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## Refunds

Cash Register Express -- Station: 01 -- Cashier: 01 -- 5/20/2010 02:46 PM

File Tools Invoice Help

Scan Barcode Now...  Quantity

#	Item Info	Quantity	Price
1	123456789101Six @ 1 pc/\$6.000 Six Pack Soda Can*	-1	(\$6.00)

Sub Total (\$6.00)  
Tax (\$0.48)  
Grand Total (\$6.48)

**PAY**

VOID INVOICE Ctrl + V    HOLD Ctrl + H    TS Lookup    Options

CASH    CHECK    CREDIT/DEBIT    ACCOUNT

DELETE    DISCOUNT Ctrl + L    QUAN CHANGE    PRICE CHANGE

FIND    QUICK FIND

Customer Info    Customer Notes

101 -- Cash Customer

## Selecting the Return Media - All Payment Methods

**Manager**

**Options**

1. Open **CRE/RPE**.
2. Select the **Manager** or **Options** button.
3. Enter the administrator password (default: admin) where applicable.
4. Select **Setup** then, **Setup Screen**.

**Setup Screen**

Account Control | Company Info | Couponing | Hardware | Internet Features | Inventory | Invoice Settings

Payment Processing | Quick Invoicing & Alerts | Quick-Add | Receipt | Reports

Restaurant Features | Station Specifics | System Access | Touch Screen

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☐ Display Tax in Price ☐ Stock Prompt ☐ Enforce Item Properties

☐ Use Mix N Match ☐ Earn Bonus Points for \$'s ☐ Exempt Tax from Foodstamp Purchases

☐ Combine Lines ☐ Prompt Zip Code ☐ Log Returns

☒ Prompt Cashier ID ☐ Last Price Lookup ☐ Prompt Customer

☐ Prompt Salesperson ☐ Customer Price Lookup ☐ Prompt Reason

☒ Prompt Amount Tendered

**Return Media**

☒ All Payment Methods

☐ Gift Card Only

☐ Print Store Credit Slip

**Commission Prompt**

☒ By Invoice

☐ Split by Item

**Idle Log Out**

0 minutes

**Valid Return Window**

-1 days

-1 = Disabled

0 = Disallow Returns

**Log Exceptions for:**

☐ Line Item Deletion

☐ Line Item Discounts

☐ No Sale

**Scale Barcode Parse Format**

☒ Original Method

☐ Custom Format

☐ Regular Expression

Custom format example: 2AAAAVPPPPPC

Where: 2 = Variable Price Indicator, A = PLU Placeholder, V = Verification Digit, P = Price Placeholder, C = Check Digit

Regular expression that matches the above custom format: 2(1){?<PLU>{4}}{1}{?<PRICE>{5}}{1}

5. Select the **Invoice Settings** tab.
6. Under **Return Media** select **All Payment Methods**.
7. Select **Update**.

Cash Register Express - Station: 01 - Cashier: 01 - 5/20/2010 02:43 PM

Scan Barcode Now... Quantity 1 Search

#	Item Info	Quantity	Price
1	123456789101Six @ 1 pc/\$6.000 Six Pack Soda Can*	1	\$6.00

Sub Total \$6.00  
Tax \$0.48  
Grand Total \$6.48

**PAY**

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

CASH | CHECK | CREDIT/DEBIT | ACCOUNT

DELETE | DISCOUNT Ctrl + L | **QUAN CHANGE** | PRICE CHANGE

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 Fns | F11 - Invoice Info | F12 - Item Options

8. Add some items to the invoice.
9. Select the item on the invoice if it has not already been selected.
10. Select **QUAN CHANGE**.

Enter quantity

**-1**

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

Clear Cancel

OK

11. When prompted for a new quantity, type **-1** and select **OK**.

Scan Barcode Now... Quantity 1

#	Item Info	Quantity	Price
1	123456789101 Six @ 1 pc/\$6.00 Six Pack Soda Can*	-1	(\$6.00)

Sub Total (\$6.00)  
Tax (\$0.48)  
Grand Total (\$6.48)

**PAY**

VOID INVOICE Ctrl + V, HOLD Ctrl + H, TS Lookup, Options, CASH, CHECK, CREDIT/DEBIT, ACCOUNT

DELETE, DISCOUNT Ctrl + L, QUAN CHANGE, PRICE CHANGE, FND, QUICK FND, Customer Info, Customer Notes

12. Select **PAY**.

Type Tender Amount & Select Tender Type Clear

**(\$42.79)**

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

Cash, Credit Card, Check, Gift Card, On Account, Debit

Amount Remaining **(\$42.79)**

Paid So Far

Type	Amount	Details

Cancel

\$ 1.00 \$ 5.00 \$ 10.00 \$ 20.00 \$ 50.00 (\$42.00)

13. When setup to **Return All Media** you will be able to pay the refund to any tender type.

14. Select the return media and follow all prompts.

## Selecting the Return Media - Gift Card Only

**Manager**

**Options**

1. Open **CRE/RPE**.
2. Select the **Manager** or **Options** button.
3. Enter the administrator password (default: admin) where applicable.
4. Select **Setup** then, **Setup Screen**.

**Setup Screen**

Account Control | Company Info | Couponing | Hardware | Internet Features | **Inventory** | Invoice Settings

Payment Processing | Quick Invoicing & Alerts | Quick-Add | Receipt | Reports

Restaurant Features | Station Specifics | System Access | Touch Screen

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☐ Display Tax in Price  
☐ Use Mix N Match  
☐ Combine Lines  
☒ Prompt Cashier ID  
☐ Prompt Salesperson  
☒ Prompt Amount Tendered

☐ Stock Prompt  
☐ Earn Bonus Points for \$'s  
☐ Prompt Zip Code  
☐ Last Price Lookup  
☐ Customer Price Lookup

☐ Enforce Item Properties  
☐ Exempt Tax from Foodstamp Purchases  
☐ Log Returns  
☐ Prompt Customer  
☐ Prompt Reason

**Tax Rounding**  
☒ Round after calculations  
☐ Round before calculations

**Line Discount Prompt**  
☒ No reason code  
☐ Ask for reason code

**Return Media**  
☒ All Payment Methods  
☒ **Gift Card Only**  
☐ Print Store Credit Slip

**Idle Log Out**  
 minutes

**Valid Return Window**  
 days  
☐ -1 = Disabled  
☐ 0 = Disallow Returns

**Log Exceptions for:**  
☐ Line Item Deletion  
☐ Line Item Discounts  
☐ No Sale

**Commission Prompt**  
☒ By Invoice  
☐ Split by item

**Scale Barcode Parse Format**  
☒ Original Method  
☐ Custom Format  
☐ Regular Expression

Custom format example: 2AAAAVPPPPPC  
 Where: 2 = Variable Price Indicator, A = PLU Placeholder, V = Verification Digit, P = Price Placeholder, C = Check Digit  
 Regular expression that matches the above custom format:  
 2(1)(?<PLU>[A-Z](4))\d(1)(?<PRICE>[0-9](5))\d(1)

5. Select the **Invoice Settings** tab.
6. Under **Return Media** select **Gift Card Only**.
7. Select **Update**.

Cash Register Express - Station: 01 - Cashier: 01 - 5/20/2010 02:43 PM

Scan Barcode Now... Quantity: 1 Search

#	Item Info	Quantity	Price
1	123456789101Six @ 1 pc/\$6.000 Six Pack Soda Can*	1	\$6.00

Sub Total: \$6.00  
 Tax: \$0.48  
 Grand Total: \$6.48

**PAY**

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

CASH | CHECK | CREDIT/DEBIT | ACCOUNT

DELETE | DISCOUNT Ctrl + L | **QUAN CHANGE** | PRICE CHANGE

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 Fns | F11 - Invoice Info | F12 - Item Options

8. Add some items to the invoice.
9. Select the item on the invoice if it has not already been selected.
10. Select **QUAN CHANGE**.

Enter quantity

**-1**

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

Clear Cancel

OK

11. When prompted for a new quantity, type **-1** and select **OK**.

Scan Barcode Now... Quantity 1

#	Item Info	Quantity	Price
1	123456789101 Six @ 1 pc/\$6.000 Six Pack Soda Can*	-1	(\$6.00)

Sub Total (\$6.00)  
Tax (\$0.48)  
Grand Total (\$6.48)

**PAY**

VOID INVOICE Ctrl + V, HOLD Ctrl + H, TS Lookup, Options, CASH, CHECK, CREDIT/DEBIT, ACCOUNT

DELETE, DISCOUNT Ctrl + L, QUAN CHANGE, PRICE CHANGE, FIND, QUICK FIND, Customer Info, Customer Notes

12. Select **PAY**.

**Question Box**

**Refunds should be processed via gift card. Would you like to override this?**

Yes No

13. You will then be prompted to override the Gift Card Refund.

- If you select **Yes** (provided that the permission **Override Refund** is setup) then it will act the same as **Return All Media**.
- If you select **No**, proceed to the next step.

Initialize Gift Card

**Refunds must be put on a gift card. Please initialize the card now.**

**OK**

14. Select **OK**.

Create Gift Card

Scan, swipe or type gift card ID

**OK**

**Keyboard**

**Cancel**

15. Swipe the Gift Card through the MSR to add the balance to it.

## Selecting the Return Media - Print Store Credit Slip

**Manager**

**Options**

1. Open **CRE/RPE**.
2. Select the **Manager** or **Options** button.
3. Enter the administrator password (default: admin) where applicable.
4. Select **Setup** then, **Setup Screen**.

**Setup Screen**

Account Control | Company Info | Couponing | Hardware | Internet Features | **Inventory** | Invoice Settings

Payment Processing | Quick Invoicing & Alerts | Quick-Add | Receipt | Reports

Restaurant Features | Station Specifics | System Access | Touch Screen

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☐ Display Tax in Price ☐ Stock Prompt ☐ Enforce Item Properties ☒ Round after calculations (Tax Rounding) ☐ Round before calculations

☐ Use Mix N Match ☐ Earn Bonus Points for \$'s ☐ Exempt Tax from Foodstamp Purchases ☒ No reason code (Line Discount Prompt) ☐ Ask for reason code

☐ Combine Lines ☐ Prompt Zip Code ☐ Log Returns ☐ Prompt Customer ☐ Prompt Reason ☐ Reason Codes

☒ Prompt Cashier ID ☐ Last Price Lookup ☐ Customer Price Lookup

☐ Prompt Salesperson ☐ Prompt Amount Tendered

**Return Media**

☐ All Payment Methods ☐ Gift Card Only ☒ **Print Store Credit Slip**

**Commission Prompt**

☒ By Invoice ☐ Split by item

**Idle Log Out**

0 minutes

**Valid Return Window**

-1 days   
 -1 = Disabled   
 0 = Disallow Returns

**Log Exceptions for:**

☐ Line Item Deletion ☐ Line Item Discounts ☐ No Sale

**Scale Barcode Parse Format**

☒ Original Method ☐ Custom Format ☐ Regular Expression

Custom format example: 2AAAAVPPPPPC   
 Where: 2 = Variable Price Indicator, A = PLU Placeholder, V = Verification Digit, P = Price Placeholder, C = Check Digit

Regular expression that matches the above custom format: 2(1){?<PLU>{4}}{1}{?<PRICE>{5}}{1}

Scale | Update | Exit

5. Select the **Invoice Settings** tab.
6. Under **Return Media** select **Print Store Credit Slip**.

**Setup Screen**

Account Control | Company Info | Couponing | Hardware | Internet Features | **Inventory** | Invoice Settings

Payment Processing | Quick Invoicing & Alerts | Quick-Add | **Receipt** | Reports

Restaurant Features | Station Specifics | System Access | Touch Screen

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**Receipt Size**

- ☐ Receipt
- ☒ Short Receipt
- ☐ Full
- ☐ Full Professional

**Print Invoices**

- ☐ No
- ☒ Yes
- ☐ Prompt
- ☐ CC And DC Only
- ☐ Prompt Size

**Print Logo**

- ☒ None
- ☐ Picture
- ☐ Company Info
- ☐ Pic and Info

**Print Modifiers on Receipt**

- ☒ Print all, total only
- ☐ Print all, breakdown
- ☐ No, Print None
- ☐ Print charged, total only
- ☐ Print charged, breakdown

# of Copies: 1 | # of Store Credit Receipts: 1

- ☒ Print Bar Code On "On-Hold" Receipts
- ☒ Print Bar Code On "Complete" Receipts
- ☐ Print Extra Copy of On Account Receipts
- ☐ Suppress Extra Signature Copy
- ☐ Print Notes on CC Receipt
- ☐ Print Dept Notes Receipt
- ☒ Print Item count on Receipt
- ☐ Print Second Description on Full Size Professional
- ☐ Validate Checks
- ☒ Combine Lines on Short Receipt
- ☐ Print Paid Status in Kitchen Receipt

**Scale** | **Update** | **Exit**

7. Select the **Receipt** tab.

8. Make sure that these two options are checked:

- **Print Bar Code On "On-Hold" Receipts**
- **Print Bar Code On "Complete" Receipts**

9. Select **Update**.

**Note:** To print a Bar Code on receipts your printer may have to be configured first. Please refer to your printers installation manual at:

<http://faq.pcamerica.com/hardware/printers>

Cash Register Express - Station: 01 - Cashier: 01 - 5/20/2010 02:43 PM

Scan Barcode Now... | Quantity: 1 | Search

#	Item Info	Quantity	Price
1	123456789101Six @ 1 pc/\$6.000 Six Pack Soda Can*	1	\$6.00

**Sub Total: \$6.00**  
**Tax: \$0.48**  
**Grand Total: \$6.48**

**PAY**

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

CASH | CHECK | CREDIT/DEBIT | ACCOUNT

**QUAN CHANGE** | PRICE CHANGE

Customer Info: 101 - Cash Customer | Customer Notes

DELETE | DISCOUNT (Ctrl + L) | FIND | QUICK FIND

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 Funs | F11 - Invoice Info | F12 - Item Options

10. Add some items to the invoice.

11. Select the item on the invoice if it has not already been selected.

12. Select **QUAN CHANGE**.



Enter quantity

**-1**

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

Clear Cancel

OK

13. When prompted for a new quantity, type **-1** and select **OK**.

Scan Barcode Now... Quantity 1 Search

#	Item Info	Quantity	Price
1	123456789101 Six @ 1 pc/\$6.000 Six Pack Soda Can	-1	(\$6.00)

Sub Total (\$6.00)  
Tax (\$0.48)  
Grand Total (\$6.48)

**PAY**

VOID INVOICE Ctrl + V HOLD Ctrl + H TS Lookup Options

CASH CHECK CREDIT/DEBIT ACCOUNT

DELETE DISCOUNT Ctrl + L QUAN CHANGE PRICE CHANGE

FIND QUICK FIND

Customer Info 101 - Cash Customer Customer Notes

14. Select **PAY**.

**Question Box**

**Refunds should be processed via store credit. Would you like to override this?**

Yes No

15. You will then be prompted to override the Store Credit Slip.
- If you select **Yes** (provided that the permission **Override Refund** is setup) then it will act the same as **Return All Media**.
  - If you select **No**, proceed to the next step.

Store Credit

**Refunds will be issued via a  
store credit.**

**OK**

16. Select **OK**.

Turquoise Steak and Grille  
www.pcAmerica.com  
1-800-722-6374

INVOICE# 21  
Closed to Cash Purchase

DATE\TIME: 5/20/2010 4:23:45 PM  
CASHIER: 100101  
STATION: 01

Item Count: 1

-1 BEEF CARPACCIO	(\$10.00)
1 STORE CREDIT	\$10.00

Subtotal	\$0.00
<b>GRAND TOTAL</b>	<b>\$0.00</b>

Gift Card/Store Credit Details:  
Transaction Description: Gift Activate  
Card #: \*\*\*1-21  
Transaction Amount: \$10.00  
Balance Added to the card: \$10.00  
Remaining Card Balance \$10.00

Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Signature: \_\_\_\_\_



Invoice: I1001-21

17. The Receipt Printer will print two copies of the invoice.

18. The store copy will have an area where the customer must sign.

19. If setup correctly the barcode will print at the bottom of both receipts.



20. The Receipt Printer will then print the **Store Credit Slip**.

21. If setup correctly the barcode will print on the slip.

**Note:** The barcode will be in this format:

- **SC-1001-21**  
SC = Store Credit  
1001 = Store ID  
21 = Invoice Number

#### **Configuring employee permissions relating to returns**

Refer to the document entitled “Employee Permissions (CRE)” on <http://faq.pcamerica.com>. See the **Returns**, **Issue Credit Slip**, **Override Refund**, and **Allow Old Returns** permissions, as they all relate to returning items.

#### **Viewing reports on returns**

Refer to the document entitled “Reporting” on <http://faq.pcamerica.com>. See the **Returns** and **Returns by Tender Type** reports.

## Redeeming Store Credit

- [Redeeming Store Credit in Cash Register Express](#)
- [Redeeming Store Credit in Restaurant Pro Express](#)

## Redeeming Store Credit in Cash Register Express

At the **Invoice Screen** add the items to be purchased then, scan the barcode that was printed on the store credit slip.

If no barcode exists then type in the information next to where it says **Store Credit:** on the store credit slip (i.e. SC-1001-21).

The store credit will automatically be taken off the balance.

Pay the remaining balance of the invoice to another tender type. The transaction is now complete.

## Redeeming Store Credit in Restaurant Pro Express

The screenshot shows the Restaurant Pro Express software interface. The top bar includes the logo, restaurant name 'Turquoise Steak and Grille', and buttons for Manager, Help, and Exit. Below this is a 'Select a Department' dropdown and a 'Touch an item to sell' button. The main menu is a grid of items categorized by department: APPETIZERS, ENTREES, SIDES, DESSERT, NONE, BAR MENU, BEVERAGES, and CASH CUSTOMER. The right side shows the invoice screen with a table of items and their prices. The bottom bar contains buttons for various functions like SHIR, REORDER, COMP, FLASH REPORT, RECEIPT NOTE, TIME CLOCK, PARTY SIZE, NUMBER SERVED, LOOKUP CUSTOMER, EDITS, PAY, CHECK, and SEND.

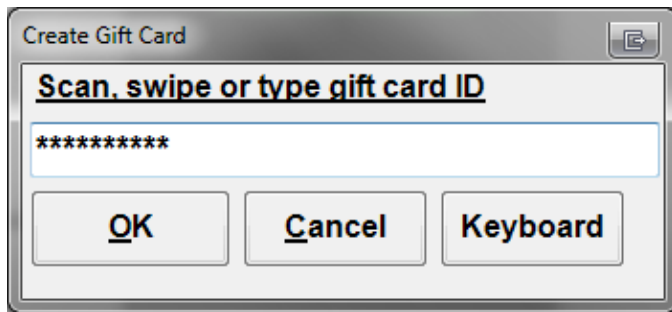
Description	Qty	Price
PEPSI	1	\$2.00
SPRITE	1	\$2.00
GINGER ALE	1	\$2.00
CAPPUCINO	1	\$3.75
SARATOGA SM	1	\$3.25
SARATOGA SM	1	\$3.25
Tax		\$1.42
Grand Total		\$17.67

At the **Invoice Screen** add the items to be purchased then select **PAY**.

The screenshot shows the payment screen in Restaurant Pro Express. It features a numeric keypad for entering the tender amount, a 'Clear' button, and a 'Type Tender Amount & Select Tender Type' dropdown. The amount remaining is displayed as \$17.67. Payment options include Cash, External Credit Card, Check, Gift Card, and Debit. A 'Paid So Far' table is also visible. At the bottom, there are buttons for preset amounts: \$1.00, \$5.00, \$10.00, \$20.00, \$50.00, and \$18.00, along with a 'Cancel' button.

Type	Amount	Details

Select **Gift Card**.



**Create Gift Card**

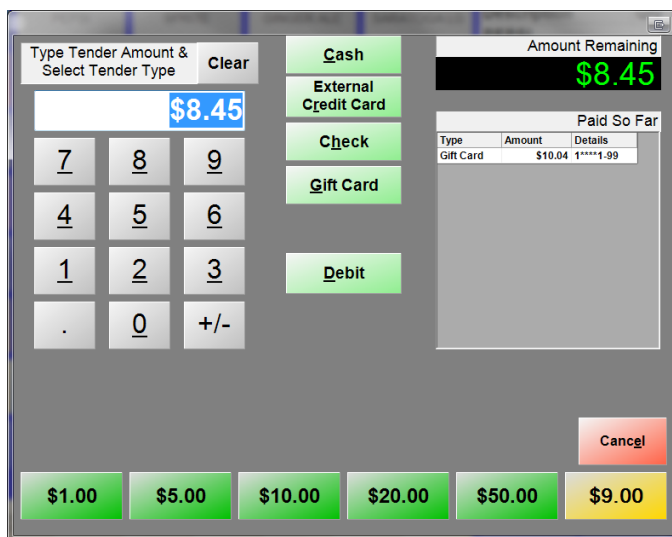
Scan, swipe or type gift card ID

\*\*\*\*\*

**OK** **Cancel** **Keyboard**

Scan the barcode that was printed on the store credit slip.

**If no barcode exists then type in the information next to where it says Store Credit: on the store credit slip (i.e. SC-1001-21) and select OK.**



Type Tender Amount & Select Tender Type **Clear**

**\$8.45**

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

**Cash**  
**External Credit Card**  
**Check**  
**Gift Card**  
**Debit**

**Amount Remaining**  
**\$8.45**

**Paid So Far**

Type	Amount	Details
Gift Card	\$10.04	1****1-99

**Cancel**

**\$1.00** **\$5.00** **\$10.00** **\$20.00** **\$50.00** **\$9.00**

**The store credit will automatically be taken off the balance.**

**Pay the remaining balance of the invoice to another tender type. The transaction is now complete.**

## Other Options

**Setup Screen**

Account Control | Company Info | Couponing | Hardware | Internet Features | Inventory | **Invoice Settings**

Payment Processing | Quick Invoicing & Alerts | Quick-Add | Receipt | Reports

Restaurant Features | Station Specifics | System Access | Touch Screen

Page 1 | Page 2

**Return Media**

☐ All Payment Methods (selected)  
☐ Gift Card Only  
☐ Print Store Credit Slip

**Valid Return Window**

☐ -1 days (selected)  
☐ -1 = Disabled  
☐ 0 = Disallow Returns

**Log Returns**

☐ Log Returns  
☐ Prompt Customer  
☐ Prompt Reason  
☐ Reason Codes

**Reason Codes**

☐ Reason Codes

**Scale** **Update** **Exit**

At the **Invoice Settings** tab (where the **Return Media** is set) you can choose to **Log Returns**.

- You can choose to **Prompt Customer** - which will require that a customer be selected for any return.
- You can choose to **Prompt Reason** - which will require that a Reason Code be selected for any return. To setup reason codes please see below.

You can also set a **Valid Return Window**.

**Setup Reason Codes**

**Reason Codes**

**Customer Returned**

**Reason Code Type**

Returns

**Add** **Delete** **Exit**

At the **Invoice Settings** tab select the **Reason Codes** button.

Use the dropdown to select Returns for the **Reason Code Type**.

Select **Add** and then enter a new reason code.