

Setting Up Tills (Gear Button > Settings > General)

Tills are access points for working with the POS. Set up Tills just below your company info for each location.

<https://websitesupport.zendesk.com/hc/en-us/articles/205936930-General-Settings>

Configuring Point of Sale Settings (Settings > POS Settings)

Before you start practicing to learn the system, you should go through the configuration settings for your Point of Sale so it will function the way you need.

<https://websitesupport.zendesk.com/hc/en-us/articles/205358894-Point-of-Sale>

Create System Logins for Employees, Set Permission Levels (Gear Button > Users)

Every employee who will be using the system will need an Admin login. You can create Groups to set permission levels in the system for different team members.

<https://websitesupport.zendesk.com/hc/en-us/articles/205075484-Set-Up-User-Logins>

Learn How to Use the Register (POS > Register, or, click the Cash Register icon in the upper left)

Before you start using the system, you will need to make sure all employees know how to use the Register for running transactions.

<https://websitesupport.zendesk.com/hc/en-us/articles/205075104-Step-Four-Using-the-Register>

Refunds, Exchanges, and Voids (POS > Register)

Your team will need to know how to process refunds, exchanges and voids, for transactions that happened before you start with us as well as after.

<https://websitesupport.zendesk.com/hc/en-us/articles/205075094-Step-Six-Processing-Refunds-and-Exchanges-and-Voiding-Transactions>

Learn How to Manage Customer Accounts (POS > Customers)

Make sure your employees can update information, access past transactions, find serialized sales by customer, and many other essential customer functions.

<https://websitesupport.zendesk.com/hc/en-us/articles/205075064-Step-Seven-Managing-Customers>

Creating Service & Repair Tickets (POS > Repairs)

Anyone working with Repairs or service work will need to learn this part of the system prior to going live with your new POS.

<https://websitesupport.zendesk.com/hc/en-us/articles/205075114-Step-Eight-Service-Repairs>

See the Recorded Point of Sale Webinar

For overview of these items, please watch the recorded webinar video. <https://websitesupport.zendesk.com/hc/en-us/articles/205361404-Point-of-Sale>

Explore Help Desk Learning Resources

For the full archive of all Help Desk resources, follow this link: <http://websitesupport.info>