



Operation Manual v 1.83 May 26, 2016

This guide is meant to provide a road map for learning and using the RT POS software. Clients switching from a previous EZ Logic Data systems program will already be familiar with most of these steps, as will many savvy users. This version is aimed at leadership and includes rep-level help also.

All training videos are proprietary to EZ Logic Data Systems and are only meant to be shared with clients thereof and their employees. The RT POS University (RTU) videos can all be found [HERE](#)

1. Basic Install & Setup

- a. Downloading. RT POS can be downloaded at any time from <http://www.rtpos.com>. Video tutorial [HERE](#).
 - i. The software will need to be installed on ALL machines wanting to access RT POS.
 - ii. All that is required is Windows 7 or higher and an internet connection* (at this time, Windows RT is not supported).
 - iii. No local server is needed as the software is web based.
- b. Logging In. Once downloaded, you will be asked to login.
 - i. Logging in requires three things: Valid User Name, Valid Password, and Store ID.
 - ii. These should all be provided in the "New Location Created" email that is sent when your store is created. This may also be provided over the phone.
 - iii. Once entered, the Store ID will auto-populate the next time on that machine. Login tutorial video [HERE](#). Note: logging in does NOT clock an employee in.
- c. Getting familiar with the home screen. Video Tutorial [HERE](#)
- d. Verify location information. Video tutorial [HERE](#)
- e. Verify Tax Rate
 - i. Prepaid Tax. Some locations may be required to charge a prepaid tax on refill cards. This is a two-step process, explained [HERE](#). First, set the prepaid tax rate under the Store Information screen, and second make sure that your refill SKUs have the "PP Tax" box checked. You may need to exit the POS and relaunch for these changes to take affect.
- f. Set Store Quota (see video in section 1.d)
- g. DOA/RMA. Decide whether or not you want to use DOA/RMA as a refund option and which one you would like to be the default. (see video in section 1.d)
- h. Password Prompt. If each rep has their own terminal, you may opt to not require passwords as often. If so, check that respective box. (see video in section 1.d). You can

also elect to disable the password requirement on a per computer basis, which is especially helpful for administrators. Tutorial [HERE](#)

- i. Set up default Receipt Printer & Return Policy. Tutorial [HERE](#)
 - i. Most stores use a thermal for invoices. In these cases, select "small printer" and select your printer from the drop down*
 - ii. If your printer is not listed then it is not installed with Windows. Please consult the printer manufacturer.
 - iii. If your printer is listed as Generic/Text Only then you may need to check the box that says "Use Generic Driver" which will change the font.
 - iv. You will need to put in your return policy for both the Small and Standard because reprints may be done to a standard sheet of paper or exported to PDF format.
 - v. If you wish to have a logo print, it may be selected or uploaded in this screen. If it is not auto-populated and you need a logo, please contact us.
- j. Set up store Email option. Tutorial [HERE](#)
 - i. Some locations may opt to try and go paperless. To facilitate this, we have added the ability to email invoices as well as reports. At this point, it is tested to be working with Gmail accounts, however other providers may work. Please note that for public "@gmail.com" email accounts, you may need to turn "on" access for less secure apps. Link [HERE](#)
- k. Decide whether or not to use the multi-station/multi-till tracking or shift tracking.
 - i. Some locations may have multiple cash drawers and may want to track sales and EOD per drawer. To set this up, you will need to assign a station ID to each computer you want to track. From there, the sales will filter into separate EODs as well as the store total EOD. Individual cash-ins and cashouts can and should be done. Tutorial [HERE](#)
 - ii. Some other locations may choose to share a station but with only 1 rep at a time and may want to track sales in shifts. For this we have a shift open, shift close, and Z report. Tutorial [HERE](#)
- l. Metro PCS Dealers Only - QPAY/ASAP integration. Basic tutorial [HERE](#)
 - i. In order for Qpay integration to work, you must configure it with your URL, user name, and password. The URL for Qpay is <https://www.qpay123.com/> . You will also need to have your Branch ID associated with EZ Logic and you will need to have one of the newer, PKI certificates installed on your machine. Both are handled by Qpay support.
 - ii. You will also need to link your SKUs that you use for the payment and fee and you have the option of setting SKUs for reactivations, upgrades, and new activations. If these have not already been created, please see the section on creating SKUs. Once setup is complete, your Qpay should look something like the video.

