Welcome to The Cosoft Training Academy

Aura Point-Of-Sale Software

Trainer: _____

Course: Aura Cashier Beginner Training

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Invoicing

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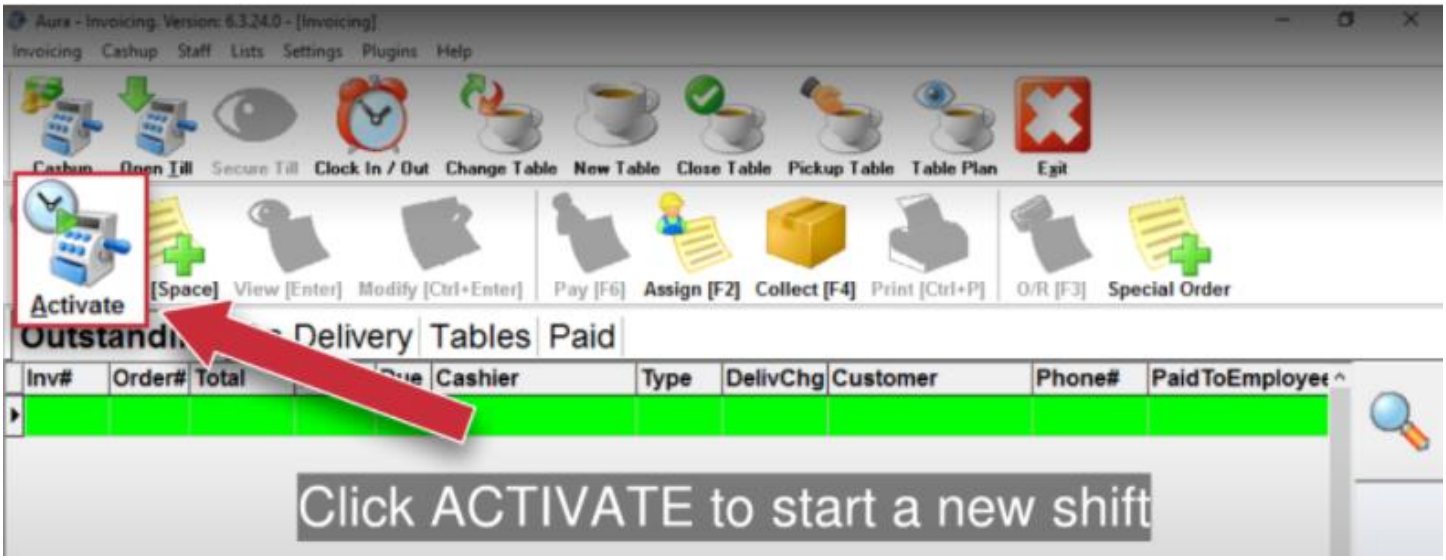
Starting till shifts & adding operators

Before you can start a new till shift you will need to open Invoicing. This must be done on each machine you're making sales on.

Once Invoicing is open the **Manager** must start **a New till Shift** by clicking **Activate**.

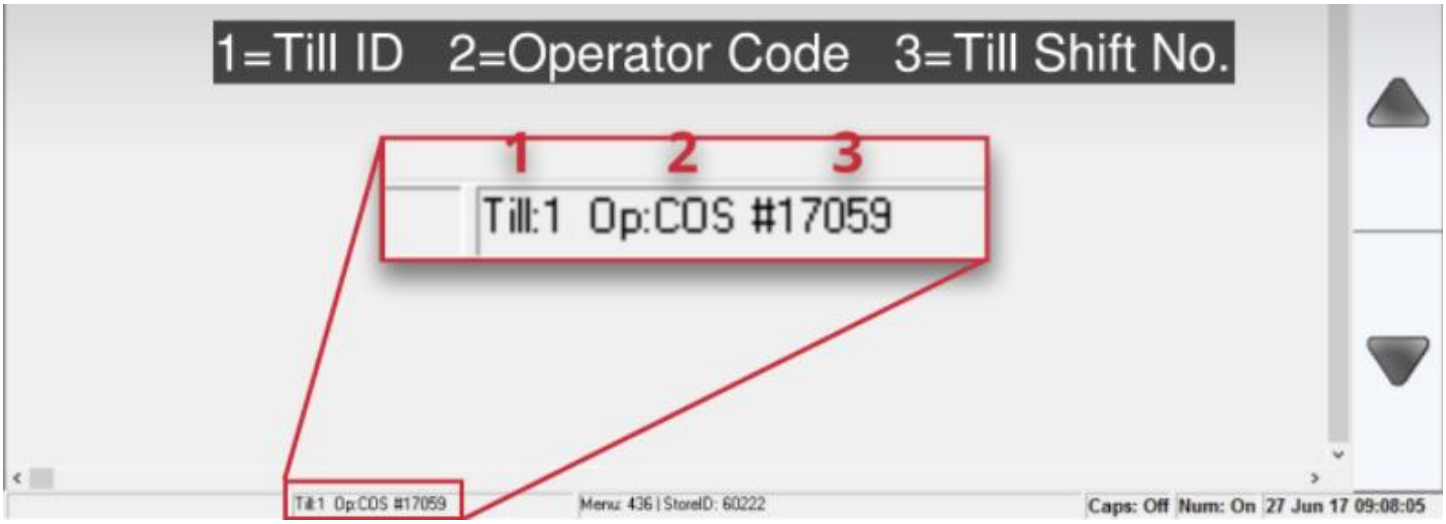


The person who activates the shift becomes the **Primary Operator**. Only the primary operator may add other operators and open the till from the main screen. For this reason, we suggest that the manager be the one who activates the shifts and adds the cashiers as secondary operators.

