



## Release Notes for Panther POS (Version 0.9.39)

- Loyalty - App-less Redemption
- Pin Reset
- Tipping
- Auto Batching
- Share Transaction Report

# Loyalty Redemption - App-less redemption

This release introduces enhancements to the Panther POS loyalty redemption system, allowing a central view of rewards and points that are available to the customer, and app-less redemption. This update aims to streamline and simplify the process of redeeming loyalty club benefits, and allows customers to redeem rewards via a text-message confirmation code.

## Key Enhancements

- **Centralized Redemption System:** Cashiers can access a unified redemption portal displaying all available loyalty redemptions, this makes it easier for customers to see their available rewards and decide what they want to do with their loyalty points.
- **App-less Redemption via SMS:** Customers can redeem loyalty rewards without needing the BR Club App by providing a confirmation code sent to their registered mobile number.

## Entry Points to the Loyalty Redemption System

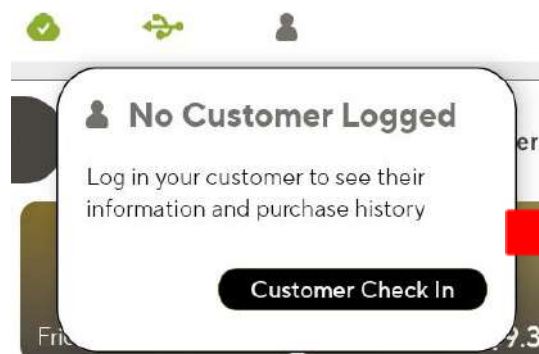
- **Customer Options** → **Loyalty Redemption**
- **Checkout Module**
- **Basket-Items Quick Summary List**

## App-less Loyalty Redemption

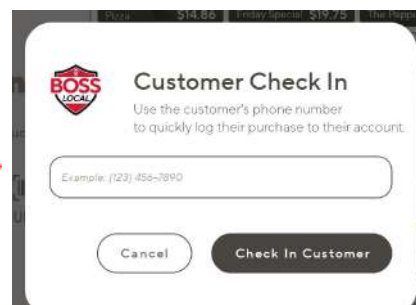
### Prerequisite:

Viewing available loyalty rewards and points is available on the register after Boss Local check in. Boss Local check in can be done in the following 2 ways.

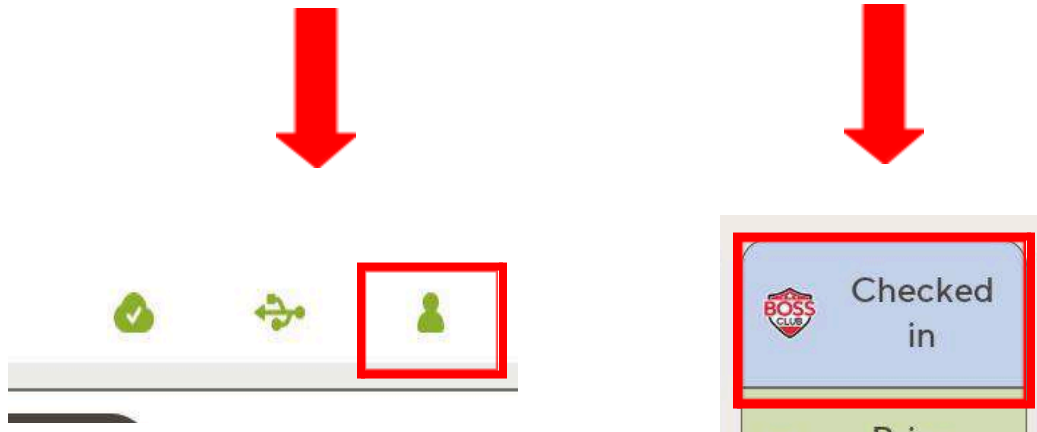
From the top bar select the person icon or



