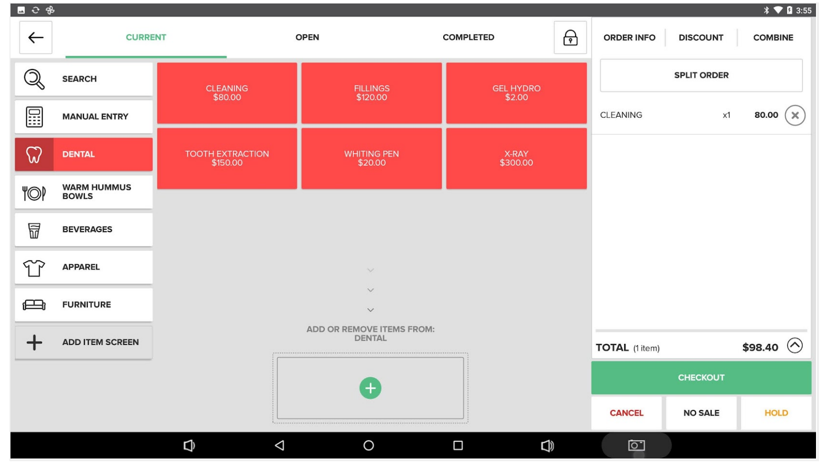
Sale

1. From the **Main Menu**, tap on **Orders**.



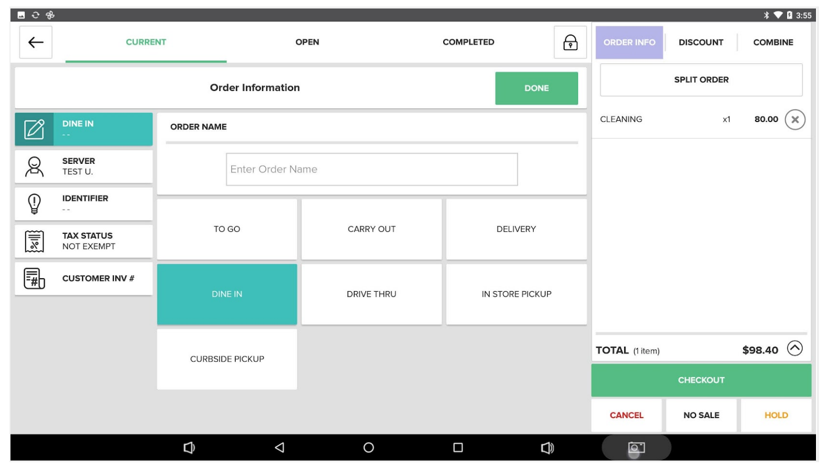
2. On the left side of the **Orders** screen, you will find:

   - The **Search** function where you can search items by name or SKU.
   - **Manual Entry**, where you can add an open item to the cart.
   - **Item screens** help to categorize your items for easy access. **Item screens** can be configured in the back office or on the POS. In the back office, you have the ability to configure what time of the day the item screen is visible (example breakfast menu only shows in the morning).



3. Select the **Item screen** that contains the item you are looking to add to your order.

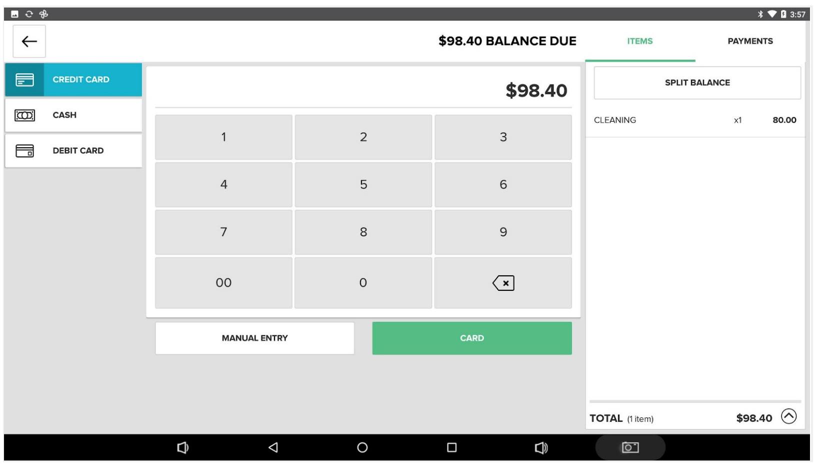
4. Select one or more items to add to your cart. Once you are done adding items, tap **Checkout** at the bottom right of the screen to take payment.



