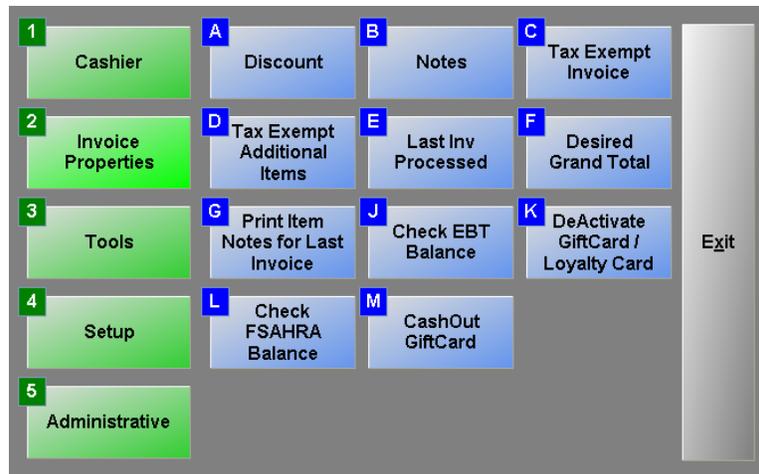


Invoice Edits in CRE



Retail establishments often need to modify an invoice.

To show/hide the invoice edit buttons select F11 on your keyboard,
 or select Options then Invoice Properties.

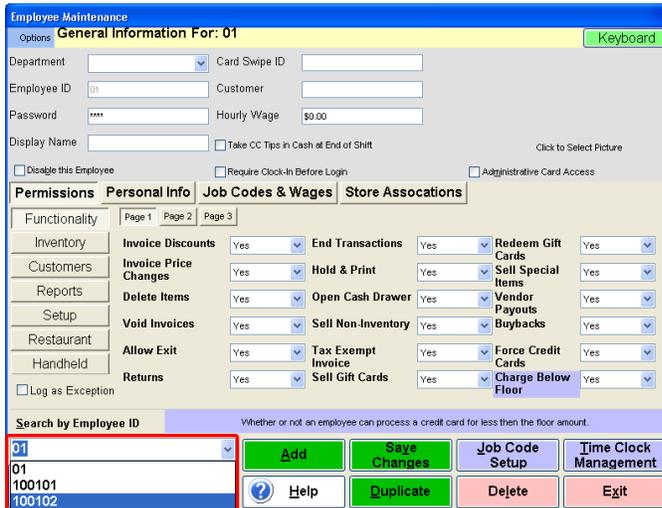
Specifying which employees can edit invoices...	page 2
Voiding an invoice...	page 4
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Specifying which employees can edit invoices

If you only want managers and select employees to be able to void invoices, discount items/invoices, invoice price changes, and tax exempt invoices select **Manager** from the login screen, provide the requested credentials, and follow these steps.



1. Select **Administrative** and then **Employee Maintenance**.



2. Select an employee.

Employee Maintenance
 Options **General Information For: Henry** Keyboard

Department: [dropdown] Card Swipe ID: [input]
 Employee ID: 100102 Customer: [input]
 Password: [input] Hourly Wage: \$0.00
 Display Name: Henry Take CC Tips in Cash at End of Shift Click to Select Picture
 Disable this Employee Require Clock-In Before Login Administrative Card Access

Permissions | Personal Info | Job Codes & Wages | Store Associations

Functionality | Page 1 | Page 2 | Page 3

Inventory	Invoice Discounts	Yes	End Transactions	Yes	Redeem Gift Cards	Yes
Customers	Invoice Price Changes	Yes	Hold & Print	Yes	Sell Special Items	Yes
Reports	Delete Items	Yes	Open Cash Drawer	Yes	Vendor Payouts	Yes
Setup	Void Invoices	Yes	Sell Non-Inventory	Yes	Buybacks	Yes
Restaurant	Allow Exit	Yes	Tax Exempt Invoice	Yes	Force Credit Cards	Yes
Handheld	Returns	Yes	Sell Gift Cards	Yes	Change Below Floor	Yes