from the action buttons on the register select Customer Check In

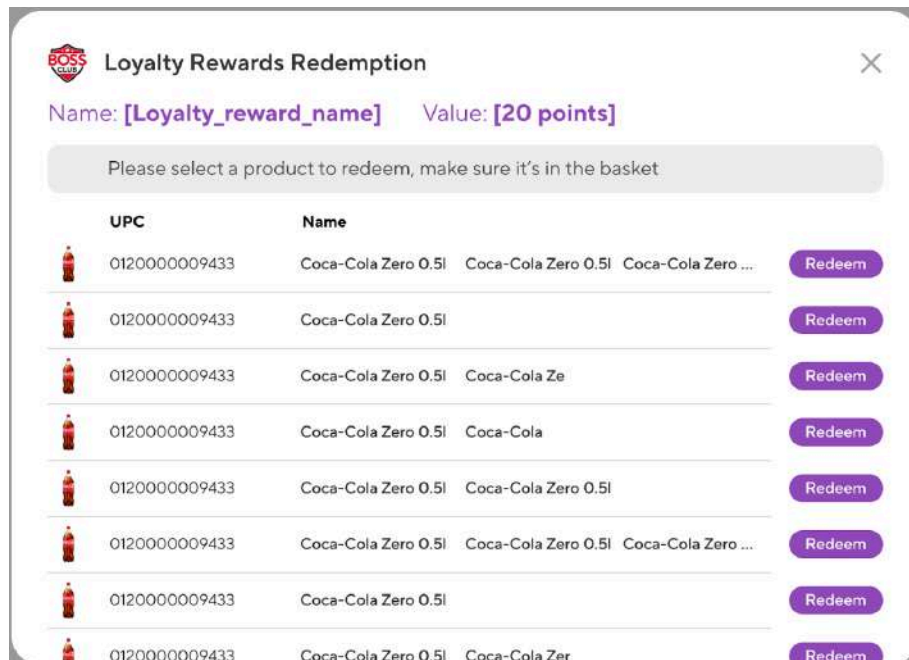


After the customer's loyalty phone number has been entered the person icon on the top bar turns green and the action button changes and says Checked in.

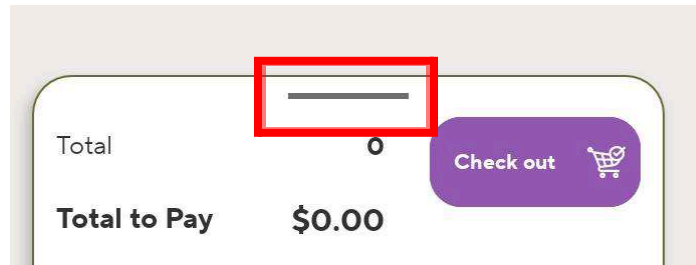


1. **Access the Loyalty Redemption view:** The **Loyalty Redemption** view can be accessed in the following ways:

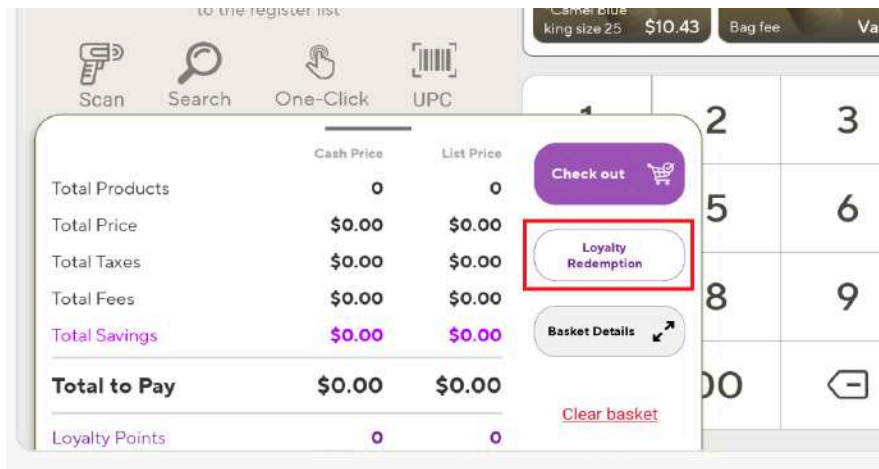
- Customer Options → Loyalty Redemption



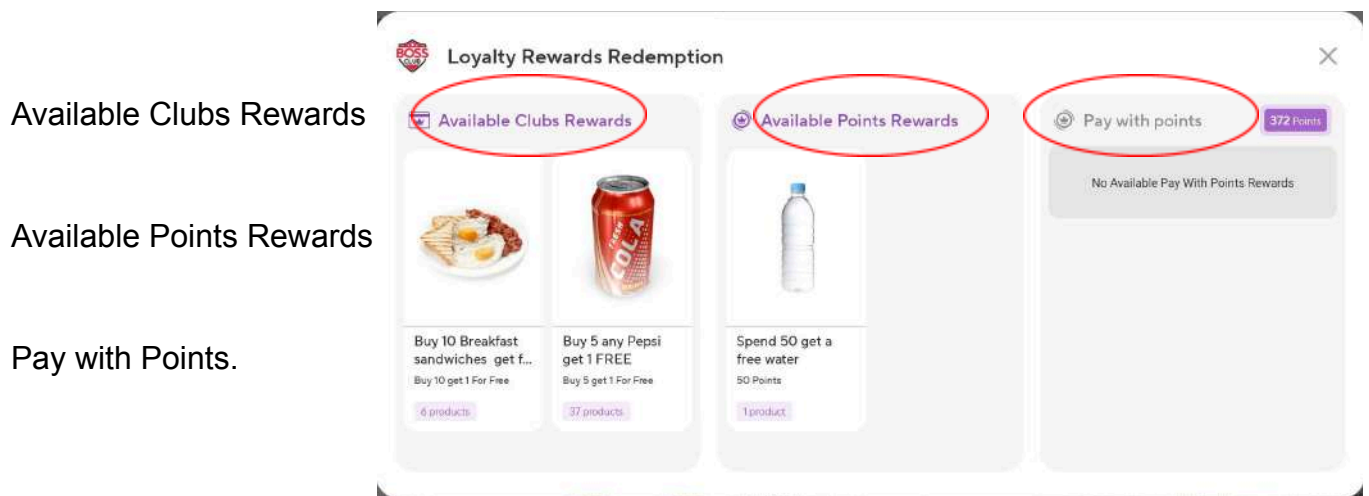
In the register, after all the items have been scanned or entered select the top line on the total to pay section of the receipt.