1. QPAY voids for API users have a special process (controlled by employee permissions); voiding the invoice or refunding a line item alone will not actually submit a void to Qpay. Tutorial [HERE](#)
- iii. In order for ASAP integration to work, you must first have an ASAP Certificate, which is obtained directly from Metro. Without it, you will not be able to activate phones through your browser or through RT Integration. Note: at this time ASAP integration is not certified with Internet Explorer 11
- iv. ASAP Integration is designed to have the following work flow (see video [HERE](#)):
 1. Enter customer info in RT POS
 2. Select ASAP and pop up window opens
 3. Auto-login then select activation type
 4. Submit customer info from POS
 5. Process activation as normal
 6. On Activation Summary Screen, select Download to POS
 7. Cash out as normal.
- v. You can also have the POS auto-submit to Qpay, if you have the API enabled. This will only work for new activations and assumes that all the lines being sold are on the same Metro account. Tutorial [HERE](#). For different accounts, please ring separate invoices.
- vi. Qpay API can also pull in the customer's IMEI and submit that for a true upgrade eligibility check. Tutorial [HERE](#)
- m. Total Re-Up / Epay integration Setup
 - i. Total Re-up and Epay (if enabled) are set up just the same as Qpay. Under the System Setup Menu, select the appropriate integration setup. Once open, you will need to plug in your url as well as login and sku you wish to use in the pos. Video Tutorial [HERE](#)
 1. Please note that you can set use individual logins per employee with either system, as explained in the video.
- n. Bill Payment Module The bill payment module is designed to track reoccurring bill payments to the same customer phone number as well as assist in sorting bill payments while not having to remember different SKUs for different carriers. Video [HERE](#)
- o. Taxing Before Discount. In some cases, such as instant rebates, dealers may choose or be required to charge tax before a discount. There are two ways to do this:
 - i. Ring up all phones at full price and have a rebate SKU to bring the price down. Video tutorial [HERE](#)
 - ii. Set all phones to be taxed before discount. Video [HERE](#).
- p. Referral Choices. Many dealers want to track their marketing to see what is bringing the customers in. This may include radio ads, flyers, google, etc.. During the customer info screen there is a drop-down box that will give you options based on what you have created. To create referral options open the System Setup Menu and select Referral Choices Setup. Video tutorial [HERE](#)

- q. Rate Plans. In order for you to track and make sure that your employees are selling the plans that will generate the most profit, you will need to create a rate plan and feature list for each carrier. Video [HERE](#). It is suggested that you create every variation. Please note that features which will be available for both family and individual plans will require the checkbox checked, labeled "Available for Family & Individual"
 - i. In order for an feature to report as "Insurance" for the Insurance Widget, you must check the box in the Rate Plan Setup. Example [HERE](#)
- r. Expected Commissions. In order to generate the correct amount of expected store commissions/rebates/spiffs, you must tell the POS what each of these would be. We have an overall review video [HERE](#)
 - i. Commissions are typically by plan, configured when setting up the rate plans as per the rate plan setup video already mentioned.
 - ii. Rebates & spiffs would be determined from a price schedule on a per-phone-per-activation type (ex. New line, iPhone 6 16gb silver, X rebate Y spiff). Price schedules are addressed later in this manual (located under "Inventory" Under the heading "Scheduled Price Changes for Phones"

2. Employees, Users, & Admins

- a. Employee Creation. Each employee needs to be set up with their own login and permissions. Video tutorial [HERE](#)
 - i. An employee's permissions will determine what they have access to and what they do not. For example: a lead sales rep may need to be able to void or to leave a balance, but a trainee does not.
 - ii. If you want to have multiple employees with the same permissions, there is a "Replicate to another user" feature. Tutorial [HERE](#)
 - iii. Employees marked as Admin have full access.
 - iv. Any employee can be linked to multiple locations, with authorized approval. However, every user will have a "home" location that they must log into first and they will not show up for scheduling or employee commissions tracking if they are only a linked user at a given store. For this reason, we recommend linking only be done for executive level; floating reps should be set up as a new rep at each store. To easily do this, we have an employee replication feature allowing you to copy an employee and all their permissions to any location that you currently have access to. Video tutorial [HERE](#)
- b. Scheduling. RT POS can be used for scheduling. Video tutorial [HERE](#). Scheduled employees for the day will be shown on the home screen.
- c. Clocking in. Logging in, or opening the POS, does NOT clock an employee in. This must be done separately. Video [HERE](#)
 - i. In the Employee Setup, there is an option to force specific employees to clock in before any transactions are done. This should be used to make sure employees are not making transactions off the clock
 - ii. Time punches are determined by the server time. If your time zone is wrong, please check the setting under Store Information

