

Deposit Order Feature

Start Deposit
Order

Pickup
Deposit
Order

As of version **12.9005**, Cash Register Express now supports the ability to allow customers to place an order for the item you offer, pay for the order, and pick up the order at a later date. You can print reports that will show the items that are pending to be picked up.

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Important Notes – Please Read!

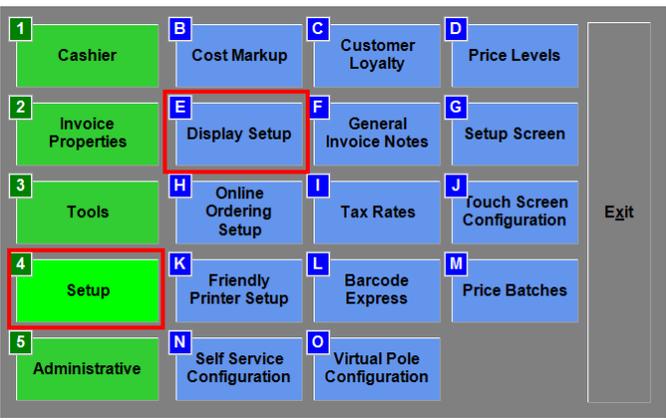
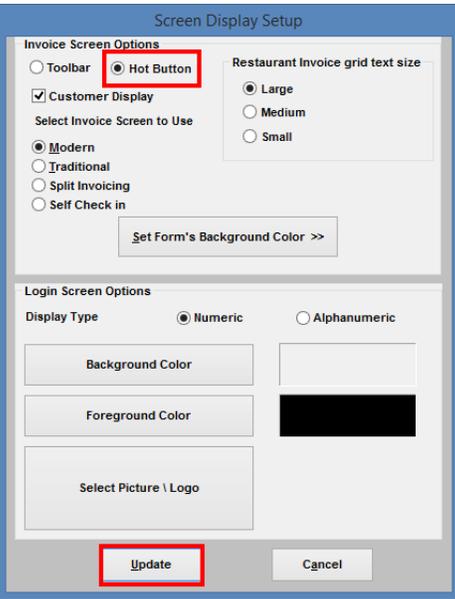
- Must upgrade Cash Register Express to version **12.9005 or newer** to use this feature.
- Must Enable and configure the start deposit order and pickup deposit order through CRE Hot buttons

Revision History

| Document Version | Date | Author | Description of Changes |
|------------------|--------------------|--------|------------------------|
| 1.0 | September 27, 2018 | JC | 1st Release |

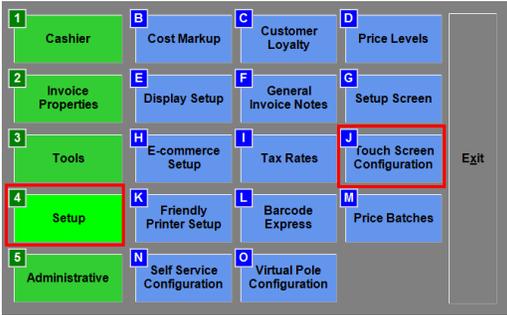
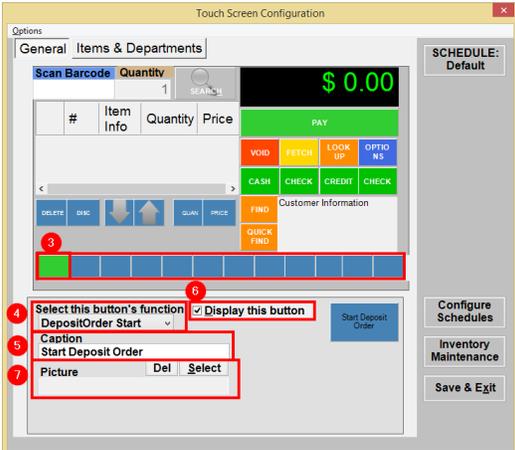
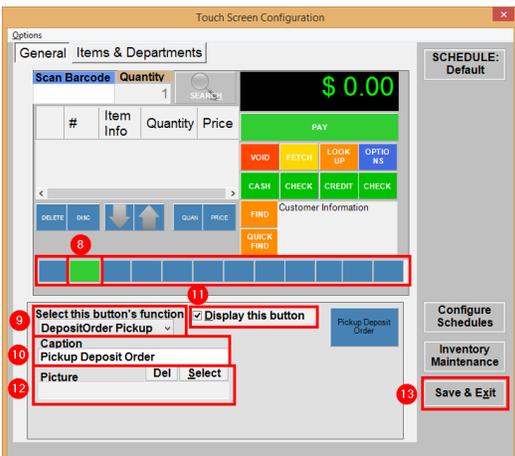
Enabling Hot Button feature in CRE

