

Removing User Access

When an employee leaves you will need to remove their access.

1. From the home page click on Manage Locations & Users
2. Click on the Users tab
3. Click on the User's name
4. Click on Lock
5. Click on Apply
6. Click on Save

The screenshot shows the TouchNet Cashiering - Campus Merchant Edition interface. The window title is "TouchNet Cashiering - Campus Merchant Edition". The menu bar includes File, Station, Drawer, History, Window, and Help. The breadcrumb trail is: Items & G/L Codes > Cashiering Reports > Locations & Users > Supervisor > Cashiering Home. The main navigation bar shows Locations, Users, Roles & Permissions, and a "Manage Users" button. The TouchNet logo is visible with the tagline "GET THE CURVE". The page title is "[CASHIERING]".

The "Realms And Users" section on the left lists users under "Weber State University": badama, gbaltar, gtyrol, kagathon, **kthrace**, krosin, rdevoe, sanders, superuser, and tadmin. The "kthrace" user is selected.

The "General Info" section for user kthrace shows:
*User Name: C20249: kthrace
*First Name: Kara
Creation Date: October 26, 2010 11:03:33 AM MDT
Status: Unlocked
Login Count: 0
*Last Name: Thrace
Last Modified: October 26, 2010 11:16:08 AM MDT
Last Login:

The "Password" section shows "Days until password expires: 55". Below this is a text area with instructions: "To change or reset a user's password, enter the new password below. As you type, the password validator tracks the password policy requirements you have met and those you still need to meet. When you have entered a password that meets all requirements, the status changes from Invalid to Valid. Retype the password to confirm it." There is a "New Password:" input field.

A password validation table is displayed:

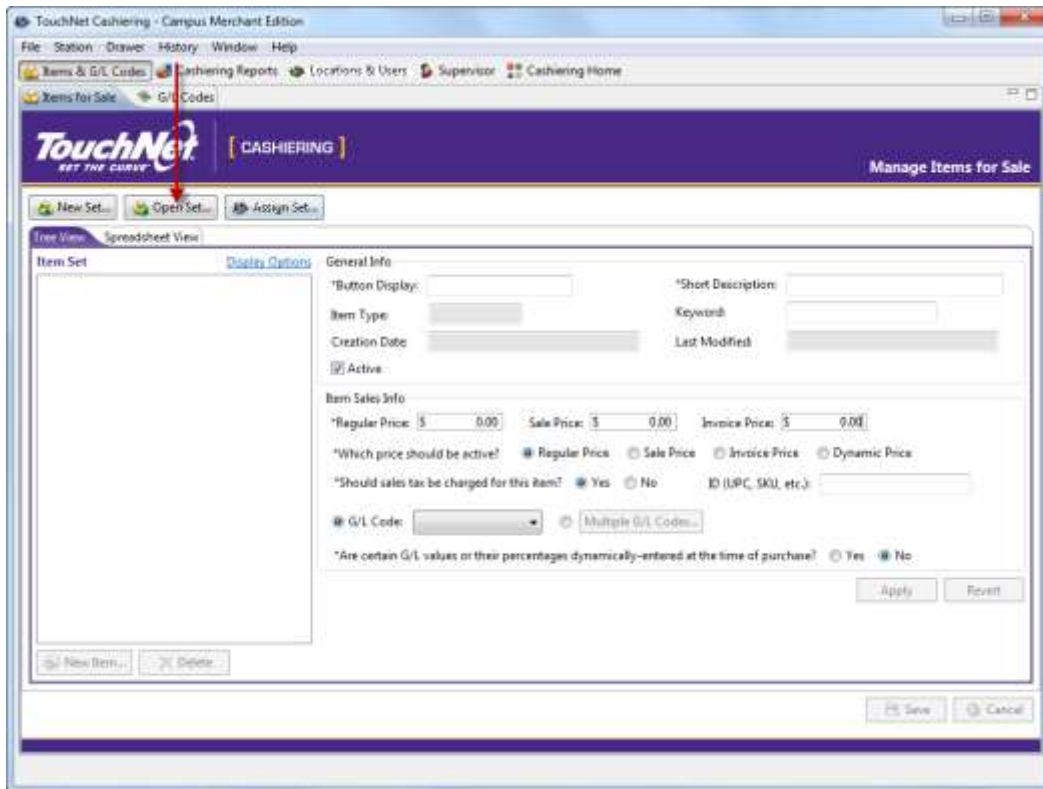
Status	Uppercase	Lowercase	Numeric	Special	Min length	Max length
Invalid	0	0	0	0	0	0
Required	1	1	1	1	7	32

