HARBORTOUCH ADVANCED RETAIL
QUICK REFERENCE GUIDE

TECHNICAL SUPPORT: 800-201-0461

CLOCKING IN/CLOCKING OUT

1. On the main screen, put your mouse over the "Time Card" button at the top of the screen and a drop down list will appear.
2. On the list of options, select "Time Card Sign In" or "Time Card Sign Out".
3. Type in your username and password and select "Sign In" or "Sign Out".

STARTING AN ORDER/RINGING UP AN ITEM

1. On the main screen, press the "POS" button to go into POS mode.
2. Type in your username and password and select "Login".
3. If the item has a barcode: Scan the barcode on the item to ring it up.
4. If the item does not have a barcode: Press F5 on the keyboard or select the button "F5 – SKU Lookup" along the bottom of the POS screen.
5. Type in part of the items description, vendor, SKU, department, or product number and press "enter" to refresh or hit the "F5-Refresh" button at the top of the search window.
6. Double-click on the item you want to ring up or select the item and then press the "Select" button. Once selected, the item's SKU will display on the main POS screen. Press "Enter" to add that item to the current invoice.

CLOSING/PAYING AN ORDER

1. After ringing up items on the current invoice, select the green payment button in the bottom right.
2. Enter the amount paid next to the appropriate payment type.
3. After typing in the amount, press "Enter" or click into another field to activate the "Complete Transaction" button. Select "Complete Transaction" on the bottom right of the screen to finish.
4. Select one of the receipt options or press "OK" to finish.

RETURNING AN ITEM (WITH INVOICE NUMBER)

1. From the POS screen, open the "Miscellaneous" tab on the right of the screen.
2. Click the "Shift + F4 Sales Return" button.
3. Search for the original invoice using the invoice number on the customer's receipt. Press "Load Invoice" to recall the original order.
4. You can either enter the number of items being returned in the "Qty. To Return" field next to the appropriate items on the invoice, or you can type in an item number at the top of the screen and press "Add Item".
5. Once you have entered all the items to be returned, click "Finish, go back to sale" on the right of the screen.
6. Click the "Payment" button in the lower right of the screen.
7. Enter the refund amount next to the payment type to which you would like to apply the return. Enter the amount as a negative number.
8. After you enter the negative number and press "Enter", select the "Complete Transaction" button just like a normal sale.

RETURNING AN ITEM (WITHOUT INVOICE NUMBER)

1. From the POS screen, ring up the item the customer wants to return by either scanning the barcode, searching for the SKU, or manually entering the item number. Press "Enter".
2. Select the item on the open invoice so that it is highlighted.
3. Select the "[F9] Change Qty" button and change the quantity to a negative number in the amount they are returning.
4. Click the "Payment" button in the lower right of the screen.
5. Enter the refund amount next to the payment type to which you would like to apply the return. Enter the amount as a negative number.
6. After you enter the negative number and press "Enter", select the "Complete Transaction" button just like a normal sale.

PERFORMING "START OF DAY"

At the start of the day, make sure to count your starting cash amount and notate it somewhere for when you perform your "End of Day" procedures. The starting amount should be entered into the "Beginning Float" field when performing the "End of Day" procedures.

PERFORMING "END OF DAY"

1. Once logged into the system, select the "Day End" button at the top left
2. On the top left, select if you will be balancing the entire store, by till/dept, or by cashier. If you change the selection, make sure you click the "Reload" button which will blink to update the day end screen.
3. Count the end of day cash and enter the quantity of each bill and coin in the "Float Totals Calculator" section.
4. Next, enter any cash drop(s) you made throughout the day in the "Cash Drops" field.
5. Enter your "Beginning Float" which is the amount of cash that you started the day with.
6. Make sure to select the checkbox for "Print Day End Report" if you want the system to print a copy of the report.
7. Select the green "Save Payment Totals" button in the bottom right corner.

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MANAGEMENT FUNCTIONS

RUNNING REPORTS

1. Once logged into the system, select the “Reports” button at the top right.
2. Expand the appropriate category on the left of the screen. For a sales overview report, expand “Sales” and select “Sales Summary” under “Hourly Sales By”. For a sales report broken down by department, employee or other variable, expand “Sales” and then expand “Sales Qty Dimension Matrix By” and select the appropriate option for how you would like to organize the report (e.g. department, clerk, etc.).
3. Change the “From” and “To” dates to the appropriate date range.
4. Select “Preview Report” to generate the report.
5. You can print or email the report using the buttons in the top right of the screen.

RUNNING AN EMPLOYEE REPORT

1. Once logged into the system, place your cursor over the “Time Card” button at the top right and a list will appear.
2. Select “Time Card Report” from the list.
3. In the search field you can type in a specific employee’s name and select “Show All” to filter the results.
4. Select the employee and click the “Print Report” button on the bottom right to generate the report.

ADDING EMPLOYEES

1. Once logged into the system, select the “Setup” button at the top right.
2. Click on the “Employees” tab.
3. Click “New Employee” on the right of the screen.
4. There are several required fields:
   - First and last name
   - Username
   - Password
   - Position
5. Click “Save” once you are satisfied with the profile.

CHANGING EMPLOYEE PERMISSIONS

1. Employee permissions are controlled by their position. To add or edit positions, log in and select the “Setup” button at the top right.
2. Select the “Positions” tab.
3. Click “Add Position” at the bottom of the screen to create a new position, and then click “Change Name” to rename it.
4. On the right side of the screen, you can toggle the checkboxes to select what permissions are associated with this position. Expand each category for more detailed options.
5. Click “Save Position” once you are done.

DISABLING/TERMINATING AN EMPLOYEE

1. Once logged into the system, select the “Setup” button at the top right.
2. Select the “Employees” tab.
3. Select the employee you wish to disable.
4. On the bottom right of the screen, you will see a checkbox that denotes “Employee Active”. Uncheck that box and click “Save” to disable the account.

ADDING AN ITEM

1. Once logged into the system, select “Inventory” at the top of the screen.
2. Select the “Skus” tab.
3. Enter a new Sku number in the “New Sku” field at the top of the screen and then click “Create New Sku”. You can also select an existing item from the list and press “Create Copy”.
4. In the “Info” section at the bottom of the screen, enter all the appropriate attributes of the item such as item description, sales price (“Reg. Sell Price”), department and vendor.
5. Click the “Save” button in the bottom right of the screen.

EDITING AN ITEM

1. Once logged into the system, select “Inventory” at the top of the screen.
2. Select the “Skus” tab and search for the item you want to edit.
3. In the “Info” section at the bottom of the screen, edit the desired item attributes and then click the “Save” button in the bottom right.

DISABLING/REMOVING AN ITEM

1. Once logged into the system, select “Inventory” at the top of the screen.
2. Select the “Skus” tab and search for the item you want to delete.
3. Select the item and click “Delete Sku” on the right side of the screen.
4. If the item has a sales history, you will not be able to delete it from the system. Instead, you will need to disable the item by opening the item details and unchecking the option for “Active” at the bottom of the screen. Click “Save” to apply the changes.

CHANGING AN ITEM PRICE

1. Once logged into the system, go to the Inventory screen.
2. Select the “Skus” tab and search for the item you want to change. Select the item.
3. Adjust the “Reg Sell Price” and click “Save” to apply the changes.

BACKING UP THE DATABASE

1. Once logged into the system as a manager, select the “Setup” button at the top right.
2. Select the “General Settings” tab.
3. Select “Backup Database Now” in the bottom right.
4. If needed, you can change the backup location by selecting the browse button. Select the green “Save” button to perform the backup.