You must enable the Hot buttons in CRE to see them on the invoice screen. Follow steps below:

| | |
|--|--|
|  <p>The image shows two buttons: a yellow 'Manager' button at the top and a blue 'Options' button below it.</p> | <ol style="list-style-type: none">1. With CRE open select the Manager or Options button. Enter the Administrative ID & password. |
|  <p>The image shows a grid of menu items. The 'Setup' button (4) and 'Display Setup' button (E) are highlighted with red boxes. Other buttons include Cashier, Invoice Properties, Tools, Administrative, Cost Markup, Customer Loyalty, Price Levels, General Invoice Notes, Setup Screen, Online Ordering Setup, Tax Rates, Touch Screen Configuration, Friendly Printer Setup, Barcode Express, Price Batches, Self Service Configuration, and Virtual Pole Configuration. An 'Exit' button is on the right.</p> | <ol style="list-style-type: none">2. Select Setup [4] followed by Display Setup [E]. |
|  <p>The image shows the 'Screen Display Setup' dialog box. Under 'Invoice Screen Options', the 'Hot Button' radio button is selected and highlighted with a red box. Other options include 'Toolbar', 'Customer Display', and 'Restaurant Invoice grid text size'. Under 'Login Screen Options', there are options for 'Display Type' (Numeric/Alphanumeric), 'Background Color', 'Foreground Color', and 'Select Picture \ Logo'. The 'Update' button at the bottom is also highlighted with a red box.</p> | <ol style="list-style-type: none">3. Select Hot Button under the Invoice Screen Options then select update. |

Configure CRE for the DepositOrder Start/DepositOrder Pickup Hot Buttons

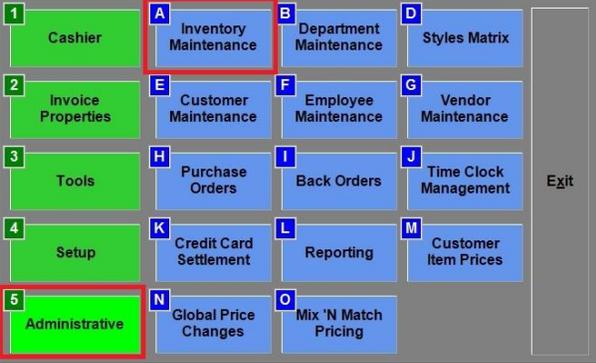
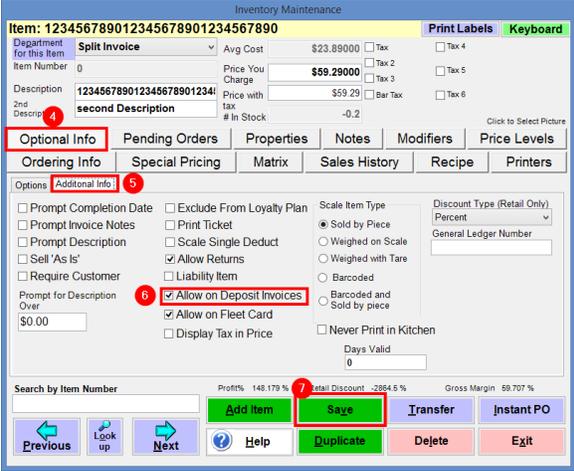
Configuring CRE to work with hot buttons to create and pickup deposit orders.
 The full list of hot button descriptions and features : [CRE Hot Button document](#)

| | |
|--|--|
| <div style="text-align: center;">  <p>Manager</p> <p>Options</p> </div> | <ol style="list-style-type: none"> With CRE open select the Manager or Options button. Enter the Administrative ID & password. |
|  | <ol style="list-style-type: none"> Select Setup [4] followed by Touch Screen Configuration [J]. |
|  | <ol style="list-style-type: none"> Select your hot button location. Select DepositOrder Start from the button's function list. Enter a Caption for the Button. Check Display this button. Select a Picture for the Button. (Optional). |
|  | <ol style="list-style-type: none"> Select your Hot Button Location Select DepositOrder Pickup from the button function list. Enter a Caption for the button. Check Display this button. Select a Picture for the button (optional). Select Save & Exit. |