Below the table is a "Confirm password:" input field.

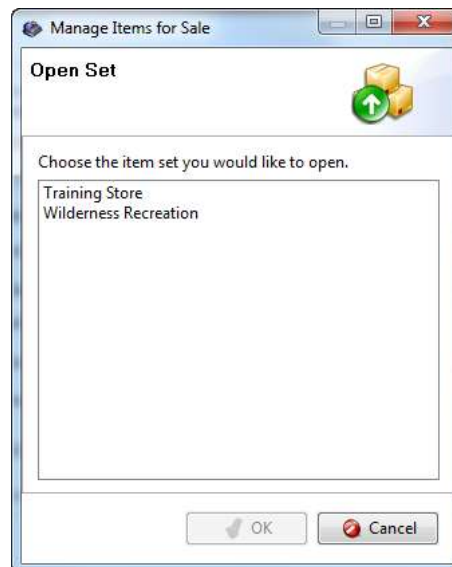
At the bottom of the interface are buttons: "New User...", "Lock", "Delete", "Apply", "Revert", "Save", and "Cancel".

Creating/Maintaining Products and Categories

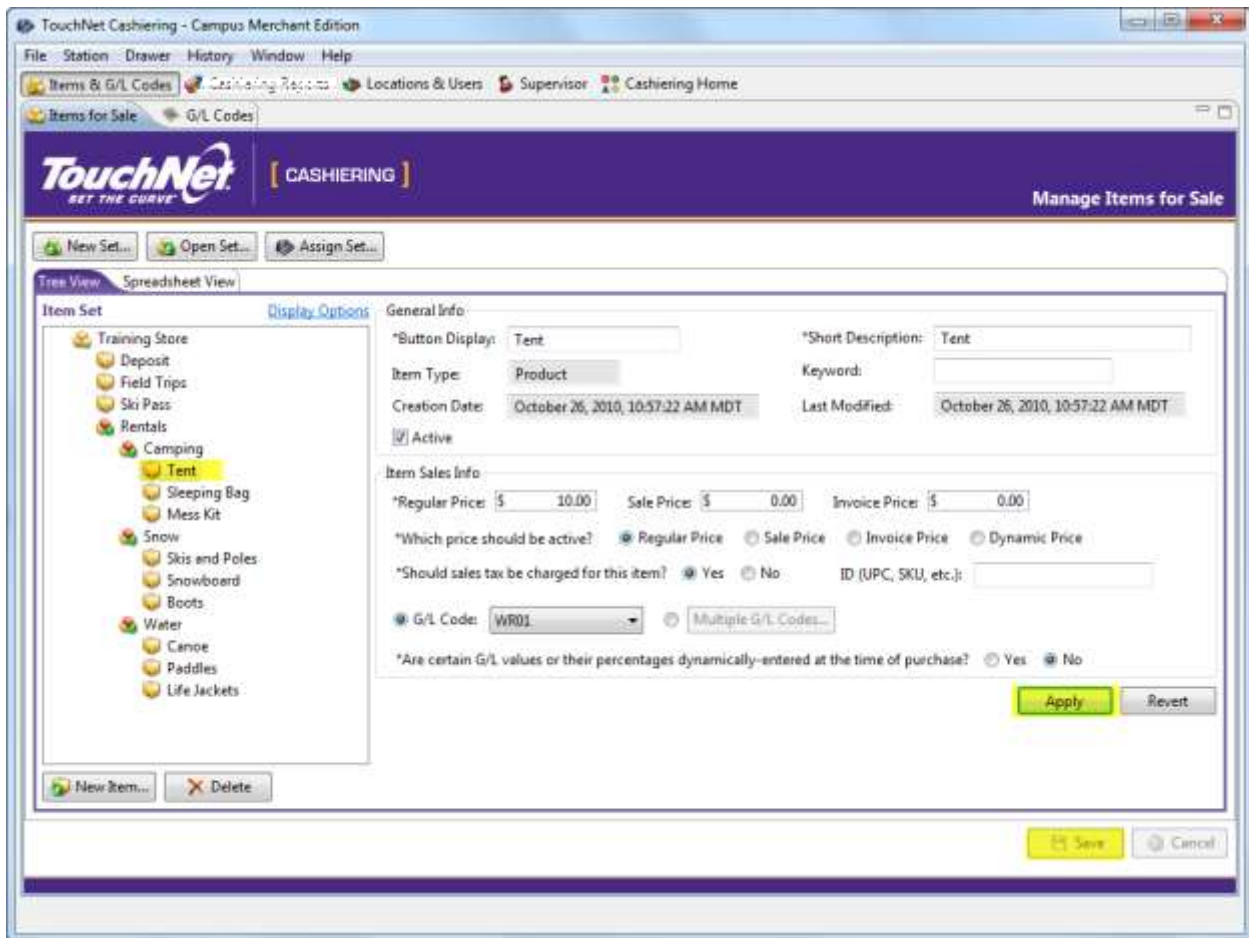
1. From the home page click on Manage Items & G/L Codes



