EXATOUCH®

User Guide for Retail

Powered By ElectronicPayments®

Technical Support: 800-966-5520 – Option 3
Exatouch® Online Knowledge Base: help.exatouch.com

Contents

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 (QRG) and does not incorporate all capabilities and features available in the Exatouch POS system. Hyperlinks will take you to related articles in the Exatouch Knowledge Base.

Getting Started

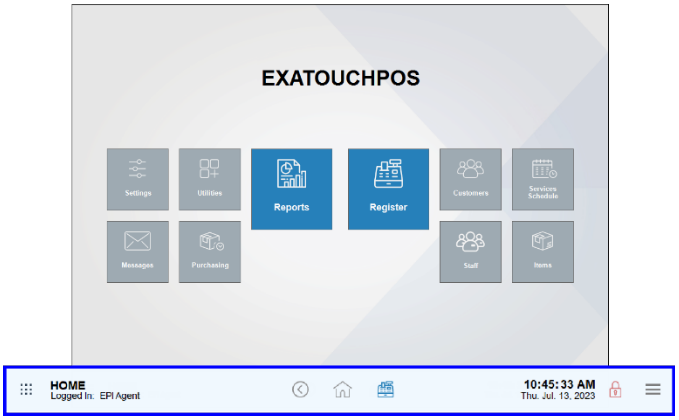
Home Screen

Modules on the **Home** screen provide access to Exatouch features. Identify your location in Exatouch by viewing the description at the bottom left of your screen.

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 images that function like buttons.

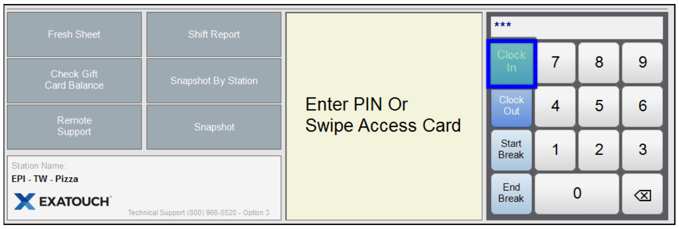


Navigation bar icons perform various functions, which are defined in the following table.

Navigation Bar Icons		
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 **Lock Screen** and **Clock In/Clock Out** keypad, as well as 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** 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.



Clock 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.

Clock Out to End a Shift

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

Clock Out for a Break

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

Clock In from a Break

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

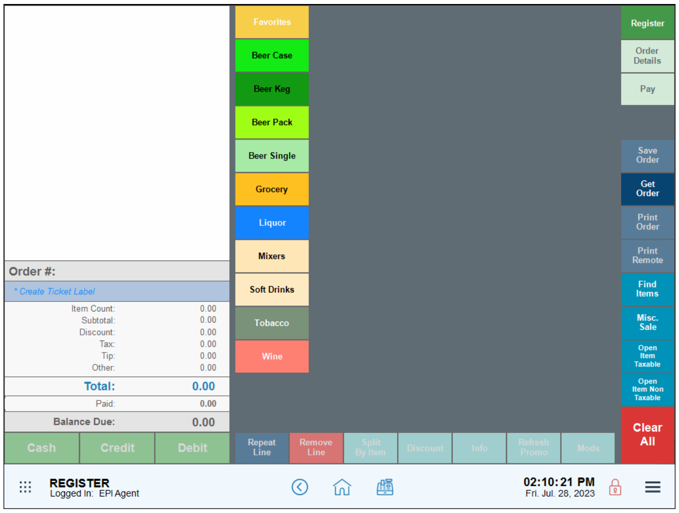
Navigating the Register

Register View

The **Registe**r view displays by default when you begin operating your Exatouch system.

In the **Register**, 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 the **Register** by 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 functions associated with ringing up an item.

