Go to TIP (Training-Information-Processes) for more CORE POS transactions details.

Sign onto CORE POS Register

1. Sign onto the register with your user ID and password.
2. Access CORE POS by double- clicking the **Follett POS** icon.
3. Select **POS** on the Store Dashboard screen.
4. Sign onto POS using assigned register/ till #.

Ring a Transaction

1. Type the customer's phone number and select **Next/Enter**.
2. Scan the barcode SKU
3. Repeat step 2 until all items in the transaction are included.
4. Select **Tender**.
5. Select the receipt option—Print, Email, or Print and Email. **Important:** Always ask the customer first for their email to generate an email receipt.
   - Select **Print and Email** when a signature is required, e.g., rental, A/R.
   - Direct customer to enter their email address at PIN Pad when prompted.
   - Verify email address with customer and edit, if necessary.
6. If a transaction is less than $10.00, cashier has option not print the receipt.
   Note: This rule applies to all tenders, follow any local requirements for specific tenders such as A/R.
   - A **Do Not Print** button with a large red **X** displays along with other receipt options.
7. Select **Next/Enter** to continue.
   Note: CORE POS does not allow a split tender such as **A/R + FA** or **FA + A/R** in a single transaction. **AR** + other tenders are possible. If **A/R** is split tendered with a gift card, A/R should be selected as the first tender.

Item Lookup

1. Select Item Lookup and scan/enter item search criteria (Department, Description, Item Type, or Style) in the Item Search Criteria field.
2. Select **Next/Enter**. Not necessary if you scan.
3. Select the item and select ADD to add the item.

Item Level Comment

1. Scan or enter item SKU.
2. Select **Item**.
3. Select **Item Comment**.
4. Enter comments in Item Comments box.

Transaction Level Comment

1. Scan or enter item SKU.
2. Select **Transaction**.
3. Select **TX Comment**.
4. Enter comments in Item Comments box.

Add/Delete Line Items

1. From tender options screen, select **ESC/Undo**
2. Application returns to main screen where an item is added or existing line can be deleted.
3. Scan Item or enter item number.
4. Add one more item.
5. Select **F8 Tender** and select receipt option.

SODA Order Sale

1. Select More ► **SODA Sale**. The Scan/Enter SODA Order Number screen displays.
2. Scan/Enter SODA Order number.
3. Select **Enter.** If cashier enters an Invalid SODA Order number, application displays an error message.
4. Scan item on the Sell Item screen.
5. Tender and complete the sale transaction.

Change Item Quantity

1. Select Item on Sell Item screen.
2. Select **Quantity**. Item Quantity screen displays.
3. Enter the quantity and select **Next/Enter.**

Follett Coupon

1. Type customer's phone number into the Enter Customer's Phone Number field and select Next/ Enter to proceed
2. Scan the SKU barcode for all items.
3. Scan the coupon barcode on the Sell Item screen.
4. Select **Next/Enter**.
   Coupon discount is applied to the scanned items.
5. Tender and complete the transaction normally.

Note: Do not confuse the Follett coupon with a manufacturer's coupon, discount or price override.

Tax Exempt Customer

A tax exempt customer must be set up in CORE POS Back Office (BO) to process the transaction as tax exempt. **Note:** Select the Windows + D key to toggle from POS to Back Office.

1. Add items to the transaction
2. Select **Transaction**.
3. Select **Tax**. (Override %, Override Amt., Exempt.
4. Select **Exempt**.
5. Type the tax certificate number in the field or select **Find** at the register. **Note:** You can only search by tax certificate number at the POS.
6. Select the Reason Code from the drop-down menu. Tax exempt certificate is applied and the tax amount is removed from the transaction.

Tax Exempt Customer in Back Office

1. Select the **Store Ops** tab.
2. Select the **Tax Certificate** link
3. Edit an existing tax exempt certificate number or add a new one. As soon as the number is added in BO, it is immediately available **in POS.**

Suspend a Transaction

A digital book transaction cannot be suspended

1. Select **Transaction**. .
2. Select **Suspend**. *Reason Code* screen displays
3. Select a reason code on and Select **Next/Enter**. The Suspend Saved screen displays.
4. Select **Enter**. The suspended transaction receipt prints. You are returned to the main screen

Retrieve a Transaction

1. Select **Transaction** and then **Resume**
2. Select the transaction.
3. Scan/enter the transaction number and select **Next/ Enter**.
4. Select **List** for a list of suspended transactions.
5. Select the transaction to be retrieved.
6. Select **Next/Enter**.
7. The suspended transaction is retrieved.
8. Complete, change, or cancel the transaction.

