



EXATOUGH®



Order #: 253

*Create Ticket Label

Item Count	3
Subtotal	43.97
Discount	0.00
Tax	3.79
Tip	0.00
Other	0.00
TOTAL:	47.76

Buttons: Course Seats, Club, Apply Group Tip, Take Away, Check Balance, Reprint, Complete Auth, Repeat Line, Remove Line, Split By Item, eGift, Mode

Bottom Bar: Home, 10:04:34 PM, Thu. Jun. 02, 2019

ID	Label	Qty	Price	Unit
114333276	Asiago		14.99	6.00
107874222	Salmon Steak		24.99	15.00
876794222	Chicken Steak		17.99	1.00
801781224	Chicken Quail		23.99	11.00
223453402	Chicken		20.99	6.00
306222424	Wheat		11.99	3.00
122214222	Pork Chop		24.99	4.00
121512342	Beef Tenderloin		19.99	11.00
89193402	Artisan		15.99	5.00
87122422	Chicken Quail		17.99	5.00
85193402	Chicken Quail		22.99	1.00
102214222	Beef Tenderloin		19.99	5.00

User Guide for Retail

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Introduction

The Exatouch Point of Sale (POS) system allows users to process sales, track inventory, manage employees, and perform other essential functions.

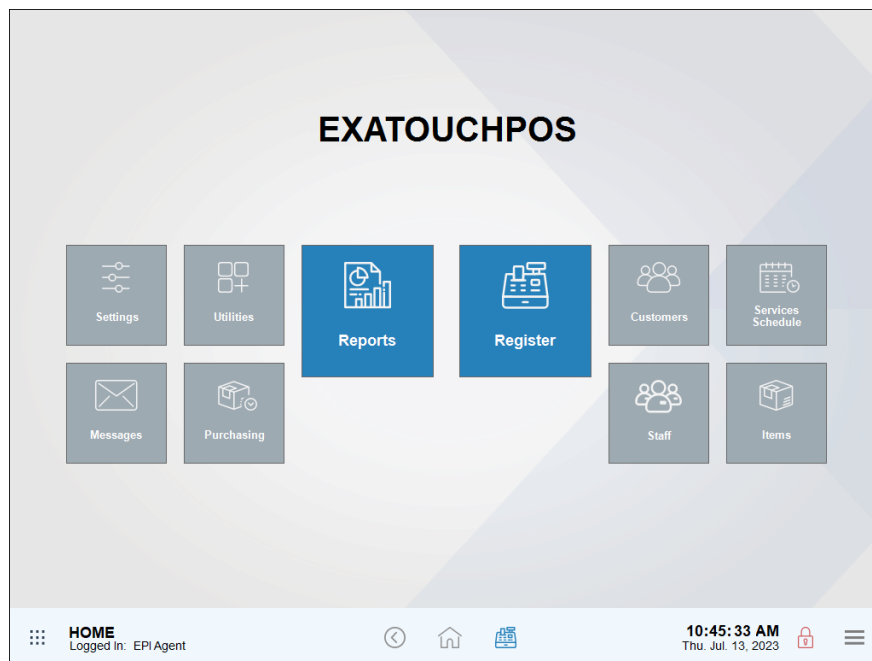
This document is intended to be a Quick Reference Guide, and does not incorporate all capabilities and features available in the Exatouch POS system. Hyperlinked topics within this document will take you to the Exatouch Knowledge Base for more information.

Getting Started

Home Screen

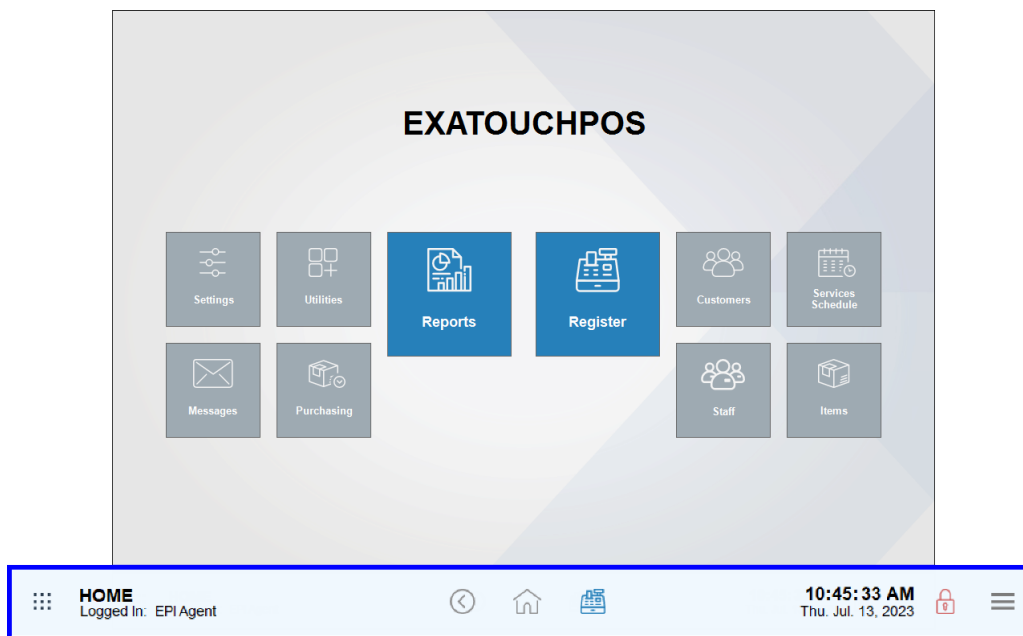
Clickable modules on the Home screen provide access to Exatouch features. Identify your location in Exatouch by viewing the description on the bottom left of your screen. Your Home screen is labeled **HOME**.

Navigate to the Home screen by tapping the **Home** icon at the bottom of most Exatouch screens.



Exatouch Navigation Bar

The navigation bar is located by default along the bottom of most Exatouch screens. Within the navigation bar are clickable images that function like buttons.