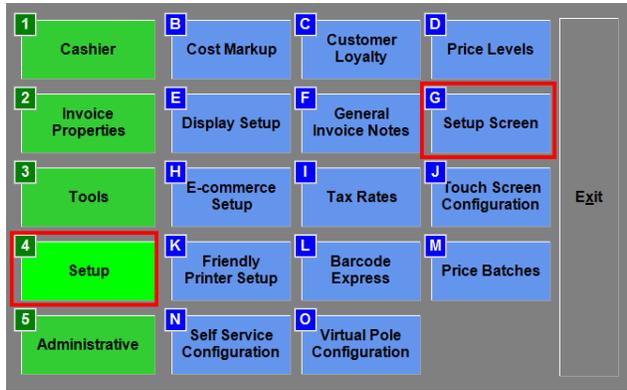
Enabling an item for the deposit order

In Order for any item to be placed on an order, first the item must be configured to be allowed on Deposit Orders.

Follow steps below

| | |
|--|---|
|  <p>The screenshot shows a yellow box labeled "Manager" at the top and a blue box labeled "Options" below it.</p> | <ol style="list-style-type: none">1. Select the Manager or Options button. |
|  <p>The screenshot shows a grid of menu items. A red box highlights the "Administrative" button (labeled 5). Another red box highlights the "Inventory Maintenance" button (labeled A). Other buttons include Cashier, Invoice Properties, Tools, Setup, Customer Maintenance, Employee Maintenance, Purchase Orders, Back Orders, Reporting, Credit Card Settlement, Global Price Changes, Mix 'N Match Pricing, Department Maintenance, Styles Matrix, Vendor Maintenance, and Time Clock Management. An "Exit" button is on the right.</p> | <ol style="list-style-type: none">2. Select Administrative [5] followed by Inventory Maintenance [A]. |
|  <p>The screenshot shows the "Inventory Maintenance" form for item 123456789012345678901234567890. The "Optional Info" tab is selected. The "Additional Info" sub-tab is active. The "Allow on Deposit Invoices" checkbox is checked. The "Save" button is highlighted with a red box. Other fields include Department, Item Number, Description, Price You Charge (\$59.29000), and various tax options.</p> | <ol style="list-style-type: none">3. Select any existing/new standard Item.4. Select Optional Info Tab.5. Select Additional Info Tab.6. Check the Allow on Deposit Invoices option7. Select Save. <p>Once complete all desired items are enabled. We can now start a deposit order.</p> |

Setup Deposit Invoices (Options)

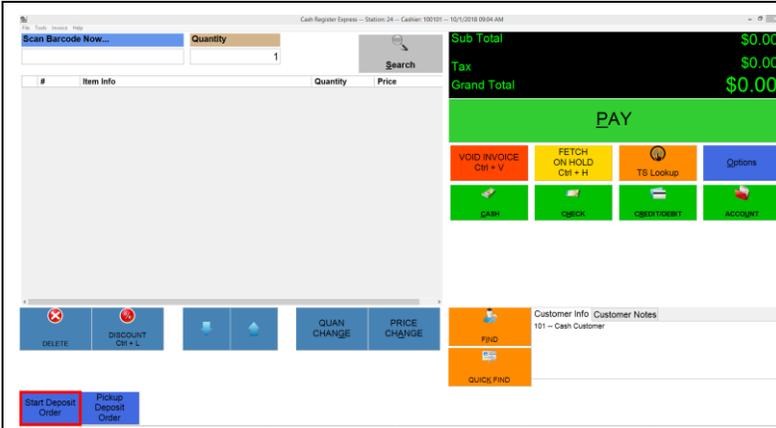


1. Select **Setup [4]** followed by **Setup Screen [G]**.

2. Select the **Account Control** tab.
3. Under **Layaway Options**:
 - Enter a number of **Days Allowed for Cancellation**. This will let the customer cancel their order in the allotted time period. After the number of days has expired the customer will not be able to cancel their order. Enter a 0 (zero) if the order can be cancelled at any time
 - Check whether partially paid orders are allowed to be picked up.
 - Optionally you can choose to **Force minimum deposit** (you will set the deposit under **Deposit Type**).
4. Under **Deposit Type** choose whether it will be a flat rate or a percentage of the total order. Enter a value accordingly.
5. Under **Pre-Cancellation Fee Type** choose whether it will be a flat rate or a percentage of the total order. Enter a value accordingly

Creating a Deposit Order

Start and pickup deposit orders in CRE are available thru the customized hot buttons only.



