SAP Customer Checkout 2.0 Feature Pack 01

SAP Customer Checkout – Business Processes in Retail

Customer

SAP

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Customer Checkout Training: Overview

The following session is designed to give you an overview of the features and business processes in SAP Customer Checkout. When you end this training you should know:

➢ Which features are supported by SAP Customer Checkout

➢ General Topics in SAP Customer Checkout

➢ Regular retail processes for a Cashier

➢ Retail Processes for a Manager

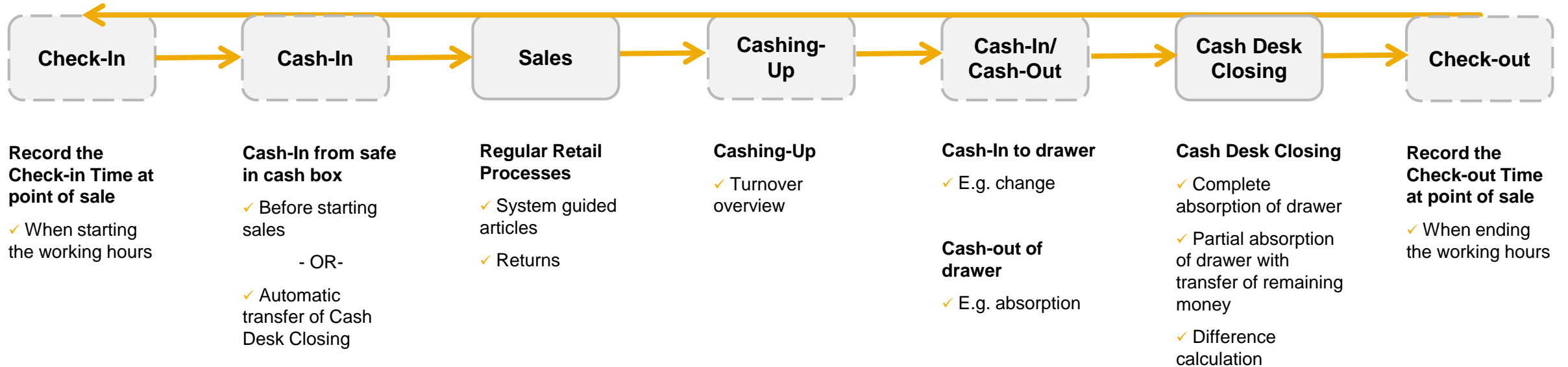➢ Special retail cases in SAP Customer Checkout (Vouchers, Returns, Payment for Invoices)

Which features are supported by SAP Customer Checkout

Features in SAP Customer Checkout

- Selling articles
- Various payment methods
- Applying discounts
- Creating vouchers
- Returns
- Stock Overview
- Creating Customers
- Parking Receipts
- Perform time recording transactions

Process Overview in Retail

Check-In → **Cash-In** → **Sales** → **Cashing-Up** → **Cash-In/Cash-Out** → **Cash Desk Closing** → **Check-out**

Record the Check-in Time at point of sale

✓ When starting the working hours

Cash-In from safe in cash box

✓ Before starting sales

    - OR-

✓ Automatic transfer of Cash Desk Closing

Regular Retail Processes

✓ System guided articles

✓ Returns

Cashing-Up

✓ Turnover overview

Cash-In to drawer

✓ E.g. change

Cash-out of drawer

✓ E.g. absorption

Cash Desk Closing

✓ Complete absorption of drawer

✓ Partial absorption of drawer with transfer of remaining money

✓ Difference calculation

Record the Check-out Time at point of sale

✓ When ending the working hours

General Topics in SAP Customer Checkout

Log In

While you start the application you log in and enter:

- ➤ User name
- ➤ Password

Overview User Interface

The SAP Customer Checkout user interface provides multiple screens, each of which is tailored to a specific set of tasks.
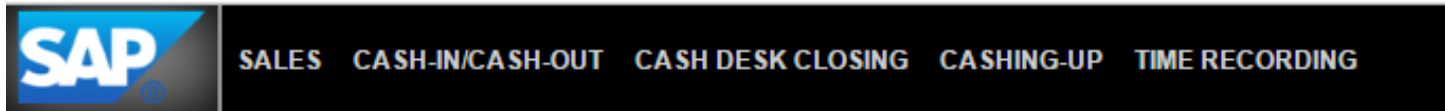
Screen	Description
SALES	The main screen of SAP Customer Checkout, on which the entire sales process is carried out. There are two user interfaces available for the *SALES* screen.
CASH-IN/CASH-OUT	Cash in or cash out money; pay-in/pay-out function also provided
CASH DESK CLOSING	Carry out cash desk closing; a separate screen is provided for each step in this process
CASHING-UP	Displays the current status of the cash desk and provides information for each type of financial transaction and revenue
TIME RECORDING	Enables to record the working time of your users (cashiers, salesperson) and performing check-in and check-out transactions. This option is only possible when using the central time recording of the SAP Customer Checkout Server.