Log as Exception

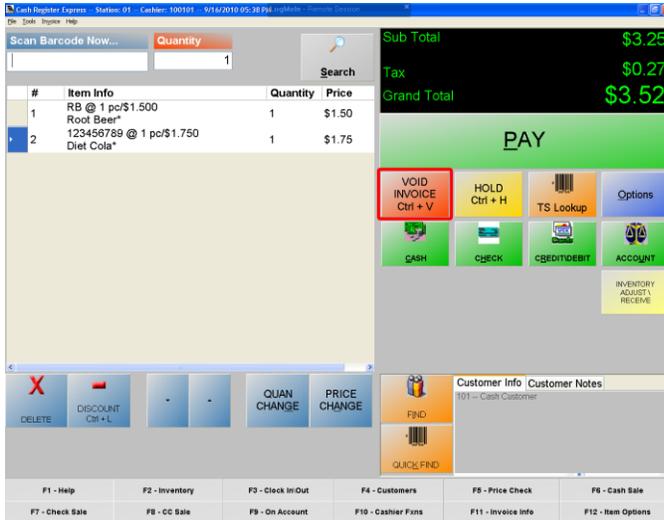
Search by Employee ID: 100102 The ability to do invoice and line discounts

Add Employee **Save Changes** Job Code Setup Time Clock Management
Previous Next Help Duplicate Delete Exit

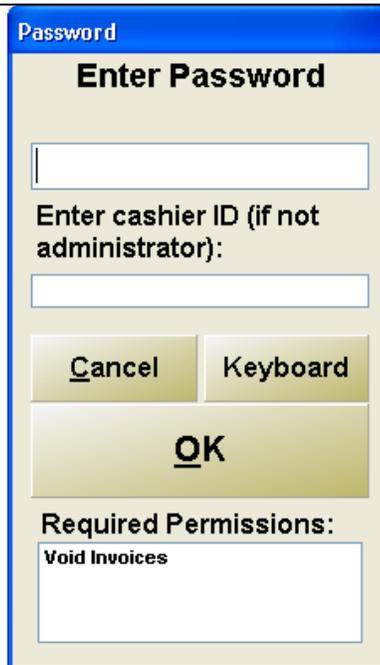
3. Select the **Functionality** tab.
4. Set the following to the desired permission.
 1. **Invoice Discounts**
 2. **Void Invoices**
 3. **Tax Exempt Invoice**
5. Select **Save Changes**.

Voiding an Invoice

To void an invoice, follow these steps.



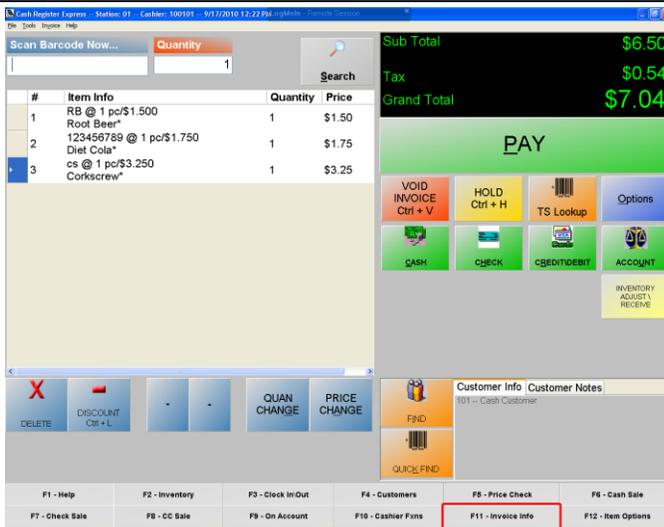
1. After the items have been added to the invoice select VOID INVOICE.
Note: Optionally you can hit Ctrl + V on your keyboard which will have the same outcome.