This will expand the Totals section and a Loyalty Redemption button will be on the right.



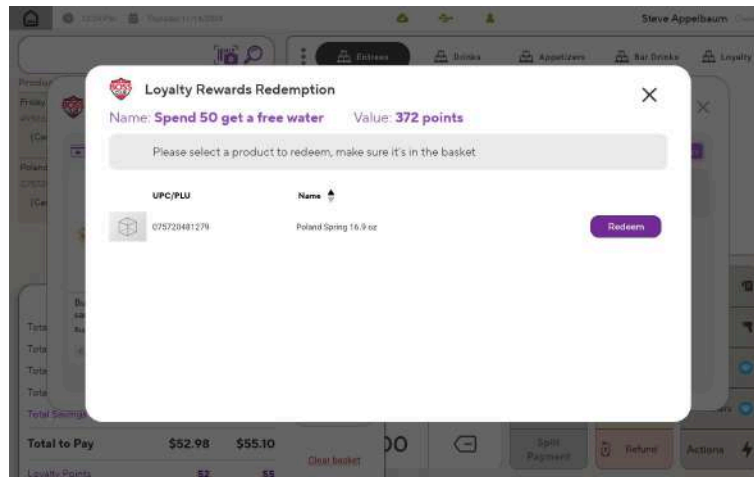
Tapping on Loyalty Redemption opens a popup window that shows all available rewards types for that customer.



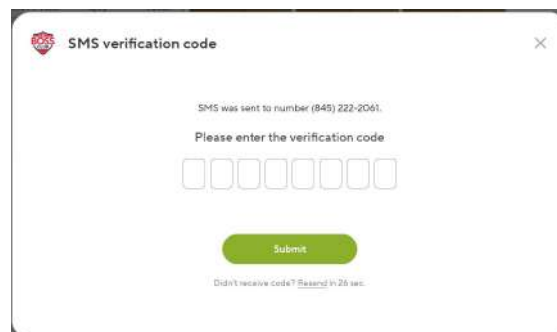
Relevant details such as product photo, UPC, and name will appear with each product.

Select the type of reward that the customer wants to use.

This opens up a window requesting the user to choose the item to be redeemed or rewarded.



Selecting a redeemable item or choosing the "Pay with Points" option triggers the text-message confirmation process.



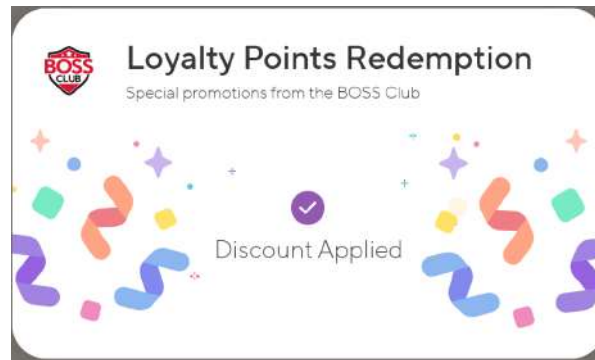
Panther POS sends a text-message with a confirmation code to the signed-in customer's registered mobile number.

A pop up message on the Panther POS informs the cashier that an SMS was sent. The cashier must request the verification code from the customer.

If the process of entering in the SMS code takes too long and the code times out (10 minutes), the cashier can request another SMS code be sent to the customer.

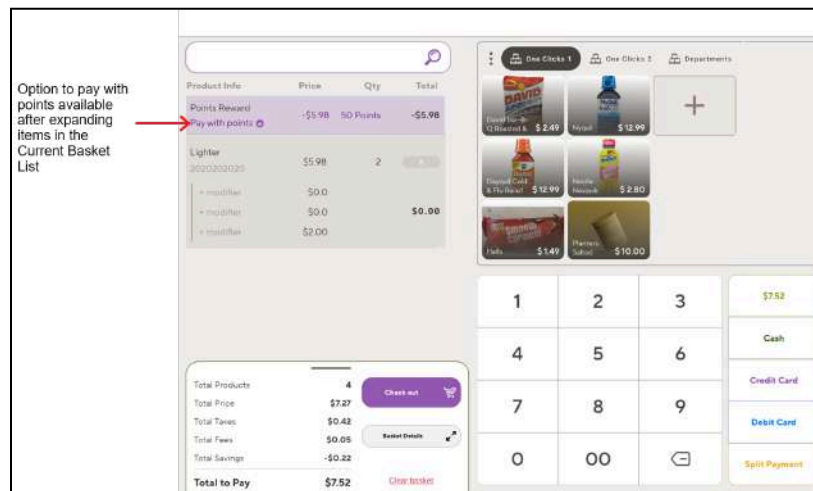
The cashier enters the code into the POS system and taps on Submit.