- iii. Adjusting time punches. In some cases, employees may forget to clock in. This can be adjusted by anyone with credentials. When adjusted, the time sheet report will show that it has been adjusted. Video tutorial [HERE](#)
 - iv. Auto clock-out. Under system setup menu -> Store information, there is a check box where you can have the system automatically clock users out at midnight. Simply check the box, then exit and reopen POS.
 - d. Employee Commissions. Employee commissions can be set up in RT POS a few different ways.
 - i. Employee comm by activation type and also for accessories use a flat dollar method. Video tutorial [HERE](#).
 - ii. Employee comm by inventory item or category can also be used, for example to pay based on a percentage or profit. Video tutorial [HERE](#)
 - e. Home Screen Messages. Users with credentials can set up a scrolling message on the home screen as well as bulletin messages on the main screen. Tutorial [HERE](#)
 - f. SMS Notifications. Users with access to the "Store Information" setup function can also set up SMS notifications for up to 6 phone numbers. Tutorial [HERE](#). These notifications will be available for the following:
 - i. Negative invoices, such as purchases or petty cash
 - ii. Voided transactions
 - iii. Employee change on an invoice
 - iv. Inventory is Adjusted
 - v. When a standard (blind) inventory count is completed
 - g. SMS messaging to staff. When creating employees in POS, if you record their mobile number, then the POS will allow you to SMS blast your entire staff of select individuals. This may be helpful for new promotions or emergency situations. Tutorial [HERE](#)
3. **Inventory**. Before an item can be sold, it must be received. Before it can be received, it must be created. And before it can be created, it must be defined and classified. *If your corporate structure has you downloading inventory from a warehouse running EZ Logic's ERP system, any SKU downloaded will be automatically created at the store level and all details necessary will follow, including groups, price, etc.
- a. Item Setup: Creating Groups. In order to properly organize SKUs, you should define how they are organized. While it will not be required, you will not be able to get accurate reporting without correct organization. For example: carriers, accessory, payments, brands, etc. There are 6 levels to a group, and you may or may not choose to use all of them. Video Tutorial [HERE](#) They consist of:
 - i. Product Line. This is the most important. Each carrier you have should be listed here, as well as accessories, services, and any other major groups you have
 - ii. Item Category. Typically, when you have your carriers set, you will want to break those down to a category for phones, broadband devices, etc. Likewise for accessories, you will want to define cases, chargers, etc.
 - iii. Sub-Class. This would be used, for example, to break down types of phones...PDA vs basic, tablets vs aircards, etc.

- iv. Manufacturer.
- v. Item Color.
- vi. Item Condition. Helpful for locations with used/refurbished phones.
- b. Item Creation & Types of Inventory. Once you have your groups defined, you can now create inventory. Once created, you can replicate SKUs to any store that your login is linked to. Video tutorial [HERE](#). When creating inventory, there are 3 types:
 - i. Serial. This is used for phones, tablets, etc. Anything with a trackable serial number. It is a good idea to use the SKU provided for the manufacturer. ESNs/IMEIs/MEIDs will be received later on. Video Tutorial [HERE](#). Once created, you will want to define prices. The default (or SRP) prices can be defined in the item setup, but sales prices should be in the Price Schedule (see Price Schedule setup). Serialized inventory cannot be adjusted or deleted.
 - ii. Tangible. This is used for accessories as well as any physical inventory without a serial number. Video Tutorial [HERE](#). Once created, tangible inventory can be adjusted if necessary.
- c. Services/Non-Tangible. This is used for payment SKUs, unlocking, in-store activation fees, rebate/discount SKUs, etc. Service SKU tutorial [HERE](#). This is also used for payment SKUs , Petty Cash SKUs, and discount SKUs
- d. Linking a SKU to activation. In many cases, a location will frequently sell the same item with a variety of phones...for example a third party insurance policy or a common car charger. Rather than having to scan or locate this SKU every time, that SKU can appear on the activation screen and the employee simply needs to check the box to add it to the invoice. Video Tutorial [HERE](#)
- e. Accessory Bundling. If you want to force the sale of multiple, specific accessories with certain phones or if you have a promotion going, you can create an accessory bundle under the "Inventory Setup". This will allow you to name the bundle, select any phones that the bundle will apply to, then select all SKUs that will be a part of that bundle. Video [HERE](#). Please note:
 - i. multiple phones may be selected for the same bundle.
 - ii. any phone may have multiple bundles
 - iii. a bundle may also include a discount sku
- f. Coupons. Creating coupons helps bypass minimum selling price for promotions and allows you to set date, category, and pricing restrictions on the coupon itself. Coupons can also be set to take a flat amount or percentage of the standard selling price. Video tutorial [HERE](#)
 - i. Note: not setting inventory type on the coupon details will allow the coupon on all inventory types. The same applies for not setting product line, category, subcategory, or manufacturer.
 - ii. Restricting coupons to combine only applies to a single item, not the entire invoice.
 - iii. Manually discounting an item will remove and override the coupon.

