

Processing Transactions

Customer Services

Sparkstone Technology Ltd



Introduction

This document outlines the workflow for processing sales within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the processes involved in creating new sales.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

Back Office | Product file | Stock Records

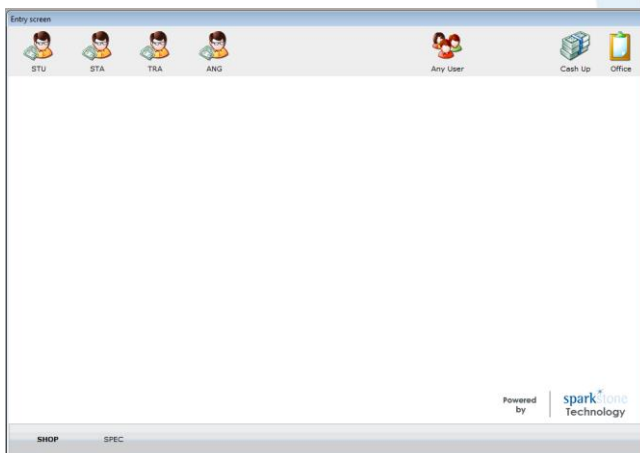
Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

Keying in transactions

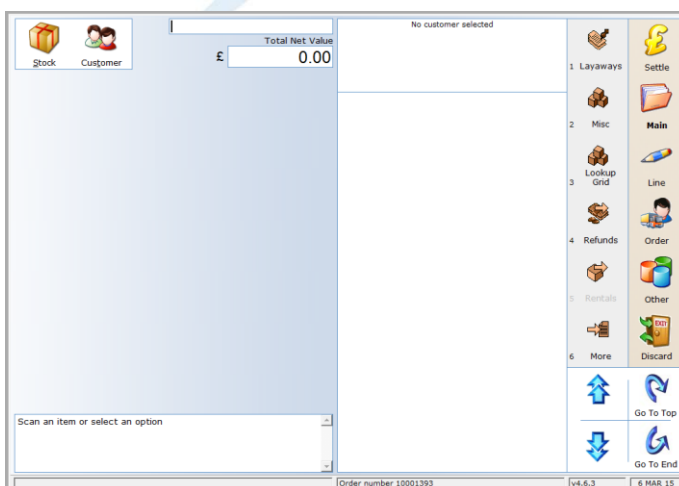
When opening Sparkstone, you will be greeted by the splash screen:



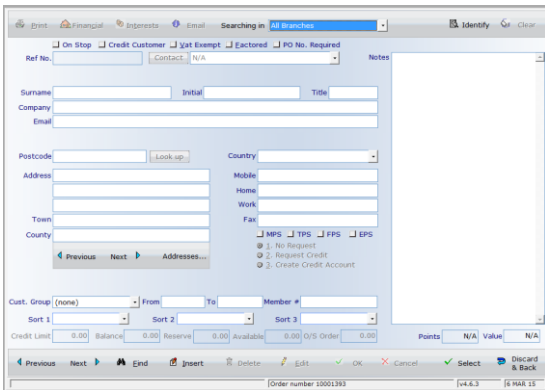
Click the screen using a mouse or the touch screen and the following login screen will be displayed:



Either select the icon that corresponds to you on the top left hand side or click 'Any user' and this will list all users. Select the required user and press 'OK'. The tilling screen will then be displayed:

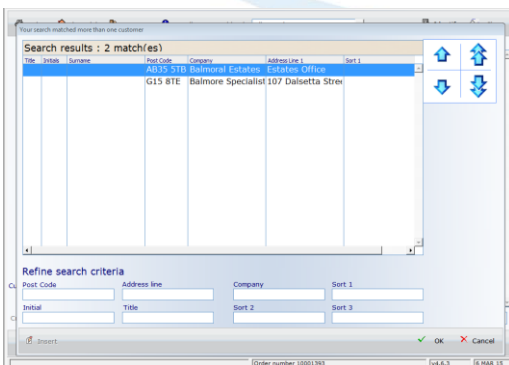


Press 'Customer' and the following window will be displayed:

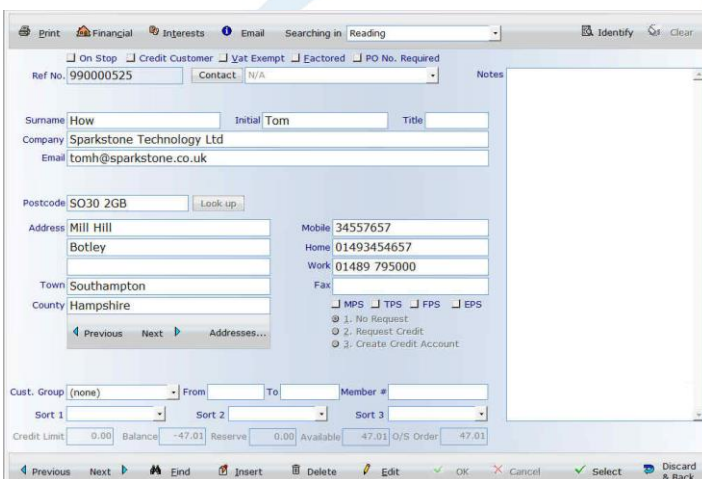


If the customer is an account customer they will most likely already have been entered into the system. To search for them click 'Find' and type in either their company name or postcode.

If there is more than one record with the same name or postcode then a window will be displayed titled 'your search matched more than one customer'. Select the relevant one from the list and click 'OK':



The rest of the customer details will then show in the customer record screen:



Alternatively- if after searching for the customer and they do not have a record and no information is populated, go to 'Insert' and type in the details manually.

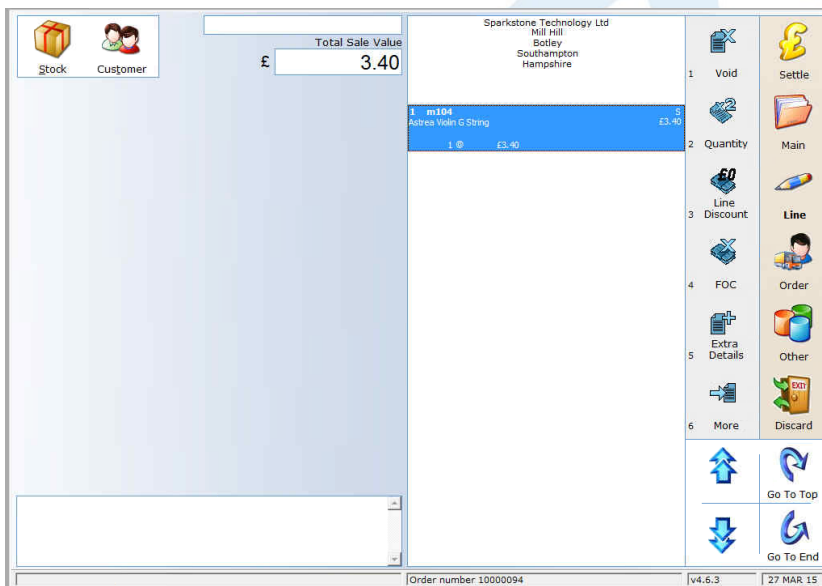
Then click 'Select'. Once the customer is selected, the tilling screen will be displayed with the customer details at the top:



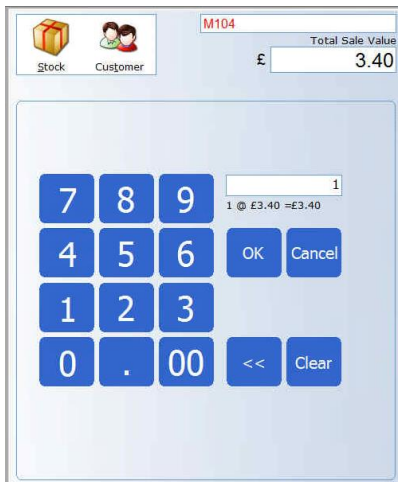
The stock can be entered by keying in the stock items in the bar at the top of the screen, or by scanning the barcodes into the same place:



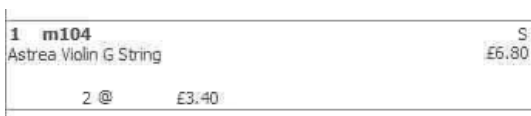
The items will be rung up in the tilling screen:



If you need to change the quantities select the line, then select 'Quantity' and the keypad will be presented where the quantity can be entered:



Type in the number of items and press 'OK'. The quantity at the bottom of the line will then update:



The arrows at the top and the bottom will enable you to scroll through the list if there are more than 10 items on the sale:



Once all of the items have been scanned or keyed in, select 'Settle' and choose the option from the menu:



Select the option and press 'OK' and the cash drawer will pop out and the receipt will print out & the sale will be finalised.