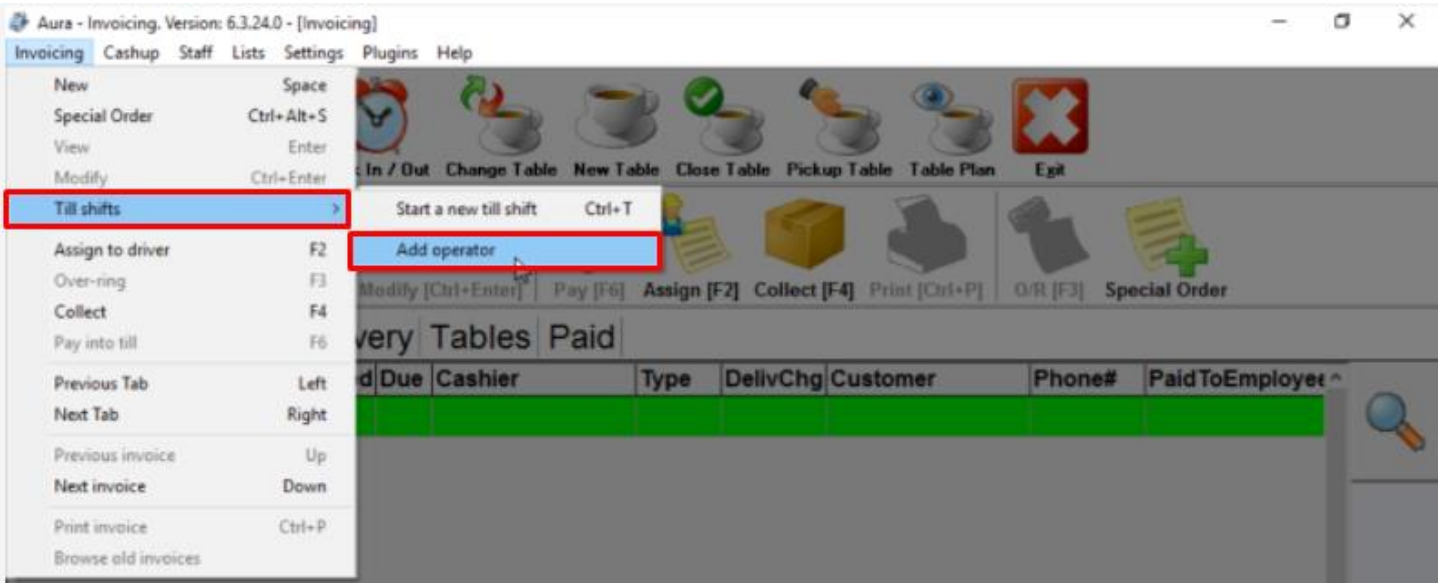
Personal Notes:

Each POS terminal is assigned a unique **Till ID.** Every time you start a new till shift, it will assign that shift a unique tilt shift number. You can only run one shift at a time on each till, but you can run multiple shifts one after the other by clicking **End Shift** on an active shift, or by posting the cash up for that shift.

At the bottom of the **Invoicing** main screen, you will see information for the shift you've just started.



The Manager then adds each Cashier to their till by clicking **Invoicing > Till Shifts > Add Operator**. The Manager enters their password first, then the cashier. This is done on each individual cashier's tills. A shift can have up to six operators.

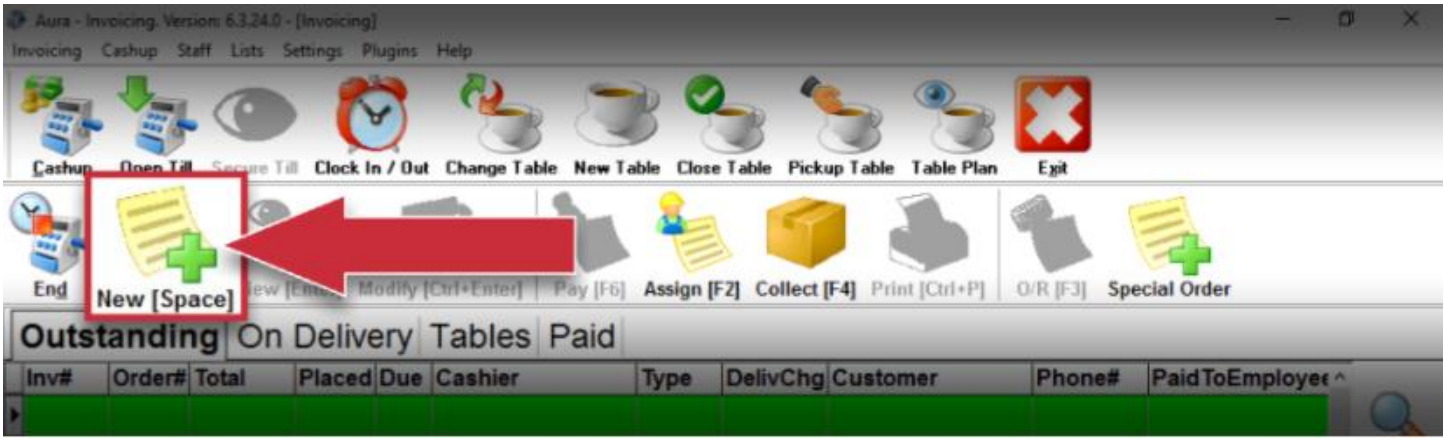


If a shift is **inactive,** you cannot take sales on the till without activating a shift first. Starting a shift assumes there is cash in the cash drawer, and a cashier is ready to take orders. Any shift started will have an entry created on the **Cash up** screen.