User Roles

Users can access different screens depending on the role assigned to them. The following table describes the roles available.

User Role	Screens Available
CASHIER	*SALES, RETURNS*
SALESMANAGER	*SALES, RETURNS, CASH-IN/CASH-OUT, CASH DESK CLOSING, CASHING-UP*
ADMINISTRATOR	All screens (including configuration screen)

Search Function

SAP Customer Checkout provides a general search function that can be accessed from every screen apart from the login screen. To access the search function, choose the magnifying glass icon in the upper right corner of the screen.

The Search screen contains up to six tab pages on which you can search the SAP Customer Checkout database for information of a specific data type.
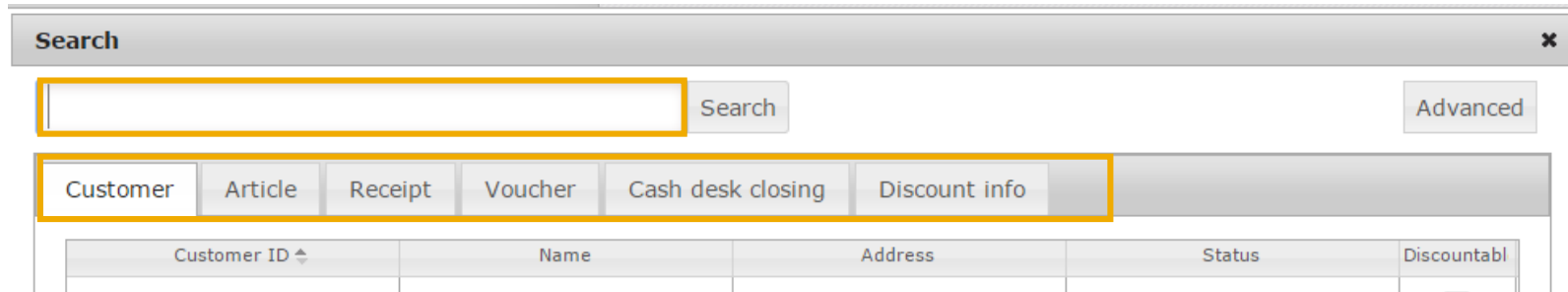
Two different types of search are provided:
➢ Basic search: Performs the search using the most common attributes of the respective data type.
➢ Advanced search: Enables you to enter a search term for each attribute.

Regular Retail Processes for a Cashier

SAP Customer Checkout for a Cashier

Depending on the role assigned to a user, the user can access different screens. A *Cashier* primarily uses the *SALES* Screen. The *SALES* Screen supports the following retail processes:

Point of Sale
- Sales Process at Point of Sale
- Customer wants to buy some articles

Articles
- Articles can be scanned
- Via barcode
- Via Quick-Selection Button
- Or entering Article ID

Customer
- Select a customer or create a new customer on Point of Sale
- Edit Customer Data

Discount
- Give a discount to special customers
- Discount on Sales Item Level
- Discount on Header Level

Payment
- Select from different Payment Methods
- Payment via Credit Card
- Cash Payment
- Payment on Credit
- Voucher Payment
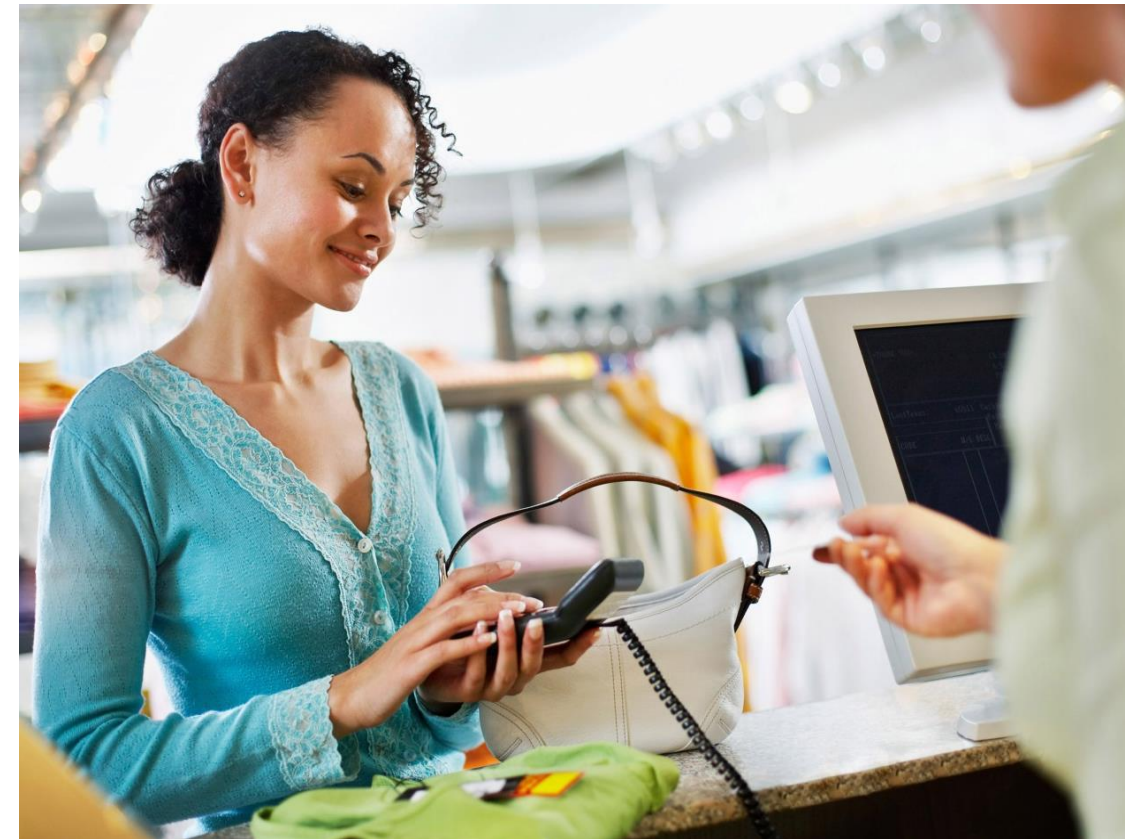
SALES Screen
Layout