- Modifiers can be used to provide more details to the order. Sample uses : Pizza toppings, flavor of soda, shirt size, etc
- If your item has any required modifiers associated with it, you will be brought to the modifier options that are available automatically.

- If your item only has optional modifiers, you can access them by tapping on the item from the order preview on the right.
- After selecting the desired modifiers, click **Done**. Before checking out, you have options available to handle the order.
    - Before checking out, you have options available to handle the order. At the top of the order, you can select **Order Info** (to add information to the order like "Take out for Mike" or a table number), **Discount** the order, or **Combine** it with another order.
    - Below **Checkout**, you also have the option to **Hold** the order and process payment at a later time.

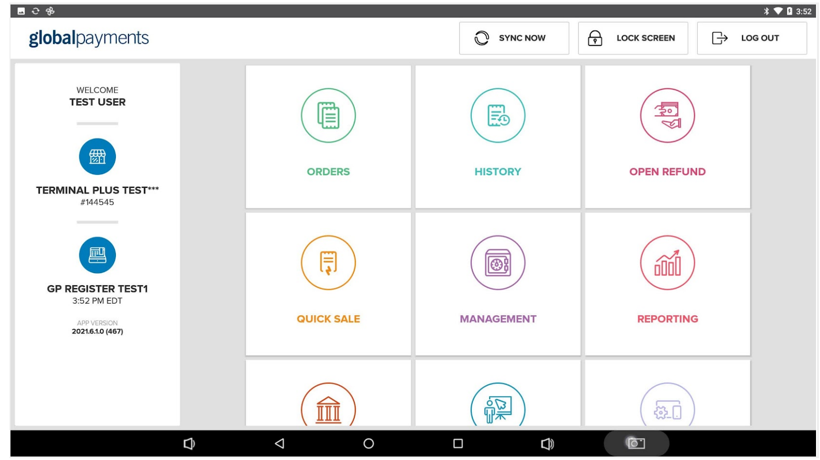
5. By default, the checkout screen displays the credit card tender type. You can select any of the tender types listed.



6. Tap **Card** to process and send the transaction to the payment terminal. Follow on-screen prompts on the terminal to complete the transaction.
    - Prompts can vary based on how your account is configured (i.e. tip, debit account type, etc.)

Quick sale

1. From the **Main Menu**, click on **Quick Sale**.

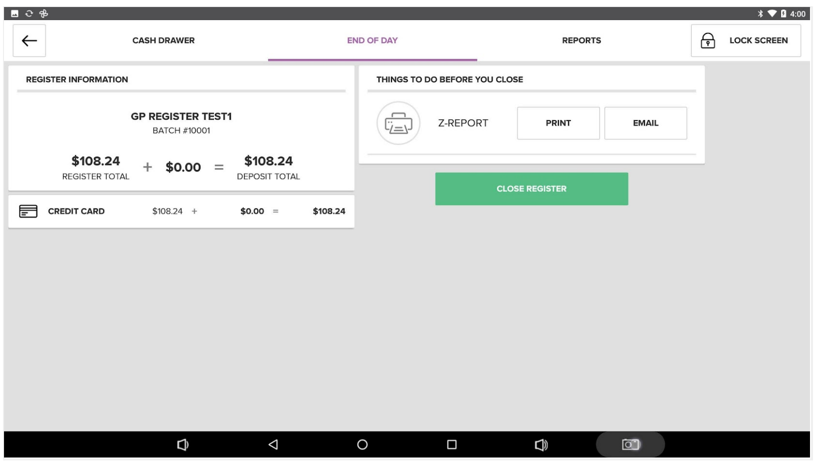


2. On the **Quick Sale** screen, the default tender selected is credit card.
3. Select the desired tender from the options on the left side of the screen.
4. Enter the sale amount using the keypad.
5. To process a credit/debit card, select **Card** to send the transaction to the payment terminal.
6. Follow the on-screen prompts on the payment terminal to complete the sale.