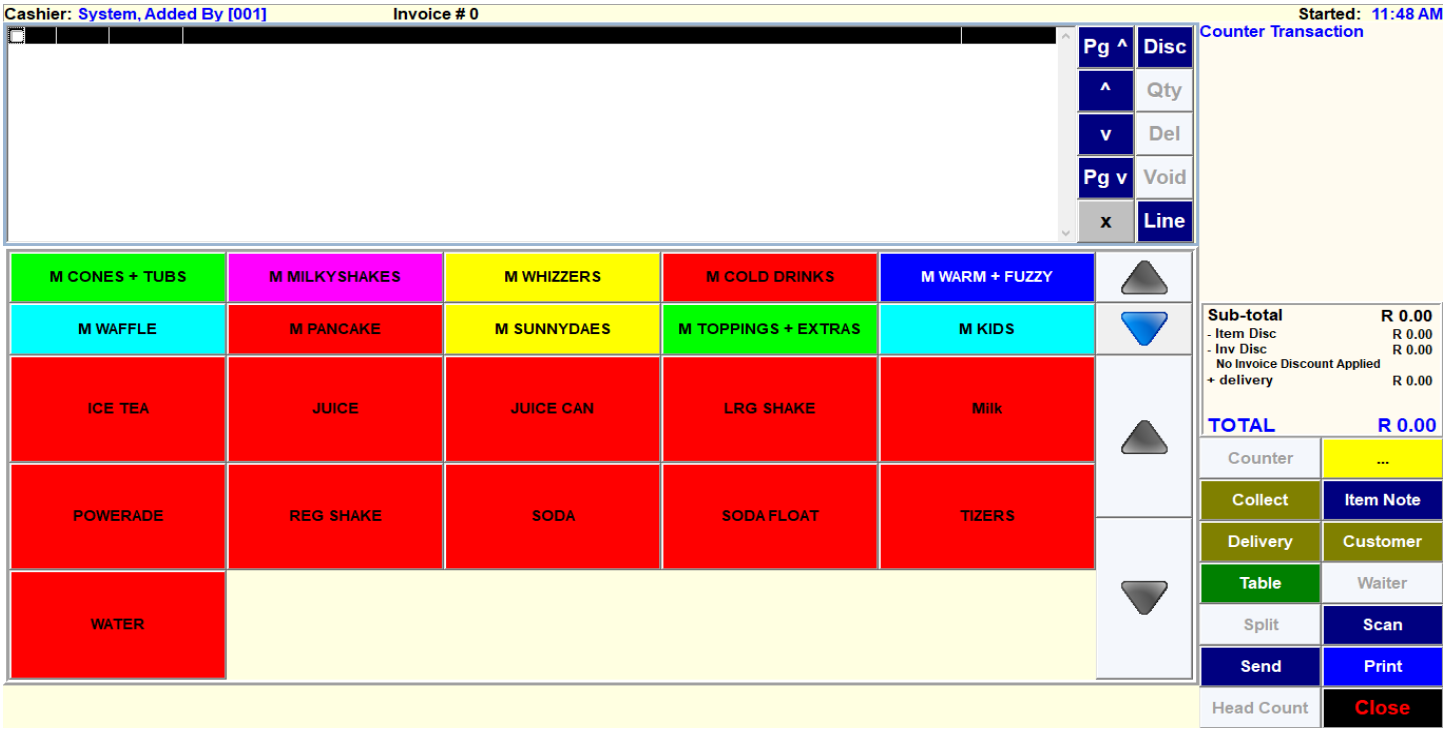
Personal Notes:

Taking orders

Click **New [Space]** or press the spacebar on your keyboard to start a new transaction in Invoicing.

