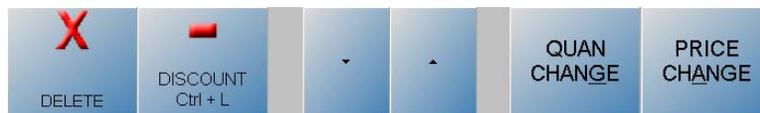


Item Edits in CRE



Retail establishments often need to modify items on an invoice.

To show/hide the item edit buttons select F12 on your keyboard.

Specifying which employees can edit items... page 2

Item (Line) Discounts - Setting up reason codes and enabling them... page 4

Item (Line) Discounts - Discounting items on an invoice... page 6

Deleting items off the Invoice... page 8

Quantity Change... page 9

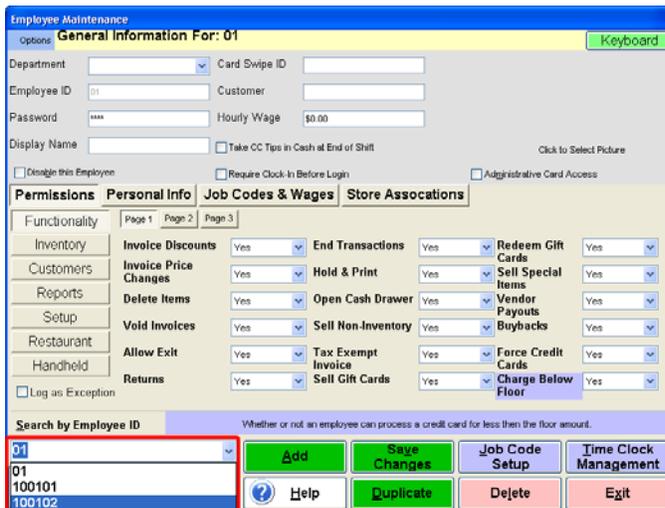
Price Change... page 11

Specifying which employees can edit items on invoices

If you only want managers and select employees to be able to edit, items on 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 ** Hourly Wage \$0.00
Display Name Henry [input] Take CC Tips in Cash at End of Shift Click to Select Picture
 Design 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	Charge Below Floor Yes

Log as Exception

Search by Employee ID [dropdown] The ability to do invoice and line discounts

100102 [dropdown]

Previous Next Help Duplicate Delete Exit

3. Select the **Functionality** tab.
4. Select **Page 1**.
5. Set the following to the desired permission.
 - **Invoice Discounts**
 - **Invoice Price Changes**
 - **Delete Items**
 - **Returns**

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

Department [dropdown] Card Swipe ID [input]
Employee ID 100102 Customer [input]
Password ** Hourly Wage \$0.00
Display Name Henry [input] Take CC Tips in Cash at End of Shift Click to Select Picture
 Design 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	Delete Sent Items Yes	Manual Age Entry Yes
Customers	End Cash Transactions Yes	Override Emp Schedule Yes
Reports	End Account Transactions Yes	Labor Scheduler Yes
Setup	Force Checks Yes	Negative Price Change Yes
Restaurant	Override ID Scan Yes	

Log as Exception

Search by Employee ID [dropdown] The ability to do invoice and line discounts

100102 [dropdown]

Previous Next Help Duplicate Delete Exit

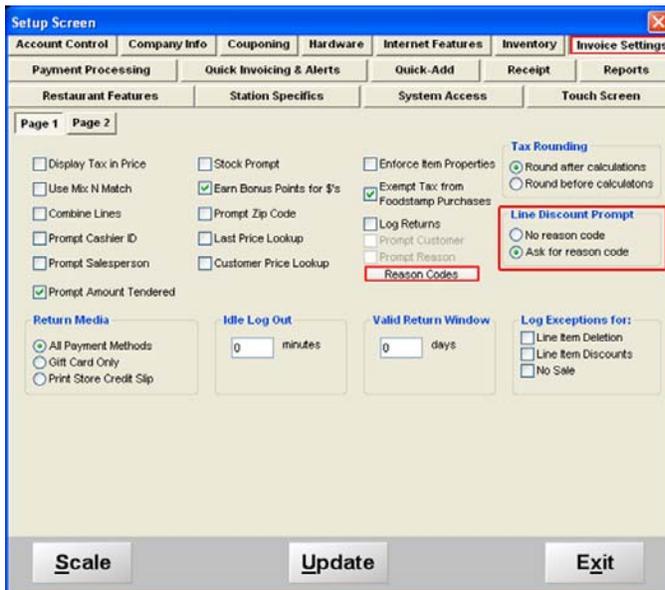
6. Select **Page 3**.
7. Set the following to the desired permission.
 - **Negative Price Changes**
8. Select **Save Changes**.

