NRS Panther POS Release Notes

Version 0.9.37 • 9/2024

- **Cloud Shared Baskets**
- **Saving, Loading and Deleting Baskets**
- **Customer Tab and Account Management**

Shared Baskets

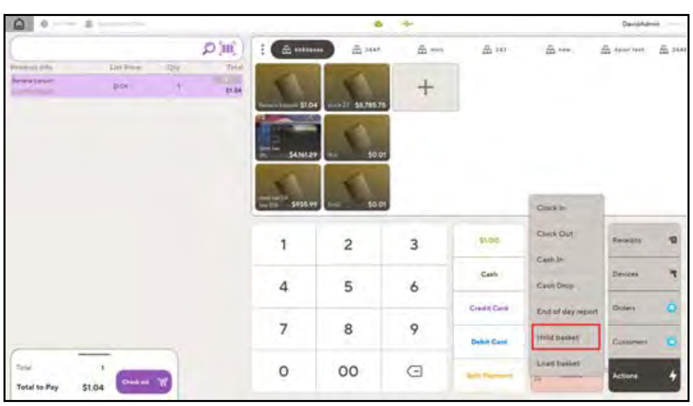
Overview

Panther POS now includes a Shared Baskets feature, which allows you to save, share, and manage shopping baskets, across multiple terminals.

Saving a Basket

1. **Add Items to Basket**: Begin by adding items to the basket as you would for any transaction.

2. **Initiate Save Basket**:
    a. Tap on the **Actions** button in the bottom right corner of the register.
    b. Select **Hold Basket** from the dropdown menu.

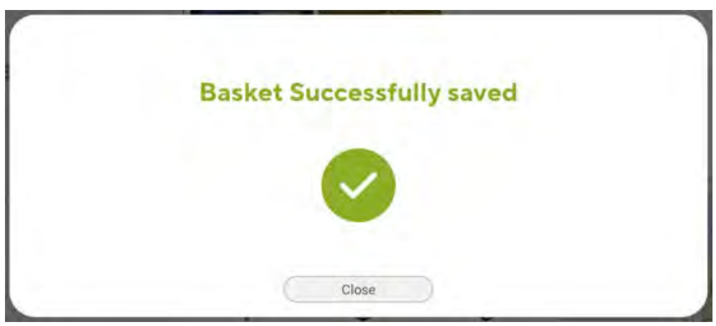


Enter Basket Details: A popup window will appear prompting you to enter:
    c. A name for the basket.

d. The customer's phone number, to associate the basket with a specific customer. This can be used for retrieving the basket later.

Check in customer - If you select this option you will check the customers loyalty number to be associated with the basket.

3. **Confirm Save**:
    a. After entering the details, tap the **Save Basket** button.
    b. A confirmation message will be displayed, indicating that the basket has b**een successfully saved to the cloud. PLEASE NOTE: In order for this feature to work (sharing) you must call CS to make sure your devices are grouped. This allows the basket to be accessed from any terminal in the store.**



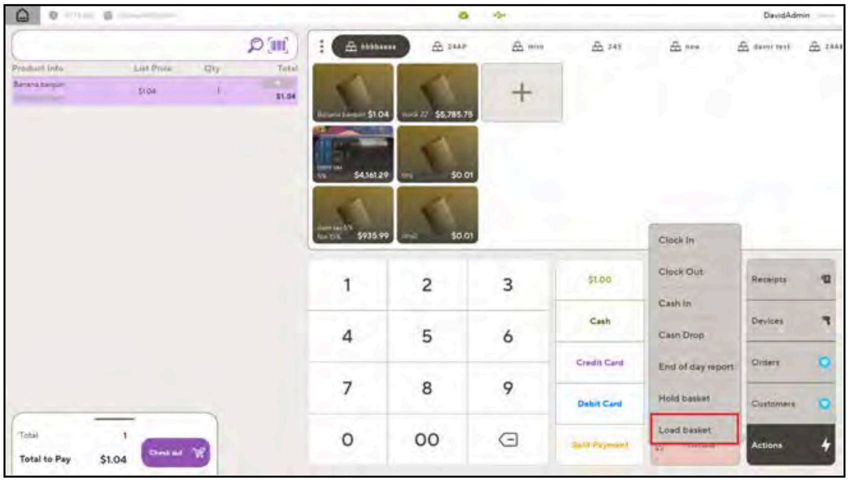
NOTE: The following 2 baskets will NOT be shared from POS classic to Panther.

- A basket with a partial payment
- A basket with a refund and a product to purchase.

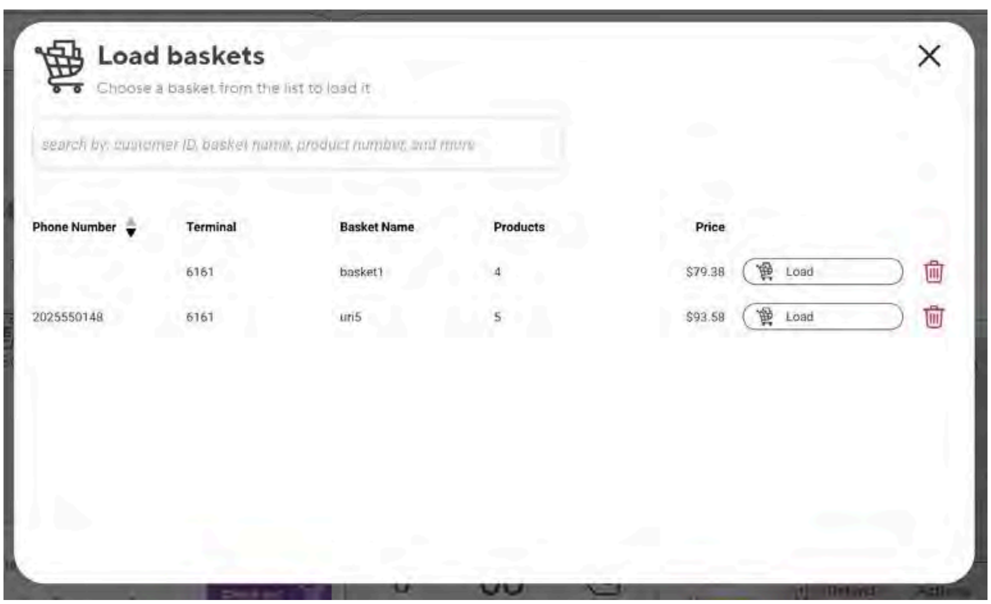
Loading a Saved Basket

1. To restore the saved basket
    a. Tap the **Actions** button.
    b. Select **Load Basket**.

NOTE: Your cart must be empty before selecting "action" and "load basket" The panther will not allow a saved basket to be opened if there are items in the cart.



2. **Search for a Basket**:
    a. A new window appears displaying a list of all saved and held baskets.
    b. You can search for a basket by basket name, phone number, or number of products included in the basket.
    c. Baskets can also be sorted or filtered to make it easier to find the one you need. The columns can be sorted by tapping on the header. This will sort the display in ABC order.



3. **Preview Basket Details**:
    a. Tap on the required basket from the list.
    b. A preview of the basket will be shown, showing all items in the basket, prices, quantity, promotions and modifiers.

4. **Load Basket**:
    a. Once you have verified the basket details, tap the **Load Basket** button to restore the basket to the register.
    b. The basket will be loaded with all its original items, quantities, promos and modifiers, ready to continue the transaction or make modifications.

What happens if data changes between the basket being saved and the basket being loaded back into the register?

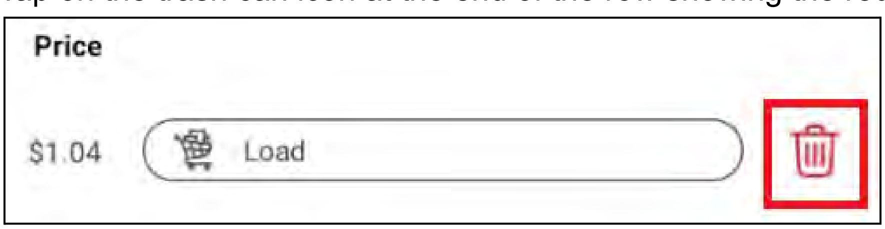
When a basket is loaded back into the register, Panther POS will load the basket back into the register with **exactly the same information** as when it was saved.

For example, even if a promotion changed (was added or removed) between the time the basket was saved and loaded back into the register, the basket will still be loaded back into the register with the same data that existed at the time it was saved.

The basket will be restored as it was saved. No changes that were made between the save and the restore will be reflected.

Deleting a Basket

1. **Select Basket for Deletion**:
    a. Follow the steps to load a basket until you see the list of baskets.
    b. Find the basket you wish to delete.
2. **Delete Basket**:
    a. Tap on the trash can icon at the end of the row showing the required basket.



    b. Confirm the deletion when prompted to ensure you are not removing a basket unintentionally.
    c. The basket will be removed from the cloud storage.

Customer Tab

Note: To navigate from the Customer Tab module back to Panther POS, use the back button on your Android tablet.

Setup

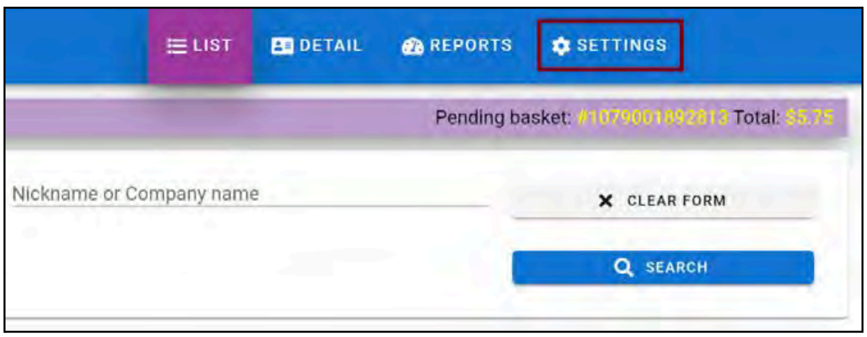
Before using the Customer Tab module, the merchant should:

1. Set the maximum customer credit limit.
2. Set permissions for the staff who are expected to use the Customer Tab module.
3. Add customers to the Customer Tab module.

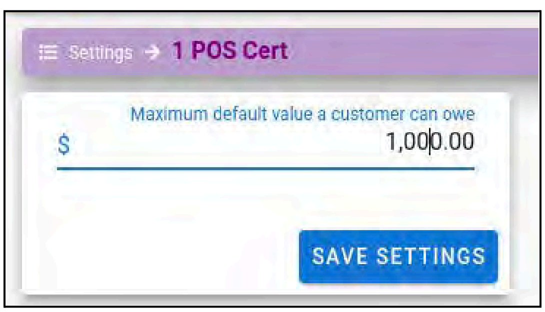
Setting the Maximum Customer Credit Limit

To set the maximum customer credit limit:

1. In the register; tap on **Customers → Customer Tab** to open the Customer Tab module.
2. Navigate to the settings screen.



3. Enter the maximum allowed customer credit limit.

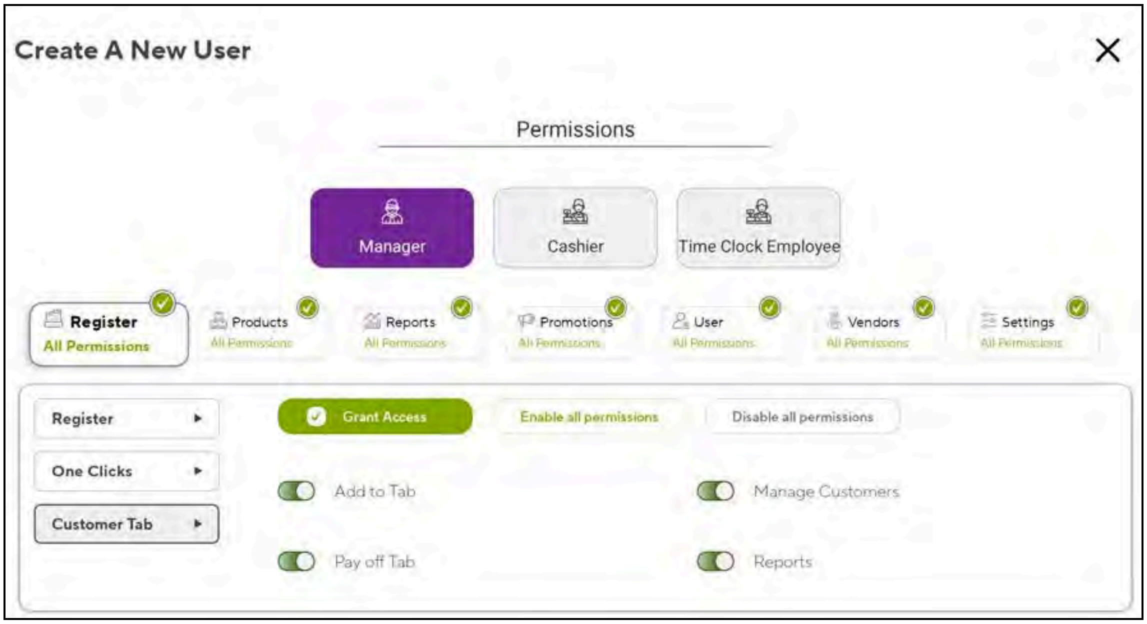


Once the maximum limit is set, it is not possible to surpass this limit for any customer. The credit limit for specific customers can be lowered only, in the customer details screen.

Setting User Permissions

Default Permissions

- **Cashier**: The default permission for newly created cashier users is View.
- **Manager**: The default for newly created manager users is all permissions.
- **Time Clock Employees:** For employees who do not have POS register access.

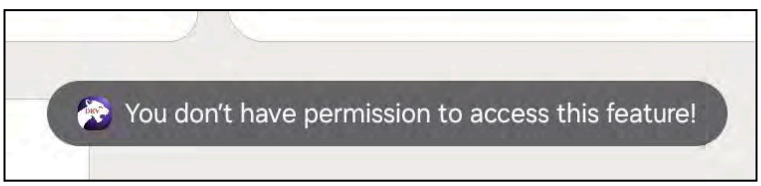


Note: Existing Manager or Cashier users will not be granted any default permissions. They will need to be granted permission by the Administrator in order to access the Customer Tab module.

Setting Permissions Manually

The following permissions can be applied to users for the Customer Tab module.

If you try to access the Customer Tab module when customer tab access is not available you will receive the following message.



To remove all permissions for accessing the Customer Tab module, double click the "Customer Tab" section.

- **Add To Tab**: The user can place a purchase on tab.
- **Manage Customers**: The user can create, edit and delete customers in the Customer Tab module.

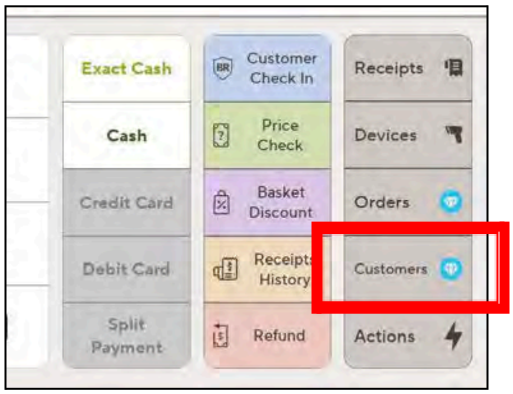
- **Pay Off Tab**: The user can pay off the customer tab.
- **Reports**: The user can view reports and modify customer tab settings.

Adding Customers

> **Note**: Customers in the Customer Tab module are not associated with BOSS Club rewards participants.. So when you start using the Customer Tab module you will have to manually add all customers who require credit in the Customer Tab module.

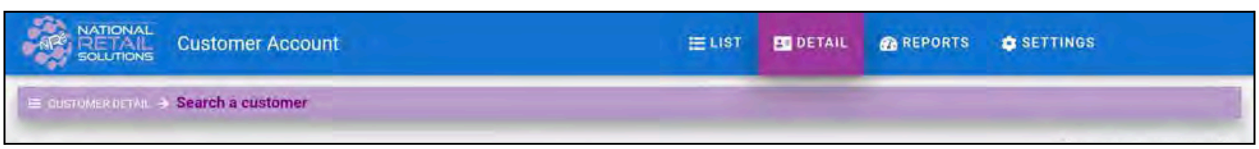
To add customers in the Customer Tab module:

Open the Register. On the bottom on the right where the "Action" buttons are, select "Customers".

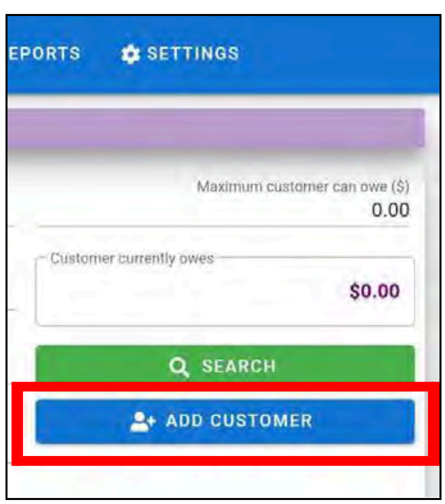


Select Customer Tab from the pop up menu.

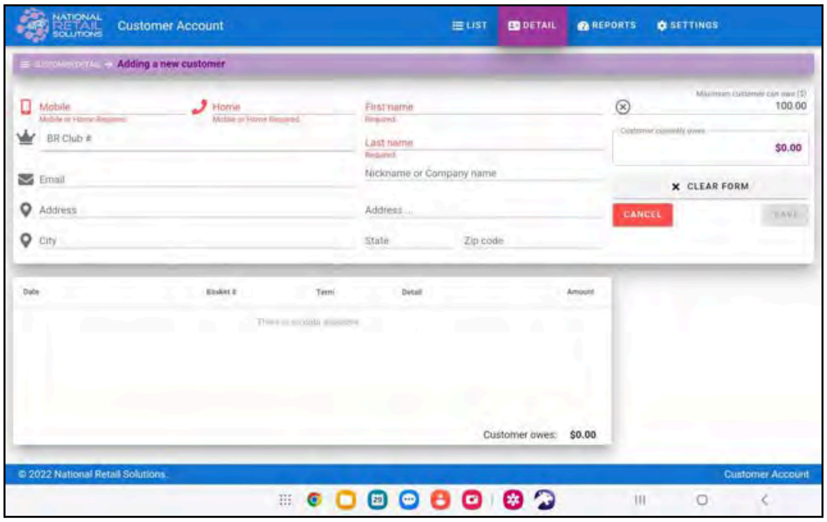
1. Select the Detail tab on the header line..



2. Click the "Add Customer" button on the right side.

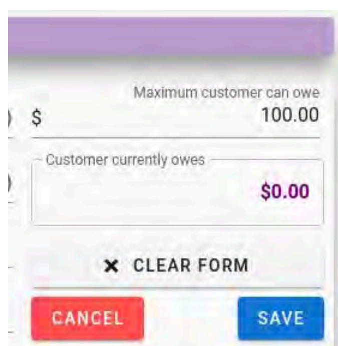


3. This will open the “Add a new customer” screen.



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

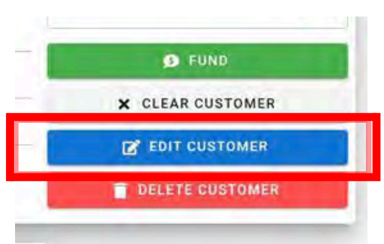
4. Enter the customer details into the Add a New Customer form; at a minimum, a phone number, first and last name are required. (all the line items in **RED**)
5. After entering the customer details, click **Save**. The save button will not be selectable until the minimum information is entered into the form.



Managing Customer Accounts

Click “List” on the header line. This will open a list of all customers that you have entered into the Customer account module. Select the customer whose profile you wish to edit. This will open a new window with that customers information

Click “Edit Customer” in the Customer Details screen to modify the customer profile.



Modify the necessary information and save your changes. 

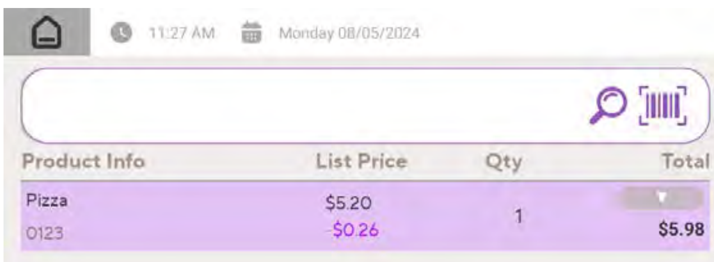
Deleting Customers

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

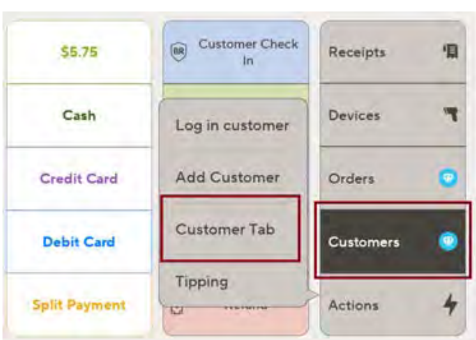
Adding a Basket to Customer Tab

Follow these steps to add a customer's basket to their account.

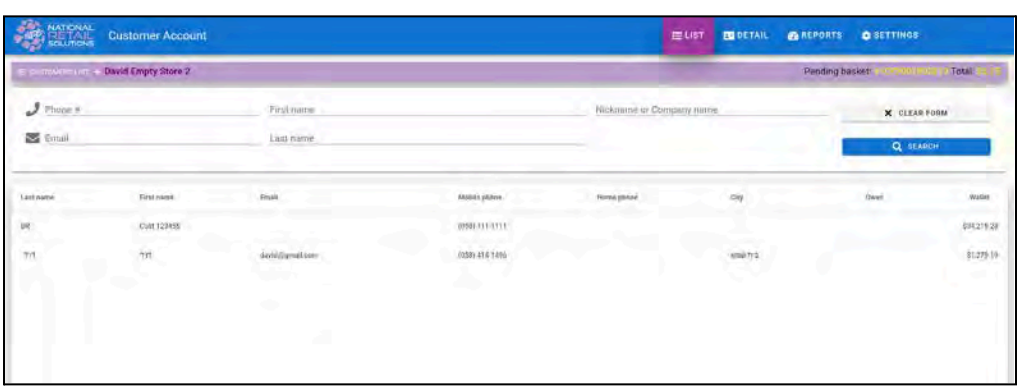
Add Items to the Basket: Add the items the customer wants to purchase to the basket.



Navigate to Customer Tab: Click on the **Customers** shortcut button then select **Customer Tab** from the dropdown menu.

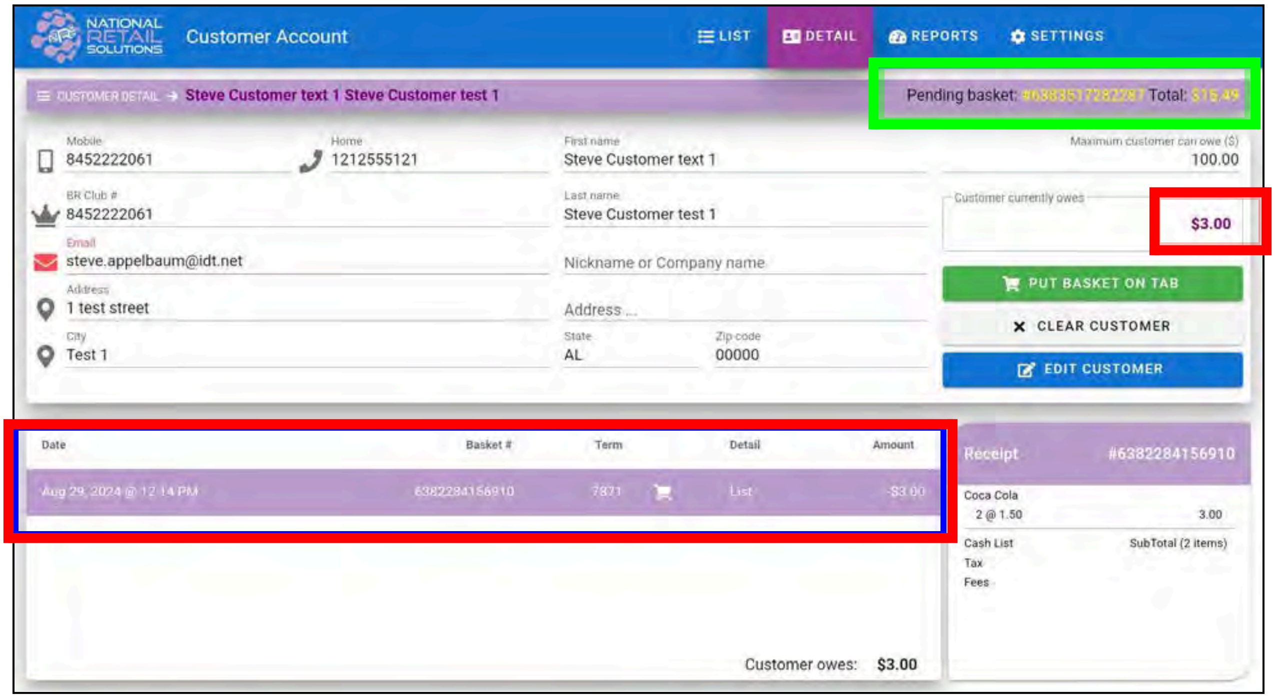


Customers List screen: The Panther will navigate to the **Customers List screen**; this screen shows a list of all customers with customer account privileges for your store.



Customer Account screen: Find and select the required customer from the list. Alternatively, you can search for the customer by inputting any search criteria from the “basic” information entered when creating the account and clicking the “Search” button.

This opens the customer's account screen, showing their **outstanding account balance** prior to this transaction, **previous transactions**, and **current transaction** amount that can be added to their tab.

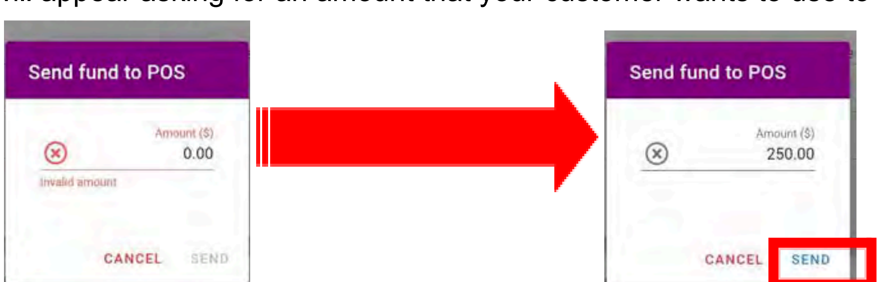


The amount that will be added to the Customer Tab is shown in the top right corner of the screen.

Customer Wallet

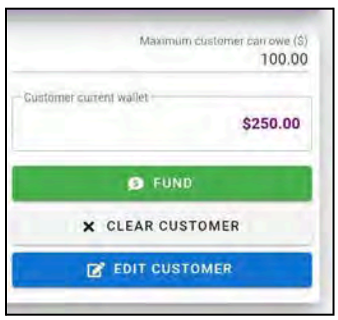
You will also be able to add money to your customers “wallet” on the Panther for them to use for future purchases. Only customer accounts with a zero balance will present a green “fund” button.

A pop up will appear asking for an amount that your customer wants to use to fund their account.



By clicking “send” you will add it to the customer's checkout.

Once the transaction is settled, you can go into the customer account and see the new wallet balance.

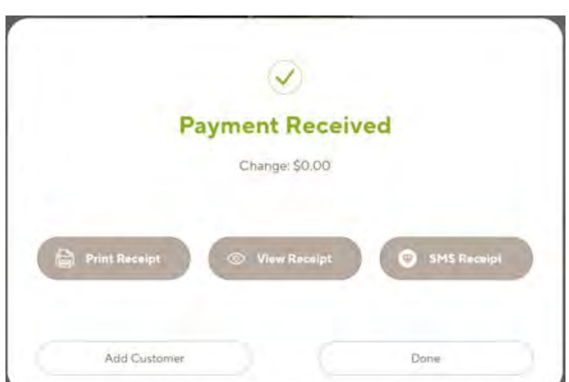


Your customer can use the wallet to pay for their next purchase. This will reduce the amount left in the wallet.

NOTE: Any purchase made using the customer account wallet will now show up on the shift and terminal reports.

Add Basket to Customer Account: Tap the **Customer** action button and the select **Customer Tab** from the pop up menu. Select the correct customer tab and tap the **Pay with my Wallet** button. A dialog box will open requesting a note for the basket that you are adding to a Tab. (this can be any sort of reminder, name, badge, drivers lic number, etc.). Enter any necessary notes for the transaction in the dialog box, then click the **OK** button to confirm.

After confirming, you will be taken back to the register screen. The transaction is now completed, with the basket amount added to the customer's account.



You will be able to print, view or SMS the receipt to the customer. The receipt will show that the payment method is **Customer Tab**.

Partial Payment

Partial payment is not supported in Panther POS.

Tab Limit

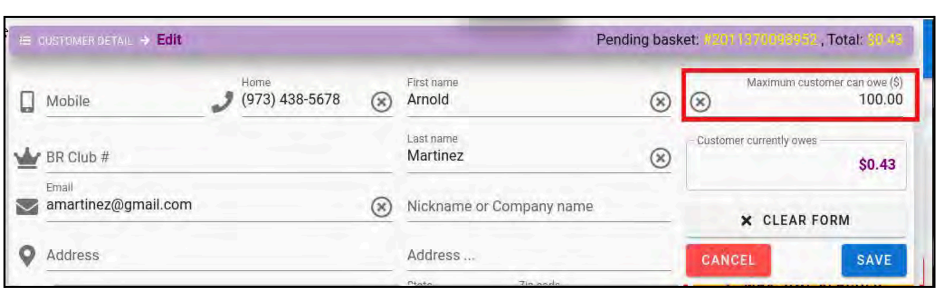
If paying the current basket would take a customer over their credit limit then the Pay With My Wallet button will instead have a caption, “Maximum customer can owe is reached” and it will not be possible to add the basket to the customer tab.

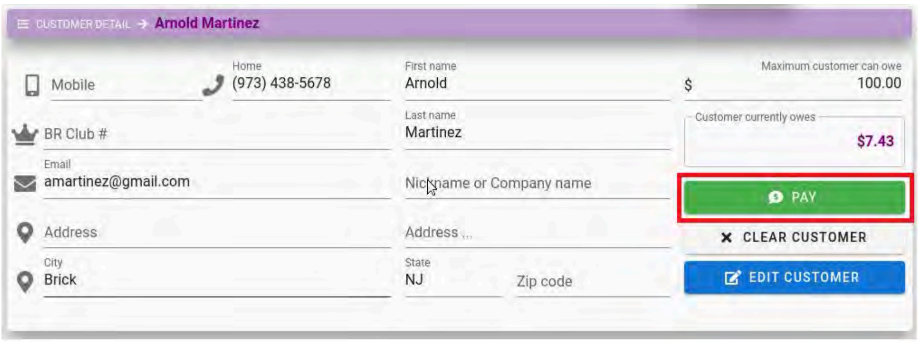
If the customer debt has not reached the overall store limit (i.e. the customer credit limit is currently set lower than the sore limit), then the cashier can raise the customer’s personal maximum credit limit. This allows the cashier to add the basket to the customer tab.