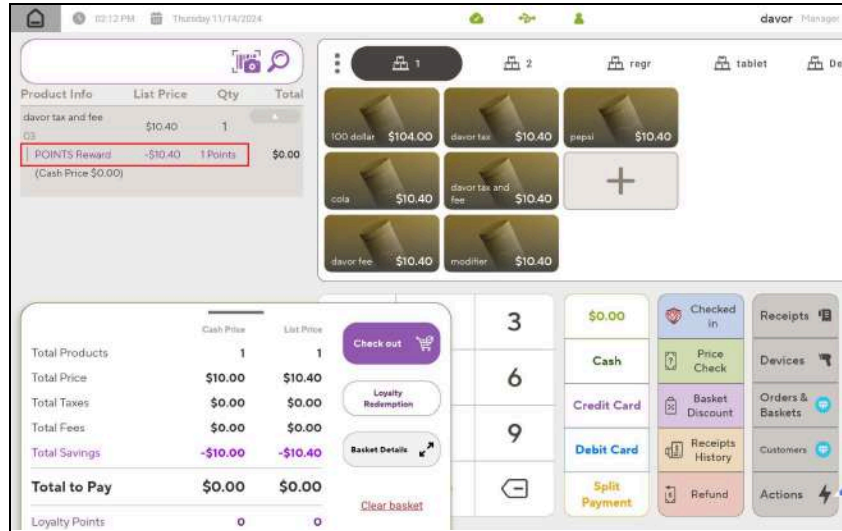
If the code is correctly entered then the product is added to the basket (if necessary), and a "redemption success" message is displayed.



If the SMS code is not entered correctly the system handles incorrect codes gracefully, including error popups for invalid codes, network issues, or offline status.

Once the redemption code has been entered and accepted by the Panther POS it will show on the register checkout screen.





**Note: If the cashier attempts to access a loyalty option and the customer is not logged in, then a prompt will appear for the cashier to enter the customer's mobile number.**

# PIN Reset

Users can now change their PIN code in Panther.

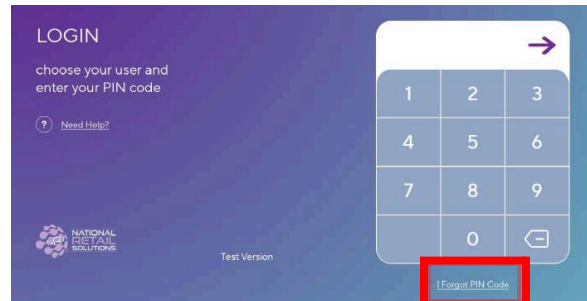
All users outside of the owner can change the pin code with the help of a manager or any user who has pin code change permissions.

## For Non-Owner/Administrator Users

If you've forgotten your PIN, you can reset it with the assistance of a manager or any user with PIN code change permissions.

**Select Your User Profile:** On the login screen, tap on your user profile.

**Tap "Forgot My PIN":** This option is now available below the PIN entry field.

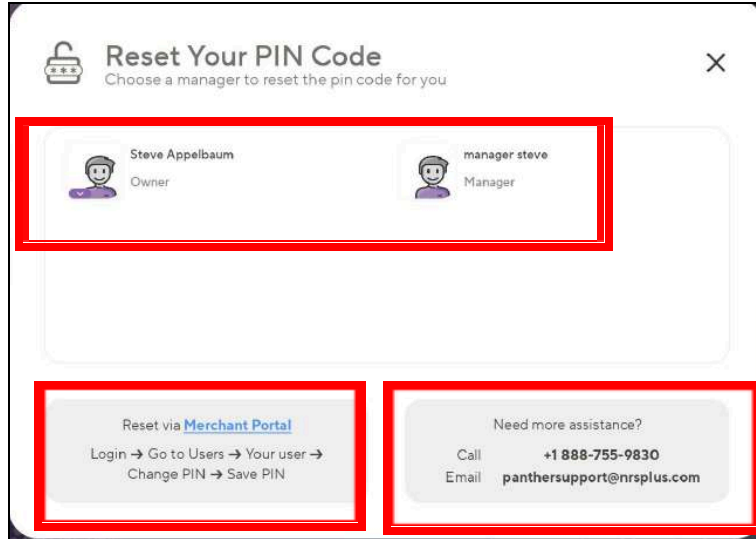


**Choose Approval Method:** A popup will appear with options:

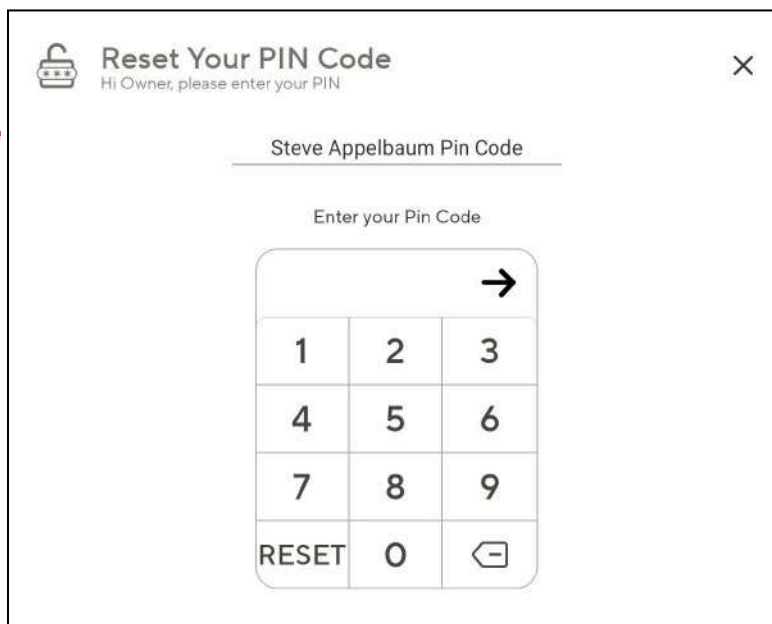
- **Reset via Merchant Portal**
- **Ask a Manager to Reset PIN**
- **Contact Support**

A list of users with PIN reset permissions will be displayed.