2. Click Open Set
3. Select your store's item set and click Ok



4. To modify a price or product
 - a. Click on the product from the Item Set tree.
 - b. Modify the item.
 - c. Click Apply
 - d. Click Save



5. To add a product
 - a. Click on New Item
 - b. Choose what item type it is
 - c. Select what category it belongs to
 - d. Enter what you want displayed on the Button
 - e. Provide a short description
 - f. Click OK



The image shows a screenshot of a software dialog box titled "Manage Items for Sale". The dialog box has a standard Windows-style title bar with minimize, maximize, and close buttons. The main content area is titled "New Item" and contains the following elements:

- A sub-header "New Item" with a small icon of a yellow box with a green plus sign.
- Instructional text: "Enter the required fields below to create a new item."
- A dropdown menu labeled "*What type of item?" with a downward arrow.
- A dropdown menu labeled "*Choose the parent category:" with "Camping" selected and a downward arrow.
- Text: "Enter the button display value (up to 25 characters). This value will be displayed on the button that is used to select it for purchase and will commonly be less descriptive."
- A text input field labeled "*Button Display:".
- Text: "Enter the item short description (up to 35 characters). This value will be the primary description of the item for things such as the shopping cart and sales receipt."
- A text input field labeled "*Short Description:".
- At the bottom, there are two buttons: "OK" and "Cancel".

- g. Enter the different pricing options
- h. Select which price should be active
- i. Select whether or not there should be sales tax
- j. Assign a G/L Code(s)
 - i. If the detail code you need is not listed in the drop down, email Rachel.
- k. Apply
- l. Save

The screenshot shows the TouchNet Cashiering - Campus Merchant Edition software interface. The window title is "TouchNet Cashiering - Campus Merchant Edition". The menu bar includes "File", "Station", "Drawer", "History", "Window", and "Help". The toolbar contains "Items & G/L Codes", "Cashiering Reports", "Locations & Users", "Supervisor", and "Cashiering Home". The main window is titled "Manage Items for Sale" and features the TouchNet logo and "CASHIERING" text. Below the logo are buttons for "New Set...", "Open Set...", and "Assign Set...". The interface is split into two panes: "Item Set" on the left and "General Info" on the right. The "Item Set" pane shows a tree view of categories: Training Store, Deposit, Field Trips, Ski Pass, Rentals, Camping (with sub-items: Tent, Sleeping Bag, Mess Kit), Snow (with sub-items: Skis and Poles, Snowboard), Boots, Water (with sub-items: Canoe, Paddles, Life Jackets). The "General Info" pane contains the following fields and options:

- *Button Display: Tent
- *Short Description: Tent
- Item Type: Product
- Keyword:
- Creation Date: October 26, 2010, 10:57:22 AM MDT
- Last Modified: October 26, 2010, 10:57:22 AM MDT
- Active
- Item Sales Info:
 - *Regular Price: \$ 10.00
 - Sale Price: \$ 0.00
 - Invoice Price: \$ 0.00
 - *Which price should be active? Regular Price Sale Price Invoice Price Dynamic Price
 - *Should sales tax be charged for this item? Yes No
 - ID (UPC, SKU, etc.):
 - G/L Code: WYR01
 - Multiple G/L Codes...
 - *Are certain G/L values or their percentages dynamically-entered at the time of purchase? Yes No

Buttons for "Apply" and "Revert" are located at the bottom right of the "General Info" pane. At the bottom of the window are buttons for "New Item...", "Delete", "Save", and "Cancel".

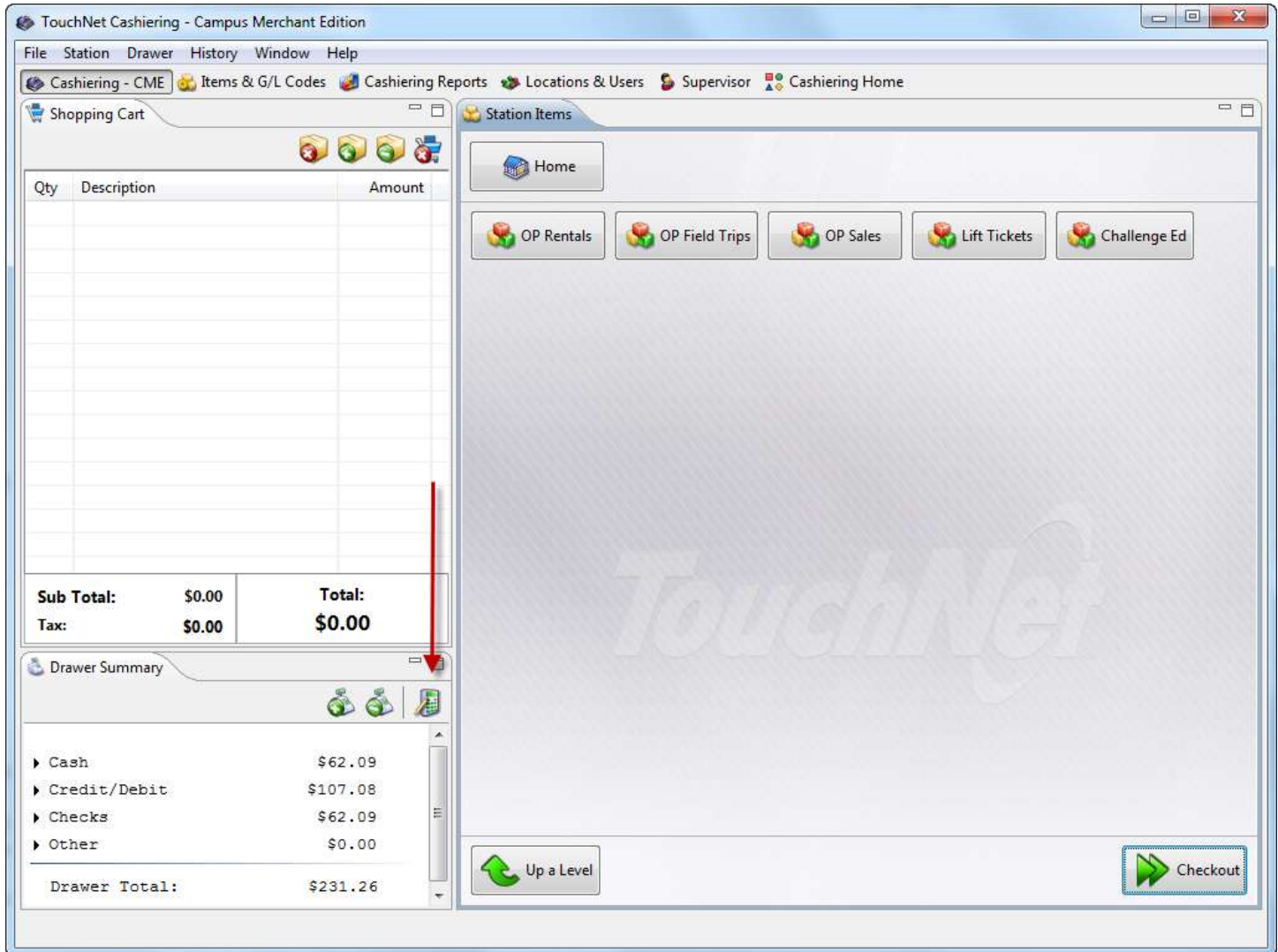
Training Cashiers

- Logging in
 - User name is always “C20249.username”
- Starting a drawer
 - Click on Begin New Drawer
- Finding products
 - How to click through categories
 - How return to main product page
- Adding or subtracting from cart
 - How to increase the quantity for an item
 - How to decrease the quantity for an item
 - How to clear the cart
- Check out
 - Select the tender type
 - Enter information in the comment box if your department requires it.

Tallying and Deposits