Paying Down a Customer Tab

1. Open the **Customer Tab** module without any open baskets.

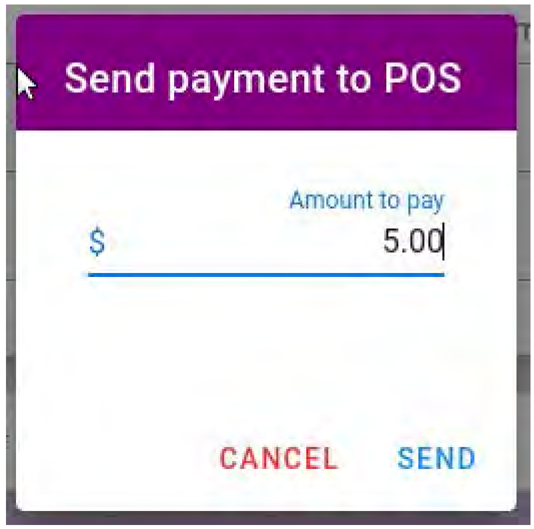
2. In the Customers List screen, locate and click on the required customer. The customer will be loaded with an option to "Pay”.





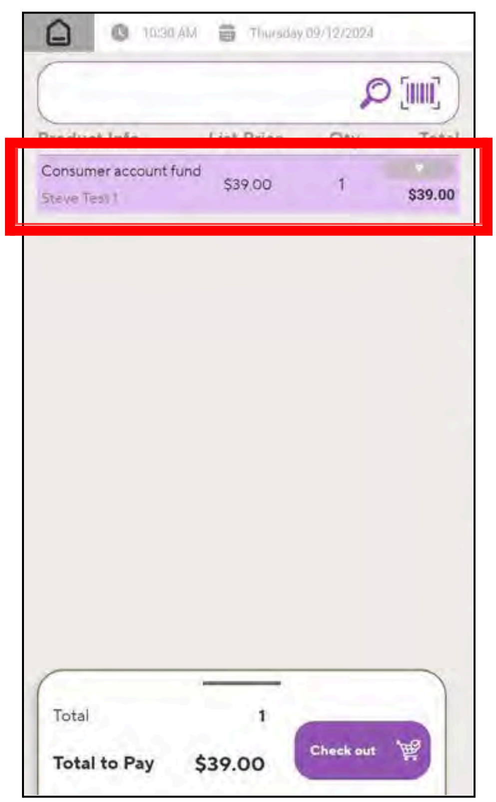
3. Select the green **Pay** button.

4. Enter the payment amount and send it to the register for processing; payments can be any dollar amount.



PLEASE NOTE: The system does not allow overpayment. I.e. the balance can only be paid down to $0.00, a positive balance cannot be carried.

The payment will appear on the Panther POS in the register as a **Customer Account fund payment**.

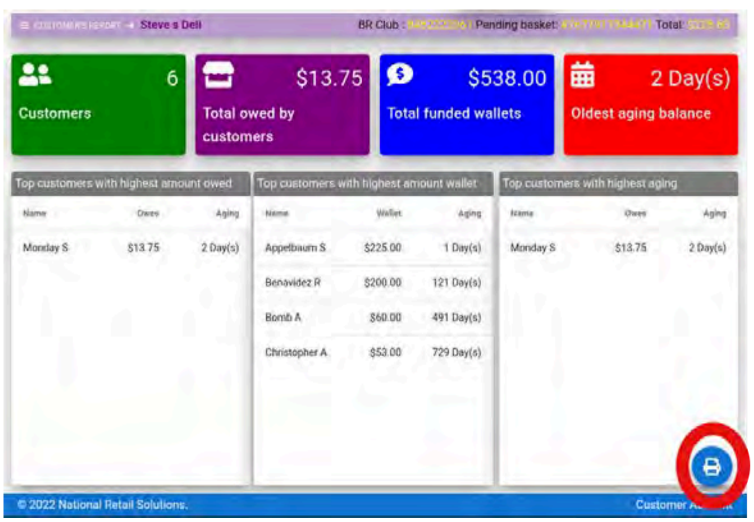


Customer Tab Reporting

Reporting is available in the Customer Tab module in the Reports screen.

The Reports screen is divided into three areas:

- **Summary tiles**
  - **Customers**: The number of customers configured in the Customer Tab module.
  - **Total Customer Owes**: The total debt owed by all customers.
  - **Oldest Aging Balance**: The longest time for which a customer has owed money.
- **Highest outstanding amount**: Customers with the highest outstanding debt; sorted by highest balance and down.
- **Longest outstanding debt**: Customers with oldest outstanding debt; sorted by the longest time since a payment was made and down.



Clicking on a customer name will load the customer Detail page where all their transactions can be reviewed. The print icon in the bottom right prints out the report.

Customer Tab Reporting on the Panther POS

Log into the Merchant portal. Select Store Statistics. Payments made using the Customer Tab are shown in the Store Report.