Item (Line) Discounts - Setting up reason codes and enabling them

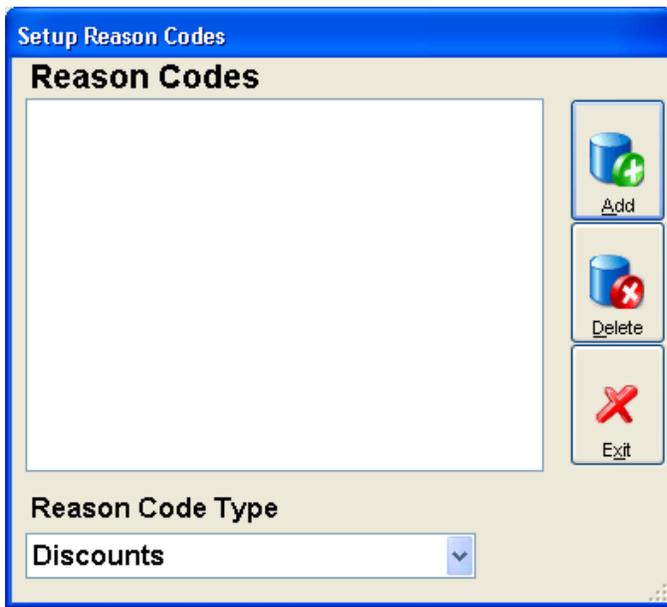
Reason codes are used to keep track of the rationale for item discounts. To set them up, select **Manager** from the login screen, provide the requested credentials, and follow these steps.



1. Select **Setup** and then **Setup Screen**.



2. Select the **Invoice Settings** tab.
3. Under **Line Discount Prompt** select **Ask for reason code**.
4. Select **Reason Codes**.



5. Select the Discount Reason Code Type.
6. Select **Add**.



7. Provide a reason code.



8. When finished, select **Exit**.

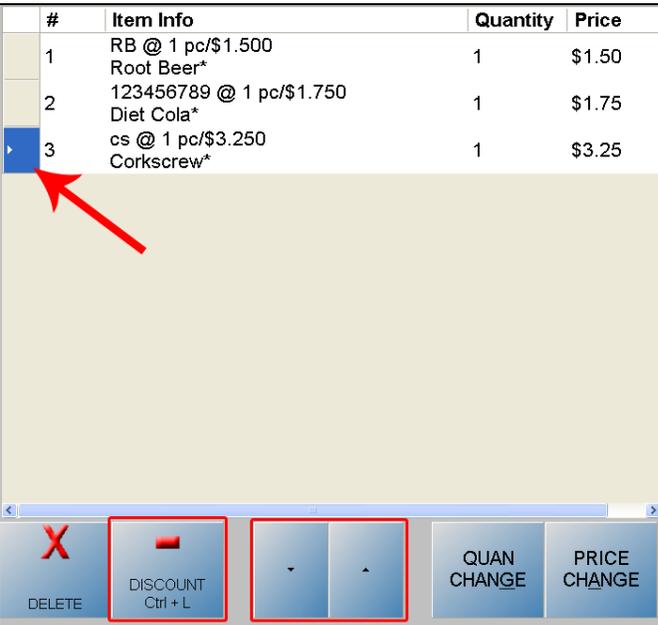


9. Select **Update**.

Item (Line) Discounts - Discounting items on an invoice

To discount items on an invoice, follow these steps.

#	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



1. After items have been added to your invoice select to the left of the line number.

Note: You can use the up and down arrows next to discount to highlight an item.

2. Select **DISCOUNT** (optionally you can hit Ctrl + L on your keyboard).

Enter Percentage off

0.00%

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

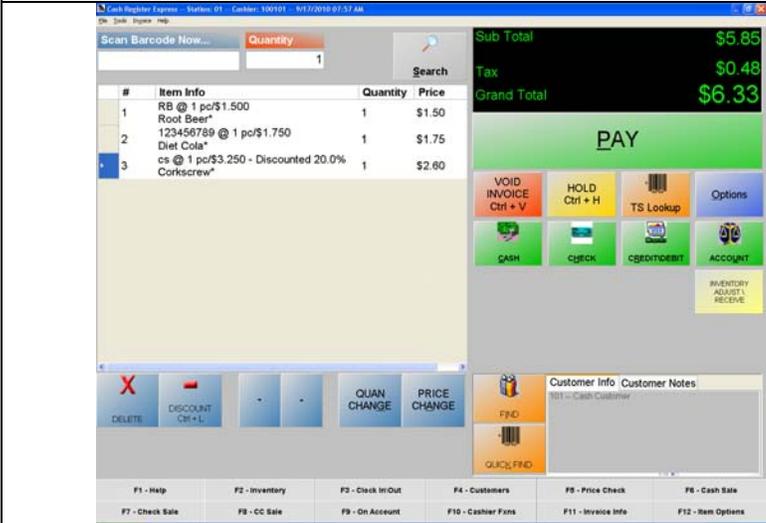
Clear Cancel

OK

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



4. Select a discount reason.

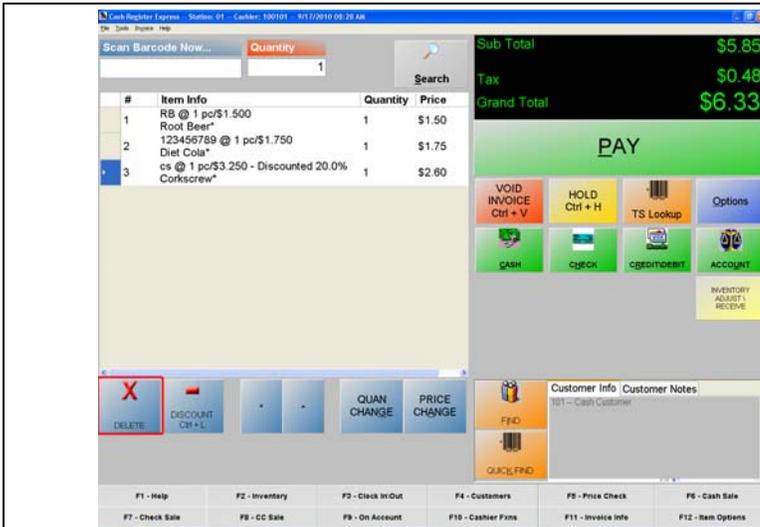


5. You will see that the discount has been applied to the selected item.

The following permission will be used for the above feature.

- Invoice Discounts

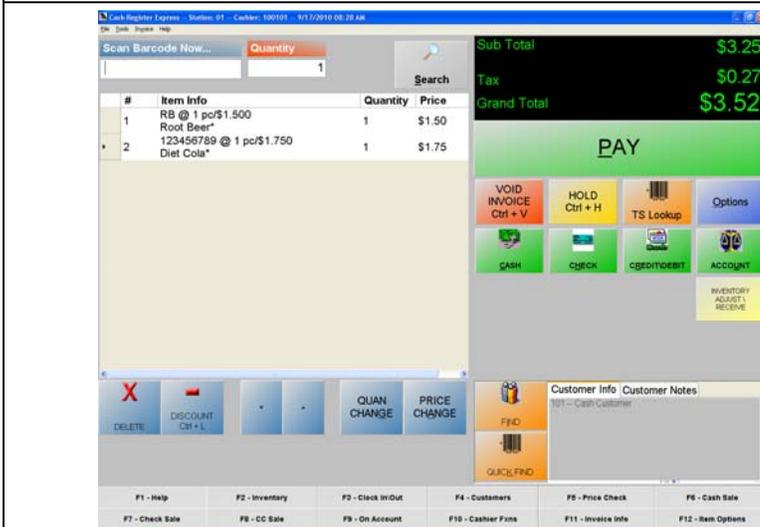
Deleting items off the Invoice



1. To delete an item off the invoice select to the left of the line number.

Note: You can use the up and down arrows next to discount to highlight an item.

2. Select **DELETE** (on screen or on your keyboard).

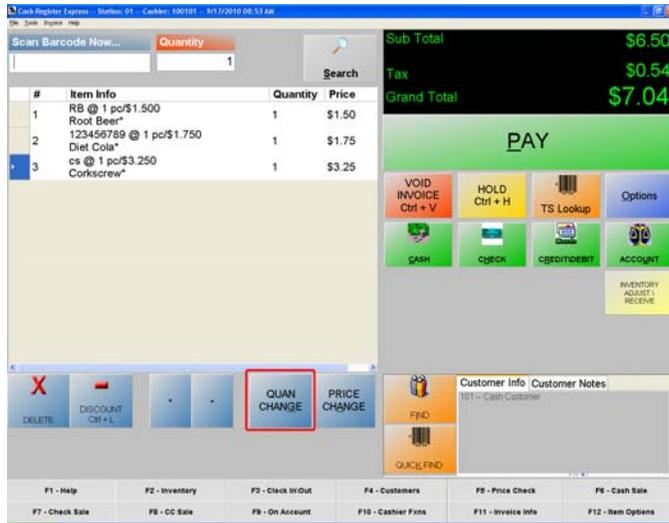


3. The highlighted item will then be deleted off the invoice.

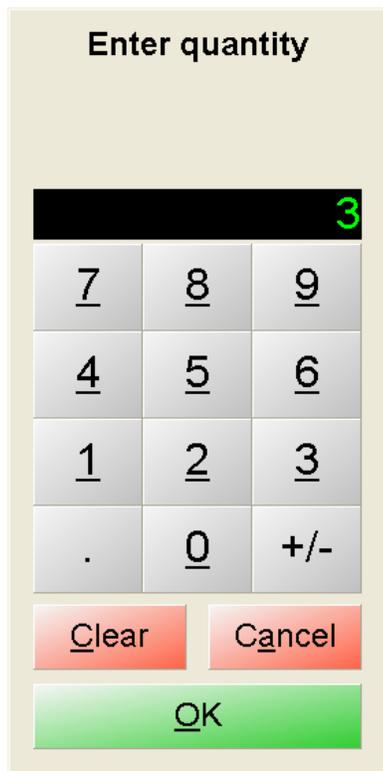
The following permission will be used for the above feature.

- **Delete Items**

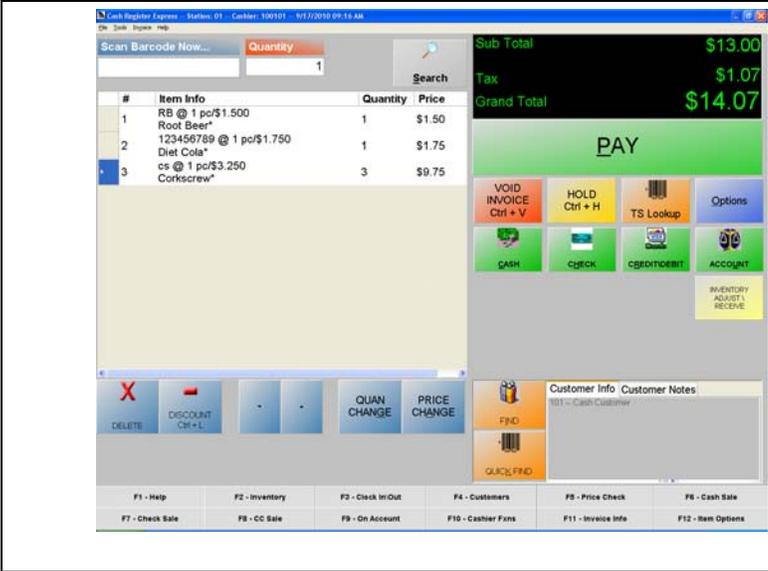
Quantity (QUAN) Change



1. To change the quantity of an item select to the left of the line number.
Note: You can use the up and down arrows next to discount to highlight an item.
2. Select **QUAN CHANGE**.



3. Enter the new quantity and select **OK**.

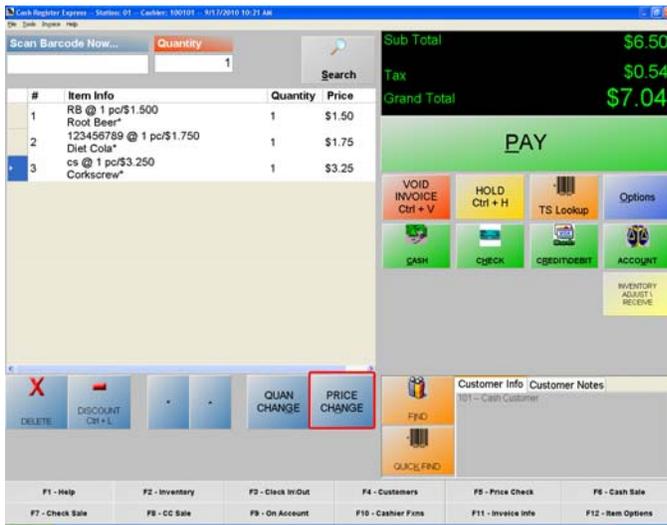


4. The quantity will then change for the highlighted item.

The following permission will be used for the above feature.

- Returns

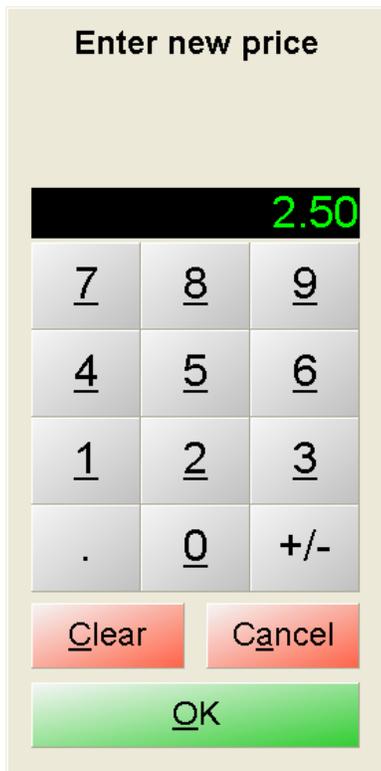
Price Change



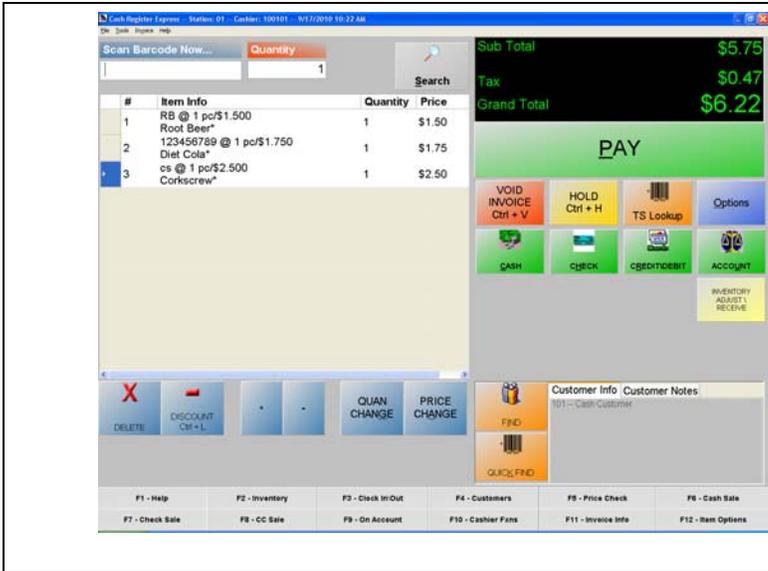
1. To change the price of an item select to the left of the line number.

Note: You can use the up and down arrows next to discount to highlight an item.

2. Select **PRICE CHANGE**.



3. Enter the new price and select **OK**.



4. The price will then change for the highlighted item.

The following permissions will be used for the above feature.

- Invoice Price Changes
- Negative Price Changes
- Returns

For information on exempting tax on items please see below:

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