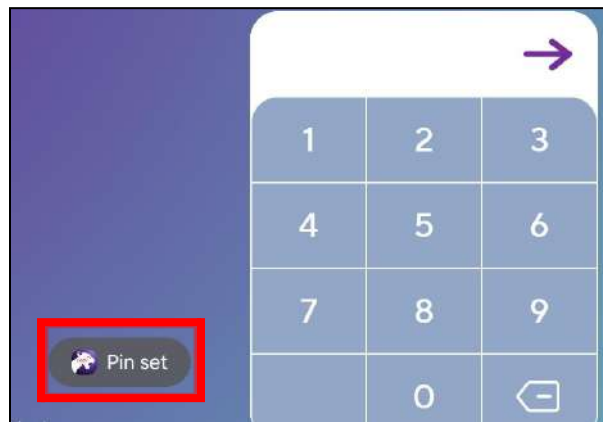
Select a manager or authorized user from the list. The approving user will be prompted to enter their own PIN to authorize the reset.



Once the manager or Admin has authorized the pin code reset, the cashier will be prompted to enter a new PIN. To finalize the process the cashier will be prompted to confirm the new PIN.



The new PIN is now reset. A confirmation pop up will briefly appear on the login screen. After it disappears, the cashier's login and new password will be active and can be used to login.

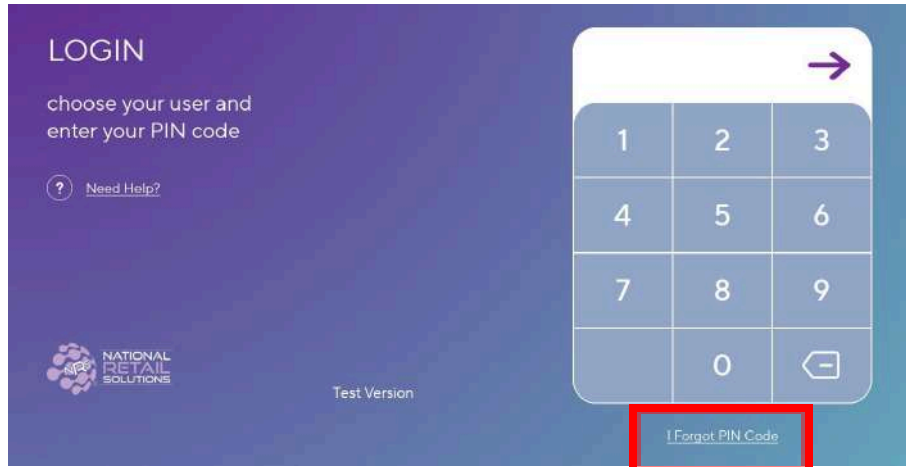


### For Owner/Administrator Users

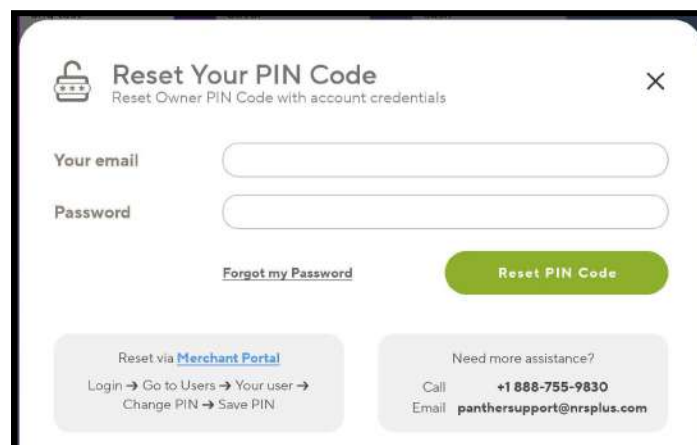
Owners or administrators can reset their own PIN by verifying their NRS registered account credentials, as follows:

On the login screen, tap on the Admin user profile.

**Tap "Forgot My PIN":** This option is available below the PIN entry field.



A popup will appear asking for the Admin to enter an email and password. Proceed to enter your NRS registered account credentials (same as used for the Merchant Portal).