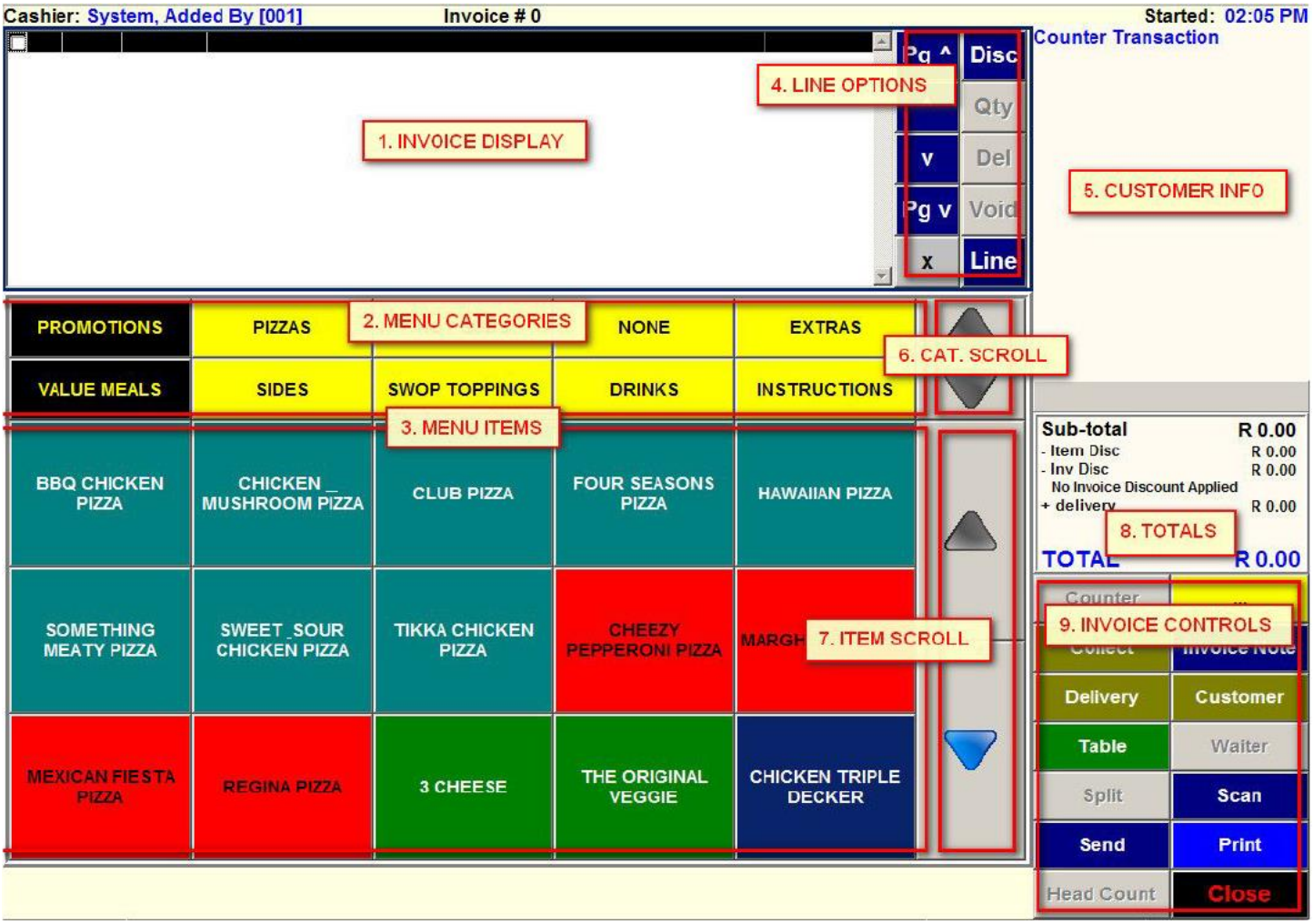


After entering your code, you will be given the **Menu Item Selection** screen. This screen is where you ring up orders.



On the next page we will be going through the basic controls on **the Menu Item Selectio**n screen.

Personal Notes:



1. **Invoice Display** - Displays the items of the invoice that you ring up. These are called **Line Items.**
2. **Menu Categories** - These are the different categories of menu items on your menu.
3. **Menu Items** - These are the menu items that you click on to ring up. They can sometimes be divided into subcategories called **Sizes.** Select a size first, then an item. Some items start a **Picklist,** meaning they're linked to other options.
4. **Line Options** - These buttons let you edit the **Line Items** that you've rung up already. Here you can scroll up and down through the line items using the arrow or **Pg.** up and down arrows, or you can use these buttons:
   [x] - Select one or more lines. You can also press the spacebar on the keyboard
   [Disc] - You can apply discounts to one item by selecting it first or apply a discount to the whole invoice by having nothing selected.
   [Qty] - Adjust item quantity.
   [Del]/[Void] - Delete or void items.
   [Line] - Insert a new blank line above the currently selected line.
5. **Customer Info** - The customer name, number and address appear here for Customer transactions.
6. **Category Scroll** - Use these buttons to scroll through Menu categories if there are more than are currently showing on the page.
7. **Item Scroll** - Use these buttons to scroll through Menu Items if there are more than are currently showing on the page.
8. **Totals** - Shows the current subtotal and Total, including any discounts and delivery charges applied.
9. **Invoice Controls** - These are functions that let you change the order type, assign staff or customers to an invoice, and complete the transaction.

Personal Notes:

Types of orders

Once an order is built, it is completed in one of two ways, depending on the type of order:

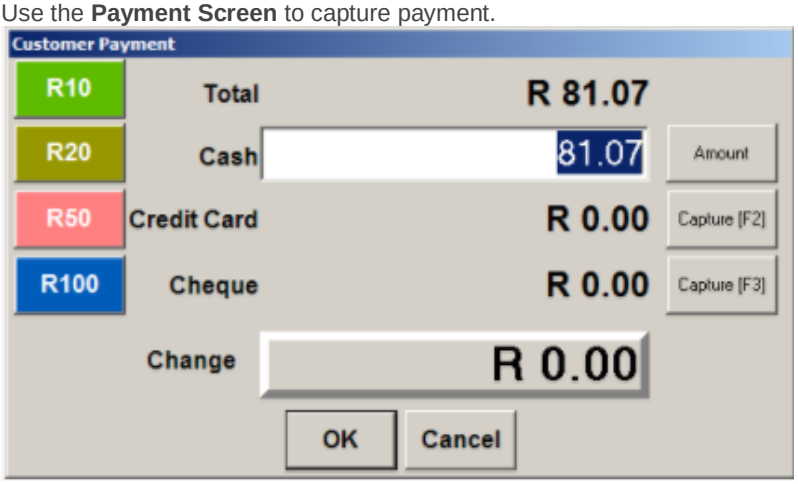
1. If the order is a counter, click **Print** to save the invoice and print a customer receipt AND send a slip to the Kitchen Printer (or send the order to the Kitchen Display).