Batching/closing Register

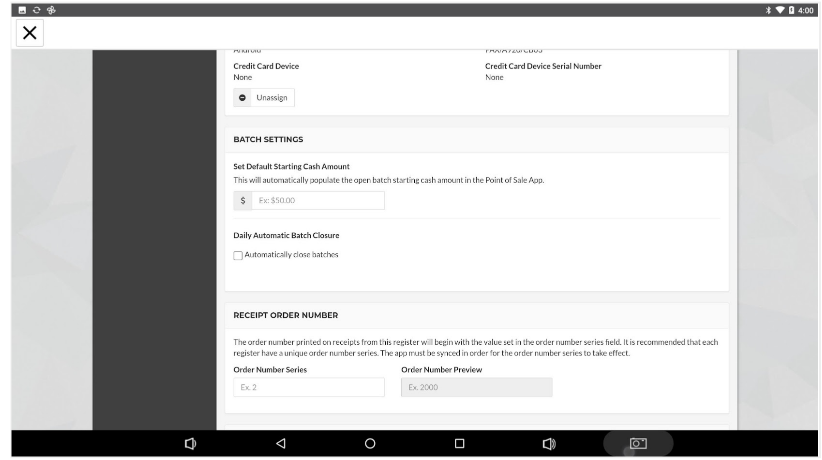
1. From the **Main Menu**, click on **Management**.
2. You will be brought to the **Cash Drawer** screen.
    - Listed on the left are the different cash drawer functions. You can perform safe drops, pay out tips, etc.

3. To close your Register, click on **End of Day** at the top of the screen.
    - Here you see an overview of transactions completed for the day. You can print out or email a Z-Report, which provides this overview.
    - You can also count down your drawer by clicking on **Count**.
4. Tap **Close Register** to close the batch for the day and reset totals.
5. If there are card transactions, a settlement request will be sent to the payment terminal.
6. You are brought back to the **Main Menu** and a success message will display.



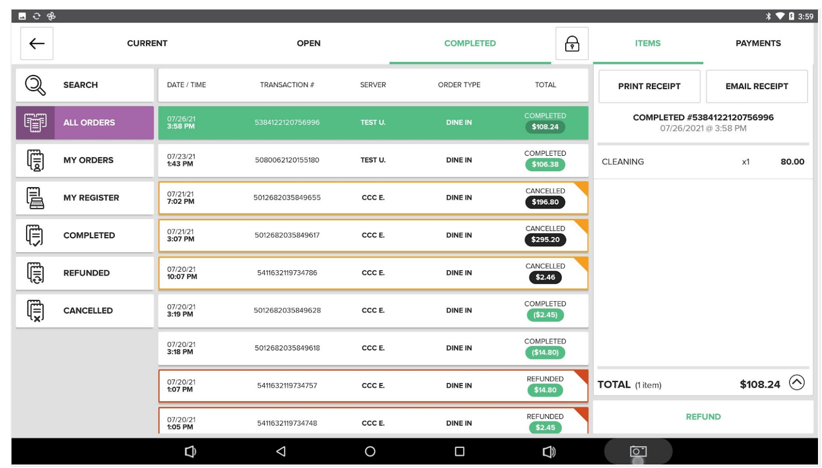
NOTE: In the web-accessed back office, you can enable auto close/batch for individual registers.

1. In the back office, select **Store Setup** from the menu on the left.
2. Then select **Registers** as a subcategory.
3. Find the Register you wish to modify, and select the **Pencil** icon.
4. Scroll down and enable **Daily Automatic Batch Closure** and define a settlement time.
5. Scroll down to the bottom of the page and select **Save**.