It is very important that all tallies and drawers are always kept separate from the others.

1. Cashier closes and balances drawer at the end of shift.
 - a. From the cashiering screen, cashier clicks on close and balance drawer




- b. Cashier counts out of the drawer the total listed on the screen and confirms that the remaining amount in his/her drawer totals \$_____.
 - i. If the cash matches then the amount on the screen will be entered in the indicated space.
 - ii. If the cash does not match, then the drawer amount will remain \$_____ and the cashier will enter the amount of cash in hand in the indicated space.
 - c. Cashier sums the amount of paper checks in drawer and enters the amount in the indicated space.
 - d. Click Submit Totals

TouchNet Cashiering - Campus Merchant Edition

Close/Balance

Enter the drawer amounts in the Cashier Values section.



Computed Values		Cashier Values	
The values below are calculated by the system.		The values below should reflect the manual counts.	
Cash	\$62.09	Cash	\$ 62.09
Cash Tendered	\$62.09	Cash Tendered	\$62.09
Beginning	\$0.00	Beginning	\$0.00
Change Given	\$0.00	Change Given	\$0.00
Credit/Debit	\$107.08	Credit/Debit	\$107.08
Visa	\$107.08	Visa	\$107.08
Checks	\$62.09	Checks	\$62.09
Paper Check	\$62.09	Paper Check	\$ 62.09
Computed Total:	\$231.26	Counted Total:	\$231.26