2. If the order is a Delivery or Collect and you don't want to print the customer receipt just yet, click **Send** to print just the kitchen slip (or send the order to the Kitchen Display).

Counter Orders

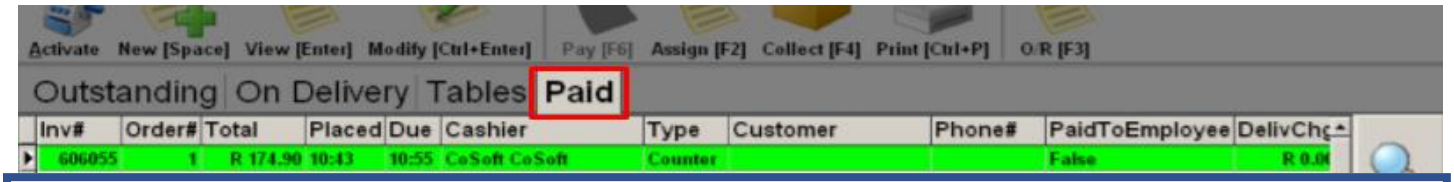
Begin a new transaction, then:

1. Click the **Counter** button (if not already selected).
2. Ring up the order using the menu buttons.
3. Complete the order using **Print**.
4. Use the **Payment Screen** to capture payment.



- If the order is paid with cash, click **Amount** for a keypad or type in the amount on the keyboard.
- If the order is paid with cash, you can also use the **Quick Tender** buttons on the left of the screen to capture notes given to you.
- If the order is paid by Card, click **Capture [F2]** to save the payment as a card payment.
  NB: The system may prompt for a Gratuity amount on credit cards first. If you want to disable this option, please contact Aura support.

Completed orders are listed under the Paid **tab**.

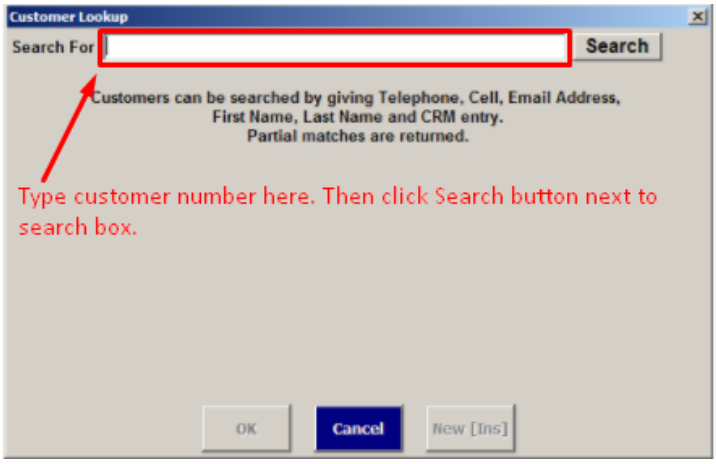


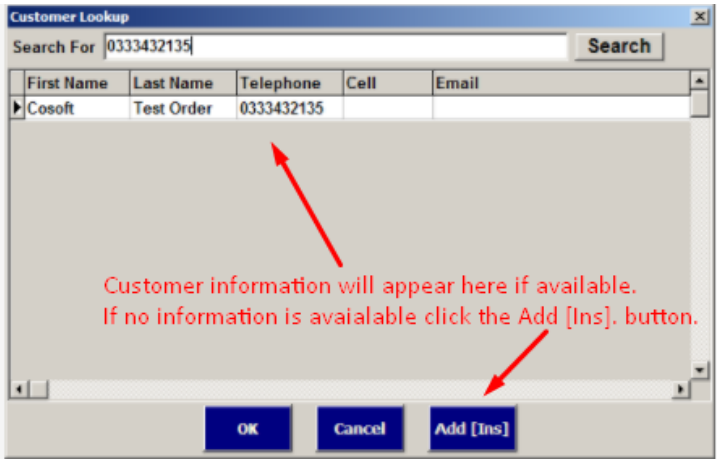
Personal Notes:

Collect / Delivery Orders

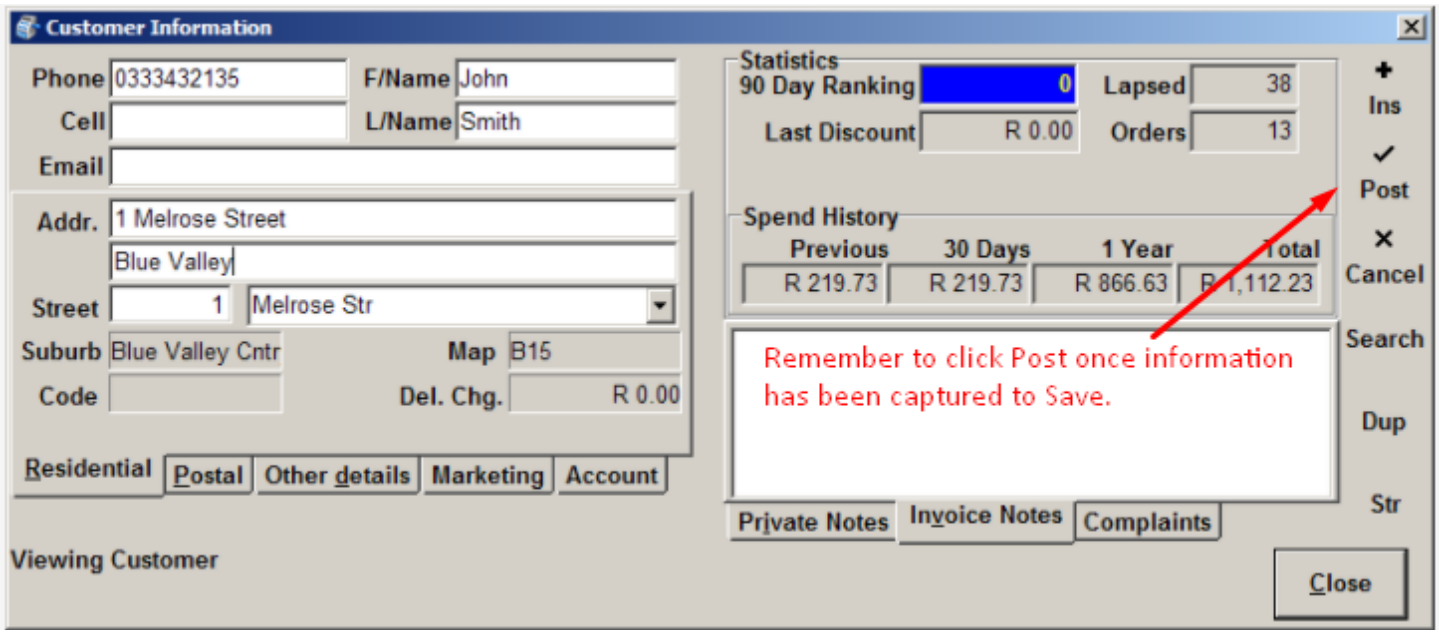
Begin a new transaction, then:

1. Click the Collect or Delivery button (if not already selected) depending on the order.
2. A customer Search window will appear. Type the Phone Number, Name or any of the other given criteria, and the search window will give the results.





3. If it's a new customer, you will now need to capture the customer's details. Be sure to get their **Name, Number** and if it's a delivery, capture their **Address.** Select their address from the provided Street List.



Personal Notes:

4. Ring up the order using the menu buttons.
5. Save the order using Send (This will only send the order to the kitchen).
6. Saved Collect / Delivery orders are listed under **Outstanding**. (They will only be complete once the customer has collected or the driver has delivered.

7. If the order is a **Collect** order, it is completed when the customer comes in to pay for it. Click the **Pay [F6]** button to bring up the payment screen and complete the order.

8. If the order is a **Delivery** order, it can only be assigned to a clocked-in driver using the **Assign [F2]** button, after which the order will move to the **On-Delivery** tab. Once the driver returns to the store with the money you can click on the Pay [F6] button to complete the order.

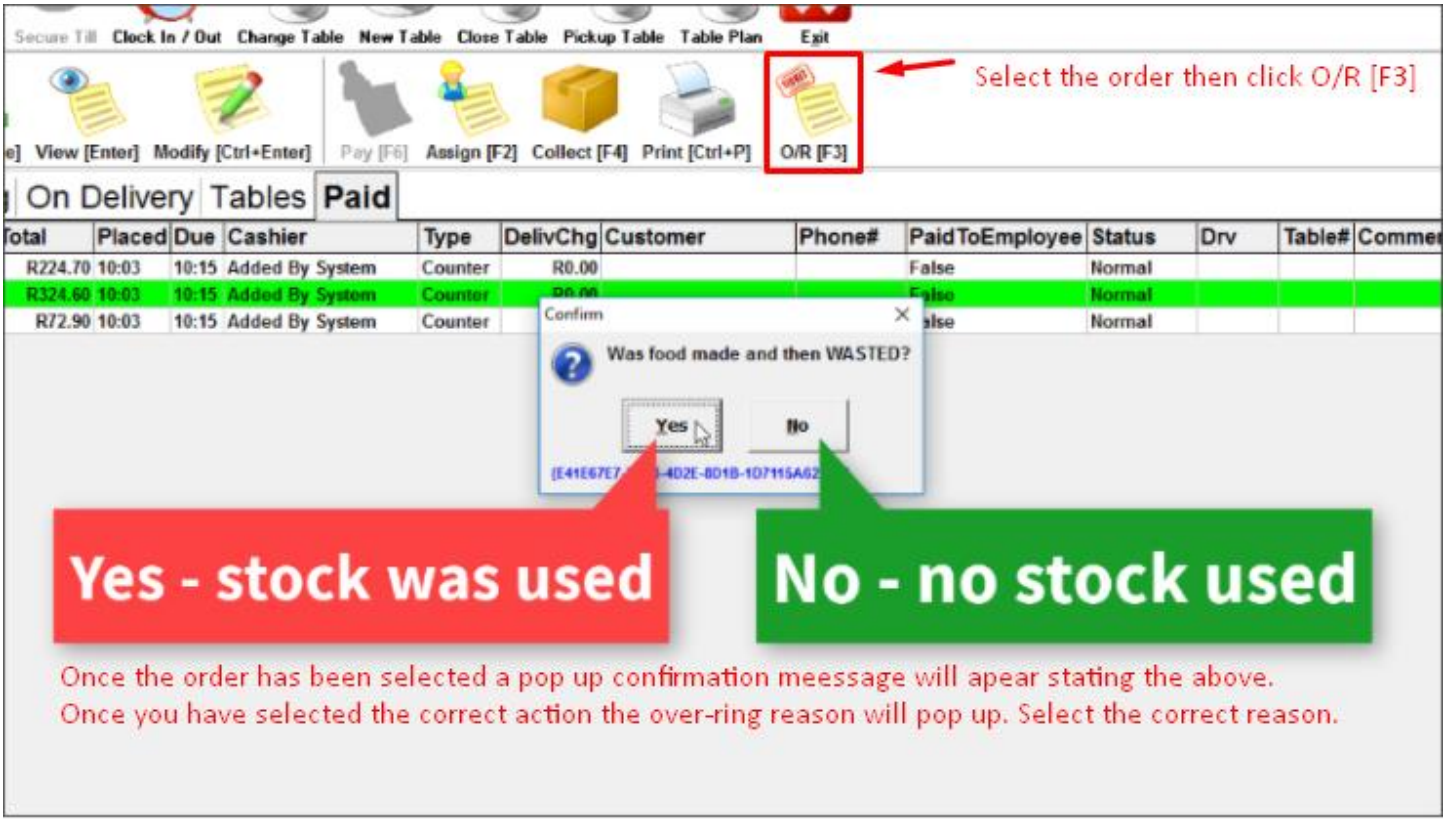
9. Delivery orders can also be converted to Collect by selecting the order and clicking on the Collect [F4] button.