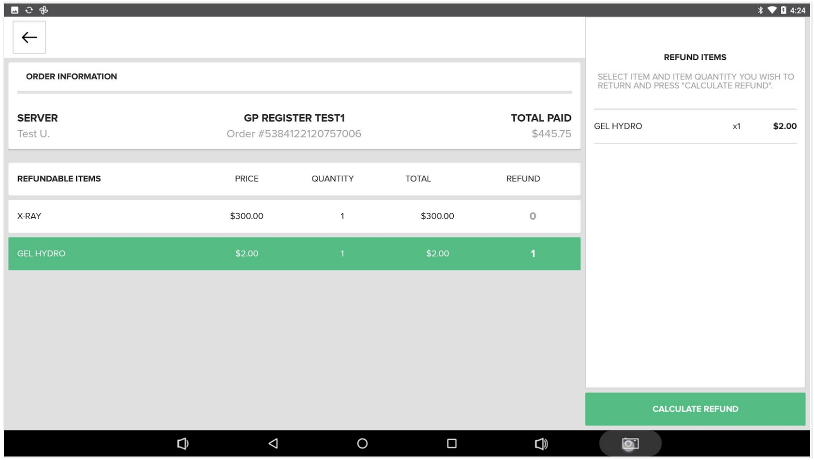
Refund/past transactions

1. From the **Main Menu**, click on **Orders**.
2. Select **Completed** at the top of the screen.



3. You will see a list of all completed orders broken down by category.
    - There is also a Search function that allows you to search a specific transaction by transaction number, date and time, or cardholder name.

4. **Refunding/Voiding an Order**



- Select **Completed** from the options on the left-hand side to display all the completed orders.
- Select the transaction you would like to refund.
- Once selected, you have the option to select **Refund Items** or **Full Refund.** Once ready, confirm Refund, and the transaction request will be sent to the payment terminal.
- Follow the on-screen prompts on the terminal to complete this process.

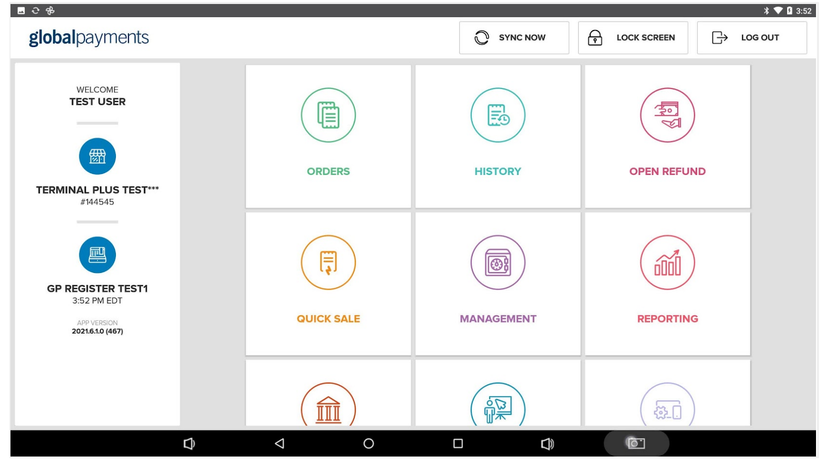
NOTE: If the transaction is in the current batch, it will process as a void. If the transaction is in a past batch, it will process as a refund.

5. **Reprinting/Re-emailing a Receipt**

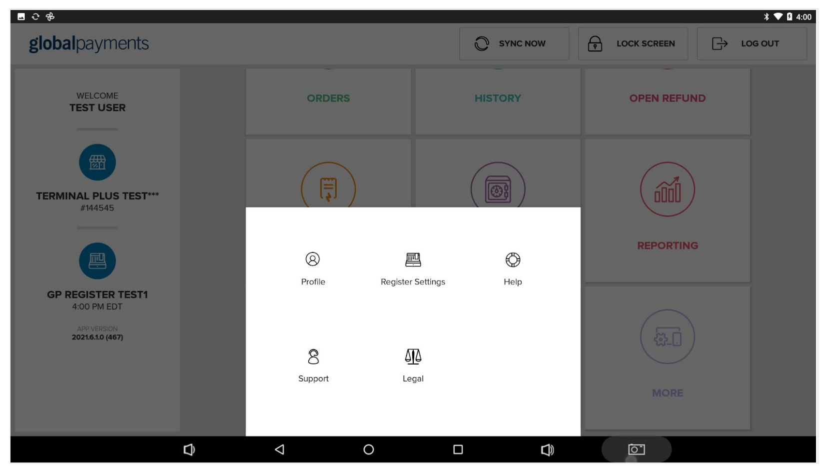
- Select **Completed** from the options on the left-hand side to display all the completed orders.
- Select the transaction you would like to print or email a receipt.
- Once selected, you have the option to select **Print Receipt** or **Email Receipt**.
    - If you select **Email Receipt**, you will be prompted to enter the desired recipient email address.