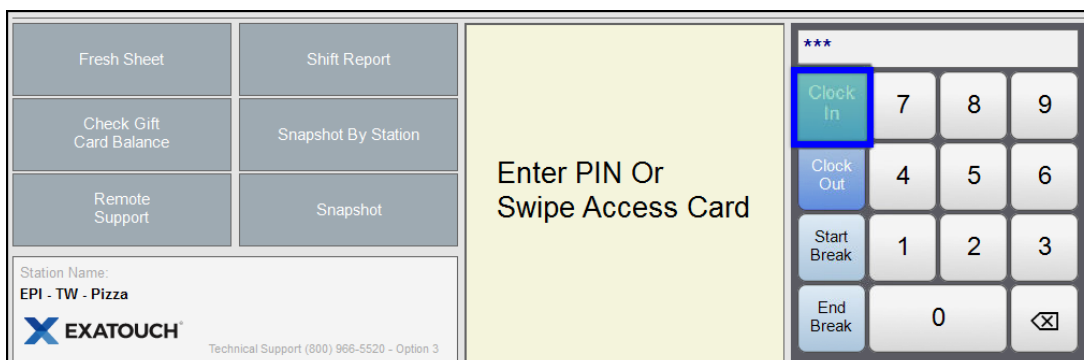


Navigation bar icons perform various functions, which are defined in the following table:

Name	Icon	Function
Global Menu		Displays the Options menu, which includes Machine ID, version number, and log in/log off functions.
Home		Returns user to the Home screen.
Local Menu		Select to access the following functions: Delivery Manager, Bank Manager, Bank Swap, Age Check, Close Batch, Open Drawer, Refund, or Reprint.
Lock		Select to access the Clock In/Clock Out keypad. Clicking the Lock icon also accesses the following features: Fresh Sheet, Check Gift Card Balance, Remote Support, Shift Report, Snapshot by Station, and Snapshot.
Previous		Returns user to the previous screen.
Register		Returns user to the Register app from any other screen.

Clocking in and Out

Exatouch lets users assign a unique, four-digit personal identification number (PIN) to every employee. Employees use PINs or swipe an employee ID card to clock in and out during shift changes or when taking breaks. PINs are set to 1111 by default and can be changed if desired.



Clocking In to Start a Shift

1. From the Lock screen, tap **Clock In**.
2. Enter your PIN or swipe your employee ID card.
3. Tap **Close** to confirm.

Clocking Out to End a Shift

1. From the Lock screen, tap **Clock Out**.
2. Enter your PIN or swipe your employee ID card.

Clocking Out for a Break

1. From the Lock screen, tap **Start Break**.
2. Enter your PIN or swipe your employee ID.
3. Tap **Close**.

Clocking In from a Break

1. From the Lock screen, tap **End Break**.
2. Enter your PIN or swipe your employee ID.
3. Tap **Close**.

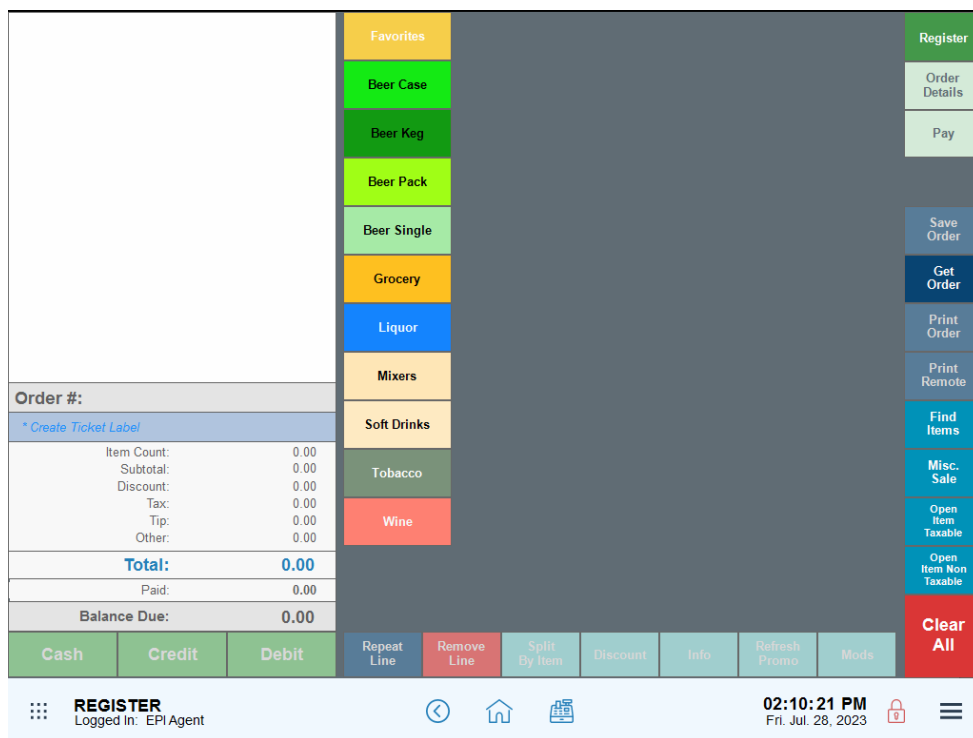
Navigating the Register

Register View

Register View displays by default when you begin operating your Exatouch system.

In **Register View**, items are organized in categories and subcategories and display in columns in the middle of the screen. Users can create new orders, edit existing orders, process payments, and perform other functions within the **Register View**.

Navigate to **Register View** by clicking or tapping the **Register** icon at the bottom of most Exatouch screens. The register configurations in this guide may differ from your customized Exatouch system.



Commonly Used Functions

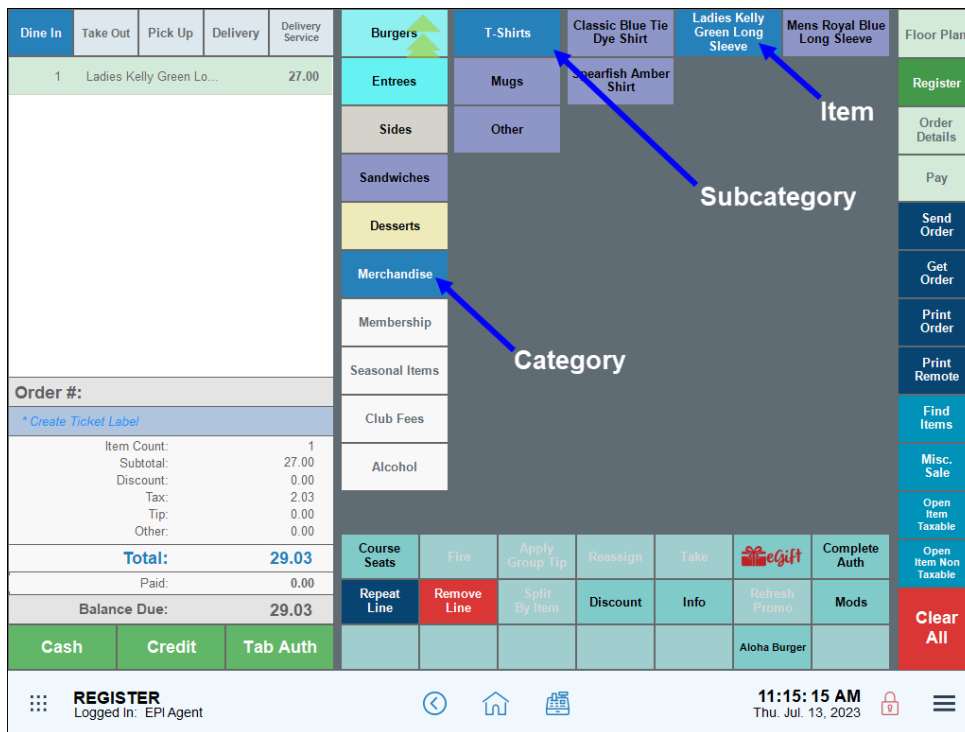
The following table lists commonly used **Register View** functions associated with ringing up an item:

Name	Function
Save Order	Saves orders in progress when, for example, a customer needs to step away from the register without completing the transaction.
Get Order	Retrieves a saved customer order.
Misc. Sale	Rings up a miscellaneous sale item if an item is not yet in inventory or if a test transaction is needed.
Repeat Line	Adds several of the same items quickly without scanning or entering the item multiple times.
Discount	Applies an item discount.
Info	Access info about the item, including Price, Quantity on Hand, and Item descriptions.
Clear All	Clears the entire sale.