- g. BOGO. For doing a buy-one-get-one promo (BOGO) we recommend using either using a discount SKU or using the add-a-line function of the price schedule for the secondary device. When using a sku and doing a refund, you will also be able to refund that SKU. You will also be able to track how many times the SKU was used, just like any other item. For a more detailed, employee-accountable method, you may choose to dock for excess usage of the discount sku ... see tutorial [HERE](#).
- h. Adding / Receiving Inventory from a Warehouse (Tutorial [HERE](#)). Before you can add inventory, however, you must create vendors. Tutorial [HERE](#).
 - i. If your company has our ERP/Portal product then the stores will be able to automatically download their inventory by setting up the warehouse as a vendor. Once the vendor is set up (from within the Vendor menu, add/edit), then the store will be able to select "Add Inventory" the "Download from Dealer Portal", select the vendor, and enter the Invoice Number (numbers only). The Invoice will download and by clicking "Save" it will be imported into the store inventory.
 - ii. If your company does not have ERP/Portal or the store is obtaining inventory from another warehouse, they may manually receive inventory by selecting "Add Inventory" then "Manually receive". They can now select any vendor based on what has been configured, manually enter a PO # and date (if desired), then scan or enter the SKU and qty and process/save.
 - 1. For serialized devices, you will be asked for the serial numbers when processing.
 - iii. If you get drop shipments of serialized devices direct from the carrier/vendor and get an itemized Excel/.CSV manifest, you can import that shipment into RTPOS by using the "Upload from Drop Ship" module under Add Inventory. Tutorial [HERE](#). Additionally, we now have a module where you can have the employees verify the phones received against the file provided. Tutorial [HERE](#). You can also receive accessories from an Excel file, tutorial [HERE](#).
 - iv. If you like to track your inbound orders by having a Purchase Order in place, we have a PO module located under the 'Vendor Menu' where you can create a PO, modify, and receive much like manually receiving. Tutorial [HERE](#)
 - v. If you receive items at the wrong cost, you can update the cost per item after the fact. Tutorial [HERE](#)
- i. XBM "Exchange By Mail" (Metro Dealers). We have added an XBM module to enter, track, and log your XBM transactions from the time the customer comes in, all the way through shipping their old device back. Tutorial [HERE](#)
- j. Transferring Items Between Stores. In some cases, stores in the same company will need to move inventory between them. This can be done two ways. The suggested way is by creating the receiving store as a wholesale customer of the sending store, then selling the phones on a wholesale invoice. The receiving store should receive an invoice with a "Token" number on it. The receiving store can then select "Add Inventory" then

"Download from Another Store" where they will be asked for the Invoice and Token numbers. Tutorial [HERE](#)