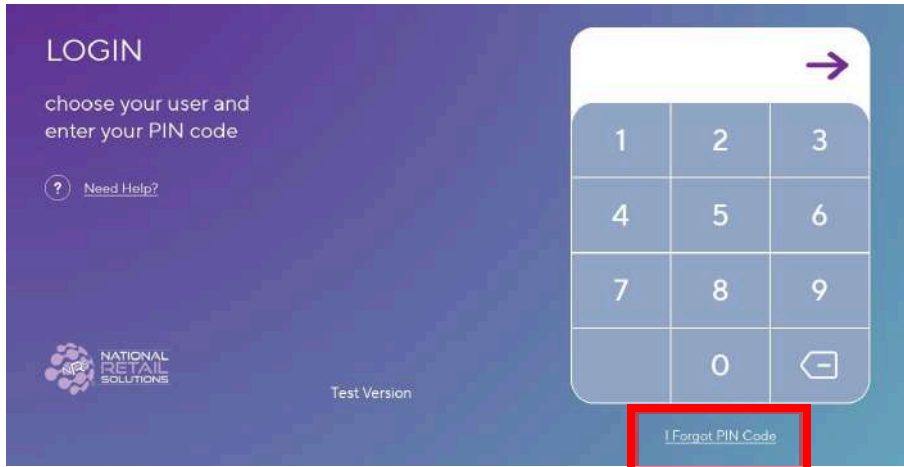


Tap on "**Reset PIN Code**". Once your credentials are verified, you'll be prompted to:

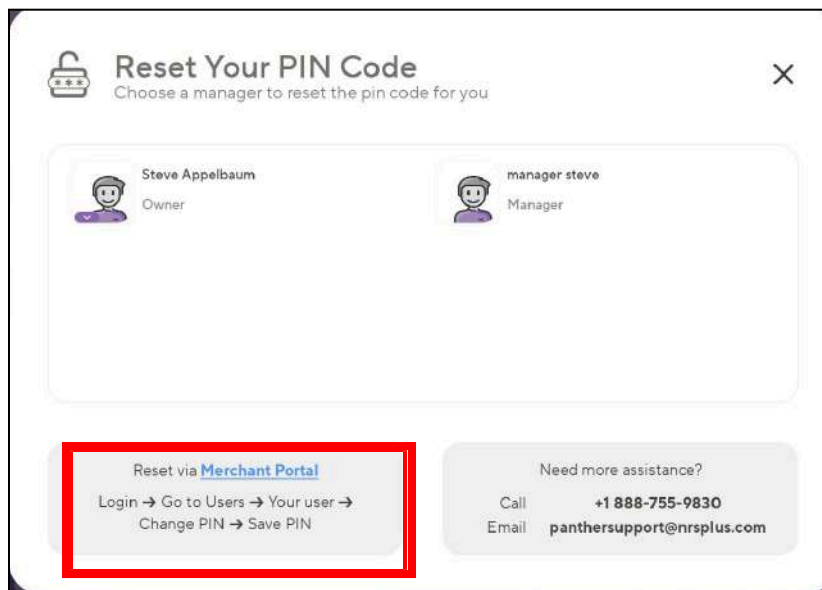
Enter a new PIN. The Panther will then ask you to confirm the new PIN. Your new PIN is now set, and you can log in using it.

**For Merchant Portal approved users:**

On the login screen, tap **Forgot My PIN**. This option is available below the PIN entry field.



Select the “Reset via Merchant Portal” on the bottom left hand side of the Reset your PIN code page.



The Panther will open the merchant portal login screen. The approved merchant portal user should enter the email and password that they use on the Merchant Portal login.

Go to users and select the correct user. Change the PIN and save. The PIN has now been updated and the user can now log in to Panther with the new PIN code.

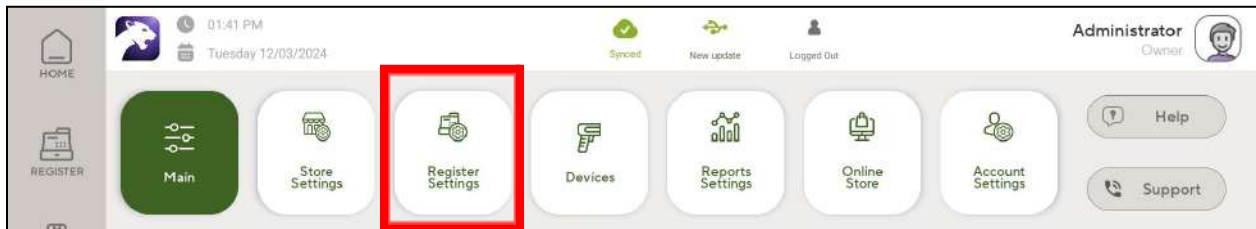
# Tipping on the PAX

To use this feature, you need to enable it within the Panther POS settings.

From the Home screen, select **Settings**.



At the next window select **Register Settings**



Then select **Configurations**



In the Configurations window below you will be able to see that Tipping using PAX device is off by default. When the radio button for tipping on the Pax is on, the Pax unit will show the tipping screen for any cc (credit or debit) transaction.



**Enable "Tipping using PAX device":** Toggle this setting **On**.

**By Percentage (%)** - Toggle **On**. (Default is On.) When **On**, preset tip percentages (15%, 18%, 20%) will be available on the PAX device.

You can customize these percentage values as needed.

**By Dollar Amount (\$)** - Toggle **On** or **Off**. (Default is Off.) When **On**, customers can enter a custom tip amount in dollars on the PAX device.