Ring up an Item

Ring up items by scanning them into the **Register**, or by selecting from menu options on your **Register** screen. Details of your transaction may vary, but the steps to ringing up an item will be similar.

1. Navigate to the **Register**.
2. Scan items using your barcode scanner, or manually enter items by tapping a category, subcategory, and then individual items.



3. Items populate in the **Register** as they are scanned or entered.
4. Tap **Send Order** or select a payment option.
5. Complete the transaction by accepting the customer’s payment.

Finding an Open Order

1. Navigate to the **Register**.
2. Tap **Get Order**. The list of open orders displays.
3. Select an order. Tap **Open** and proceed with the order.

Open Orders

Time	Order #	Customer/Location/Label	Total	Balance		Staff
07/25 03:16 PM	1051		\$18.99	\$18.99	I	EPI Agent
07/17 11:59 AM	1047		\$139.74	\$139.74	I	EPI Agent
07/12 05:34 PM	1045		\$4.00	\$4.00	I	EPI Agent
06/24 09:23 PM	1044		\$82.78	\$82.78	I	EPI Agent
06/20 03:03 PM	1040		\$9.00	\$9.00	I	EPI Agent
06/19 01:55 PM	1039		\$50.37	\$50.37	I	EPI Agent
05/17 08:42 AM	1029		\$28.00	\$28.00	I	EPI Agent
05/09 12:21 PM	29		\$43.68	\$43.68	I	EPI Agent
05/04 03:34 PM	28		\$28.00	\$28.00	I	EPI Agent
04/13 09:44 AM	25		\$2.38	\$2.38	I	EPI Agent
04/11 03:32 PM	24		\$103.30	\$103.30	I	EPI Agent
04/10 10:37 AM	23		\$2.50	\$2.50	I	EPI Agent
04/10 08:53 AM	22		\$84.26	\$84.26	I	EPI Agent
04/03 02:16 PM	21	014	\$10.00	\$10.00	I	EPI Agent
04/03 11:32 AM	20	009	\$31.95	\$31.95	I	EPI Agent

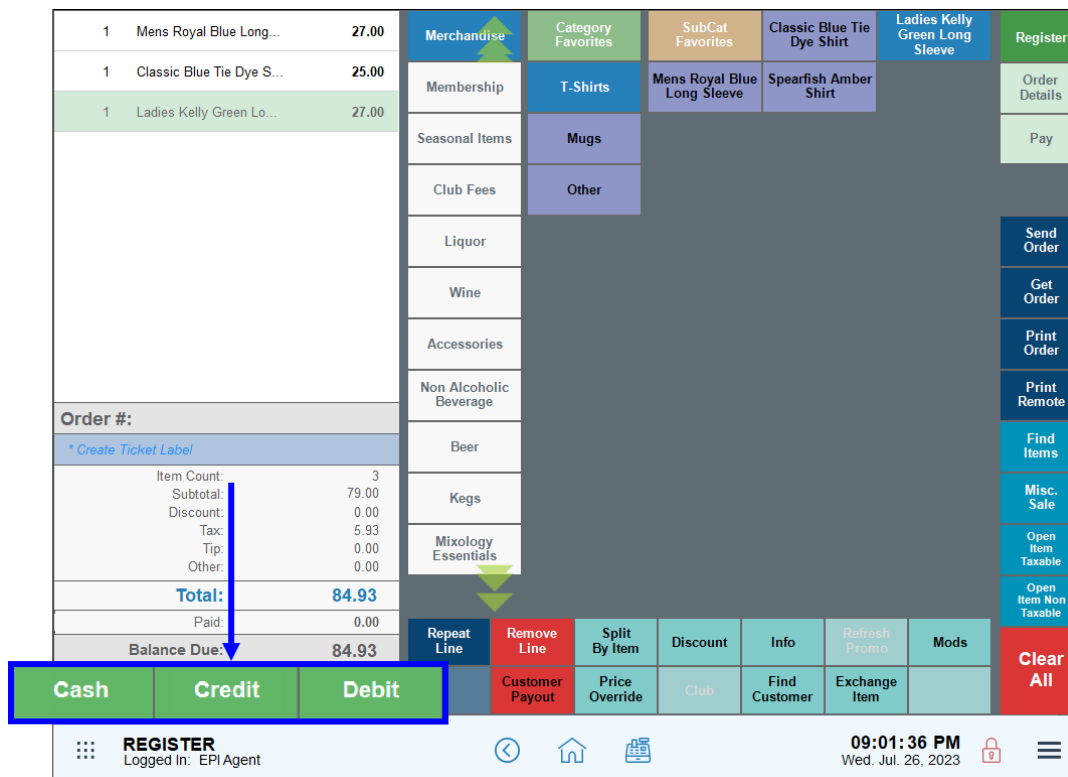
Search:

Close
Void Order
Join In
Copy Order
Preview
Print
Print Remote
Open

Collecting Payments

Accepting Payment Directly in the Register App

Quick Pay options display on the **Register** and include **Cash**, **Credit**, or **Debit** as default payment types.



1. Enter an order or open a saved customer order.
2. Select a payment option.
3. Follow the prompts for your selected tender type to complete the payment.

Selecting Other Payment Options

1. Enter an order or open a saved customer order.
2. Tap **Pay** to display the Pay screen.
3. Select a payment option and follow prompts to complete the transaction.

NOTE: The actual display varies since users can customize how buttons display. Highlighted tabs are enabled; faded tabs are disabled.

Cash	Credit
Manual Entry	Tab Complete
Debit	eGift
EBT	Payout Customer
Rewards	Check
Discounts	Promos & Coupons
Gift Certificate	Delivery Services

Quick Cash Payments

The Pay screen also displays likely cash payments customers may use.

Quick Cash Payments	
19.86	20.00
50.00	100.00

eGiftSolutions Cards

This section provides basic instructions for processing payments made with eGiftSolutions cards. Refer to the online Knowledge Base for more detailed information on eGiftSolutions.