1. From the Invoice Screen, Select the **Start Deposit Order** Hot Button



Enter completion date/time:

October 2018

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 30 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Today: 10/1/2018

Last Year Next Year Last Month Next Month

Select time AM PM

| | | | | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| :00 | :05 | :10 | :15 | :20 | :25 | :30 | :35 | :40 | :45 | :50 | :55 |

Type date & time or select 10/6/2018 9:50:00 PM

Cancel Select 10/6/2018 9:50:00 PM

2. Enter the date/time that this order will be picked up.
3. When finished select the green Select bar that shows the correct pickup date/time.

Question Box

Create Deposit Order

Lookup Customer New Customer

Cancel

4. You will then be asked to create a new customer account or **lookup** an existing customer.
 - If you select **New Customer** you will be prompted to enter the customer's information. This information will automatically create a customer account within CRE.

Select Customer

| Customer# | First Name | Last Name | Address |
|--------------|------------|-----------|---------|
| 000000000001 | John Q. | Customer | |

Type customer #, last name, company, phone #

Change Sort Order [] BackSpace Add Customer Edit Customer Scroll Up

1 2 3 4 5 6 7 8 9 0 - Scroll Down

Q W E R T Y U I O P Search

A S D F G H J K L Exit

Z X C V B N M Space Select

- If you selected the **Lookup Customer** option when you created a deposit order, the **Select Customer** screen will prompt you to select a pre-existing customer from your database.
- Highlight the customer and press the **Select** button. It will then take you to the invoice screen.

DEPOSIT REQUIRED:
\$15.00
PAY HOW MUCH NOW?

██████████ \$15.00

| | | |
|---|---|-----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| . | 0 | +/- |

Clear Cancel

OK

- Select the **Pay** button to accept payment for a deposit. If you have a flat rate or percentage selected you will be prompted for that amount automatically.
- Select **Ok** to proceed.

Type Tender Amount & Select Tender Type Clear

\$15.00

| | | |
|----|---|-----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 00 | 0 | +/- |

Cash
Credit/Debit
Check
Gift Card
On Account
EBT
Secondary

Amount Remaining
\$15.00

Paid So Far

| Type | Amount | Details |
|------|--------|---------|
| | | |

After \$ 0.00 tax exempt from Food stamp
Maximum Allowed in Food Stamps Remaining Amount
\$0.00 \$0.00

Minimum deposit: \$15.00

Cancel

\$1.00 \$5.00 \$10.00 \$20.00 \$50.00 \$15.00

- Finish the deposit transaction with the type of payment and print a receipt for the customer. **A deposit is not recorded as a sale until the final payment is made.**

NAME: John Q. C
 LAYAWAY #15
 Closed to Cash Purchase
 DATE/TIME: 10/1/2018 10:32:03 AM
 CASHIER: 100101
 STATION: 24
 LAST DAY TO CANCEL: 10/11/18

Customer Info
 =====
 000000000001 PL: A
 John Q. Customer

Item Count: 1
 =====
 1 RC CAR \$399.99
 =====
 Subtotal \$399.99
 GRAND TOTAL \$399.99

Amt Tendered \$15.00
 Change \$0.00
 Layaway Balance \$384.99

=====

| Date | Amount Paid | Payment Type |
|-----------------------|-------------|--------------|
| 10/1/2018 10:32:03 AM | \$15.00 | Cash |
| ----- | | |
| Total Paid So Far | \$15.00 | |

=====

Due Date: Saturday, 10/6/2018 9:50 PM

Order Deposit Receipt

The receipt for the customer will have their deposit information recorded on it. You will notice the **Order Number** and **Balance** are listed. In addition, it records the pickup date, time and amount of the deposit paid so far.