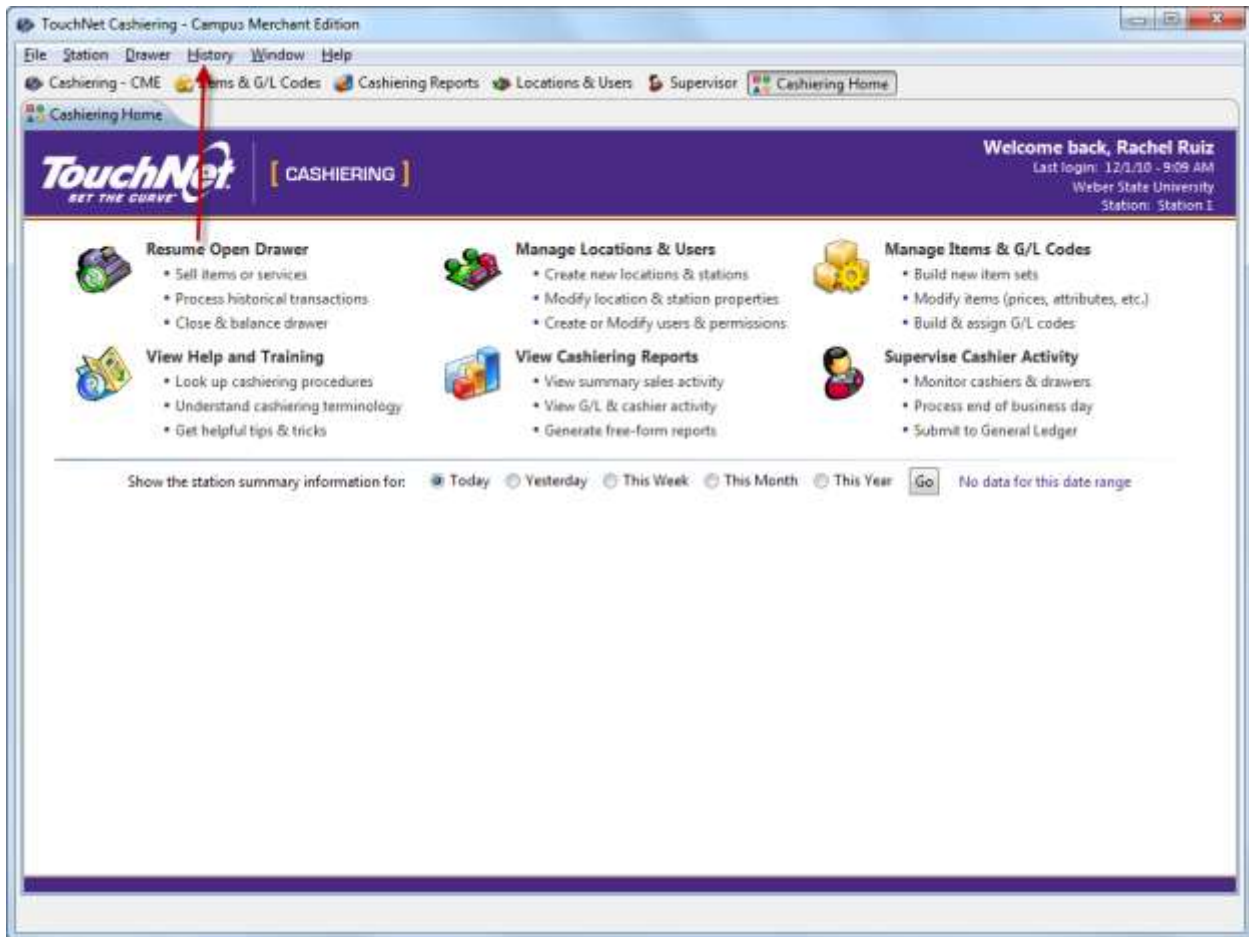
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- e. Cashier initials and dates Drawer Balance Report and places the report and monies in a secure environment for the supervisor's review.
2. Supervisor approves tally and prepares deposit bag
 - a. Supervisor compares monies to the Drawer Balance Report
 - b. Supervisor initials and dates Drawer Balance Report
 - c. Supervisor places monies and report in deposit bag to send to the Cashier's Office

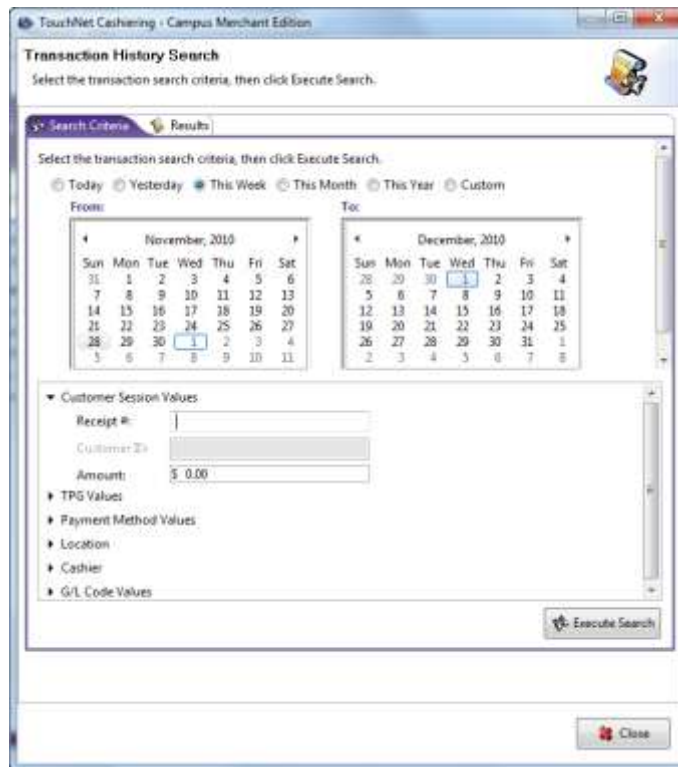
Refunds and Voids

Refunds and voids can only be done by those users who have been given permission.

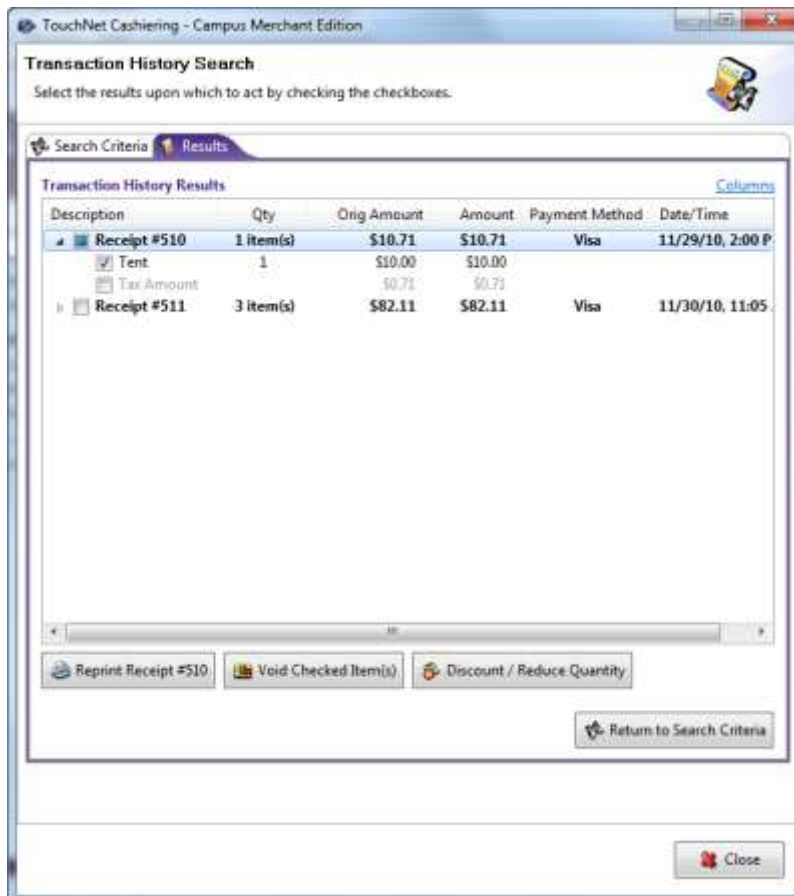
1. Click on History from the toolbar



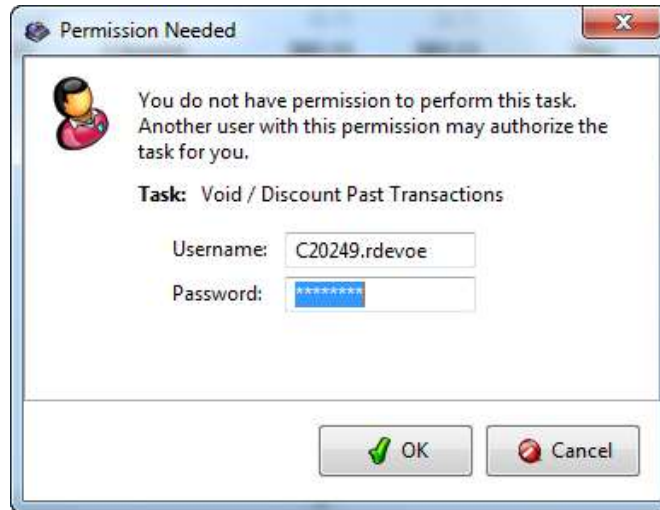
2. Select Transaction History Search
3. Look up the transaction by receipt number or search by date range.



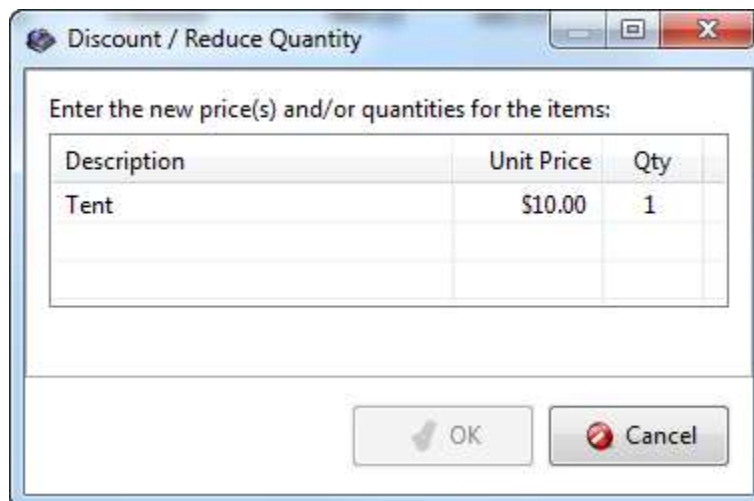
4. Click the box next to the transaction you would like to void/adjust
5. Select either the Void Checked Items button or the Discount/Reduce Quantity



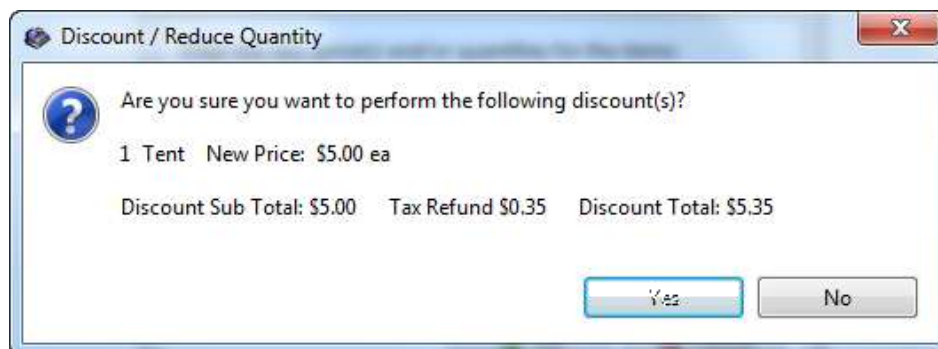
6. A Permission Needed box will appear for everyone. Someone with permissions will need to enter their username (remember the "C20249.") and password.



7. From here you can adjust the unit price or the quantity.



8. Modify the item and press OK
9. A verification window will appear, click yes if the information is correct.



10. You will need an open session to transact the refund/void. Follow the steps to close and settle your session when you are done processing transactions.