The *SALES* screen provides all of the functions required for completing a sales process.

Articles that are added to a receipt are displayed in a table (called the sales item list) in the middle of the screen.

Information about the methods of payment selected for the sale is displayed at the bottom of the screen.

SALES Screen
Selecting an Article

There are different options to select an article in the *SALES* Screen:

- **Splitting of Articles**
  - ✓ Articles can be shown splitted or incremented

User can select the Article using the search or enter the Article ID or scan the product consisting of barcode

User can also select Article via the Quick Selection Button

SALES Screen
Selecting a Customer

In the SALES Screen you can select a customer:

User can select the customer using the search or enter the customer ID or scan the card consisting of customer ID barcode

SALES Screen
Editing Sales Items

User can edit Quantity, Unit Price, Discount etc

SALES Screen
Applying Discounts

You can apply discounts at sales item level, in which case they affect only one specific sales item...

… or at header level, in which case they affect the whole receipt.

✓ Discount in amount
✓ Discount in %

SALES Screen
Assigning a Salesperson to a Sales Item

User can select a Salesperson for a specific item

SALES Screen
Assigning a Salesperson to a Whole receipt

User can select a Salesperson at the Receipt level

SALES Screen
Reprinting a Sales Receipt

To be able to select the *'print last receipt'* button, you need to activate this option in the *Configuration*.

User can reprint the last sales receipt

SALES Screen
Payment Methods

SAP Customer Checkout supports four general payment methods:
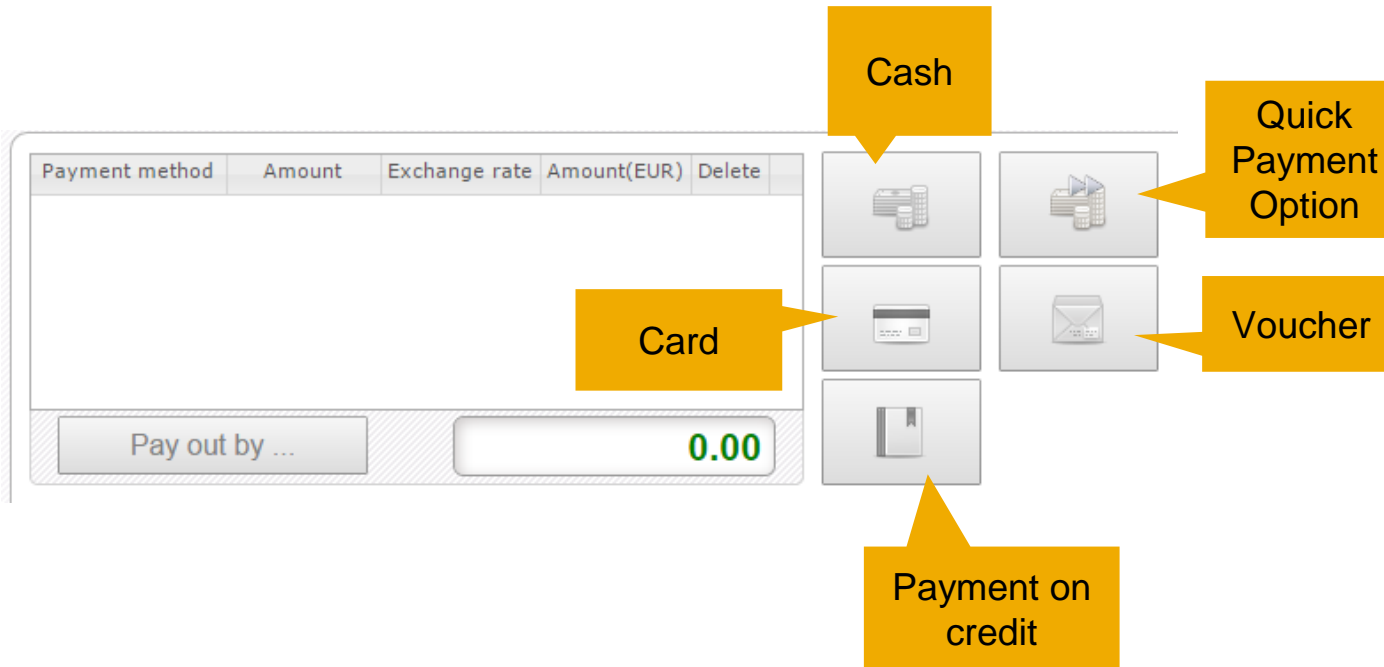
A mixture of various payment methods and a partial payment is also possible in SAP Customer Checkout.