Checking Balances from the Lock Screen

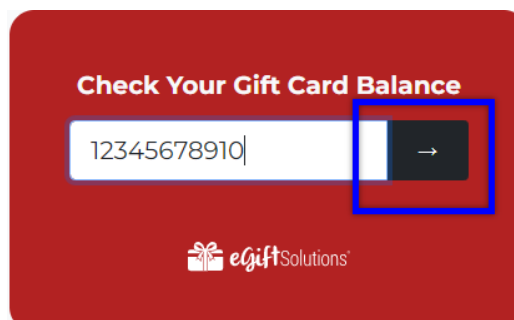
1. Select **Check Gift Card Balance**.
2. Swipe the gift card when prompted to display the card balance.

Checking Balances from the Register

1. Navigate to the **Register**.
2. Tap **Pay**. The Pay screen displays.
3. Tap **Check Balance** and select **eGift**.
4. Swipe the gift card when prompted to display the card balance.
5. View the balance on the receipt that displays.

Checking Balances Online

1. Access www.cardbalance.info.
2. In the empty field, enter the eGift number from the back of the card.
3. Click the **Search** arrow.



Redeeming eGiftSolutions Cards

1. Enter an order or open a saved order and tap **Pay**.
2. Tap the **eGift** button.
3. Enter the **eGift Amount** and tap **Pay**. The Pay screen displays.

NOTE: The eGift amount cannot exceed the total bill.

4. Tap **Pay** or **No Receipt, Pay**.

5. Swipe the eGift card, or tap **Manual Entry** to enter the eGift card number manually.
6. Complete transaction as prompted.
7. Select and apply other payments to the order, if needed.

Pre-paid Gift Card Payments

Process pre-paid gift cards, such as Visa or Mastercard, the same way as traditional credit or debit cards.

1. Create an order or open a saved order.
2. Swipe, insert, or tap the gift card on the payment device.
3. Tap **Debit** or **Credit**. The Balance pop-up screen displays.
4. In the **Debit Amount** field, enter the amount of the gift card to apply, then tap **OK**.
5. Continue with the transaction as prompted.
6. Tap **Pay** to complete the transaction.

Discounting Payments

Manually apply discounts to single items, multiple items, or an entire transaction. Discount settings are set by system administrators. Enter or open a customer order in the **Register** app.

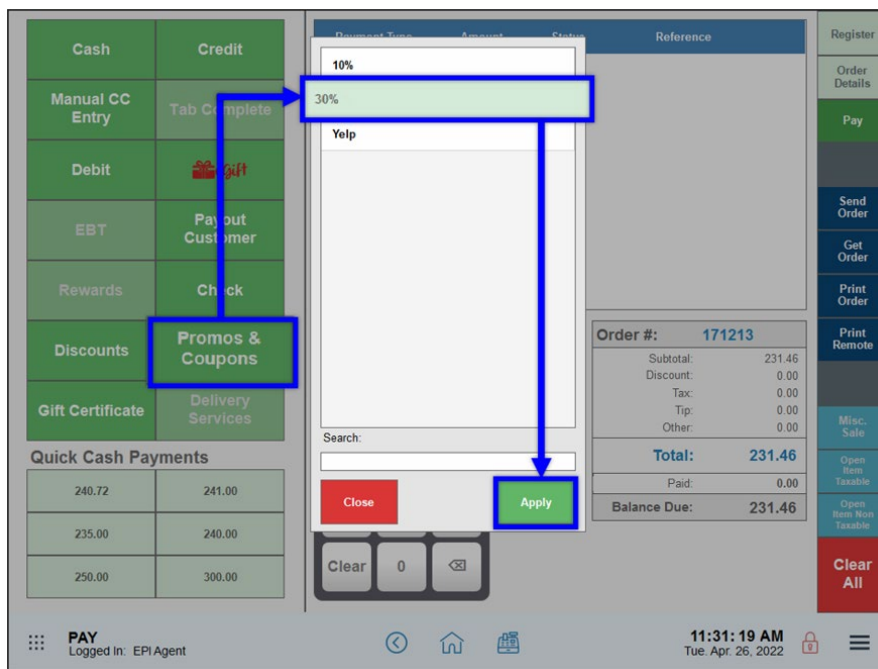
Discounting Single Items

1. Select an item from the **Register**, then tap **Discount**.
2. Select the desired discount for the highlighted item and tap **Apply**.
3. The discount amount displays in the order total calculation.
4. Tap **Undo Discount** to remove the discount. Discounted line items display green in the order list.

Discounting an Entire Order

1. Enter or open a saved customer order in the **Register**.

2. Tap the **Pay** tab. The Pay screen displays.
3. Tap **Promos & Coupons**. A list of available global discounts displays.
4. Select a discount or coupon, or use **Search** to find a specific promo. Tap **Apply**.

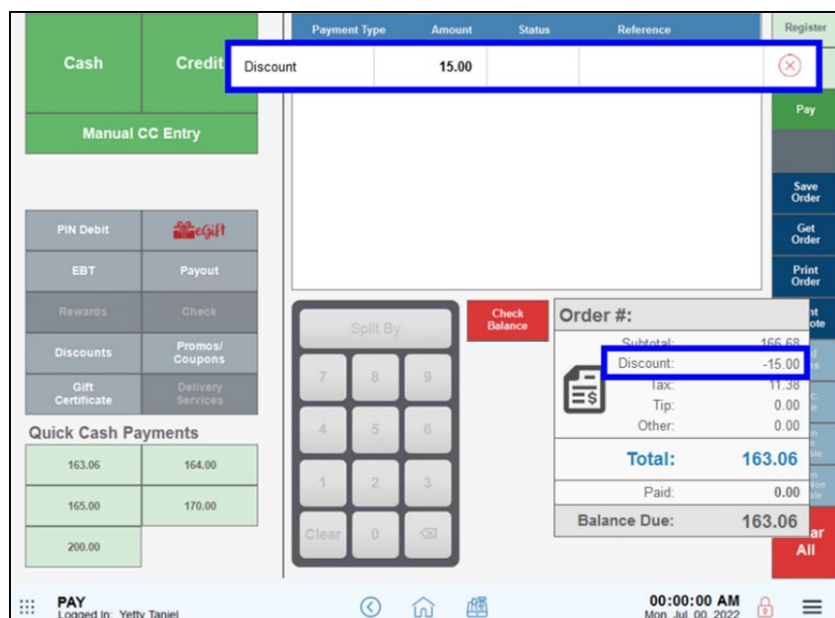


5. Continue processing the transaction.

Applying an Open Discount

Create an open discount to an entire order.

1. Enter or open a saved customer order.
2. Tap the **Pay** option. The Pay screen displays.
3. Tap **Discounts**.
4. Review the order's current **Balance** and enter a discount **Amount**.
5. Tap **OK**.
6. The discount amount displays in the payment grid and reflected in the **Total**.

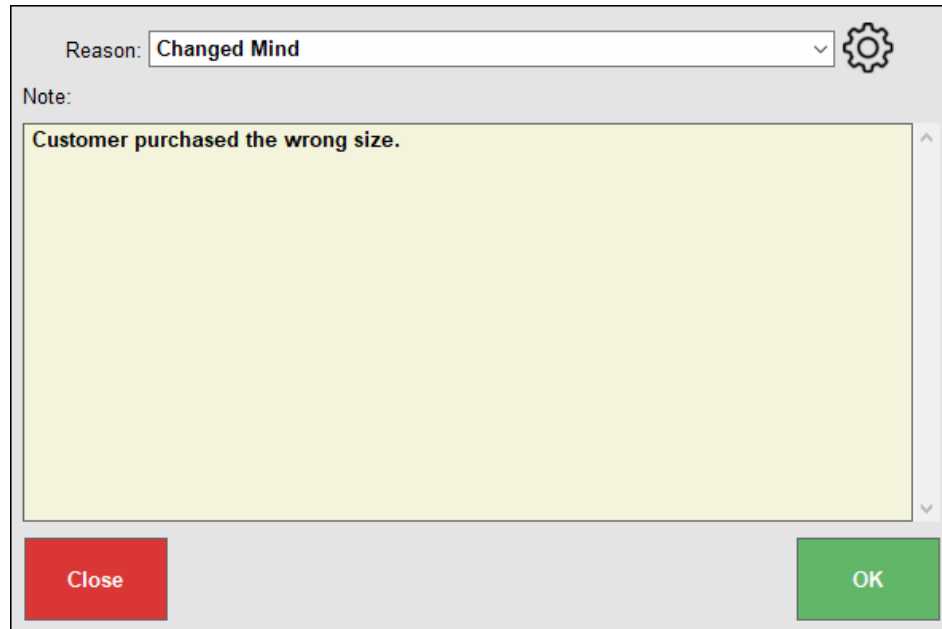


Voids and Refunds

Depending on the situation, merchants can cancel transactions and return payments by performing either voids or refunds. Voiding occurs with open or saved orders before batching out a register. Refunds occur after a register has batched out.

Voiding Open or Saved Orders

1. Navigate to the **Register**.
2. Tap **Get Order**. The Open Orders screen displays.
3. Select a saved order from the list, and then tap **Void Order** at the bottom.
4. After selecting **Yes**, a splash screen displays. Select a **Reason** from the dropdown and add any notes in the **Note** field.



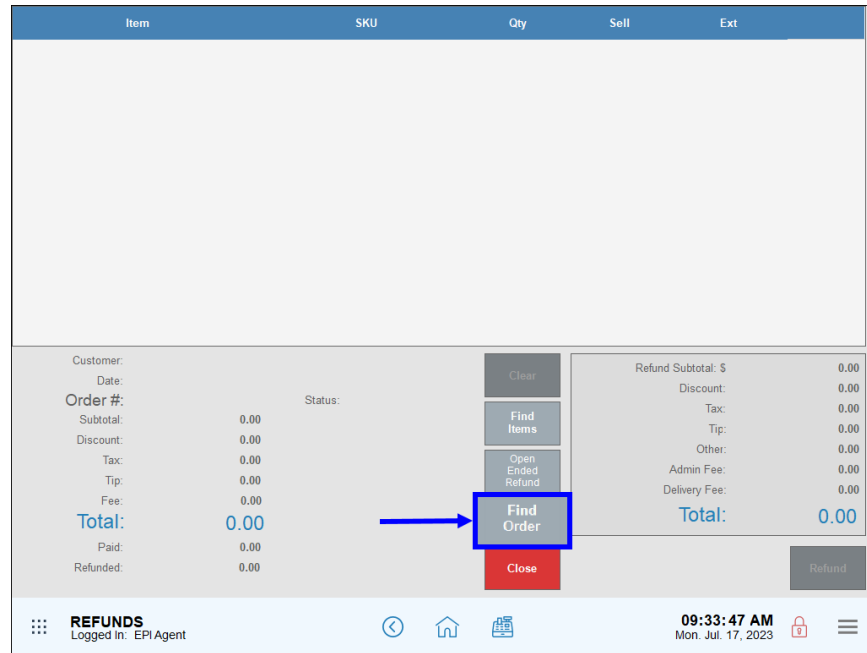
The screenshot shows a dialog box with a light gray background. At the top, there is a dropdown menu labeled "Reason:" with "Changed Mind" selected. To the right of the dropdown is a gear icon. Below the dropdown is a text area labeled "Note:" containing the text "Customer purchased the wrong size." The text area has a light yellow background and a vertical scrollbar on the right. At the bottom of the dialog box, there are two buttons: a red button labeled "Close" on the left and a green button labeled "OK" on the right.

5. Click **OK**. A pop-up notification displays verifying the order was voided successfully.

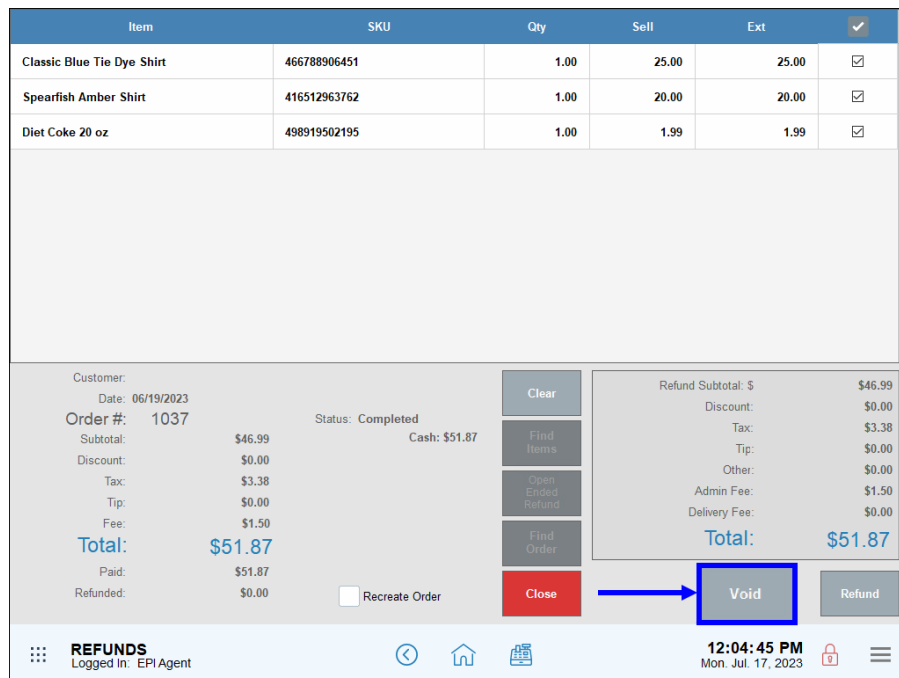
Voiding Payments Before Batching Out

Void orders and payments before [batching out the register](#). Credit or debit cards are not required to void payments.

1. From **Register**, tap the **Local Menu**.
2. Select **Refund**. The **Refunds** screen displays.
3. Select **Find Order**.

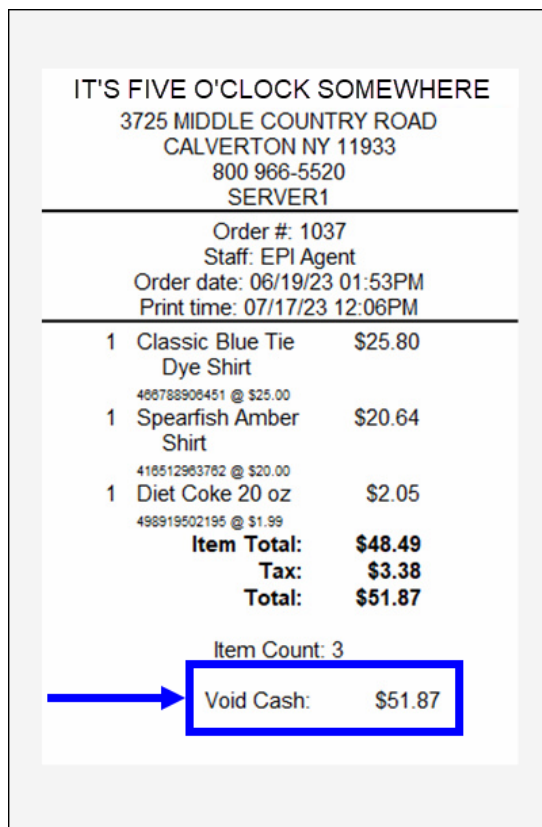


- Select an order with one or more items to void.
- When the itemized order displays, select the items to be refunded and tap **Void**.



- Select a reason for the void or enter a reason in the **Note** field, then tap **OK**.

7. A receipt prints, displaying the voided payment amount.



Refunding Payments After Batching Out

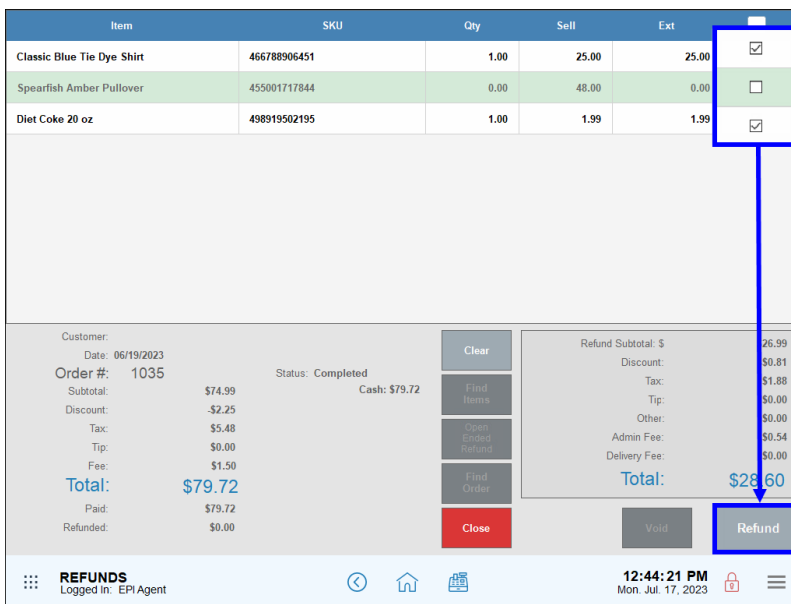
Merchants can also void closed transactions and issue partial or full refunds. Credit or debit cards are required to process refunds.

By default, the **Refund** button is accessed from the Register's **Local Menu** located at the bottom right of most Exatouch screens.

Partial Refunds

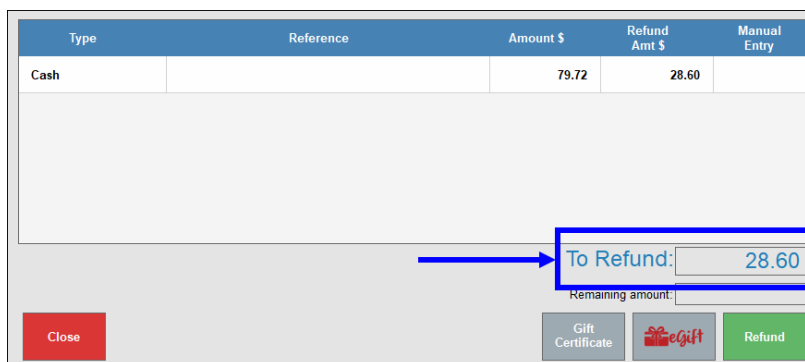
1. From **Register**, tap the **Local Menu**.
2. Tap **Refund**.
3. From the Refunds screen, tap **Find Order**.
4. Select an order with one or more items to refund.

5. When the itemized order displays, select only the items to be refunded and tap **Refund**.



6. Select a reason for the refund or enter a reason in the **Note** field, then tap **OK**.

7. A pop-up screen displays with the amount to be refunded.



8. Perform one of the following:

- a. Tap **Close** to cancel.
- b. Tap **Gift Certificate** to add the refund amount to a gift certificate.
- c. Tap **eGift** to add the refund amount to an eGiftSolutions card.
- d. Tap **Refund** to issue a refund back to the original tender.

9. A receipt prints, displaying the refund amount.

Full Refunds

1. From **Register**, tap the **Local Menu**.
2. Tap **Refund**.
3. From the Refunds screen, tap **Find Order**.
4. Select an order to refund.
5. Verify that order details populate on the Refund screen, then perform the following to complete the transaction:
 - a. For cash, checks, or other currency, tap either **Void** or **Refund** and follow the prompts.
 - b. For debit, credit, and other electronic payment methods, tap **Refund** and follow the prompts.

Printing Receipts

[Print a Receipt from the Register Screen](#)

1. Confirm that active orders display within the **Register**.
2. Select **Print Order**.

[Reprinting Receipts](#)

1. From **Register**, tap **Reprint**. This tab is located by default in the **Local Menu**.
2. Select an available order, or search by **Customer**, **Item**, **Service**, **Staff**, **Card Number**, or **Date**. Use the **Search** field to search by function, such as **Order**, **Time**, **Customer/Label**, **Machine**, or **Total \$**.
3. Tap a print option, such as **Print**, **Gift Receipt**, or **Email Receipt**.

4. Tap **Close**.

Print a Receipt from the Get Order Screen

1. At the **Register**, tap **Get Order**.
2. Select an Order.
3. Tap **Print Order**.

Customer Management

Finding Customer Details

Find customer profiles and corresponding details in the **Customers** module. Refer to the online Knowledge Base for [more detailed information about customer management functions](#).

1. From **Home**, tap **Customers**.
2. Select **Customer List**, and then select a customer.

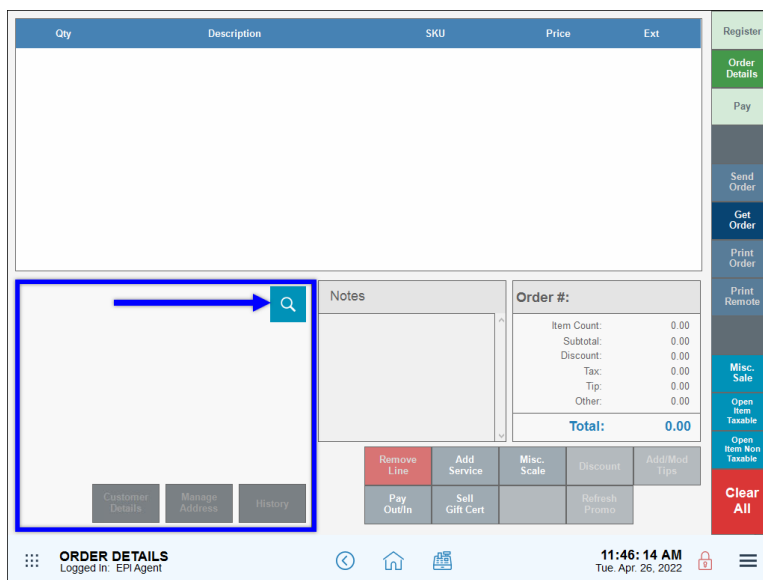
NOTE: Navigate by scrolling, using the **Search** field, or tapping **Advanced Customer Search**.

Checking Loyalty Balances

Loyalty rewards balances can be viewed using the following methods. Customers must be attached to an order to view balances. Refer to the Knowledge Base for more detailed information about [Loyalty Rewards](#).

View Balances from Order Details

1. From **Home**, tap **Register**.
2. Tap **Order Details**.
3. Select the **Search** button.

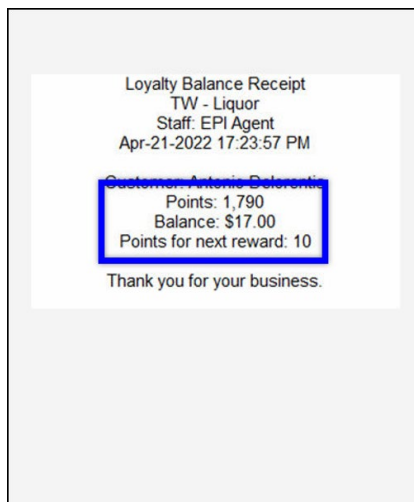


4. Select a customer. Use the **Search** or **Phone #** fields to search for an existing customer.
5. Tap **Go To Order**.
6. The Order Details screen displays with the customer’s loyalty balance (if any) populated along with their contact information in the Customer Details section.

View Balances on Register Pay Tab

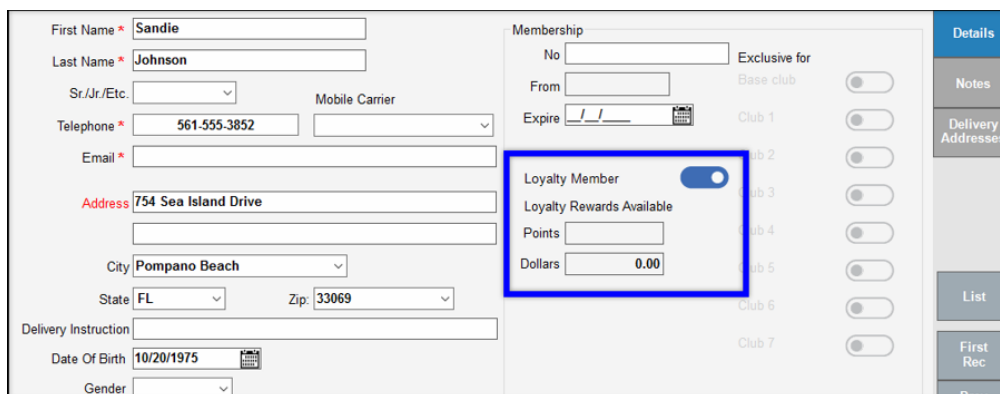
In this scenario, the customer has already been attached to an order.

1. Tap **Pay**.
2. Tap **Check Balance**.
3. Choose **Loyalty** to view a list of saved customers.
4. Select a saved customer and tap **OK**. Depending on how settings are configured, the balance will either display on the screen or print from a printer.



View Balances in Customer Details

1. From **Home**, navigate to **Customers > Customer List**.
2. Select a customer. Use the **Search** or **Phone #** fields to search for an existing customer.
3. View Loyalty balances on the customer information page.



Managing Banks

The Bank tracks cash from the cash drawer at the end of a shift. Users can review bank activity and identify discrepancies between shift activity and any missing money.

Opening a Bank

1. From **Register**, tap the **Local Menu**.
2. Select **Bank Manager**. The Bank Manager screen displays.

From	To	Status	Staff	Machine

Date: 04/21/2022

Machine: Open

Supervisor:

Staff:

Drawer:

Start: 07:00 AM

Close: 11:30 PM

Swap In:

Swap Out:

New bank

Notes:

Cash	Quantity	Amount
Penny:	0	0.00
Nickel:	0	0.00
Dime:	0	0.00
Quarter:	0	0.00
\$1.00:	0	0.00
\$5.00:	0	0.00
\$10.00:	0	0.00
\$20.00:	0	0.00
\$50.00:	0	0.00
\$100.00:	0	0.00
Total:		0.00

Buttons: Close, Reset, Open Drawer, Duplicate Bank, Void Bank, Print, Save

3. In the **Date** field, select a date that the bank will be used.
4. Tap the **Supervisor** drop-down menu to select who will be responsible for managing and reconciling the cash drawer.
5. Tap the **Staff** drop-down menu and select the staff member who will be using the cash drawer.
6. Enter **Start** and **Close** times. This data is for reporting purposes only, indicating when a cash drawer is expected to be used. Regardless of times specified, a bank can be swapped in or out when a merchant chooses.

7. Enter the starting cash-in drawer amounts. You don't need to enter the exact monetary denominations. Verify the Total amount is accurate. You can enter accurate denominations later when you reconcile the drawer.
8. Tap **Save**.

Swapping in a Bank

1. From **Register**, tap the **Local Menu**.
2. Tap **Bank Swap**.
3. Select a bank and tap **Swap**.
4. A popup notice displays stating the bank has been swapped in.

NOTE: If there is only one bank in your system, Exatouch will swap the one bank automatically. If multiple banks are listed, you'll be prompted to select a bank.

5. When the shift ends, the bank is removed from circulation by swapping out the bank.

Swapping out a Bank

6. From **Register**, tap the **Local Menu**.
7. Tap **Bank Swap**.
8. Select a bank.
 - a. If you have only one bank, the system will swap the bank in automatically. When prompted, tap **Yes**.
 - b. If multiple banks are engaged, you'll be prompted to select a bank from the Bank list. Select a bank and tap **Yes**.

Closing a Bank

1. Select a Bank and navigate to the Bank Manager.

2. Click to highlight a bank to close. Be sure the bank has been swapped out, as designated by **Status: Out**. Multiple banks may be listed.
3. Review Bank Operation Times.
4. Count cash in the drawer and enter the total when closing the bank.
5. Close Shift.
6. Review Bank Report.

Running Reports

Exatouch features over 70 report functions for both summaries and granular information about staff, sales, items, purchasing, and deliveries. Reports fall under the following categories:

- **Appt's:** Schedule any available report to run and send by email.
- **Customer:** Schedule any available report to run and send by email.
- **Delivery:** Schedule any available report to run and send by email.
- **Items:** Schedule any available report to run and send by email.
- **Purchasing:** Schedule any available report to run and send by email.
- **Sales:** Schedule any available report to run and send by email. Note: the Snapshot and Station Snapshot reports cannot be scheduled.
- **Staff:** Schedule any available report to run and send by email. Note: the Staff Shift report cannot be scheduled.

How to Run Reports

1. From **Home**, tap **Reports**.
2. Select a category.
3. Choose a report you wish to view.

Email & Print Reports

- **Reports can be printed if you have a Report Printer.** A report printer will enable you to print reports directly from Exatouch.
- **Email Settings must be enabled for printing.** If your Email Settings are enabled, you can email reports to a designated email address. From email, reports can be printed on your individual printer.
- **Report Formats.** Reports can be emailed and printed in Excel, PDF, and Word format.

Troubleshooting

Review the following table to find common troubleshooting issues and possible solutions:

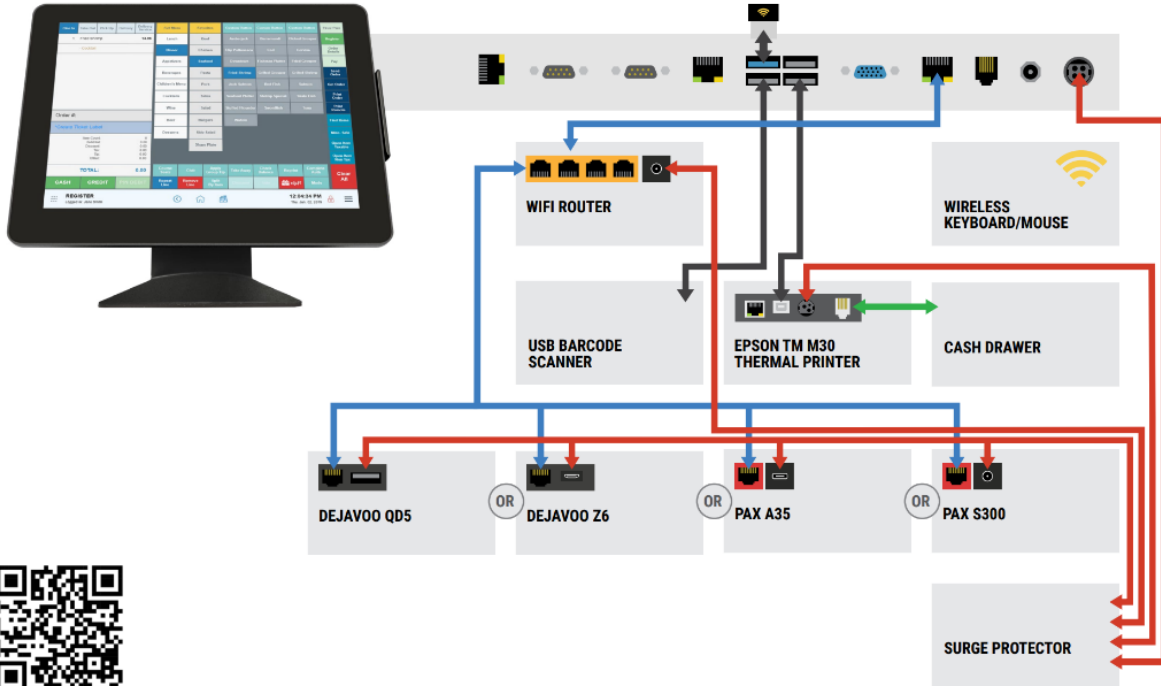
Function	Issue	Solution(s)
Home Screen	Not able to exit Kiosk Mode after clicking Kiosk Mode module.	Double-click the Exatouch logo at the bottom right to display a numeric keypad. Enter your PIN to return to the Home screen.
Clocking In/Out	Can't clock in/out.	Click Lock icon to access Log in screen.
		Tap Clock In or Clock Out first, then enter PIN.
Orders	Can't find an order.	From the Register , tap Get Order . Select the order from the Open Orders display.
+Age Verification	State issued cards won't swipe or scan.	If card swiping or scanning fails, tap Manual Entry to enter DOB manually. Tap Override to skip age Verification altogether.

Function	Issue	Solution(s)
<p>Miscellaneous</p>	<p>Unable to check loyalty point balances.</p>	<p>From Home, select Customer > Customer List. Select a customer to view loyalty points in the Customer Detail work area.</p>
		<p>From Register, tap Order Details. Click magnifying glass icon. Select customer from list and click Go To Order. Loyalty balance displays along with other customer information.</p>
		<p>From Register, click Pay. On the Pay screen, click Check Balance > Loyalty.</p>
		<p>Customer is not enrolled and/or saved into system.</p>
	<p>An Offline Mode message displays.</p>	<p>No Internet connection is present. Contact a manager if the Offline Mode message displays.</p> <p>NOTE: Transactions can be processed offline. See the Open Batch Settlement of Offline Transactions topic in the Knowledge Base for details.</p>

Exatouch Wiring Diagram



- Power Source/Supply
- USB
- Ethernet/Internet
- Cash Drawer Data Cable



Forgot to schedule your installation and training? No worries!
Please email the Product Success Team so we can best assist you.

Scan the QR Code to see Exatouch
Quick Reference and User Guides:



Any questions? We're here to help! Contact our 24/7 Technical Support Team at
(800) 966-5520 – Option 3 or email us at support@electronicpayments.com.