- i. As an alternative, linked users may do a direct transfer using the "Transfer Inventory" function under the Inventory Menu. This does require that the SKU exist at the target location. Tutorial [HERE](#). The Qpay/Incomm module will allow you to transfer as well by capturing the branch ID from the target location. Please see the section on the Qpay/Incomm Inventory Management.
- k. Reassigning / Editing an Item Number. In some cases, you may need to reassign a SKU. In these cases, you can use the "Change Item Number" function in the Inventory Menu. Video tutorial [HERE](#). Please note that this is not designed for fixing an error in receiving inventory.
- l. Adjusting Inventory.
 - i. Non-serial. In some cases, it may be necessary to adjust the quantity of Non-Serial Inventory. To do so, please use the "Adjust Non-Serial Inventory" Feature under the Inventory Menu. Video [HERE](#)
 - 1. Alternatively, if you choose to do a non-serial audit, you can adjust from the audit log as well.
 - ii. Removing Serialized Inventory. There are 3 ways to do this:
 - 1. Selling to a wholesale shrinkage account. A shrinkage account would be used for theft or loss as it can be more easily tracked for reimbursement or if the devices were to reappear in the location. There is a tutorial on how to do this [HERE](#)
 - 2. Return To Vendor. This would be used if an error is made during the receive process or if a phone is being sent back (or RMA'd) to the vendor. If you RTV a phone, you can still manually receive it back into the system at a later date. RTV is only available for employees with inventory adjust permissions. Video tutorial [HERE](#).
 - 3. Adjust missing from a scan. First, perform a standard (blind) inventory scan under Inventory Menu, Inventory Physical Audit. Then when you open the log, you will see an adjust button. You can choose to adjust single items, multiple, or all. Tutorial [HERE](#)
- m. Replicating Items. For companies or operators with more than one location, you may choose to replicate a SKU from one location to another. This is especially handy for a new phone or accessory, or even a new rate plan. Video [HERE](#)
 - i. If you wish to replicate everything, please contact support as we have a tool for that as well.
 - ii. Only users with linked access to both locations will be able to replicate.
- n. Generating barcodes. In some cases, you may have generic items or items that do not have a barcode. In these situations, you can create your own SKU and then print scannable barcodes for those SKUs. Video tutorial [HERE](#)
- o. Mass Price Changes for Accessories. In some instances, you may wish to edit pricing many accessories at once; for example if the vendor raises the cost on a series of case.

In these instances, you can use the "Update Inventory Prices" feature from the Inventory Menu. Video Tutorial [HERE](#)

- p. Scheduled Price Changes for Phones. When phone prices change or promos start, you have the option of manually changing on that day or scheduling the prices to change. By scheduling, this ensures that the person in charge of implementing the change does not need to access the system on that day. Video tutorial on Price Schedules [HERE](#)
 - i. Add-a-line Promotions. Add-a-line special promotions work much the same way as port-in or other activation types, however the activation will still report as a new line with a plan type "add-a-line". Video tutorial [HERE](#)
 - ii. Updating price schedules with new promotions. You can now make a new schedule using data from an old one (or current one). This is very helpful when only a couple phones change prices. Tutorial [HERE](#).
 - 1. You can also now update the date range for one schedule and the system will allow you do so the same for stores that you are linked to. Tutorial [HERE](#)
 - 2. Adding a phone to a price schedule is easy as well. Tutorial [HERE](#)
- q. Inventory Audit. An Inventory Audit basically builds a list of what the system shows you have then allows you to count and compare and do so paperless.
 - i. Auditing Phone Inventory. There are two ways to audit phone inventory: Audit Sheets and Blind (Standard).
 - 1. Audit Sheets: The system will build you a list based on your search criteria and you can scan the ESNs/IMEIs/MEIDs or enter them manually and get a variance report. Video Tutorial [HERE](#)
 - 2. Standard (Blind) Inventory: A blind inventory count will not show the user what is expected and will not allow for filtering by carrier. It will also allow the location to scan items which are not actually in inventory and report separately. Tutorial [HERE](#)
 - ii. Auditing Non-Serial (Accessory) Inventory. The system will give you a count of all SKUs in the system and you can scan or key in the SKU then manually input the count and will be given a variance. Once you have completed this, you can then adjust manually or through the log (log is suggested) Video Tutorial [HERE](#)
- r. Searching for / Tracking Serial Numbers. In some cases, you may need to track the history of a serial number. For this, we have a tool called "Serial Tracking [Detail]" which can be accessed from the quick shortcut or from the Inventory Menu. If your login has credentials, you will also be able to view cost. Using the shortcut button on the main screen, there is also a "Global Tracking" which will track the device in any store that your login is linked to. Tutorial [HERE](#)
- s. QPAY/Incomm 5.0 Inventory Management. Prior to the 10/6/15 launch of the Qpay/Incomm Inventory Management, we launched an update up expedite this process. You will need to have your Qpay integration set up, on version 5.0, with a certificate issued by Qpay. When receiving inventory, you will see a button to launch the Inventory Module and the system will copy all the serial numbers to the clipboard for you to paste

into Qpay. Additionally, when doing a transfer, the system will pull the target location's Branch ID and put that on the clipboard as well as allow you to launch the Qpay module inside POS. For existing receipts/transfers, you can access them and upload them if they have not already been loaded. Tutorial [HERE](#)

4. Customers

- a. Creating / Editing / Searching Customers. This is the most basic of sales transactions. Video Tutorial [HERE](#).
 - i. Please note that serialized items cannot be sold to the generic QuickSale account.
- b. Retrieving a customer's sales history. In some cases, returning customers may need to access their sale history (for example warranty or mail-in-rebates). For this reason, it is suggested that every sale have accurate customer info. Video Tutorial [HERE](#)
- c. Changing the Customer Internal ID. In some cases, you may want to change the customer's ID number in the system. This can be helpful when creating wholesale or business customers or if you wish to use a customer's mobile number as their account ID. Video Tutorial [HERE](#)
- d. Disabling the "Quicksale" Account. Some dealers may want to disable the "Quicksale" option to try and force the sales reps to collect customer information. To do so, there is only one check box in the "Store Information" Screen. Tutorial [HERE](#).

5. Sales & Invoices

- a. Creating an Invoice. Video tutorial [HERE](#)
- b. Selling a Phone. Selling a phone requires entering the serial number. You will then be prompted for activation information as identified in the video above.
 - i. When selling a phone, there are two activation screens that may appear. The prepaid one (default) omits some of the information such as activation type and SIM. To enable these features, edit the carrier in "Inventory Configuration" and select the box that says "Post-Paid Carrier". Once enabled, you will have the option to select Prepaid as an activation type when selling the device.
 - ii. BYOD (Bring Your Own Device) Activations aka "Line Only" work in just the same manner buy you will use the "Line Only" button on the invoice screen. Video tutorial [HERE](#)
 - iii. Unlocked phones. Unlocked phones can be done in several ways. It is suggested that unlocked devices be treated like an accessory, meaning that no activation information is linked to it. It should setill be set up as a serialized item for tracking, but on the dropdown that asks for the activation screen, select "no". In reality, if the customer is activating, it will be a sim and not the imei. Video [HERE](#)
 - iv. If a phone is sold and the wrong rate plan is selected, or wrong phone number, etc., is entered, then it can be corrected without having to re-ring. Video [HERE](#)
- c. Refunds & Exchanges. Refunds/Exchanges are done much the same way as an invoice. Video tutorial [HERE](#)

- i. Locations have the option of sending phones to DOA (also known as RMA). By default, this feature is turned off. To enable, please check the box located in the "Store Information" screen.
 - ii. Qpay voids/refunds must be done through a special process notated [HERE](#)
- d. Splitting Payment Type. In some cases, customers may want to split tender (part by one payment method and part by another). All you need to do is select any method used and populate the amount tendered in the box. Video tutorial [HERE](#)
- e. Price Checks. There is both a quick shortcut along the top and an option under "Inventory Menu" to check quick pricing. In addition, you will be able to see price and quantity for any locations you are linked to. Video [HERE](#)
 - i. This will not show you cost. To view cost, go under add/edit item or view an inventory report.
- f. Buybacks / Trade-ins. There are two primary ways to do buybacks. Video [HERE](#)
 - i. Integrated. This utilized the Buyback button on the Invoice Screen. By selecting this method, you will be asked to input the serial number as well as select the model and confirm condition. When you process through this method, the device is put into your inventory with the cost you selected and it ready to be resold.
 - ii. Generic. This would be used for devices that are to be sold outside of the store or that are not ready to be sold right away or will be used for parts. It involves creating/using a generic SKU to bring in the device and does not allow for much in the way of tracking. See the video on creating service/nontangible skus.
- g. Discounting Items. In some cases, you may wish to mark down the price of an item, for example a special sale "20% off car charger with case purchase". Video tutorial [HERE](#)
- h. Displaying & Voiding Invoices. In many cases, employees or management may want to go through invoice listings or it may be necessary to void an invoice. This can be done several ways but the easiest is using the "Invoice Listing" button, locating the invoice, and double clicking. Tutorial [HERE](#)
 - i. Please note that once voided, it will not show as voided until you refresh the invoice listing and that even voided invoices will display. There is no way to completely delete an invoice record.
- i. Retrieving Bill Payments. Bill payments can be retrieved in the same method as Invoices, but by selecting "Bill Payment Listing" from the Invoice Listing button.
 - i. To reconcile Qpay payments against qpay, you can export the file from Qpay and import into pos. The system will compare the transactions from Qpay against the ones recorded in pos. Tutorial [HERE](#)
- j. Account Balances: Leaving and Paying. In some cases, it may be necessary to leave an account balance for a customer; for example business Net 30 customers. Tutorial [HERE](#)
 - i. Please note that when paying on invoices, the payments are reflected in the "Invoice Payments" tab in the customer profile, in cases where you need to reprint a receipt. Reprinting from the "Invoice History" screen will only reprint the original unpaid invoice.

- k. Financing products. Many dealers work with a finance company to help customers pay for their purchase. Ringing these up can be tricky. For that reason, we have added a “Financed Amount” payment type which also gives you a box for entering the reference number. These financed transactions can then later be reconciled as you receive payment from the finance company. Video tutorial [HERE](#)
- l. Device Fulfillment (EIP/VAD) Processing & Pickup . Video Tutorial [HERE](#)
 - i. EIP is rung up using the EIP button on the invoice screen.
 - ii. When the phone is delivered, it can be updated with the previously unknown activation information from the "EIP Pickup" option under "POS Menu"
- m. Wholesale & Shrinkage Accounts. Video tutorial [HERE](#)
 - i. For selling inventory to another store or employee at or near cost, you may want to set them up as wholesale. Wholesale accounts will automatically populate the pricing set in the item setup and will not charge tax or expect commissions.
 - ii. For situations as theft, loss, or mis-entry, it is recommended that you create a wholesale account to use for shrinkage. This allows for removal from the system while still being able to track serial/quantity history.
- n. Petty Cash & Purchases. Petty cash & Purchases operate similarly. Petty cash would typically be used for things like cash window cleanings or other services; whereas Purchase would usually be used for physical supplies. In each cases it is recommended that you use a designated SKU. Video Tutorial [HERE](#)
- o. Converting ESNs/MEIDs. In some cases you may need to convert between a HEX and a DEC format ESN/MEID. For this, please use the "ESN Calculator" tool under "Inventory Menu". Video tutorial [HERE](#)

6. Reports & Dashboards

- a. End Of Day Report – Cash In/Out. The EOD Report can be accessed using the button on the main screen or from the "Reports Menu" under "Sales Reports". It is designed to cover enough information for an accurate cashout without giving employees information that they should not be privy to. Tutorial [HERE](#)
 - i. To establish a standard float for the EOD report for the entire store, this can be set in the "Store Information" screen.
 - ii. To have a variable float by doing a daily cash-in, simply select the “Enter Cash-In Amount” under the EOD report button and type in the amount the till is starting with, or use the till calculator as shown [HERE](#)
 - iii. For dealers wishing to restrict the employee from seeing the expected amount in the drawer, we have designed a second, blind cashout. Tutorial [HERE](#)
 - iv. EOD reports can also be marked as having been reconciled if you have a back office team that double checks the reports. Tutorial [HERE](#)
 - v. Cash Drops. Cash drops can be performed throughout the day to keep the cash level in the drawer down. Doing so pulls the money out and makes a record of how much was dropped, from which station (if set up), and by whom. We have a tutorial [HERE](#)

- b. Dashboards. Dashboards are designed to provide an overview of store performance. Video overview [HERE](#)
- c. Reports Overview. RT POS Provides a few types of reports and each report type has varying levels of filters and ways to view. Overview [HERE](#)
- d. Business Dashboard Intelligence (BDI) Reporting - optional. We offer an option BDI feature for portable reporting access. It will work from a tablet, phone, or computer...with virtually any browser. User name and password will not be the same as the POS but one user can be linked to several locations and even several companies, as needed. Video Tutorial [HERE](#). The new URL is www.myrtpos.com.