Personal Notes:

Over-rings and discounts

Over-ring

On occasion it might be necessary to cancel an order - whether it be due to cashiers making an error, the kitchen making an error, or the customer requiring a refund. In Aura, the way to do this is to perform an Over-Ring. Over-rings essentially mark an invoice as 'void', leaving a record of it on the system for record keeping and reporting, but removing its value from your sales.



The order will now be highlighted red and will be moved to the **Paid** invoice tab if not there already. The over-rung status of an invoice can be cancelled by highlighting it and clicking the **O/R [F3]** button again.

Discount

Aura allows for discounts to be applied to invoices or items to reduce the cost when necessary. Aura has two main types of discounts:

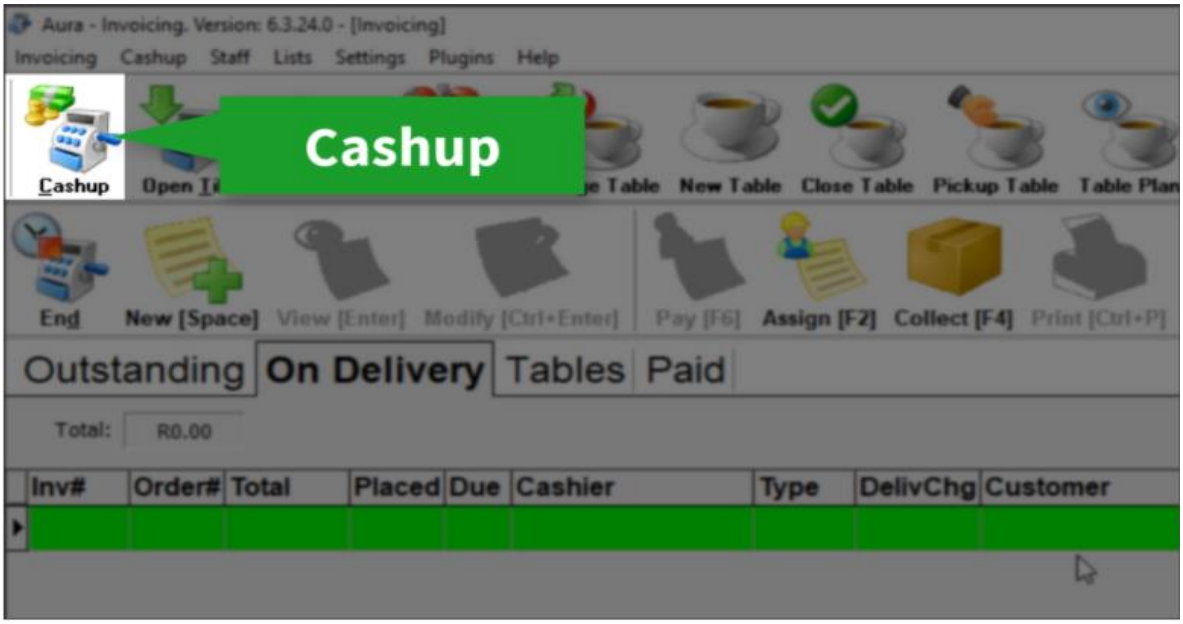
- **Invoice** - applies a discount to the whole invoice.
- **Item** - applies a discount to a single line item.

Discounts are applied when creating an invoice. In the *Menu Item Selector* screen, click the **Disc** button to bring up a list of available discounts. (**NB:** Some discount options are included with the menu, but others can be added in Backoffice. We will cover creating discounts in the *Backoffice* training module ahead.)

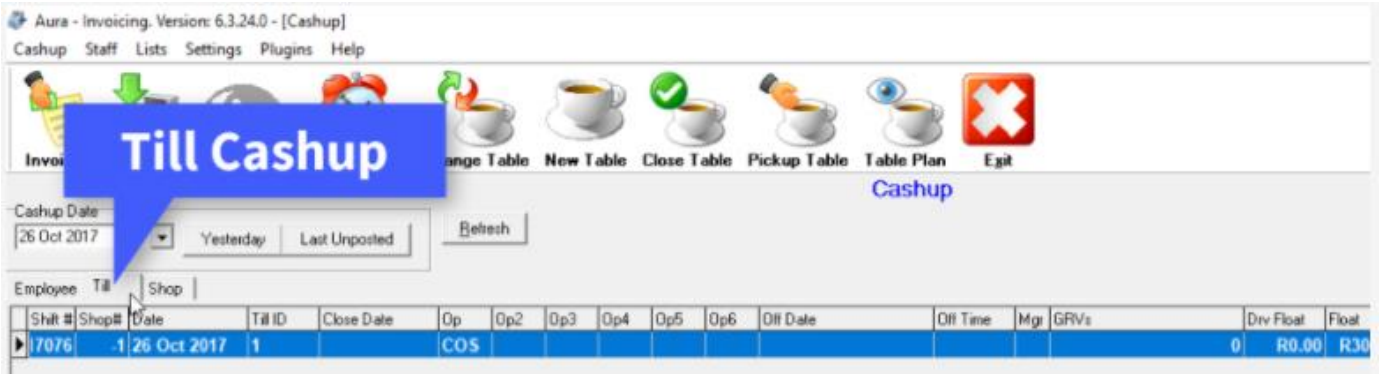
Personal Notes:

Cash up in Invoicing

At the end of the shift, the cash in the till must be reconciled with the sales that were made to make sure that you aren't short on money received. In Aura, this is called **Cash up.** A Cash up is typically done after each shift ends, and then the full shop cash up is done after all shifts are complete.

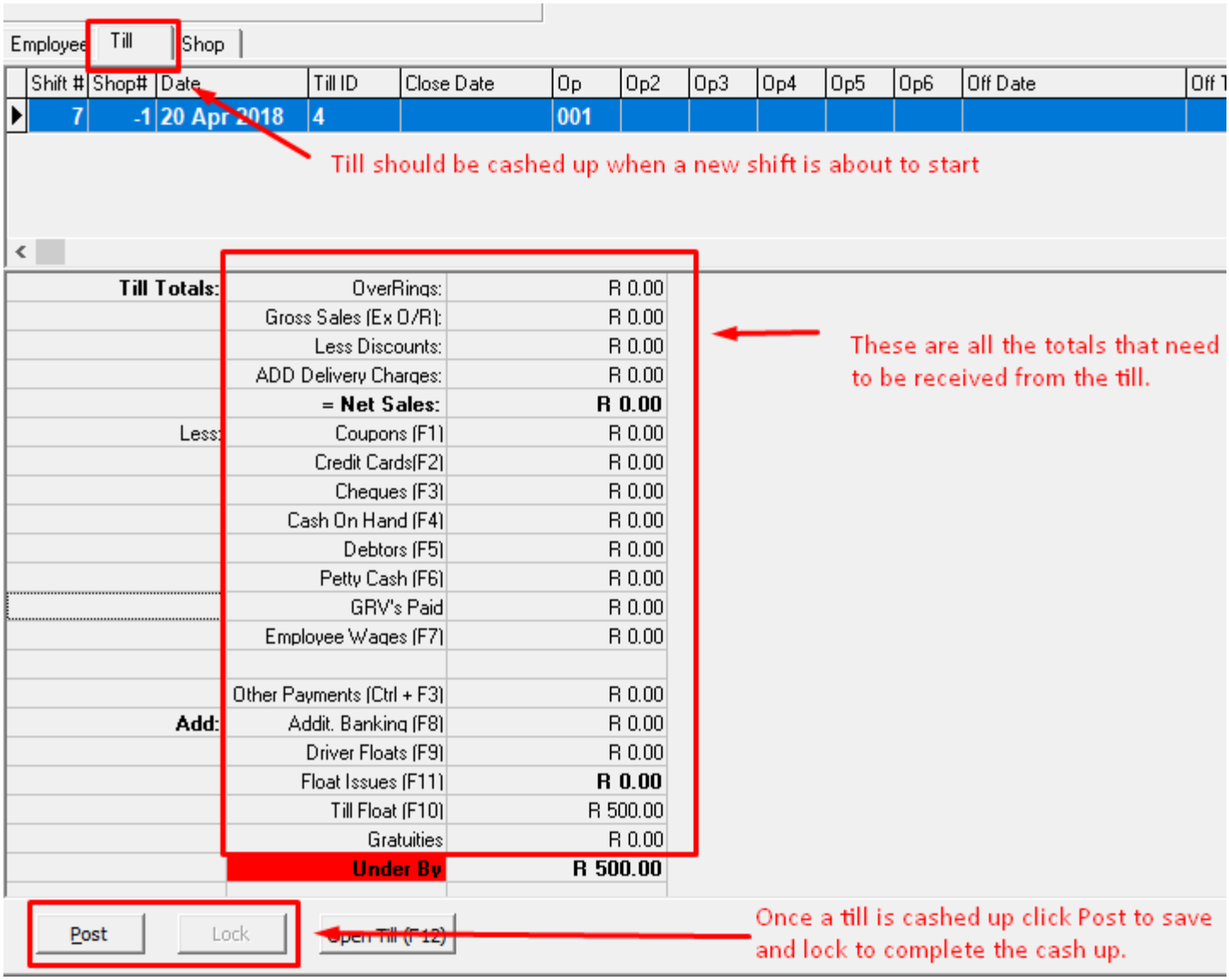


Once the cash up screen appears, the first screen you will see is the Employee screen here you will see a list of all employees, Select till Cash up.



NB: Capture ALL the cash in the till, always including the float! The float doesn't get counted towards cash sales, since it will be deducted under **Float (F10)**. If the float is not counted, the till will not balance.

Personal Notes:



Confirm all other fields are captured correctly. If an entry needs to be added, open the relevant window by pressing the corresponding "F" key. The float should be counted as **Cash on Hand** [F4] Once a till has been locked no changes can be made to that till.

ONLY at the end of the day should the Shop be cashed up by clicking on **Shop** and then **Post.**

Personal Notes: