



NATIONAL
RETAIL
SOLUTIONS



Customer Tab ****Premium Feature****

Merchants can now extend credit to customers and manage account balances and customer information through the POS. Customer Tab is considered a form of payment and will reflect in all terminal statistics.

Customer Tab | LIST | **DETAIL** | REPORTS | SETTINGS | Back to Home

CUSTOMER DETAIL → **Joseph Smith** | Pending basket: #1706167374086, Total: \$2.00

Cell: Land (973) 438-1234 | First name: Joseph | Maximum customer can owe: \$ 100.00

BR Club # | Last name: Smith | Customer currently owes: **\$32.00**

Email: jsmith12@gmail.com | Nickname or Company name

Address | Address ...

City | State | Zip code

PUT BASKET ON TAB

CLEAR CUSTOMER

EDIT CUSTOMER

Date	Transaction #	Detail	Amount
May 20, 2020	1704070222082	(2 items)	-\$32.00

Customer owes: **\$32.00**

Receipt #1704070222082

Greeting CARDS	2.00
Greeting CARDS	50.00
>> Check	-20.00
SubTotal (2 items)	\$52.00
Tax	
Fees	
Total	\$32.00

© 2020 National Retail Solutions. | Customer Tab

Putting a Basket on Tab

If there are items in the basket on the register when the Customer Tab is opened, the basket and its total will appear at the top. Search for the customer via any of the available fields and click the **“Search”** button. If the customer provided his BR Number at the register they will be loaded directly into the Details page.

NATIONAL RETAIL SOLUTIONS Customer Tab LIST DETAIL REPORTS SETTINGS Back to Home

CUSTOMER'S LIST → 1 POS Cert Pending basket: #1637196239156, Total: \$2.00

Phone # First name Nickname or Company ... CLEAR FORM

Email Last name Smith SEARCH

Select the customer from the search results at the bottom.

Last name	First name	Email	Cell phone	Land phone	City	Owes
Smith	Joseph	jsmith12@gmail.com		(973) 438-1234		\$32.00

The Detail tab will open populated with the customer details. Click the **PUT BASKET ON TAB** button.

CUSTOMER DETAIL → Joseph Smith Pending basket: #1706167374086, Total: \$2.00

Cell Land (973) 438-1234 First name Joseph Maximum customer can owe \$ 100.00

BR Club # Last name Smith Customer currently owes \$32.00

Email jsmith12@gmail.com Nickname or Company name PUT BASKET ON TAB

Address Address ... CLEAR CUSTOMER

City State Zip code EDIT CUSTOMER

The Customer Tab module will close and return to the register to close out the basket with a payment type of "Customer Tab". The receipt will reflect the customer tab balance.

BOSS Revolution -- For a limited time, unlimited calls to Mexico for \$5/month!

Item	Price
Pringles BBQ Flavored Potato Crisps	2.39
Pringles BBQ Flavored Potato Crisps	2.39
Promotion Buy 2 for \$4.39	-0.39
little bites	3.49
Subtotal	7.88
Tax	0.26
Fees	0.00
Total	8.14
Customer Tab	-8.14
Paid in Full	0.00

SubTotal (3 items) \$8.27
Discount \$-0.39
Tax \$0.26
Coupons \$-0.39
BR Club Paid \$-8.14
Change \$-8.14

No Change Due

Administrator
Store Boss Bal: \$132.57
Wed May 20 05:37 PM

Hygiene Feminine

7.88
0.26
8.14
8.14
0.00

Tab

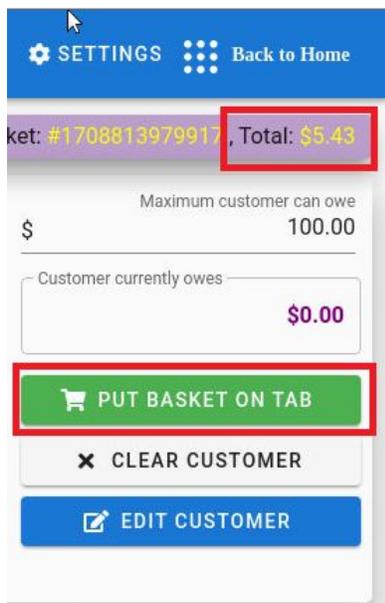
nith Balance: -42.14

Coupons
BR Club
Paid
Change \$-8.14

Administrator
Store Boss Bal: \$132.57
Wed May 20 05:37 PM

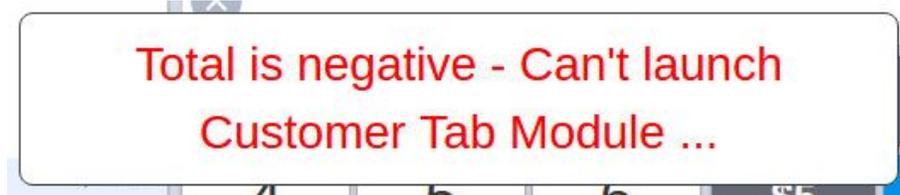
No Sale
Calculator

If a partial payment is made on the basket prior to opening the customer tab, only the remaining balance will be placed on the tab.



Should the customer change their mind, the customer tab can be closed (by tapping **Back to Home**), and the remainder can be paid with another payment type or the basket cancelled altogether.

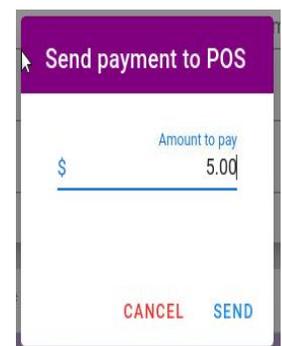
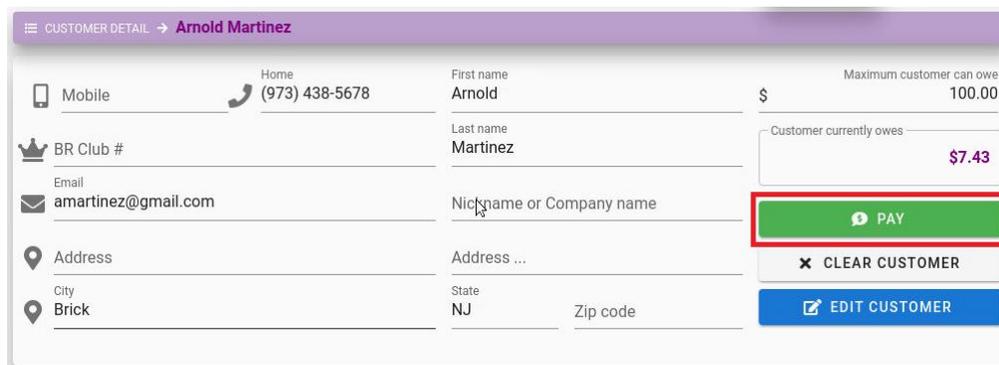
A refund amounting to a negative amount cannot be put on tab.



Click on "**Back to Home**" at any time, to return to the register.

Pay Down Tab

With no open baskets at the register, open the customer tab module and locate the customer by searching on the List or Details page. The customer will be loaded with an option to "Pay"



Select a payment amount and "**SEND**" to the register. Payments can be any dollar amount. The system will not allow overpayment. The balance can only be paid down to 0. A positive balance cannot be carried.

CUSTOMER DETAIL → Edit Pending basket: #2011370098952, Total: \$0.43

Mobile	Home (973) 438-5678	First name Arnold	Maximum customer can owe (\$) 100.00
BR Club #		Last name Martinez	Customer currently owes \$0.43
Email amartinez@gmail.com		Nickname or Company name	CLEAR FORM
Address		Address ...	CANCEL SAVE

They can edit the maximum amount and then put the basket on tab. The other option is to pay down their tab and then put the current basket on tab.

Reporting On the POS

Payments placed on the customer tab will reflect in the Payments reports for both the terminal and shift reports, as a payment type.

Payments				
Method	Baskets #	Baskets %	Payments	Payments %
Cash	1	100%	\$10.00	65%
Check	0	0%	\$0.00	0%
Credit/Debit	0	0%	\$0.00	0%
ePaid	0	0%	\$0.00	0%
EBT SNAP	0	0%	\$0.00	0%
EBT CASH	0	0%	\$0.00	0%
BR Club Promo	0	0%	\$0.00	0%
Customer Tab	1	100%	\$5.43	35%
Total	1	100%	\$15.43	100%

The Customer Tab - Pay Off section, on terminal and shift reports, provides pay off totals for the report period along with the payment type used. **Customer tab pay offs do not impact basket or sales statistics since that data was collected at the time the items were purchased.**

Customer Tab - Pay Off

Payment method	#	Amount
Cash	1	\$5.00
Total Pay Off:	1	\$5.00

On the Customer Tab Module

The Reports tab is a dashboard that provides the number of customers with tabs and the highest and longest running balances.

NATIONAL RETAIL SOLUTIONS Customer Tab LIST DETAIL **REPORTS** SETTINGS Back to Home

CUSTOMER'S REPORT → 1 POS Cert

 3
Customers

 \$33.91
Total customers owes

 3 Day(s)
Oldest aging balance

Top customers with highest amount owed			
Last name	First name	Owes	Aging
Smith	Joseph	\$16.73	3 Day(s)
Paglione	Louis	\$12.18	0 Day(s)
Martinez	Arnold	\$5.00	0 Day(s)

Top customers with highest aging			
Last name	First name	Owes	Aging
Smith	Joseph	\$16.73	3 Day(s)



© 2020 National Retail Solutions. Customer Tab

The list on the left is sorted in descending order. The list on the right is an “aging” report, showing the longest time since a payment was made. Clicking on any customer will load the customer into the Detail page where all transactions can be reviewed. The print icon in the bottom right will print out the report.



All customer tab accounts are included in the screen and printed report.

The system does not enforce any time constraints on payment but the merchant can get an idea when was the last time a customer made a payment towards their tab.

BR Club

If a new customer provides their BR Club number at the register, the Add Customer form will populate with the BR account number. Populate the customer information and save to create a local customer tab account.

To associate a BR Number with an existing enter the BR Number at the register and open the Customer Tab. Click the List tab and search / select the customer. The Details page will open with the customer details and BR Number populated. Save the customer to update the customer along with their BR Number.

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A customer having BR club 1000000005 exists - YOU MUST SAVE IT ON YOUR STORE! CLOSE

Back to Home

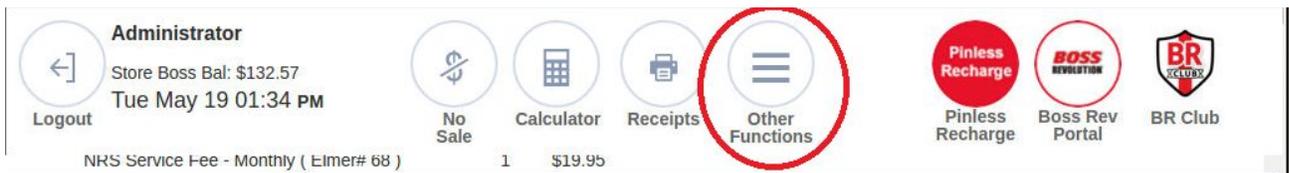
CUSTOMER DETAIL → Edit BR Club : 1000000005

Mobile (123) 456-7890	Home (123) 456-7890	First name Albert	Maximum customer can owe (\$) 100.00
BR Club # 1000000005	Last name Albert	Customer currently owes \$0.00	
Email ali@toto.fr	Nickname or Company name	CANCEL	SAVE
Address	Address ...		
City Jerusalem	State	Zip code	

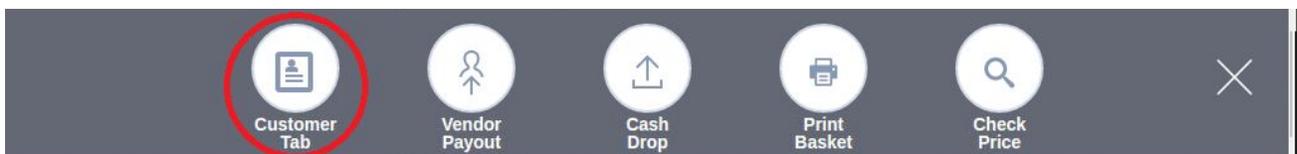
If the customer already has a tab the customer will be identified and loaded into the Detail page.

Setup

To set up the credit max limits and customer list, administrator can click the “Other Functions” button from the button panel at the bottom of the register:



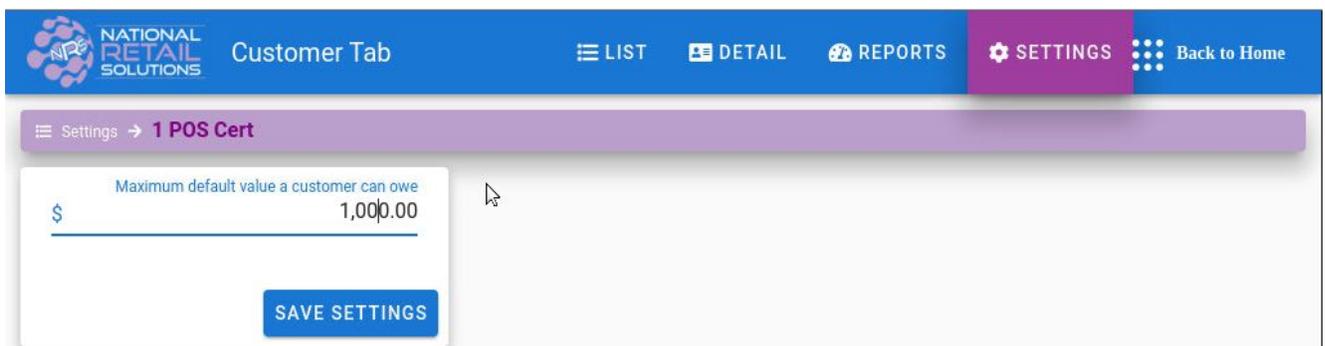
Click the “Customer Tab” from the popup button ribbon.



The “Customer Tab” module will open.



Go to the Settings tab and enter a default credit maximum for all customers, and click “[Save Settings](#)”. This is the default maximum for all users. The maximum can only be lowered for individuals by the administrator and is done in the user details section. It can not be raised for any customer beyond this maximum.



Click the “Add Customer” button on the **Detail** page to open the “Add Customer” form.

Customer Tab LIST **DETAIL** REPORTS SETTINGS Back to Home

CUSTOMER DETAIL → Search a customer

Phone # First name Maximum customer can owe (\$) 0.00

BR Club # Last name Customer currently owes \$0.00

Email Nickname or Company name SEARCH

Address Address ... **ADD CUSTOMER**

City State Zip code



The “Add Customer” form can also be opened by clicking the “Add Customer” button at the bottom of the List page.

At a minimum, a phone number, first and last name are required. The form can be cleared or cancelled. Populate the form and click Save. *BR Number will only appear if it was scanned or entered at the register. It cannot be entered on the form.*

CUSTOMER DETAIL → Adding a new customer

Cell Land (973) 438-1234 First name Joseph Maximum customer can owe (\$) 100.00

BR Club # Last name Smith Customer currently owes \$0.00

Email jsmith12@gmail.com Nickname or Company name CLEAR FORM

Address Address ... CANCEL SAVE

City State Zip code

The customer will be saved.

CUSTOMER DETAIL → Joseph Smith

Cell _____ Land (973) 438-1234 First name Joseph Last name Smith Maximum customer can owe \$ 100.00

BR Club # _____ Email jsmith12@gmail.com Nickname or Company name _____ Customer currently owes \$0.00

Address _____ Address ... _____ CLEAR CUSTOMER

City _____ State _____ Zip code _____ EDIT CUSTOMER

Click “[Edit Customer](#)” to modify the customer. The “Clear Customer” button will transition to search mode for search of other customers by phone or BR number. When a customer is found in Details their transaction history will appear at the bottom of the page. Continue adding customers as needed.

Permissions

The following permissions can be applied to any user:

- **None** - the user will not be able to access customer tab and receives this message:



Click the “Customer Tab” section (in User Profile) twice to remove all permissions.

CUSTOMER TAB	<input type="checkbox"/> Add To Tab	<input type="checkbox"/> Manage Customers	<input type="checkbox"/> Pay Off Tab
	<input type="checkbox"/> Reports		

- **View** - the user can open the customer tab and view/search users, balances and details but they can not put purchases on tab. To set, click the “Customer Tab” section to add all permissions, then remove the individual permissions leaving the “Customer Tab” section green.

CUSTOMER TAB	<input type="checkbox"/> Add To Tab	<input type="checkbox"/> Manage Customers	<input type="checkbox"/> Pay Off Tab
	<input type="checkbox"/> Reports		

- Place On Tab - the user can place a purchase on tab.
- Manage Customers - the user can create, edit and delete customers
- Pay Off Tab - the user can pay off the customer tab
- Reports - the user can view reports and modify customer tab settings

For newly created users, the cashier default is **View**. Manager default is **All Permissions**. Admin has **All Permissions**.

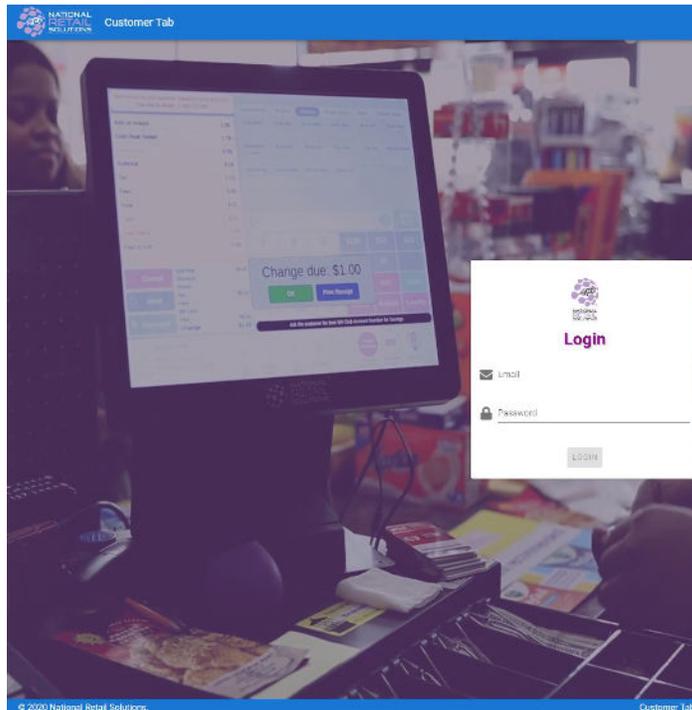
Existing Manager or Cashier users will not have any default permissions. They will need to be granted permission by the Administrator in order to access the customer tab.

Delete Customer

Customers with a 0 balance can be deleted on the Details page. This operation is permanent and all history will be lost.

Online Access

The customer tab module is available online at the following url: <https://customertab.nrsplus.com/#/login> from any desktop or mobile device (The same merchant portal login user and password can be used here).



Manage Features

Overview

There is no need to call customer service to add or remove NRS Premium Features. Self service is now possible directly on the POS.

Specifics

Click on the **Details** button on the main menu to open the Charges window.



“Manage My Features” will open a page to NRS Premium Features that you can self-manage. **This is only available to the POS Administrator, not to any other user.**

Charge	Price	Expires
Altria Tobacco Billing	\$19.95	07/01/20
All Tobacco Reporting	\$29.95	07/01/20
NRS Cash Discount (Billed Separately)	\$0.00	07/01/20
NRS - Customer Tab	\$50.00	07/01/20
Gas Pump Integration	\$500.00	07/01/20
Item Modifiers	\$19.95	07/01/20
NRS - Loyalty Clubs	\$9.95	07/01/20

“Recheck Status” will refresh and activate the license for any newly acquired features.

Manage recurring charges
POS NRS Demo Store Thirtyeight - Passaic

Select service fee option

Elmer #	Service fee option	License expiry	Payment method	Billing status	Next billing date
56	NRS Service Fee - Monthly - \$19.95	Jul 1, 2020	CC *****1111 12/2020	Active	Jun 1, 2020
58	NRS Service Fee - Monthly - \$19.95	Jul 1, 2020	CC *****1111 12/2020	Active	Jun 1, 2020

Select additional features

Feature	License expiry	Charges	Payment method	Billing status	On / Off
NRS Pay (Included)		\$0.00			Off
NRS Cash Discount (Billed Separately)	Jul 1, 2020	\$0.00			On
Unlinked Pay (Billed Separately)		\$0.00			Off

There is a line item for each feature. Turn the slider “On” to activate, and select the payment option from the dropdown. Any credit card or ACH that we have on file will be available for selection.

NRS License ID Scan	\$9.95	<input type="text"/>	Active	<input checked="" type="checkbox"/> On
RJR Tobacco Reporting	\$19.95	<input type="text"/>	billing status	<input type="checkbox"/> Off

Request to Turn On

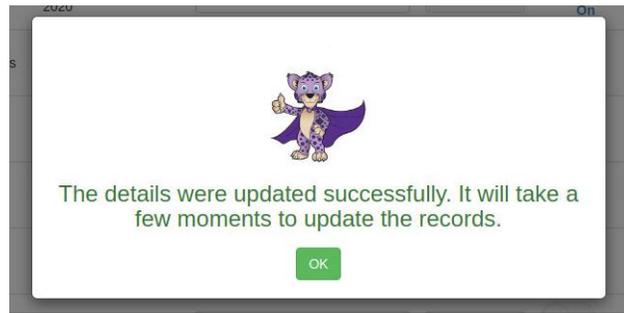
To remove a feature slide the toggle to “Off”. A summary of all changes with the updated monthly total is displayed at the bottom of the page. Click the Submit button to save any changes.

Total charges

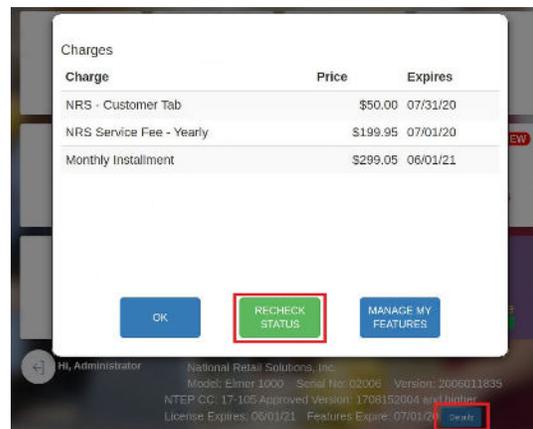
Yearly	Quantity	Charges	Monthly	Quantity	Charges
NRS Service Fee - Yearly (Elmer# 2006)	1	\$199.95	NRS License ID Scan	1	\$9.95
			NRS - Customer Tab	1	\$50.00
Yearly total		\$199.95	Monthly total		\$59.95

Do you want to add a new payment method? The system will send a link to your email

The following confirmation will be received:



- Click Ok
- Click  [Back to Home](#)
- Click Details to open the list of Charges
- Click Recheck Status to refresh the license on the POS

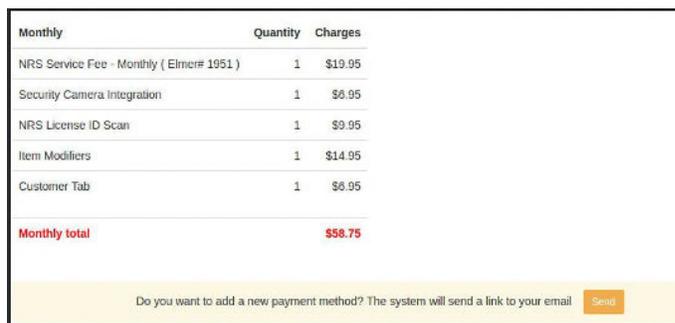


- The list will refresh



- Enjoy the new feature!

To generate an email for the purpose of adding a **NEW** payment method, use the Send button at the bottom of the form.



Certain features must be authorized prior to enabling or disabling. For those features a convenient “Request to Turn On/Off” button will generate an email to have a support team member contact the merchant regarding this feature. *In the meantime, it will not be possible to change the status of the feature.*



The page can be closed at any time by clicking “Back to Home” at the top right.

Postpone Update

Overview

Now merchants can defer the latest software update normally triggered by a login. They can stop the update and postpone until a more convenient time. The next update attempt will activate at the next login session.

Specifics

Software updates to the terminal are scheduled to begin with the first morning login. Merchants who find the update disruptive to their morning business can postpone the update until a more convenient time. The update can be postponed 3 times. On the fourth login, the update will automatically happen.

Updating. Please wait....

If you wish to postpone the update, press 'Postpone' now.

(You may postpone the update up to 3 more times.) Will update in 7 seconds

Postpone

Update Now

Do not turn off the machine!

Working...