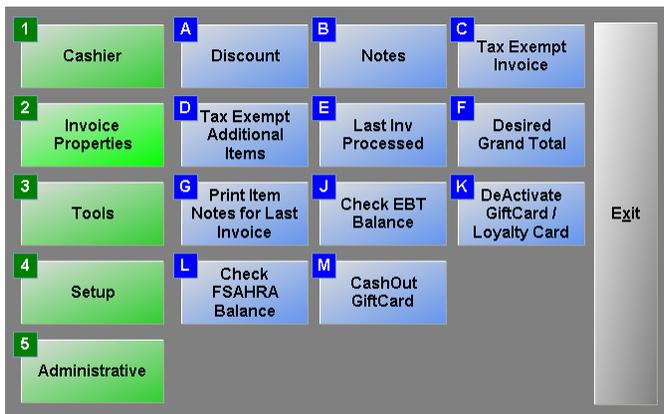
If the current employee has the Void Invoices permission set to prompt then a manager with an override permission will be required to continue.

Discounting an Invoice

To discount items on an invoice, follow these steps.



1. After items have been added to your invoice select **F11 - Invoice Info**.



2. Select **Discount**.

Enter Percentage off

0.00%

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

Clear Cancel

OK

3. Enter a discount percentage and select **OK**.

#	Item Info	Quantity	Price
1	RB @ 1 pc/\$1.500 Root Beer*	1	\$1.50
2	123456789 @ 1 pc/\$1.750 Diet Cola*	1	\$1.75
3	cs @ 1 pc/\$3.250 Corkscrew*	1	\$3.25

Sub Total \$5.20
Discounted 20.00%
Tax \$0.43
Grand Total \$5.63

PAY

VOID INVOICE (Ctrl + V) | HOLD (Ctrl + H) | TS Lookup | Options

GASH | CHECK | CREDIT/DEBIT | ACCOUNT

INVENTORY ADJUST/RECEIVE

Customer Info / Customer Notes
101 - Cash Customer

F1 - Help | F2 - Inventory | F3 - Clock In/Out | F4 - Customers | F5 - Price Check | F6 - Cash Sale
F7 - Check Sale | F8 - CC Sale | F9 - On Account | F10 - Cashier Fxns | F11 - Invoice Info | F12 - Item Options

4. You will see that the discount has been applied to the invoice.

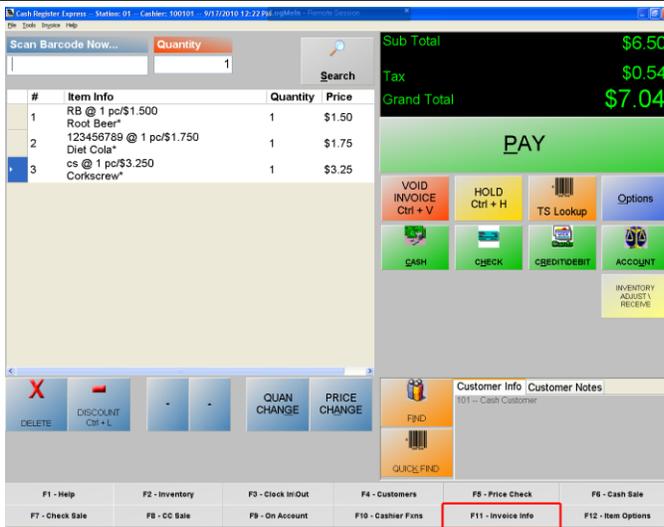
The following permission will be used for the above feature.

1. Invoice Discounts

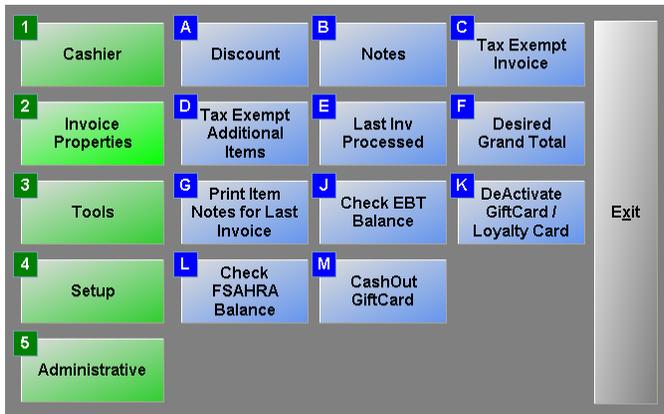
Adding Invoice Notes

Invoice Notes are a good way to quickly enter information pertaining to an invoice.

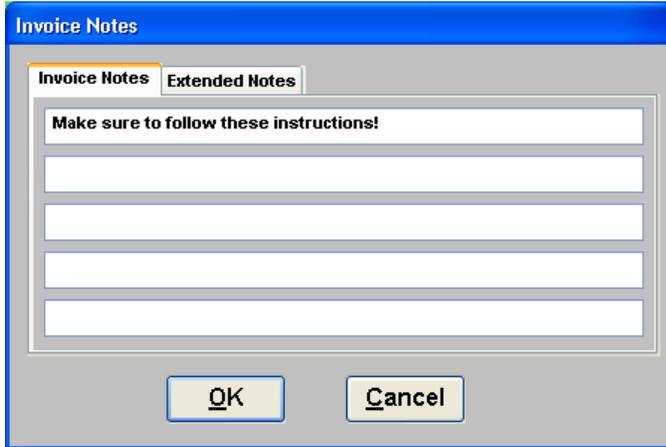
Select **Manager** from the login screen, provide the requested credentials, and follow these steps.



1. After items have been added to your invoice select **F11 - Invoice Info**.



2. Select **Notes**.



1. Under **Invoice Notes** enter any information you would like to have printed on the receipt.
2. Select **OK**.

Retail Checkout w/CRE
 www.PCA.com
 1-800-722-6374

INVOICE# 40
 OnHold ID: 40
 Closed to Cash Purchase

DATE/TIME: 9/17/2010 2:13:40 PM
 CASHIER: 100101
 STATION: 01

Item Count: 0

=====	
1 ROOT BEER*	\$1.50
=====	
Subtotal	\$1.50
Tax	\$0.12
GRAND TOTAL	\$1.62
Amt Tendered	\$1.62
Change due	\$0.00
Cash Amount	\$1.62
Make sure to follow these instructions!	

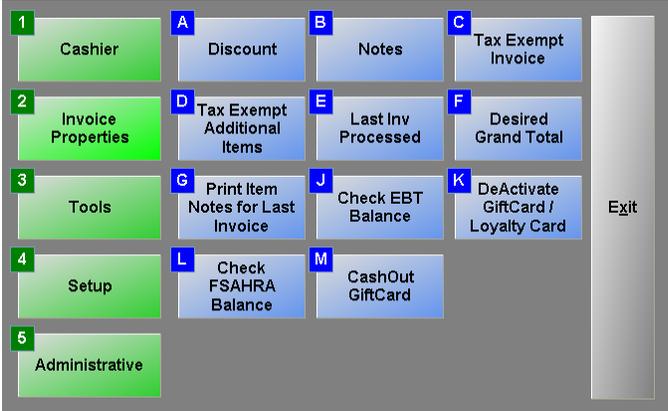
3. The receipt will have the notes printed on it.

Exempting Tax from an invoice and items on an Invoice

Invoice Notes are a good way to quickly enter information pertaining to an invoice.

For a more in depth guide to Tax exempting invoices please see below:

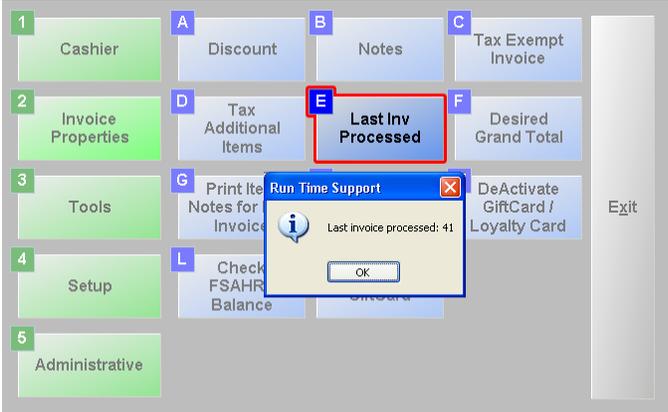
2. http://faq.pcamerica.com/file-lockers/pdf-locker/Tax_Exempt_Invoice_Items.pdf

	<ol style="list-style-type: none">1. After items have been added to your invoice select F11 - Invoice Info.3. Selecting Tax Exempt Invoice will exempt tax from the entire invoice.4. Selecting Tax Exempt Additional Items will exempt tax from any additional items added to the invoice. <p>Note: After selecting either of these options you will be required to enter the customers drivers license number, the license state code (NY), and the expiration date.</p>
---	--

The following permission will be used for the above features.

5. **Tax Exempt Invoice**

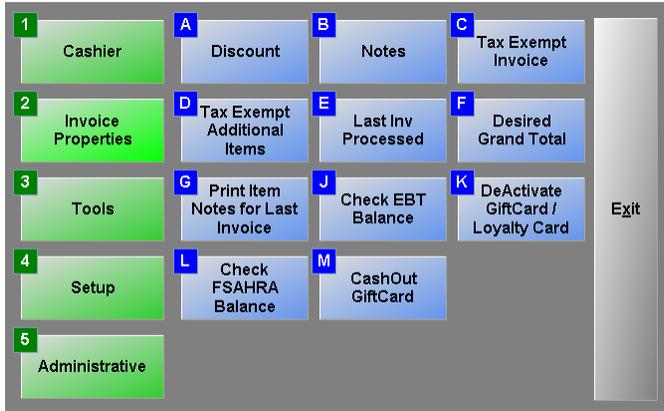
Last Invoice Processed

	<ol style="list-style-type: none">1. After items have been added to your invoice select F11 - Invoice Info.6. Selecting Last Inv Processed will show you the number of the last invoice processed.2. Select OK when finished.
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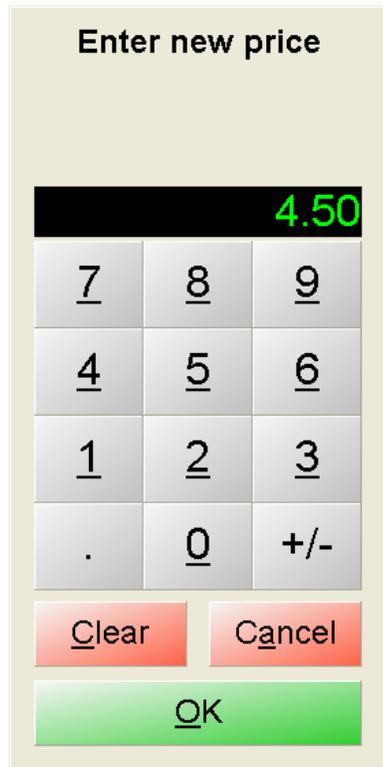
Desired Grand Total

This function can be used to manually change the grand total for an invoice. For example, if a customer purchases an item and the total comes to \$10.23. The customer pays \$10.00 but can't find any change so you decide to just charge him the \$10.00. You can click on **Desired Grand Total** to change the grand total of the invoice to \$10.00 and CRE/RPE will automatically calculate and apply the proper discount.

Select **Manager** from the login screen, provide the requested credentials, and follow these steps.



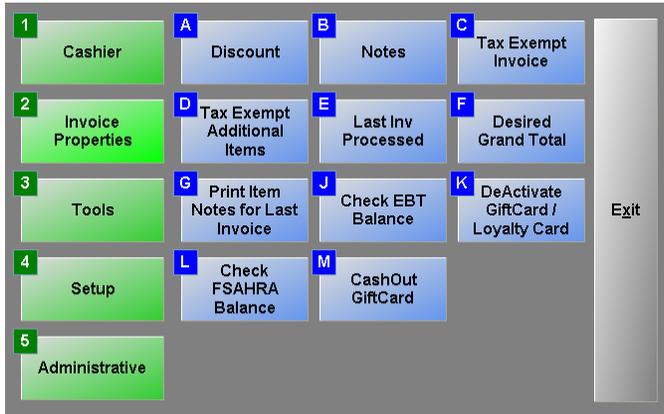
1. Select, **F11 - Invoice Info.**
2. Select **Desired Grand Total.**



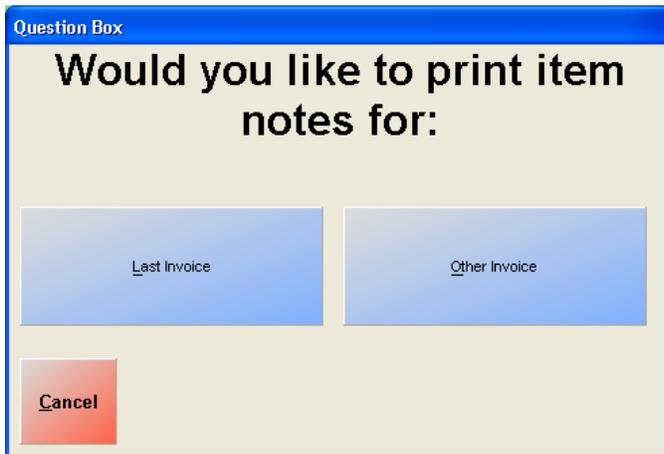
3. Enter the **Desired Grand Total.**
4. Select **OK.**

Print Item Notes

This function allows you to print the item notes from the last invoice processed or for a different invoice. These are the notes that are specified for individual items in the **Notes** tab of the **Inventory Maintenance** screen, such as instructions for caring for a plant or ingredients found in a meal.

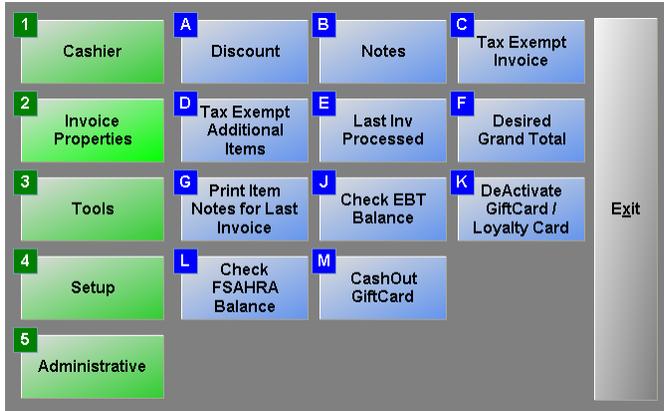


1. Select, **F11 - Invoice Info**.
2. Select **Print Item Notes for Last Invoice**.



7. Selecting Last Invoice will automatically print the notes for the last invoice.
8. Selecting Other Invoice will prompt you for the invoice number.

Check EBT Balance



1. To check the balance on your EBT card select **F11 - Invoice Info**.
2. Select **Check EBT Balance**.

EBT Payment

EBT Card Number
 #

Pinpad Status:

Expiration Month # Expiration Year #

Manual Entry

OK CANCEL

3. Swipe or enter the EBT card information then select **OK**.

Note: You must have a payment processor setup for EBT in the payment processing tab of the setup screen, to use this feature.