Syncing/Register settings

1. For most updates conducted in the back office, such as adding new items, updating receipt settings, etc., you will need to sync your device. Select **Sync Now** at the top of the **Main Menu** to get started.



2. A message will display showing the sync's progress. A success message will display once completed.
    - If no changes were made, you will receive a message indicating the sync was not necessary.



3. To adjust the settings for your Register's hardware, scroll down on the **Main Menu** and select **Register Settings**.

4. By default, you will be brought to the screen to configure the settings for the scanner. You can select different hardware options from the list on the left.

5. **Scanner Setup**

   - Ensure the **Code CR950** scanner is selected, then tap **Test**. Scan a barcode using the scanner to complete the test. A success message will display once completed.

   - Click **Save** to save your changes.

6. **Terminal Setup**

   - Select **Terminals**.

   - Select the **Global Payments Register A920**. Next, select **TCP/IP** as the **Connection Type**.

   - To configure the device's IP address, select **Search**. A list of devices that are within reach will display. Select the IP address that corresponds to your A920 device.

   - If you do not get a list of devices, try unchecking the **Filter** box.

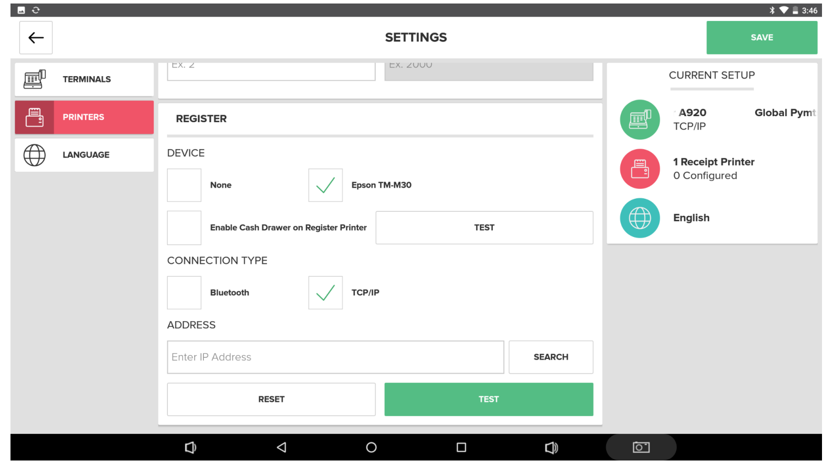
   - Your A920's IP address will be displayed on the A920 once you are on the Portico application. It will appear under "BroadPOS."

   - Tap **Set Up** to configure the device with processing credentials from the back office.

   - Once you get a success message, you can click **Test** to ensure the A920 device is functional.

   - Click **Save** to save your changes.

7. **Printer Setup**



   - Select **Printers**.

   - There are two (2) printer options available. Select the printer you would like to connect to and configure the Bluetooth, or IP address of the printer.

   - If you want your cash drawer enabled on **Register Printer**, ensure that **Enable Cash Drawer** on **Register Printer** is selected. You can test this by clicking **Test**.

   - To test functionality, click on **Test**. If successful, a receipt will be printed from the printing station.

   - If your setup includes online orders, use the steps above to set up your printer for this feature.

   - Click **Save** to save your changes.

8. **Language setup**

   - Language is configured during the initial setup process, but should you wish to change language at any time, you can change between English and French on this screen.

Creating a catalogue item

It is recommended to create your catalogue through your web based admin portal as it offers more functionality. A catalogue can be created on the Register by following the steps below.

Terminology to get you started.

- Item Screen – This is a grouping of items that will show on the Point of Sale.
- Category – This is a grouping of items to allow you to organize all your items within the Web based management system.

Please follow the following sequential steps from 1-5 to create a catalogue item.

1. **Select Orders from the main menu.**

2. **Creating an Item Screen**

   a. On the left side of the screen, select **Add Item Screen**.

   b. Create a name for the screen, and select **Continue**.

   c. Choose a colour and an icon.

   d. On the preview screen, confirm your selections by selecting **Save**.

3. **Adding Items to an Item Screen**

   a. On the left side of the screen, select the **Item Screen** you'd like to add an item to.

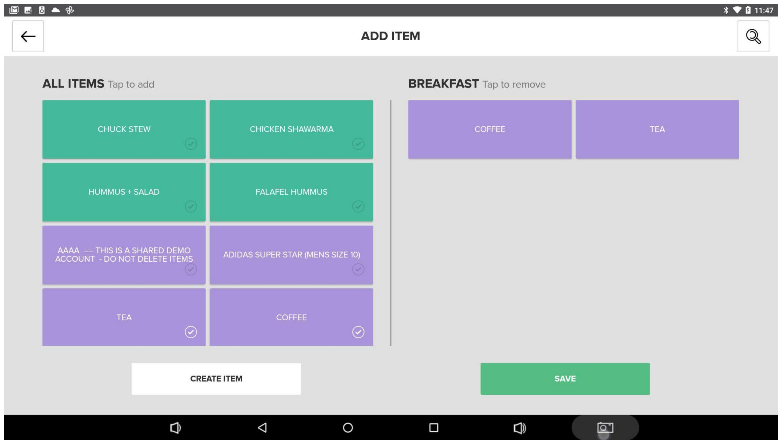
   b. Select the **Plus** button to add items to the screen. If the Item screen is empty, this Plus button will be in the middle of your screen. If the item screen has items on it, you will have to scroll to the bottom of the screen to locate the Plus button.

   c. Select items to add to the screen, by selecting items on the left hand side of the screen. The right half of the screen will populate with your selections.

   d. Click **Save** to save your changes.

4. **Creating an Item**

   a. To create an item, follow the screen in step 3-c above, in the **Adding Items to an Item** screen.



   b. Select **Create Item** in the lower left corner of the screen.

   c. Enter a name, and select **Continue**.

   d. Enter a price for the item, and select Add.

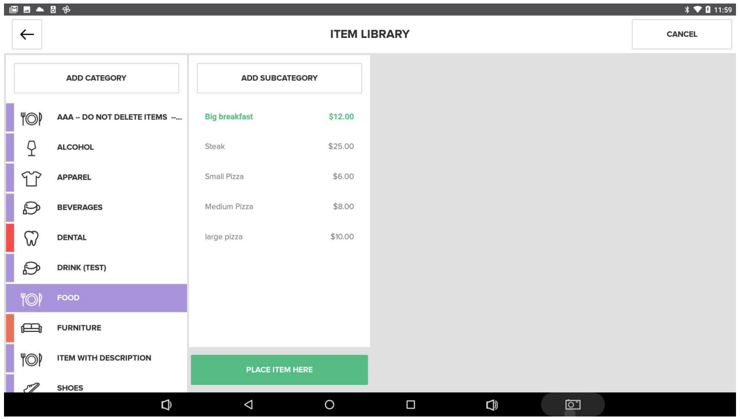
   e. Enter an optional **Item Code** (barcode), and select **Continue**.

   f. On the preview screen confirm your selections by selecting **Continue**.

   g. Select the Category the item belongs to, then select Place Item Here. Select Save to save your changes.

5. **Creating a Category**

   a. At Step 4-g above, in the **Creating an Item** screen.



b. Select **Add Category** in the upper right corner of the screen.

c. Enter the **Category Name**, and select **Continue**.

d. Choose a **Colour**, and an **Icon**.

e. On the preview screen confirm your selections by selecting **Save**.