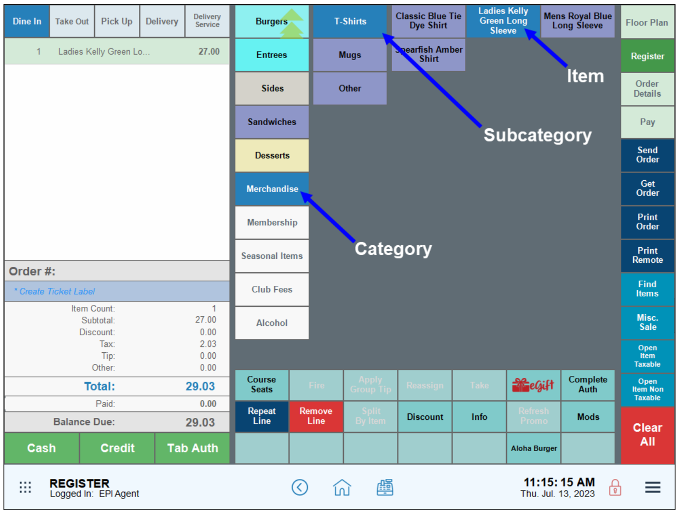
Register View Functions	
Name	**Function**
Save Order	Saves orders in progress.
Get Order	Retrieves a saved customer order.
Misc. Sale	Rings up a miscellaneous sale item if an item is not yet in inventory or if a test transaction is needed.
Repeat Line	Adds several of the same items quickly without scanning or entering the item multiple times.
Discount	Applies an item discount.
Info	Access info about the item, including Price 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**.

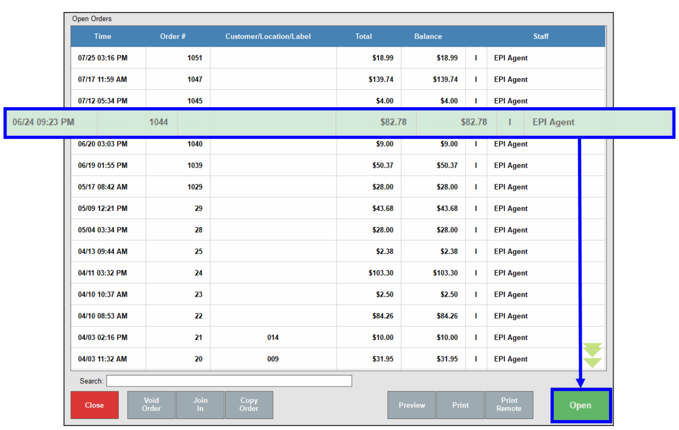
2. Scan items using your barcode scanner, or manually enter items by tapping a category, subcategory, and then the individual items.



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

Find an Open Order

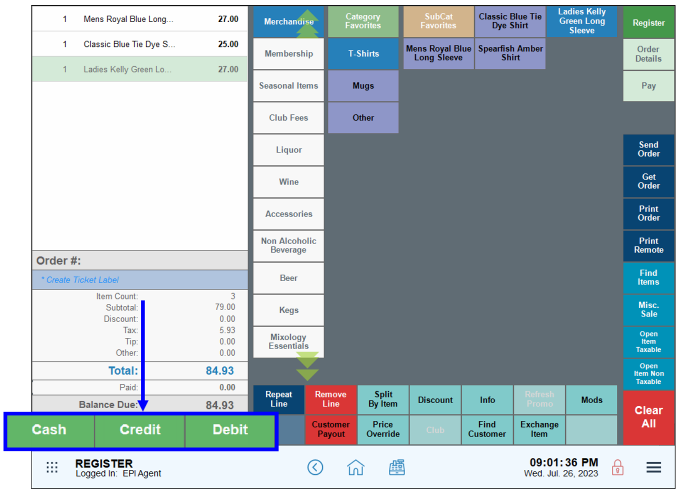
1. Navigate to the **Register**.
2. Tap **Get Order**. The list of open orders displays.
3. Select an order.
4. Tap **Open** and proceed with the order.



Collecting Payments

Accept Payment Directly in the Register

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

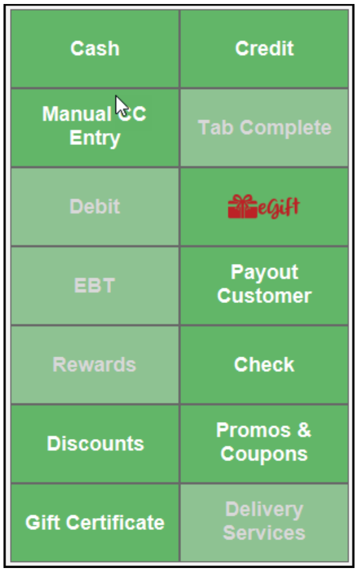


1. Enter an order or open a saved customer order.
2. Select a payment option.
3. Follow the prompts for your selected tender type to complete the payment.

Select Other Payment Options

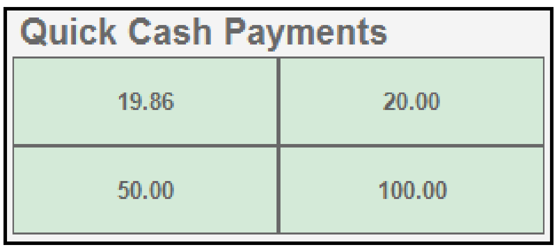
1. Enter an order or open a saved customer order.
2. Tap **Pay** to display the **Pay** screen.
3. Select a payment option and follow prompts to complete the transaction.

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



Quick Cash Payments

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



NOTE: Quick Cash Payments are not available when the Reverse Cash Discount program has been implemented and Admin Fees have been enabled. For more information, see Enable Admin Fee (Reverse Cash Discount Program).

eGiftSolutions Cards

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

Check Balances from the Lock Screen

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

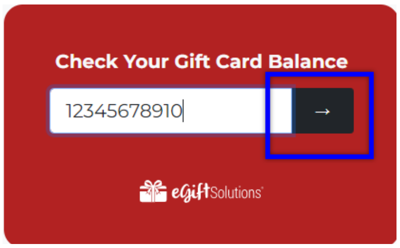
Check Balances from the Register

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 displayed receipt.

Check 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.



Redeem 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 the 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** 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.

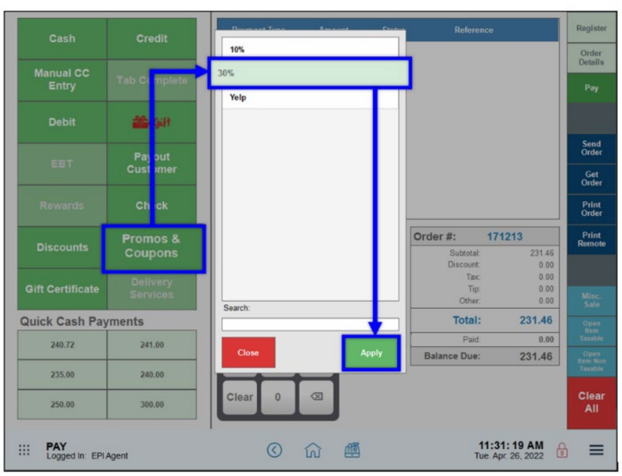
Discount Single Items

1. Enter or open a customer order in the **Register** and select an item, 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.

   NOTE: Discounted line items display green in the order list.
4. Tap **Undo Discount** to remove the discount.

Discount 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 discounts displays.
4. Select a discount or coupon or use **Search** to find a specific promo.

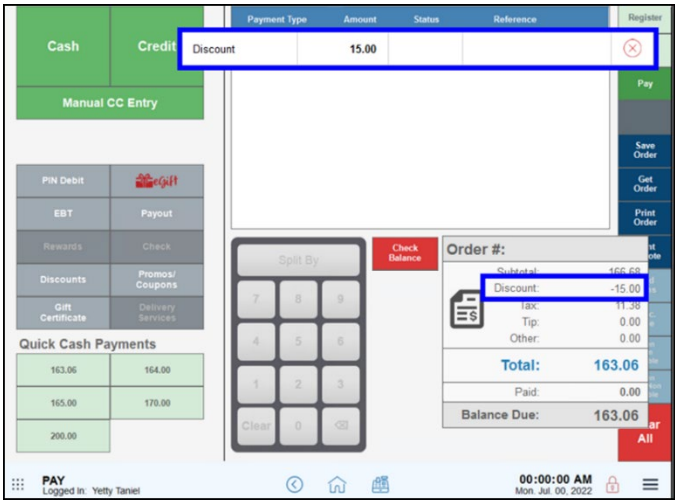


5. Tap **Apply,** and continue processing the transaction.

Apply an Open Discount

1. To apply an open discount to an entire order, 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 is reflected in the **Total**.

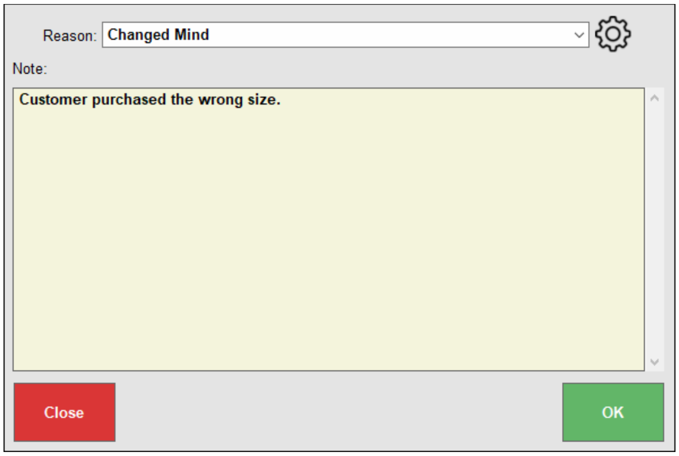


Voiding Transactions / Refunding Payments

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.

Void 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 new screen displays. Select a **Reason** from the drop-down menu and add any notes in the **Note** field.

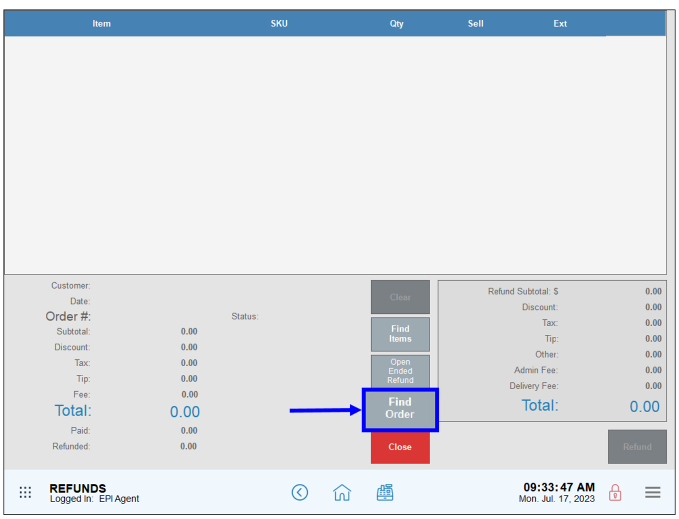


5. Click **OK**. A notification displays verifying the order was voided successfully.

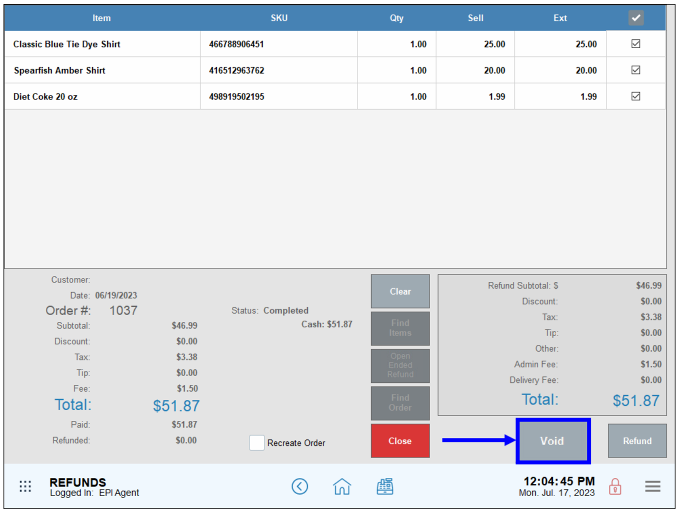
Void Payments Before Batching Out

Orders and payments must be voided before batching out the register. Credit or debit cards are not required to void payments.

1. From **Register**, tap the **Local Menu**.
2. Tap **Refund**.
3. On the **Refunds** screen, tap **Find Order**.

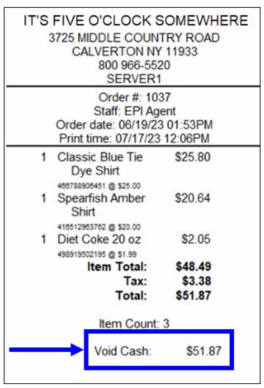


4. Select an order with one or more items to void.
5. When the itemized order displays, select the items to be voided and tap **Void**.



6. 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.