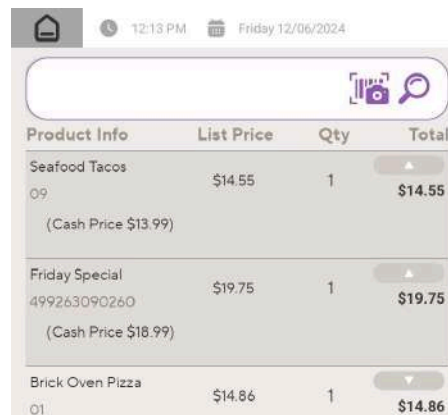
**Show Tipping Before Closing the Basket** - Toggle **On** or **Off**.

**When On:** The tipping prompt will appear after the cashier selects a payment method but before finalizing the transaction. A pop up window will appear that says **"Require Cashier PIN code to go back to register"**. If the Toggle is **On** the Panther POS will require cashiers to enter their PIN to return to the register from the tipping screen.

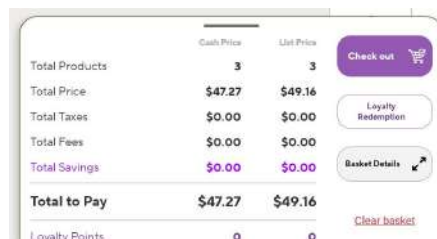
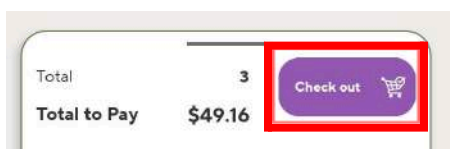
**PLEASE NOTE: At this point the Customer can choose whether or not to add a tip directly on the PAX device, without needing to inform the cashier.**

The tip amount entered on the PAX terminal is automatically sent back to the Panther POS, updating the total transaction amount and will be reflected on the receipt.

In order to process a Transaction with Tipping on the PAX device, the cashier will go through the process of scanning or adding the items to the basket as usual.

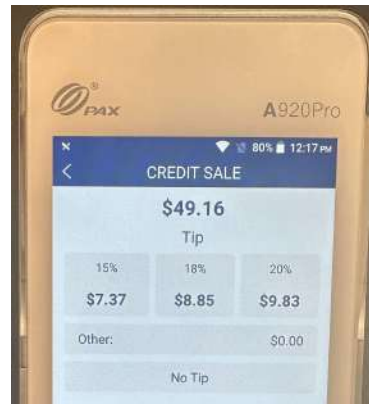


When all items have been added to the basket the cashier should select "Check Out" to proceed to the payment screen.



Select the Payment method by choosing "Credit" or "Debit".

If "**Tipping using PAX device**" is enabled and no tip has been added manually through the Panther register, the PAX terminal will automatically display the tipping options to the customer.

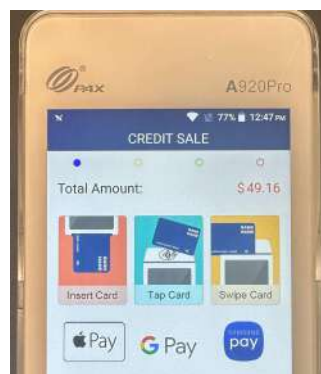


### **For Customers:**

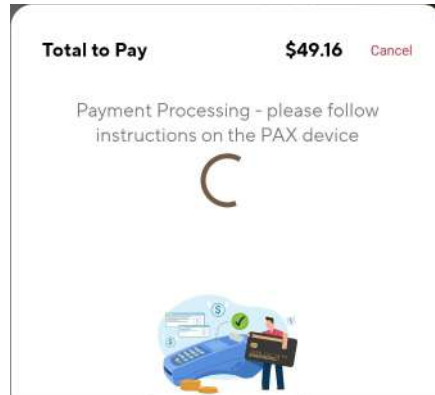
The PAX terminal will display tipping options. They can choose from preset tip percentages (e.g., 15%, 18%, 20%) or they can enter a specific tip amount in dollars or they can opt not to add a tip.

**Note: If a tip was already added to the basket on the Panther POS, the PAX device will skip the tipping prompt.**

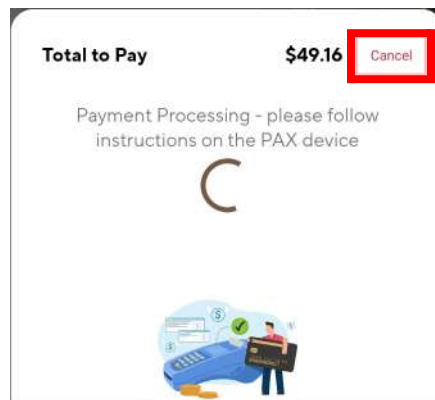
**To Complete the Payment:** follow the prompts to swipe or insert your card. The PAX terminal will process the payment, including the tip amount.



The POS screen will display a "**Waiting for card processing**" message.



If you need to cancel the tipping prompt, tap **"Cancel"** on the Panther screen. This will also cancel the tipping process on the PAX device.



Once the customer completes the tipping and payment process on the PAX device, the updated total (including the tip) will be sent back to the Panther.