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SALES TOTALS

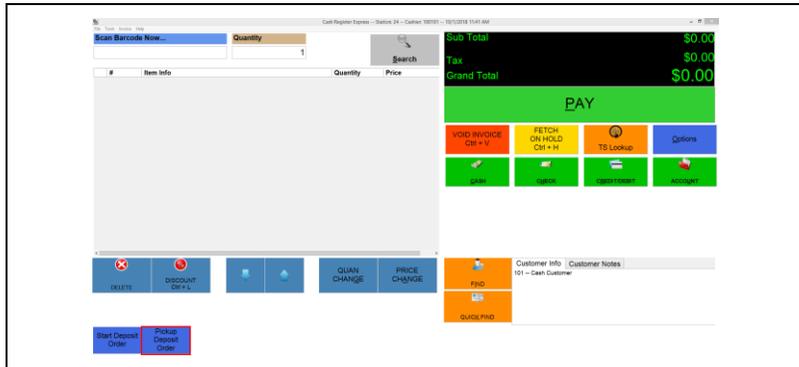
=====

| | |
|---------------------------|---------|
| Net Sales..... | \$42.00 |
| Net Tax..... | \$0.00 |
| Net Tax 2..... | \$0.00 |
| Net Tax 3..... | \$0.00 |
| Net Tax 4..... | \$0.00 |
| Net Tax 5..... | \$0.00 |
| Net Tax 6..... | \$0.00 |
| ----- | |
| Grand Total Sales..... | \$42.00 |
| | |
| Net Taxed Sales..... | \$0.00 |
| Net Non-Taxed Sales..... | \$42.00 |
| Net Tax Exempt Sales..... | \$0.00 |
| ----- | |
| Grand T + GC/SC/Tips..... | \$42.00 |
| | |
| Grand T + GC/SC/Tips | |
| - DISC for GC..... | \$42.00 |
| Layaway Deposit Collected | \$15.00 |
| Grand T + GC/Tips/Dep.... | \$57.00 |

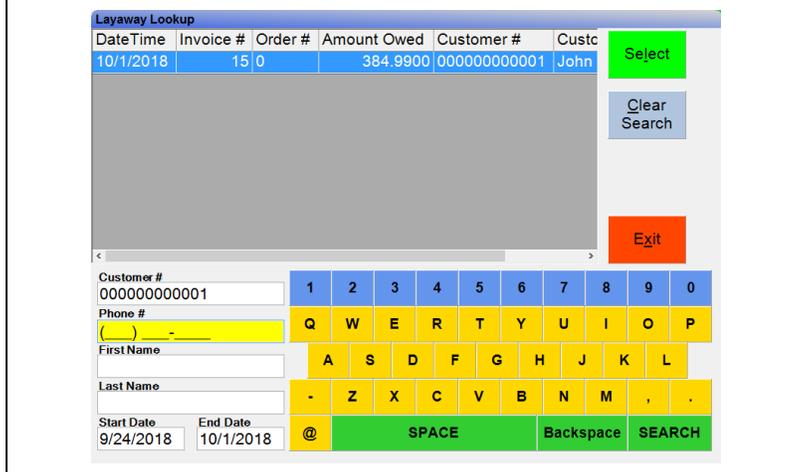
Deposit Payment on the Detailed Daily Report

The deposit will be listed under **Sales totals** as **Layaway Deposit Collected** on your Detailed Daily Report (DDR).