Special retail cases in SAP Customer Checkout

SALES Screen
Returning articles

User can enter a negative quantity (-1, -2), using which the solution identifies that these articles are returned.

SALES Screen
Returning a receipt

To return a receipt, you need select the return icon

2 To select a receipt, enter the receipt ID or scan the receipt barcode

Scan a receipt barcode or use the search.

SALES Screen
Partially returning a Receipt

User can enter the quantity to be returned, select a stock location and a return reason code

The contents of the selected receipt is displayed here

SALES Screen
Returning whole Receipt

User can return the whole receipt

Return whole Receipt

SALES Screen
Creating Vouchers

To create a voucher, you need to enter the article ID of the voucher in the article field.

- ***Vouchers***
  - ✓ *Material ID for Vouchers needs to be pre-configured*
  - ✓ *Description editable*
  - ✓ *Price editable*

SALES Screen
Payment with Voucher

SALES Screen
Resuming and Parking Receipts

User can select the appropriate action to Park or Resume the receipt

SALES Screen
Creating Payments for Invoice and Down Payment Invoice Payments

For Invoice or Down Payment Invoice Payments, click on the position field to get the pop-up and change the item type
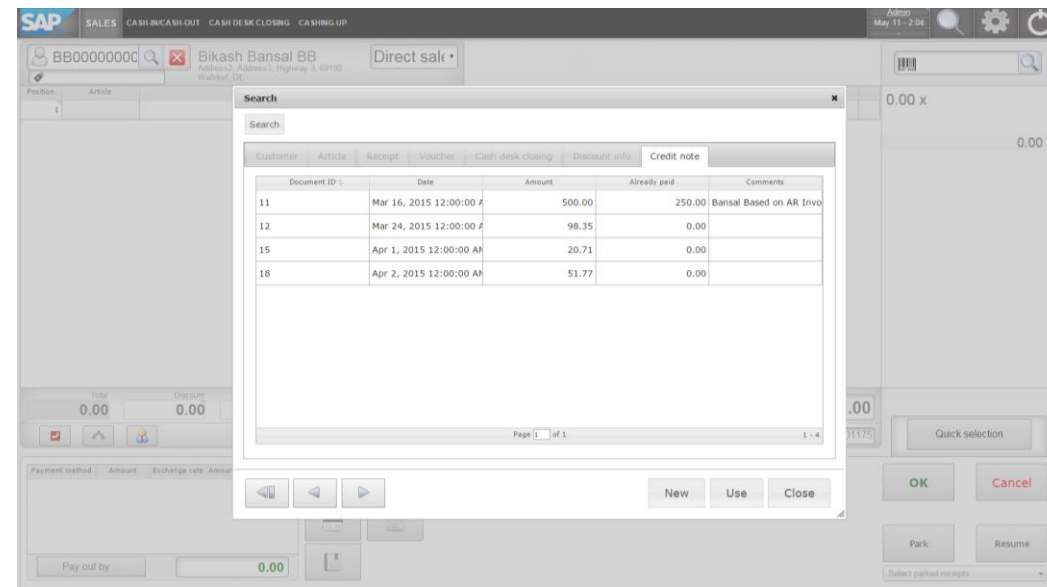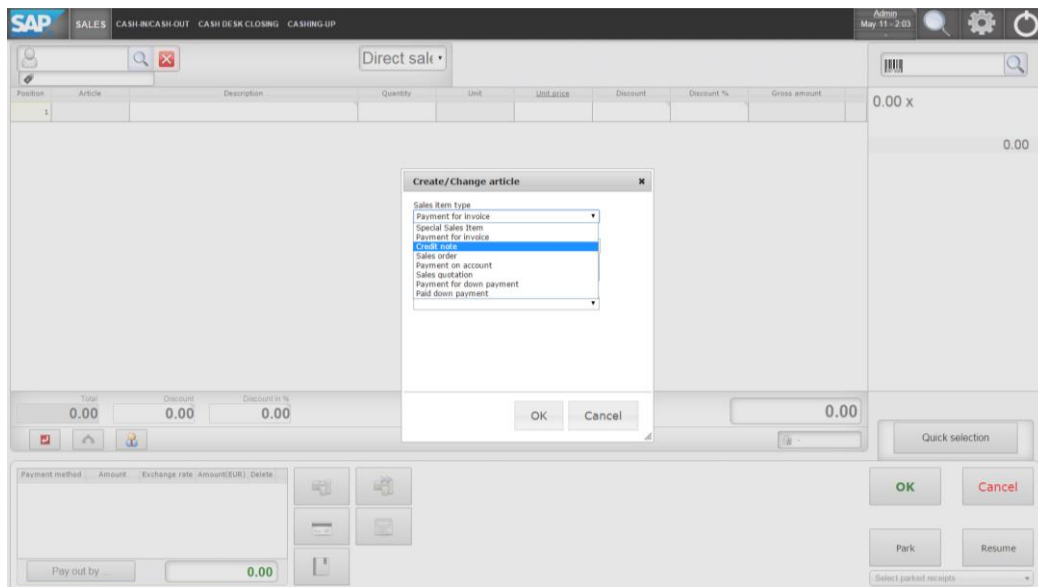
For SAP Business One only:

Sales Orders, Sales Quotation and Credit Notes created in SAP Business One , can be fetched in SAP Customer Checkout.

SALES Screen
Using Credit Note, Payment on Account and Paid Down Payment

SAP Customer Checkout supports fetching open credit notes, paid down payments and open incoming payments (with payments on account amount) from SAP Business One.
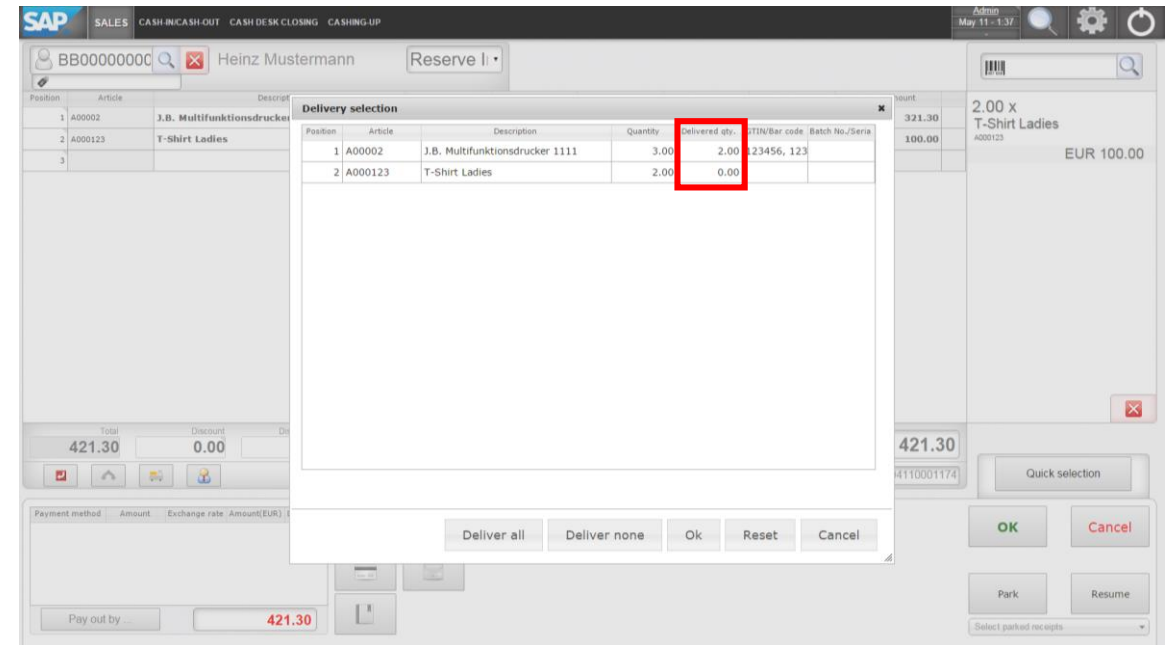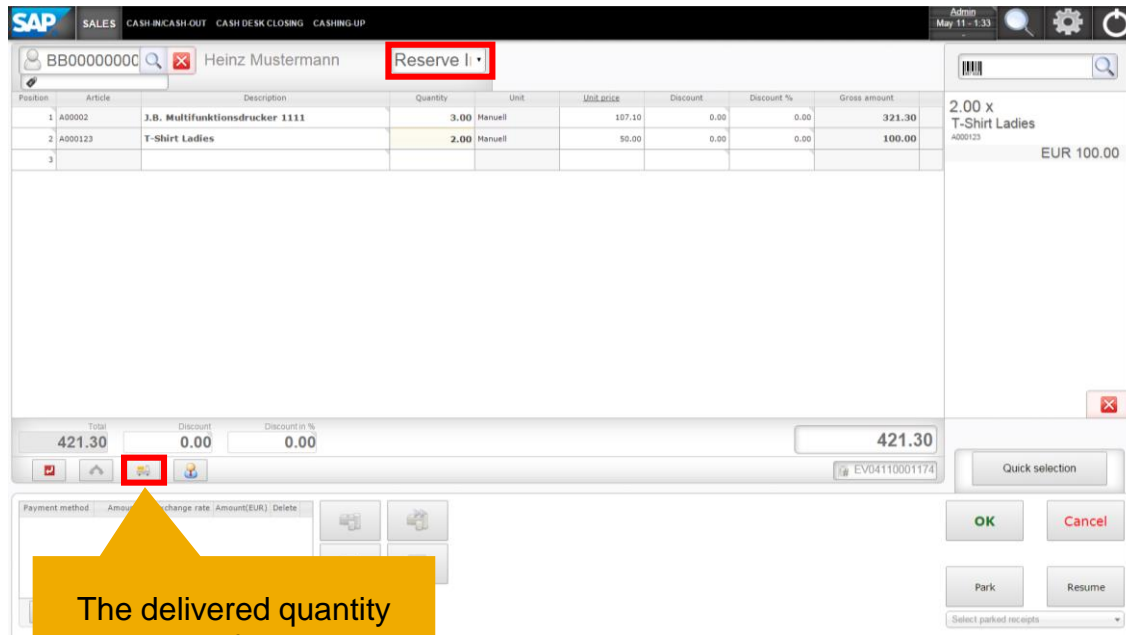