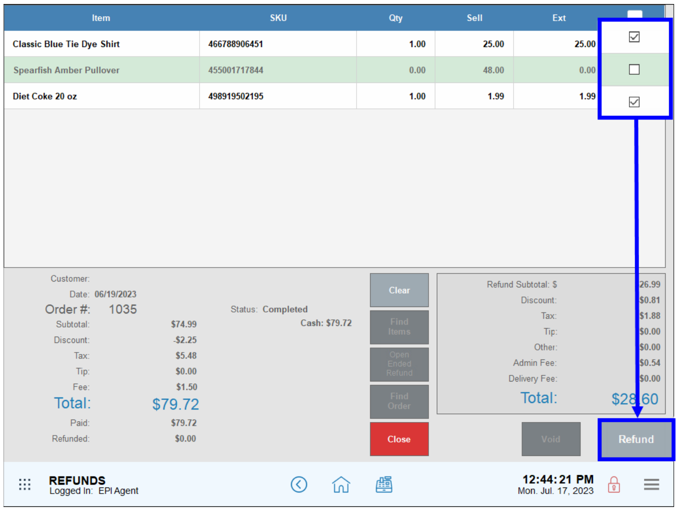
Refund Payments After Batching Out

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

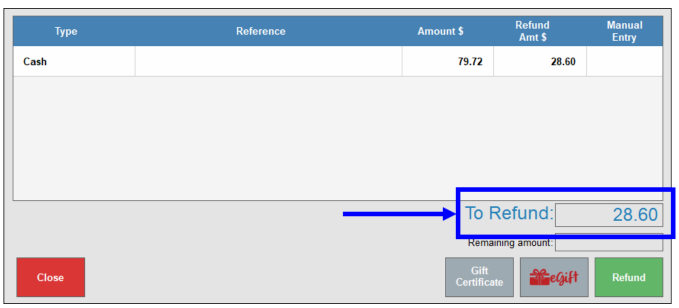
By default, the **Refund** button is accessed from the Register's **Local Menu** located at the bottom right of most Exatouch screens.

Partial Refunds

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

5. Verify that order details are on the **Refund** screen, then perform the following to complete the transaction:
   a. For cash, checks, or other tender types, 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. Tap **Print Order**.

Reprint 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. From **Register**, tap **Get Order**.
2. Select an order.
3. Tap **Print Order**.

Managing Customer Profiles

Find Customer Details

Find customer profiles and corresponding details in the **Customers** module. Refer to the Exatouch Knowledge Base for more detailed information about customer management functions.

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

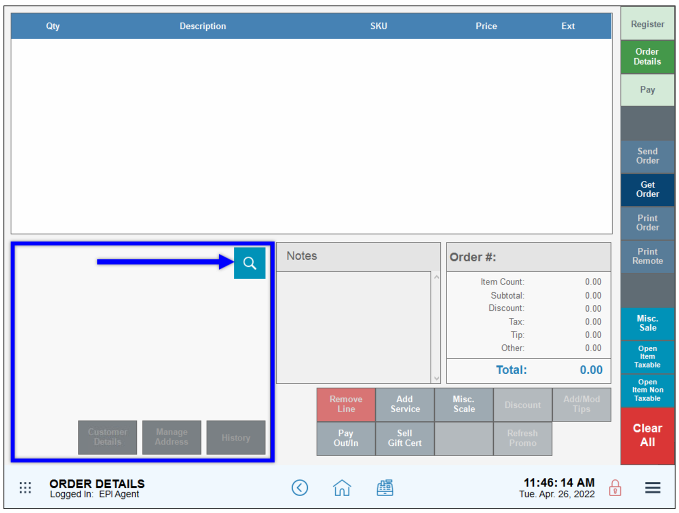
   NOTE: Navigate by scrolling, using the **Search** field, or tapping **Advanced Customer Search**.

Check 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. Tap the **Search** button.

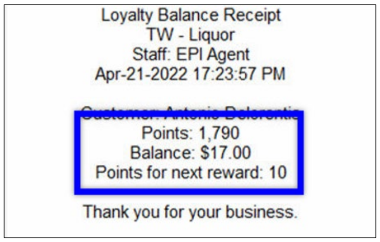


4. Select a customer or use the **Search** or **Phone #** fields to search for an existing customer.
5. Tap **Go To Order**.
6. The **Order Details** screen displays with the customer's loyalty balance (if any), along with their contact information in the **Customer Details** section.

View Balances on Register Pay Tab

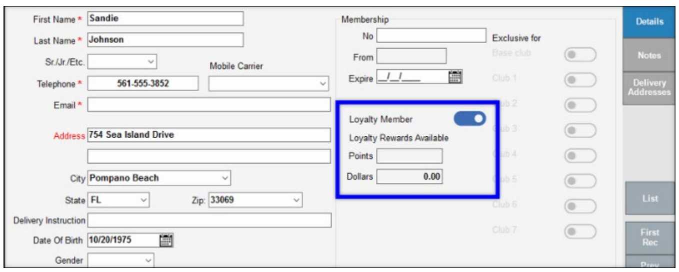
In this example, the customer has already been attached to an order.

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 or use the **Search** or **Phone #** fields to search for an existing customer.
3. View **Loyalty** balances on the customer information page.



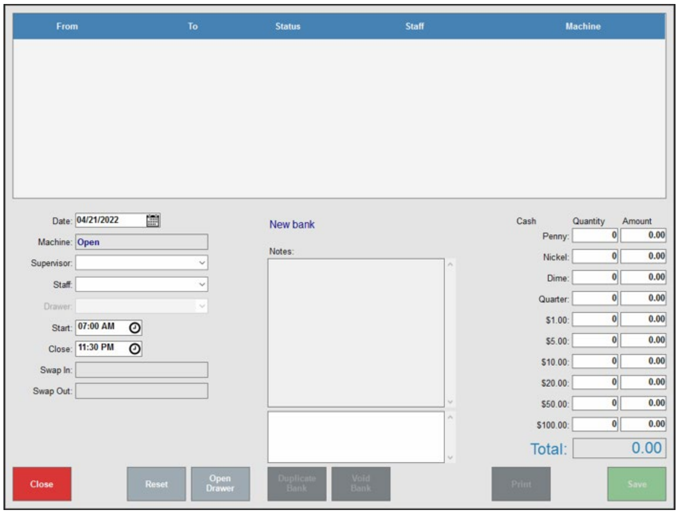
Managing Banks

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.

NOTE: Accuracy is critical when managing and reconciling banks. Any errors translate through the rest of the bank.

Open a Bank

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



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.

   NOTE: This data is for reporting purposes only, indicating when a cash drawer is expected to be used. Regardless of the 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 at this time.
8. Verify the **Total** amount is accurate. You can enter accurate denominations later when you reconcile the drawer.
9. Tap **Save**.

Swap In a Bank

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

   NOTE: If there is only one bank in your system, Exatouch will swap that 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.

Swap 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. Tap **Yes** when prompted.
    b. If multiple banks are engaged, you'll be prompted to select a bank from the **Bank** list. Select a bank and tap **Yes**.

Close a Bank

1. Select a **Bank** and navigate to the **Bank Manager**.
2. Select 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 in the **Cash** column 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:

- **Appts:** 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.

Select and Run Reports

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

Email and Print Reports

- **Reports can be printed if you have a Report Printer**. This 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 out.
- **Report Formats**. Reports can be emailed and printed in Excel, PDF, or Word format.

Troubleshooting

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

Troubleshooting		
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 and enter your PIN in the keypad to return to the **Home** screen.
Clocking In/Out	Can't clock in/out.	• From 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.
Loyalty Points	Unable to check balances or the customer is not enrolled/saved in the system.	• From **Home**, select **Customer** > **Customer List**. Select a customer to view loyalty points in the Customer Detail work area. • From **Register**, tap **Order Details**. Select customer from list and click **Go To Order**. Loyalty balance displays along with other customer info. • From **Register**, click **Pay**. On the **Pay** screen, click **Check Balance** > **Loyalty.**
Offline	An Offline Message Mode displays.	• No Internet connection is present. Contact a manager if the **Offline Mode** message displays. • **NOTE:** Transactions can be processed offline. See Open Batch Settlement of Offline Transactions for details.

Scan the QR code to see **Exatouch Quick Reference and User Guides**.
For assistance, contact our 24/7 Technical Support Team
at (800) 966-5520 – Option 3 or support@electronicpayments.com.