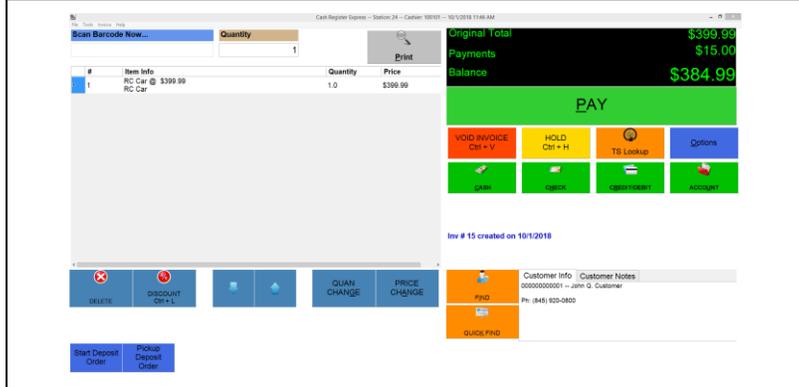
Completing a Deposit Order



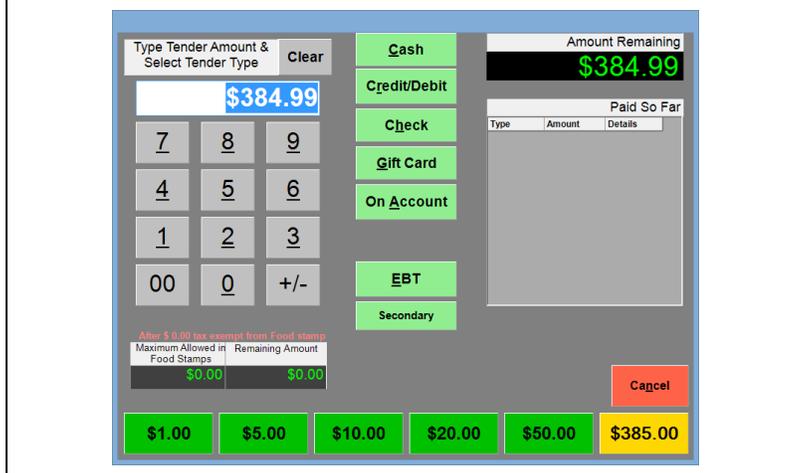
1. Invoice Screen, Select the **Pickup Deposit Order** hot button



2. The **Order Lookup** screen will be displayed.
Note: There are many ways to search for an order in the database. You can select the customer from the customer grid, enter their Order Form Number, type in their name, phone number, dates, etc.
3. Choose the order by highlighting it and press the **Select** button.



4. The **Invoice Screen** will appear showing you the remaining balance for the order.
5. Select **pay** to close out the transaction



6. The Payment Screen will show you the amount remaining for the order.
7. Select the type of payment and close out the transaction.
8. Once the order is paid in full it will now record as a sale in the system.
9. A receipt will print indicating that the invoice has been closed. Followed by the future order details receipt

NAME: John Q. C

INVOICE# 15
Closed to Cash Purchase

DATE/TIME: 10/1/2018 10:32:03 AM
CASHIER: 100101
STATION: 24

Customer Info
=====

| | |
|----------------------|-------|
| 000000000001 | PL: A |
| John Q. Customer | |
| 131 Elm Street | |
| Pearl River NY 10965 | |
| (845) 920-0800 | |

Item Count: 1
=====

| | |
|-----------------------|----------|
| 1 RC CAR P/U 10/01/18 | \$399.99 |
|-----------------------|----------|

=====

| | |
|-------------|----------|
| Subtotal | \$399.99 |
| GRAND TOTAL | \$399.99 |

Cash \$384.99
(Tendered: \$384.99, Change: \$0.00)

Layaway Balance \$0.00
=====

| Date | Amount Paid | Payment Type |
|-----------------------|-------------|--------------|
| 10/1/2018 10:32:03 AM | \$15.00 | Cash |
| 10/1/2018 11:51:09 AM | \$384.99 | Cash |

| | |
|-------------------|----------|
| Total Paid So Far | \$399.99 |
|-------------------|----------|

=====

| Item | PickupDate |
|--------|------------|
| RC Car | 10/01/18 |

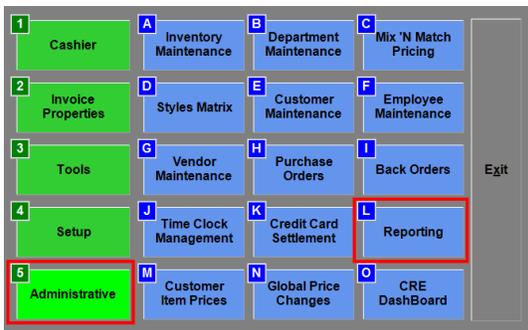
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Due Date: Saturday, 10/6/2018 9:50 PM

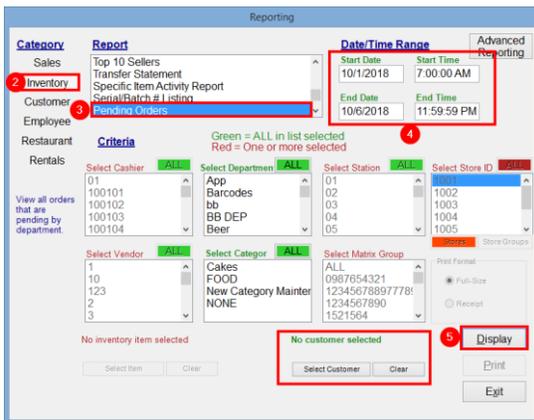
Completed Deposit Order Receipt

Here is an example of the Deposit order details receipt. It will include the items on the invoice, the payment history of the invoice, and a list of items and the dates they were picked up.