For SAP Business One only:

Credit Notes, Payment on Account and Paid Down Payments created in SAP Business One, can be fetched in SAP Customer Checkout.

SALES Screen
Creating a Reserve Invoice

On the **SALES** Screen, you can either choose a direct sale or a reserve invoice.

For reserve invoices, you can select the delivered quantity for delivery creation in SAP Business One.

The delivered quantity can be modified by using the delivery button.

For SAP Business One only:

Creating a Reserve Invoice in SAP Customer Checkout is only possible for SAP Business One.

SALES Screen
Creating a Manual Set

To create a manual set, click on the position field to get the pop-up and change the item type

Note:

Make sure that you have enabled manual sets in the Configuration settings

Configuration→ Cash Desk → Sales Screen.

SALES Screen
Adding Sub Sales Items to a Manual Set

After having selected the "manual set" in the position field, all sales items that are now selected will automatically be included into the manual set as sub sales items.


- *When changing the unit price or giving a discount to the manual set, the sub sales items are recalculated and/ or automatically adjusted.*
- *When no price is manually defined for the manual set, the unit price of the manual set results from the summation of the single sub sales items.*

SALES Screen
Barcode/ GTIN dialog

If an article with a duplicate barcode is entered on the *SALES* Screen, a pop-up opens and the user has the possibility to choose the right article.
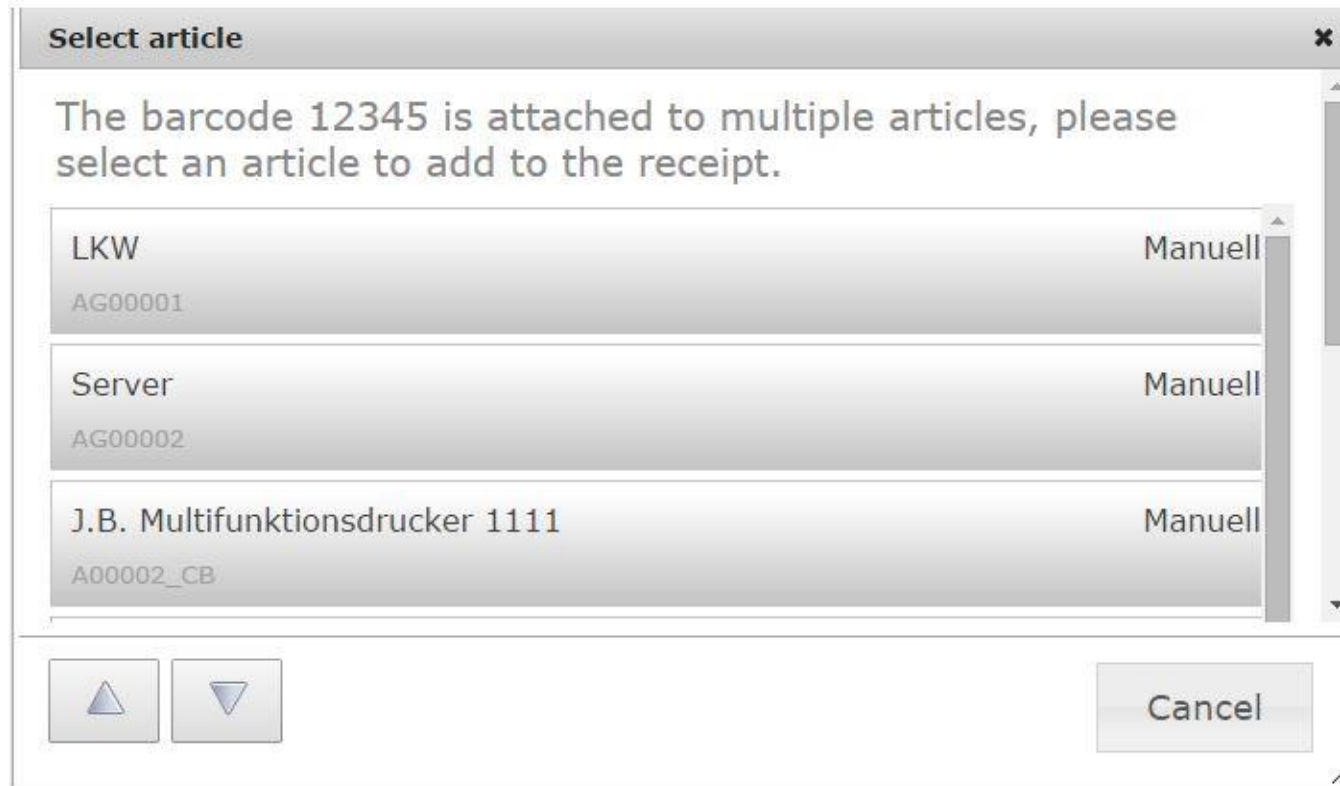
For SAP Business One only:

Using articles with a duplicate barcode in SAP Customer Checkout, is only possible for SAP Business One.

SALES Screen
Handling of Articles with Serial and Batch Numbers

When selecting articles with serial and batch numbers in SAP Customer Checkout, a pop up opens.

The articles are directly read from SAP Business One.

Before the receipt is been posted into the SAP Business One system, the serial and batch numbers can be edited/ changed.

Attention!

Sales Orders created in SAP Business One that include articles with Serial and Batch Numbers are not supported in SAP Customer Checkout.

SALES Screen
Special Cases in a Manual Set

When handling with manual sets, there are special cases to be considered:

- ***Business documents and vouchers***
  - ✓ Business documents (for example Sales Quotation, Invoice) and vouchers are not allowed to be part of a manual set

- ***Serial and batch number sales items***
  - ✓ To add a serial or batch number sales item into a manual set, the quantity of the manual set has to be one

- ***Tax rate codes***
  - ✓ Tax rate codes are not applied to manual set level, but to sub sales item level

- ***Returning a manual set***
  - ✓ Returning a manual set (with negative manual set quantity) is possible in SAP Customer Checkout
  - ✓ One or more sold manual sets in a posted receipt can only be returned, if the proportion of the manual set base quantity and base quantities of the sub sales items is still valid for all non-returned items of the selected receipt
  - ✓ If any sub sales item of the manual set is partially returned compared to the sold quantity, the manual set itself cannot be returned

Retail Processes for a Manager

SAP Customer Checkout for a Manager

Depending on the role assigned to a user, the user can access different screens. A *Manager* has access to further screens than the Cashier. These are:

✓ CASH-IN/ CASH-OUT

✓ CASH DESK CLOSING

✓ CASHING-UP

✓ TIME RECORDING
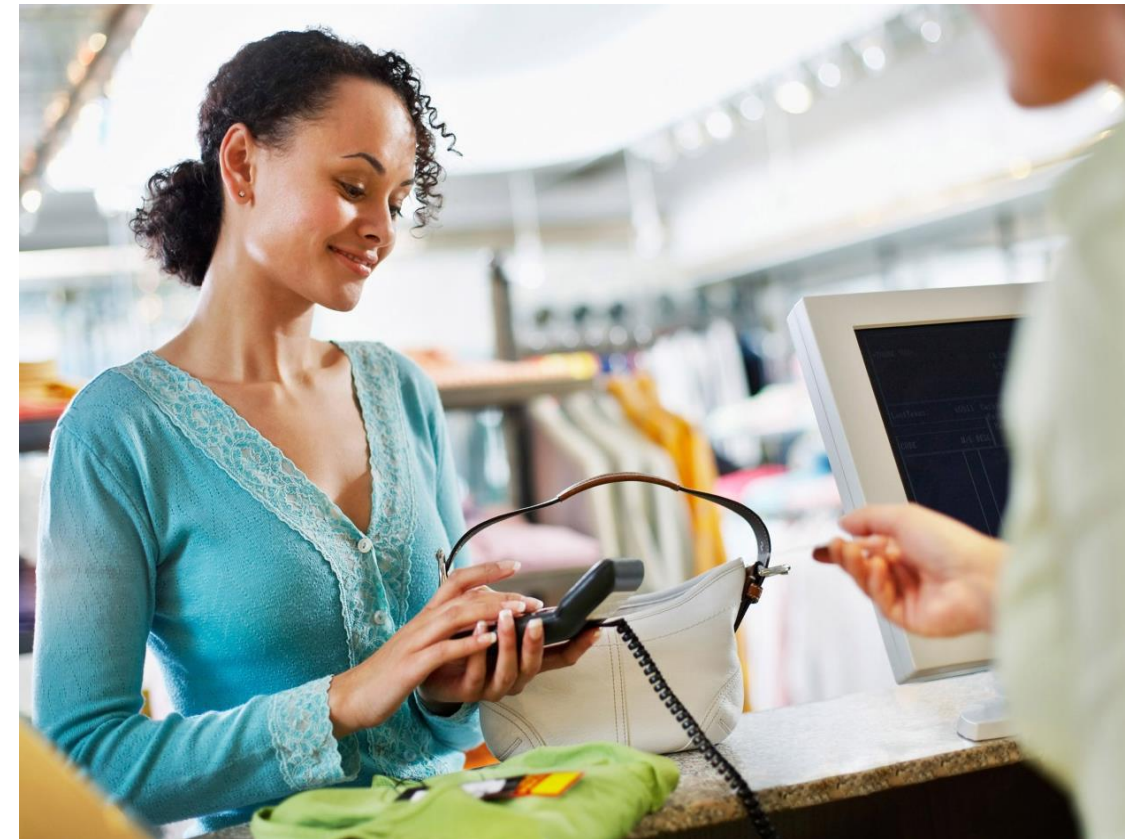
CASH-IN/ CASH-OUT Screen

On the *CASH-IN/ CASH-OUT* Screen, special transactions can be carried out.

User can select the type of transaction, enter the relevant values and a reason or comment for this transaction.

CASH-IN/ CASH-OUT Screen
Transactions Types

Transaction Types:

- ✓ *Cash-In* enables you to deposit a specific amount in the cash desk (for example, from bank or safe).

- ✓ *Cash-Out* enables you to withdraw a specific amount from the cash desk (for example, to store it elsewhere in bank or Safe).

- ✓ *Pay-Out* enables you to withdraw money that is needed for specific expenses (for example, for refueling business vehicles).

- ✓ *Pay-In* enables you to deposit other revenue (for example, change returned after fuelling business vehicles).

To carry out a pay-in/pay-out transaction, first select the respective type from the Type dropdown list and select the Financial Transaction Type.

CASH-IN/ CASH-OUT Screen
Tax Rates for PAY-IN/ PAY-OUT Transactions

On the CASH-IN/ CASH-OUT Screen, you can select a tax rate type for Pay-In and Pay-Out transactions.

CASHING-UP Screen

✓ **This screen displays the current status of each transaction type and the corresponding revenue**

- Cash Turnover
- Credit Card Turnover
- Turnover from Vouchers
- Turnover from Payments on credit

✓ **You can print the current cashing-up status by choosing Print.**

CASH DESK CLOSING Screen

The CASH DESK CLOSING screen comprises three sub-screens:

- ✓ **CASH IN / PAY IN – CASH OUT / PAY OUT overview**

- ✓ **Counting screen**

- ✓ **Difference screen**

CASH DESK CLOSING Screen
CASH-IN/ PAY-IN – CASH-OUT/ PAY-OUT Overview

In this screen all transactions from the current cash desk closing process are displayed.

CASH DESK CLOSING Screen
Counting Sub-Screen

In this screen you can enter values for the notes, coins, card payments, and vouchers counted.

CASH DESK CLOSING Screen
Difference Screen

This screen compares the actual values entered on the counting screen with the expected target values.

After confirming the actual values of the counting screen, user can enter an amount to remain at the cash desk.

TIME RECORDING Screen

(Outlook: works only with SAP Customer Checkout Server)

This screen enables users to record their working time in SAP Customer Checkout.
This option is only possible when using the central time recording of the SAP Customer Checkout Server.

User can enter its credentials to perform a time recording transaction.

- **There are two possibilities to perform time recording transactions**
  - ✓ *User either has the permission to record time*
  - ✓ *If the user has no permission to record time by his or her own, an authorized user has to login and confirm the transaction*

TIME RECORDING Screen
CHECK-IN (Outlook: works only with SAP Customer Checkout Server)

The following screens are shown, when the user is about to *Check-In* at point of sale:

User can select the organizational unit for which he/ she is working and confirm.

A confirmation of the *Check-In* is shown.

TIME RECORDING Screen
CHECK-OUT (Outlook: works only with SAP Customer Checkout Server)

The following screens are shown, when the user is about to *Check-Out* at point of sale:

User has to confirm the *Check-Out*.

A confirmation of the *Check-Out* is shown.

Thank you

Contact information:

Customer.checkout@sap.com