Cancel Suspended Transaction

Note: This can be done during till reconciliation

1. Select **Transaction**, then Select **Retrieve**.
2. Scan or enter the transaction number and Select **Next/Enter**. The Suspend List screen displays. To see a list of suspended transactions, Select **List**. The Suspend List screen displays.
3. Select the transaction to be cancelled.
4. Select **Delete**.
5. To confirm and cancel the suspended transaction, Select **Yes**. The receipt annotated ** Cancelled Transaction ** prints. You return to the main screen.

Digital Book Sale

1. Scan the ISBN barcode or enter the ISBN for the digital books at the **Enter a number** prompt.
   If multiple SKUs exist, the screen displays the options. If only a single SKU is available, proceed to the Enter Student ID/Email ID screen.
   Note: If you enter the SKU, select **More Options** to view available options.
2. Confirm with the customer which variation they want.
3. Select the item on the screen and click **Add**.
4. Collect customer Email or Learner ID.
   Note: All auto provisioned titles purchased in the same transaction, post to same learner.
5. Select **Tender**.
   Customer is prompted to pay for digital delivery fee with another tender if A/R restricts purchase.
6. Select the appropriate email option.
   Note: Receipt contains the Download URL and the PIN for access. If there is an issue during activation of the digital books, CORE POS displays the error.

Text Rental Express Enrollment

1. Enter Customer Phone number and select **Yes**.
2. Scan items.
3. Select **Tender**.
   The Rentable Item Found screen displays.
4. Ask the customer if they want to rent the item.
5. Select **Yes** to rent the eligible items.
   Note: Phone Number field on Patron Inquiry screen auto-populates with the phone number.
6. Select **Next**.
   Note: Patron Not Found displays on No Patron Found screen.
7. Select **Yes** and enter all information required.
8. Cashier is directed to **Express Enrollment** screen.
   Note: Observe the Telephone Number field on the Express Enrollment screen. The phone number provided at the start of the transaction auto populates the Express Enrollment screen.
9. Instruct customer to swipe when prompted. If customer uses a branded debit or debit/credit combo card, the Debit button displays on the PIN pad. Direct customer to select **Enter** to process as a credit card, not Debit.
10. Complete express enrollment.
11. Continue with Step 9 in **Renting Items to an Existing Patron** to complete the transaction

Rent Items—Existing Patron

1. Scan items in the transaction as normal.
2. Select **Tender** when transaction is complete. Rentable Item Found displays if any items are rentable.
3. Ask customer if they want to rent eligible items. Select **Yes** if customer wants to rent the items.
4. Search for rental patron by phone number.
5. Select the correct patron.
   Note: A Patron Confirmation Screen displays when selecting a patron from list.
6. Select **Yes** to confirm the selection. If the patron selected is not correct, select **No** and you return to the search results list.

Rent Items—Existing Patron (cont.)

Note: The status defaults to Actionable Item for the Patron Search Criteria.

7. Select the appropriate drop-down for your search.
8. Select **Yes** if customer is renting all items for the same term and proceed to step 9
9. If the customer is renting items for different terms, select **No**, then:
   a. Select the item.
   b. Select **Rental Term**.
   c. Select the term.
   d. Select **Next**.
   e. Complete these steps for each item.
10. Select each the item to be rented.
11. Select **Next** and select **Rental Term.**
12. Select the term for all rental items.
13. Select **Next**.
14. Select **Tender**, The No eligible items are found for discounts screen displays.
15. Select **Yes** to continue and complete transaction.

Rental Only Titles

Rental only titles are rung as part of the standard text rental process. CORE POS does not allow these titles to be purchased. Alerts display to warn the cashier when a rental only title is selected.

1. Scan items in transaction, as normal.
   A message displays if an item is rental only.
2. Select **Yes** if the customer wants to rent the item, then continue to scan other items.
   Note: The items display on the screen as Rental Eligible and RENTAL ONLY.
   Select **No** if the customer does not want to rent the item. Item is removed from the transaction. Continue to scan other items.
3. Select **Tender**.
   The Rental Item Found screen displays.
4. Select the items to be rented.
   If any item is rental only, it is automatically marked R on the screen.
5. Complete the transaction normally.

Convert Rental to a Purchase

1. Enter the telephone number or select **Next**.
2. At the Enter number prompt, select **More**.
3. Select **Rental.**
4. Search for the patron using the patron's phone number.
5. Select **Next**.
6. Select the patron.
7. Select **Next**.
8. Select the item to be purchased.
9. Select **Convert Rental to Purchase**.
10. Select **Next**.
11. Select the tender option and receipt option.

Extend a Rental

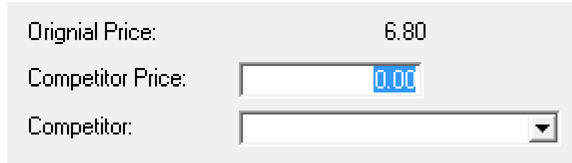
1. Enter customer's phone number, select **Next**.
2. Scan/enter item to extend and select **Next**.
3. Select **More**.
4. Select **Rental** and enter patron phone number.
5. Select the patron and select **Next**.
6. Select the item(s) to extend.
7. Select **Extend Rental**. The Action column changes to Rental Extended.
8. Select **Next**.
9. Select the rental term and select **Next**.
10. Select **Tender**.
11. Enter the tender amount and select **Next**.
12. Select the tender option and receipt option.

Price Match Sale—No Rental

1. Select **Next/Enter** at the Customer phone number prompt.
2. Scan the SKU barcode. Repeat until all items in the transaction are included.
3. Select the item being purchased (not rented) for price match.
4. Select **Pricing**.
5. Select **Price Match**, then **Enter**. Original price is pre-populated.

Price Match Sale—No Rental (cont.)

6. Enter the Competitor Price and select competitor from the drop-down. Local competitor name can be added in item comment.



7. Select **Next** to continue with sale or repeat the process for price match on additional items.
   Note: A warning message displays if the price match difference amount between the original price and competitor price for a SKU is more than $100. If the price match amount is less than $5.00, it is added as a line item discount for that SKU.
8. Select **Tender**, FHEG Gift Card amount is displayed along with Gift Card number prompt.
9. Enter/Swipe the gift card number and select **Enter**. System returns to Sale item screen with a new line item that has FHEG Gift Card details.
10. Select **Tender.**
    Note: Do not use issued gift card as tender

.Price Match Rental Eligible Items

1. Select **Next/Enter** at the Customer phone number prompt.
2. Scan the SKU barcode. Repeat until all items in the transaction are scanned.
3. Select **Tender**.
   Rental Item Found screen displays.
4. Select **Yes**.
5. Enter patron details and select **Enter**.
6. Select the correct patron and select **Enter**.
7. Select the term details and select **Enter**.
8. In Rental Item screen, select **Price Match**.

Price Match Rental Eligible Items

9. Enter competitor rental price and select competitor from the drop-down list (Amazon, Barnes & Noble, Chegg and Local Competitor..
   Note: if the price Match amount is less that $5.00, it is added as a line item discount for that SKU.
10. Select **Next**. System returns to sale item screen.
    - When the Rental Price Match amount is between $5.00 and $1000.00, Rental amount is overridden with the new amount and FHEG gift card is issued.
11. Select **Next/Enter** at the Customer phone Select **Tender**. Message displays: Advise customer to swipe gift card now.
12. Select **Tender** to complete the transaction.
    Note: Do not use issued gift card as tender.

Rental Return

1. Select **Return** to display the Return Options screen.
2. Scan the receipt barcode to enter the information. If there are rental items in the transaction, the Rental Item Found screen displays.
3. Select **Yes** if the customer is going to return the rented item.
4. Select **Trans Detail** to view all items in the transaction.
5. Select the item(s) to be returned, then select the Rental Refund $ button.
   Note: The Action on each item changes to Refunded.
6. Select the **Return Reason Code**.
7. Select **Next**.
8. Select Tender and enter the patron information.
9. Confirm tender for the refund.
10. Select receipt option.

Return with a Receipt

If the return is a split transaction with A/R and another tender, complete return in two separate transactions.
Note: If this is a Price Match return, amount paid is returned and customer keeps the FHEG gift card.

1. Select **Return**
2. Scan the original receipt barcode.
3. Select **Trans Details**
4. Select item(s) for return and select **Enter/Next**.
5. Select the Return Reason Code from the drop-down menu for each item, then select Next/Enter.
6. **Select Tender**
7. Select **Next/Enter**.
8. *Complete the* Customer *ID* screen and select **Next/ Enter**
9. Select a refund option. Select **Next/Enter.**

Return—Exchange

1. Follow steps1 through 5 in **Return with a Receipt**.
2. At the Sell Item Screen, scan the barcode SKU of the exchanged item.
3. Select **Tender**.

Return without a Receipt

Search for transaction in the Returns Options screen.
Note: Manager Override is required

1. Select **Return**
2. Select **No Receipt** on the Return Options screen.
3. Enter item to be returned and Select **Next/Enter**.
4. Select Tender
5. Application displays capture.

Return Multiple Quantity Discounted

Perform return of one line item with multiple quantity discount applied.

1. Select **Return** to display Return Options screen.
2. Enter or scan receipt barcode.
3. Select **Trans. Detail.**
4. Enter or select the items and select **Next**.
5. Select **Reason Code** from drop down list. **Note**: The screen displays single row with return quantity and discount for one line item.
6. Select **Tender**

SODA Return

Use the SODA Return function in the Return Options screen to process a refund for a non-epay sales or transaction or exception that cannot be processed in SODA .
With a receipt, packing slip or SODA Order number:

1. Select **Return.**
2. Select **SODA Return**
3. Scan/Enter SODA sales receipt or order number information.
4. Select **Next/Enter**. The transaction details display on the screen. The transaction number and order number is also displayed as a reference. If no transaction details display, **Scan/Enter** the SKU for item(s) to be returned.
5. Select item to be returned and select **Next/Enter**.
6. Enter item return information, and select **Next/ Enter**.
7. Select **Tender** and complete the transaction normally. **Note:** If you or the customer cannot access the SODA order information, complete a Return without a Receipt.

Return with a Gift Receipt

1. Select **Return**.
2. Select **Gift Receipt** on the Return Options screen.
3. Continue with step 4 in Performing a Return with a Receipt procedure.

The following transactions types cannot be post voided:	
Returns Rental sales or actions Rental Price Match Campus Card Debit card A/R account payments	Apple Care Warranty sale Successful gift card issue Successful gift card reload Till pickup Till loan No sale transactions

Debit to Debit Return

Cashier can refund to debit card when a customer purchases items using a debit card.
Note: Refund can occur to same debit card or another debit card.

1. Select **Return**
2. Scan original sale receipt and select **Next**.
3. Select **Trans. Detail**
4. Select **Next** will redirect to next screen to provide reason codes.
5. Select **Next**.
6. Select **Tender** to tender the transaction.
7. Select **Credit/Debit** to refund**. Note:** Pin Pad screen shows message to swipe the card.
8. Customer swipes debit card. Pin Pad prompts for pin entry.
9. Customer enters Pin.
10. Amount confirmation shows on Pin Pad and customer selects yes to confirm or no to cancel.
11. Customer swipes debit card. Pin Pad prompts for pin entry.
12. Customer enters Pin.
13. Amount confirmation shows on Pin Pad and customer selects yes to confirm or no to cancel.
14. Debit refund is approved once amount is confirmed and approved message displays on Pin Pad. User will see last 4 digits of debit card on the Pin Pad.
    Note: If customer uses different debit card for refund, Pin Pad displays the last 4 digits of debit card used.
15. If there was a cashier error selecting the first tender, select **ESC/Undo** in the tender options screen.

Important! If more than one item is being returned, mark the correct reason code for **each** item.

Rental Damaged by Carrier

Use this process to handle a return that was damaged or lost by carrier return.

1. Enter telephone number or select **Next**.
2. At the Enter number prompt, select **More**.
3. Select **Rental**. Enter patron search information.
4. Press **Next**.
5. Select the patron.
6. Press **Next**.
7. On the *Rental Action* screen, select the item.
8. Press the **Damaged Carrier** button. Notice the Action column changes to Damaged Carrier.
9. Press **Tender**.
10. Select the tender and complete the tendering as normal.

Split Tenders and Reversals

1. Select **Tender**.
2. Enter the amount of the first tender on the tender options screen and select the corresponding tender. **Note:** If A/R is tender, it should be first. If not, cash should be first.
3. Once the first tender is completed, the remaining balance displays again on the tender options screen.
4. Continue to repeat step 2 and 3 to further split the tenders or complete the payment with the remaining balance.
   Note: If the customer changes their mind or there was a cashier error selecting the first tender, select ESC/Undo in tender options screen

Tender with Cash

1. Select **Tender**.
2. Enter the amount first and then select **Cash**.
   If amount of tender is more than the balance due, Issue Change screen displays.
   - If the cash tender is for entire amount due, the cash tender is complete.
   - If the amount of cash tender is less than the balance due, the Tender Options displays to complete the tender.
   - Select receipt option.

Tender with Credit/Debit

1. Select **Credit/Debit** on the Tender Options screen. You are prompted to have the customer swipe the card. The authorization begins automatically.
2. When approval is received, ask the customer to follow the directions on the signature pad, if applicable.
3. If a signature is required, select **Next/Enter** once the customer signs**.** The Verify Signature screen displays.
4. To accept the signature, Select **Yes**. To reject it, Select **No**. If signature is rejected, you return to the Tender Options screen to select another Tender Option to complete the tender. If **YES** is selected and credit tender is equal to balance due. The Close Drawer screen displays. If multiple tenders are used, authorization is done for the next tender.
5. Select a receipt option.

Tender with Buyback Slip

1. Select **Tender**, then select **Buyback**.
2. Scan or type the buyback slip barcode. The amount of the buyback slip displays.
4. Select **Enter** to apply amount to the transaction.
5. If there is a balance left, select the tender type.
6. Select a receipt option

Tender with Check

1. Enter the amount of the check and Select check.
2. Select the ID Type from the menu and Select **Next/Ent**er. The Enter ID screen displays.
3. Swipe or manually enter the ID number and Select **Next/Enter**. If a driver's license number was entered, the ID Origin field display
4. Select **Next/Enter**. Enter Phone screen displays.
5. Enter the customer's phone number and Select **Next/Enter**. The Check Entry Scan screen displays
6. Enter the **bank information** (routing and account numbers) and Select **Next/Enter**.
7. Enter the check number and Select **Next/Enter**. You are prompted to select a receipt option.

Redeem a Buyback Slip

1. Select **More**.
2. Select **Redeem.**
3. Select **Buyback.** Scan/enter the buyback slip number.
4. Select **Next.** Redemption option displays.
   Note: Buyback amount can be redeemed to multiple tender types, cash, gift card, prepaid VISA.
5. Select tender type.

Account Balance Inquiry

1. In the Sell Item screen **Select More**
2. Select **Account Inquiry.**
3. Select **DirectFA** , **CC, or AR** Inquiry:
   - Campus Card, user can swipe campus card or enter campus card manually.
   - DirectFA
   - AR Inquiry enter customer name/ID for balance.
4. Select **Next**. Student Account displays -or-
5. Select **Done** to return to the main screen

Tender with A/R

1. Select **Tender. Note:** If first tender is A/R and tax exempt is selected, the second tender can be any tender including a taxable A/R account. AR tender is not allowed when partial tender is done for a transaction, and non-AR tender is selected first.
2. Enter the ID Type and Student ID/Last Name to search for the A/R account. A list of accounts are displayed.
3. Select **A/R account**
4. Select **Next** and then any additional tender.
5. Have the customer e-sign
6. Select **Done**.
7. Select **Yes** to complete the transaction

Tender with DirectFA

1. Select Tender. Tender Option screen displays.
2. Select **DirectFA**. **Note**: Entire transaction amount must be charged to DirectFA, unless amount exceeds available DirectFA amount.
3. Enter student id to search for a DirectFA account.
4. Select **Next/Enter** account is charged.

Tender A/R (restricted or non-restricted it)

If a transaction has a non-restricted and restricted item, two separate transactions are performed:

1. Follow steps 1 through 5 in Tendering with A/R
2. Tender the non restricted item with A/R and the restricted item with any other tender.

Tender with Campus Card

1. To tender a transaction using a Campus Card, select **More > Campus Card**.
   Note: If a campus has multiple account types, application displays the list of account types.
2. Select account from the list and select **Next**.
   Note: Application prompts to Swipe the Card or Manually enter the Campus Card
3. If you choose to enter the campus card manually:
   a. Enter the campus card number and press **Next**.
   b. Authorization process is in progress.
   c. Try again if there is an error message displaying **TIMEOUT**.
   d. The campus card account details display with the balance.
   e. Press **Next**.
5. Ask customer to sign on signature pad
6. Select **Next/Enter** when signature is complete.
7. Select **Yes** to accept or **No** to reject signature.
8. Select receipt option.

A/R Payment

1. Type the customer's phone number and select **Next/ Enter**.
2. Select **Transactions**.
3. Select **Payment on Account**.
4. Select **Customer Account**.
   a. Enter Student ID or Last Name for Customer Account .
   b. Select the correct account.
   -or-
5. Select **Major Account** and select the correct account.
6. Select **Tender** and enter the tender amount.
7. Select the receipt option – Print, Email, or Print and Email.

Reprint Receipt

1. Select **More** and then **Reprint Receipt**.
   - Reprint the previous transaction, Select **Last Trans**;
   - Reprint a receipt by transaction number, Select **Trans. Number**. The Trans. Search screen displays.
2. Enter the transaction number
3. Select **Next/Enter**. And receipt prints.

Return with a Gift Receipt

1. Select **Return**.
2. Select **Gift Receipt** on the Return Options screen.
3. Continue with step 4 in Performing a Return with a Receipt procedure.

Create Transaction Receipt

1. To print a receipt, Select **Print**.
2. To create an eReceipt, Select **Email**.
   The eReceipt Email Address screen displays.
3. Enter the email address for the customer.
4. Enter the address again to confirm.
5. Select **Enter**.
6. Select **Print & Email** to print and email.
7. Tender the transaction.

Issue Gift Receipt

1. On the Sell Item screen, select the item or items to be printed on a gift receipt
2. Select **Item**.
3. Select **Gift Receipt**. The Sell Item screen displays annotated with Gift Receipt.
4. To tender the transaction, Select **Tender**.
5. Select the **One** or **Multiple** button.
6. Complete the transaction.

Cancel a Transaction

1. Select the **Cancel** button at the bottom of the screen. A Cancel Operation confirmation message displays
2. Select **Yes** to confirm, or—select **No** to return to the previous screen.

Buyback Slip Redemption

1. On the Sell Item screen, select **More > Redeem.**
2. Select **Buyback**
3. Scan or enter the buyback slip number and select **Next.** Enter the redemption amount and select **Tender**
4. If FHEG Gift Card is selected, swipe/enter card number and select **Next**. A new card displays
   Note: If an active FHEG Gift card is used, select **Yes** to reload gift card, or select the redemption option.

Post Void

Use the Post Voice steps to cancel a transaction after completion. Once a transaction is voided, it is no longer available for retrieval. **Note:** Manager override is required based on security role.

To post void a transaction:

1. Select the **Transaction** button
2. Select the Post Void button. Void Transaction screen displays
3. Select **Trans. History**. A list of transactions for the current business day and till display
4. Select the transaction to post void
5. Select **Enter**. The Void Confirm screen displays
6. Select reason from Reason Code drop-down.
7. Select **Enter/Next** to complete the transactions.

Close Till at register

An assigned team member closes the till at the register. (See Till Sharing Procedures)

1. At the register, select **Daily Operations ▶Till Options ▶ Close**.
2. Enter the Till ID and press **Next/Enter**.
3. Select **Yes**.
   Note: Cash drawer opens. Close the drawer and Z read prints.
4. Select the **Windows** key + **D** to toggle to the desktop.
5. Select **Ctrl** + **C** when asked if you want to quit the batch job.
6. Select **Y** and hit the Enter key on your keyboard.