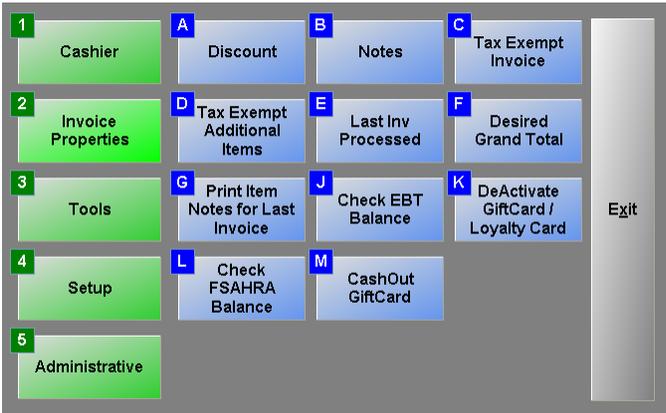
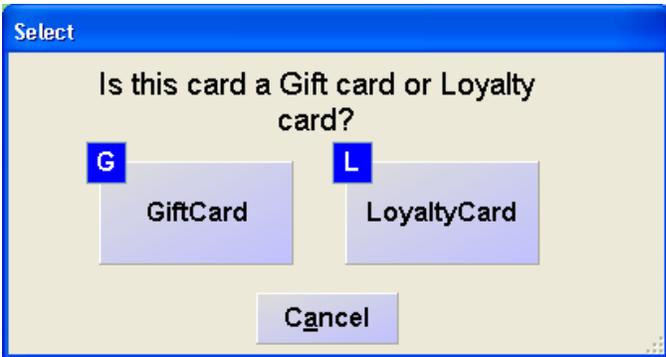
De-Activate Gift Card / Loyalty Card

For more information on creating Gift Cards please see below:

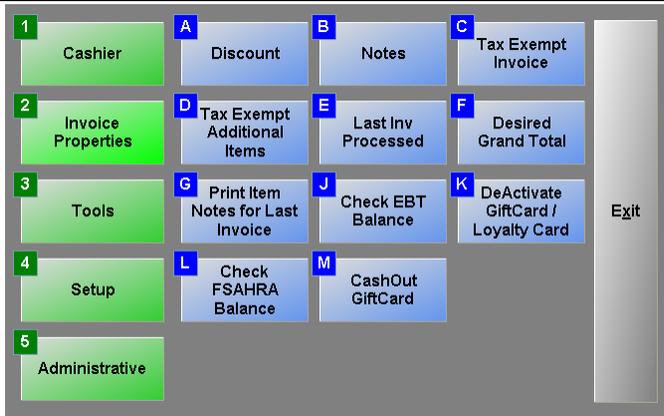
- http://faq.pcamerica.com/file-lockers/pdf-locker/Giftcard_setup_in_CRE.pdf

For more information on creating Loyalty Plans please see below:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf

	<ol style="list-style-type: none">1. To de-activate gift/loyalty cards select F11 - Invoice Info.2. Select DeActivate GiftCard / Loyalty Card.
	<ol style="list-style-type: none">3. Select what you would like to de-activate.
	<ol style="list-style-type: none">4. Then swipe the card or enter the card id.

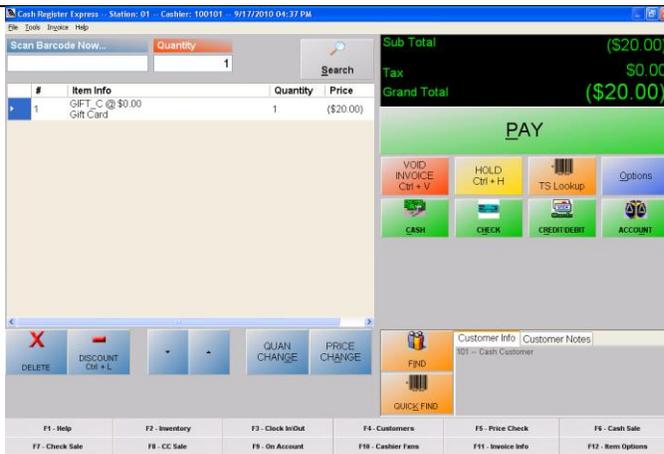
Cash Out Gift Card



1. To cash out a Gift Card select **F11 - Invoice Info**.
2. Select **CashOut GiftCard**.



3. Swipe or enter the Gift card information then select **OK**.



4. You will be asked to pay the customer the remaining balance on the card.