Pending Order Report



1. Select the **Administrative** then **Reporting**.



2. Select the **Inventory** Category.

3. Scroll down until you see the **Pending Orders** report. These reports will display information regarding orders that are waiting to be picked up.

4. Specify the **date range**. For an order to be displayed, the **Pickup date** of the order **must be within the date range** of the report.

- You can specify which customer you want to see the pickup orders from, this will prevent other customers' pickup orders with due dates that fall within the date range from appearing on the report.

5. Select **Display**



Next you'll be prompted to sort the report by customer. If you Select **Yes**, the report will display by grouping the items by the customer that placed the order. An example of this will be displayed on the next page.

If you Select **No**, the report will display by grouping the items by the department they are associated with. An example of this will appear on the next page.

Question Box

One page per department?

Yes

No

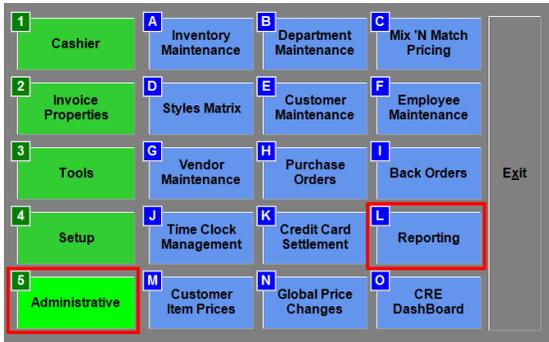
If you Select **No** to the “List sorted by customer?” prompt, you be prompted to specify whether or not you want one page per department.

Items Currently Pending

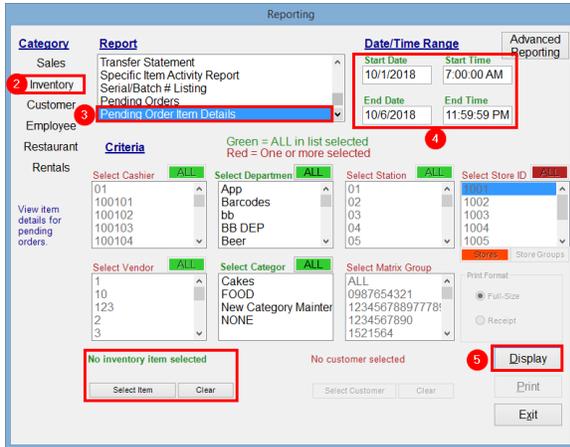
10/1/2018

| Item Name | Department | Due Date | Invoice # | Quantity | Status | Pick Up Type |
|------------------------------|--------------------------|---------------------|-----------------|----------|--------|--------------|
| Customer Information: | | | | | | |
| 000000000001 | 131 Elm Street | | Ph1: 8459200800 | | | |
| John Q. , Customer | Pearl River , NY , 10965 | | Ph2: | | | |
| RC Car | RC Toys | 06-Oct-2018 9:50 pm | | 15 | 1.00 | Complete |
| Notes: | Order No: | | | | | |

Pending Order Item Details Report



1. Select the **Administrative** then **Reporting**.



2. Select the **Inventory** Category.

3. Scroll down until you see the **Pending Order Item Details**. These reports will display information regarding orders that are waiting to be picked up.

4. Specify the **date range**. For an order to be displayed, the **Pickup date** of the order **must be within the date range** of the report.

- You can specify which customer you want to see the pickup orders from, this will prevent other pickup orders with due dates that fall within the specified date range from appearing on the report.

5. Select Display

Items Pending Details

10/1/2018

| Department: | Due Date: | Status: | Pick Up Type: |
|------------------------------|--------------------------|----------|---------------|
| RC Toys | 10/6/2018 9:50:00PM | Complete | |
| Invoice # | 15 | Notes: | Order No: |
| Item Name: | RC Car | | |
| Item #: | RC Car | | |
| Quantity: | 1.00 | | |
| Customer Information: | | | |
| 000000000001 | 131 Elm Street | Ph1 | 8459200800 |
| John Q. , Customer | Pearl River , NY , 10965 | Ph2 | |