The sale data and receipt will automatically reflect the tip amount.



# Auto-Batching for Panther POS

Auto-Batching has been added to Panther POS, this allows merchants to enable scheduled batch-outs directly from the POS interface, and reduces dependency on the PAX terminal for batching operations.

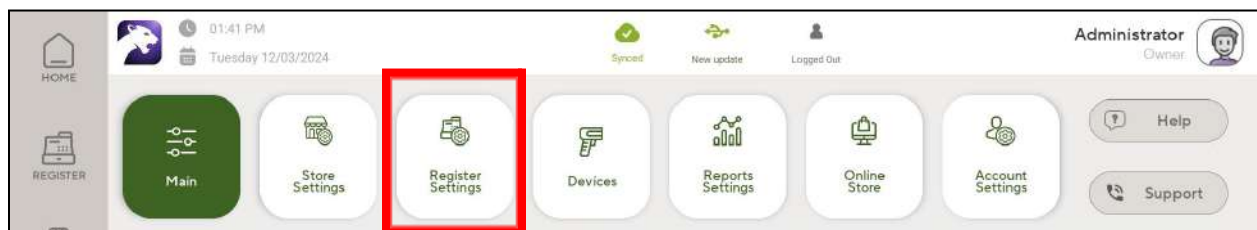
## Advantages of Automatic Batching

You can reduce manual tasks by scheduling automatic batch-outs and manually override (batch out on the fly) as needed. **PLEASE NOTE: Each time you batch out you will receive a deposit. Depending on the time of the batchout will indicate the DAY that you receive the deposit. For example: If the Panther POS is batched out before 9:30PM EST, then you should receive your deposit the next business day. However, if you batch out after 9:30 PM EST then the likelihood is that you will get your deposit 24 hours later than the next day deposit.**

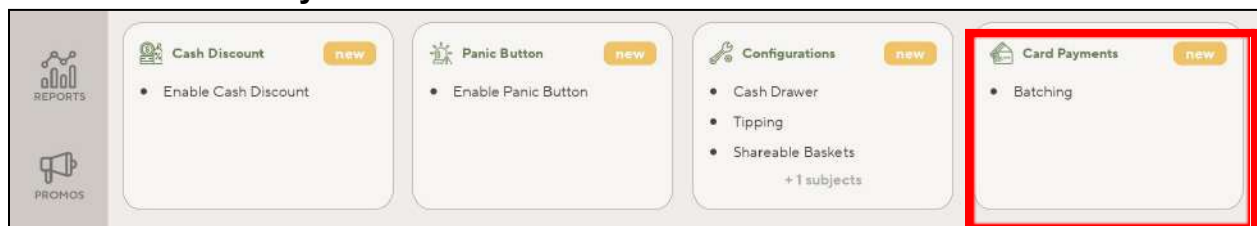
Setting up an automatic batch out will ensure routine financial closings and minimizes the risk of human error or missed batch-outs. To navigate to the Auto-Batch out screen: from the Home screen, select **Settings**.



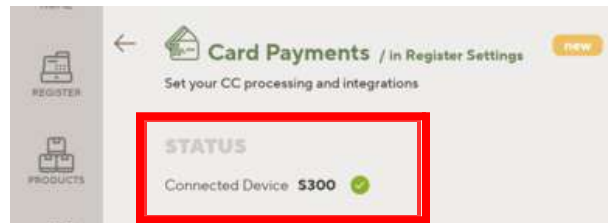
At the next window select **Register Settings**



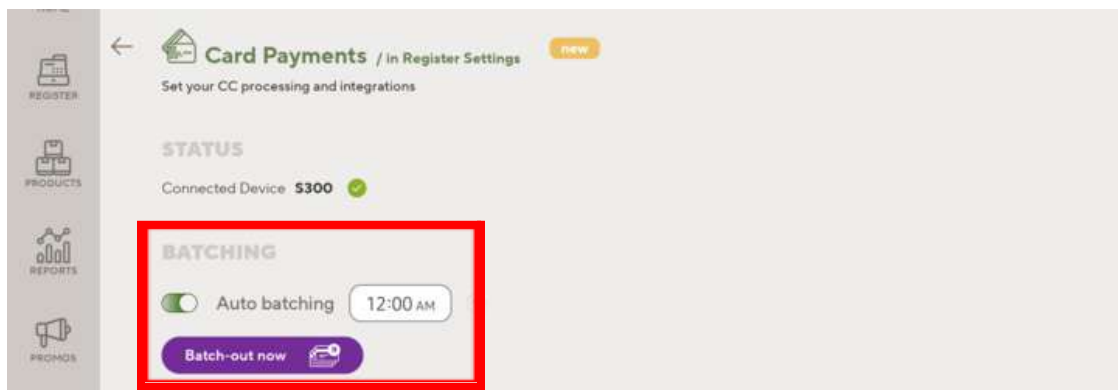
Then select **Card Payments**



From the Card Payments screen you will be able to see the model number of the Pax device connected to the Panther POS.



Below that you will see the Auto Batching radio button. When it is on (green) you will be given the option to select the Auto Batch out time. In addition, you can also batch out your credit card transactions at any time by selecting the **Batch out now** button.



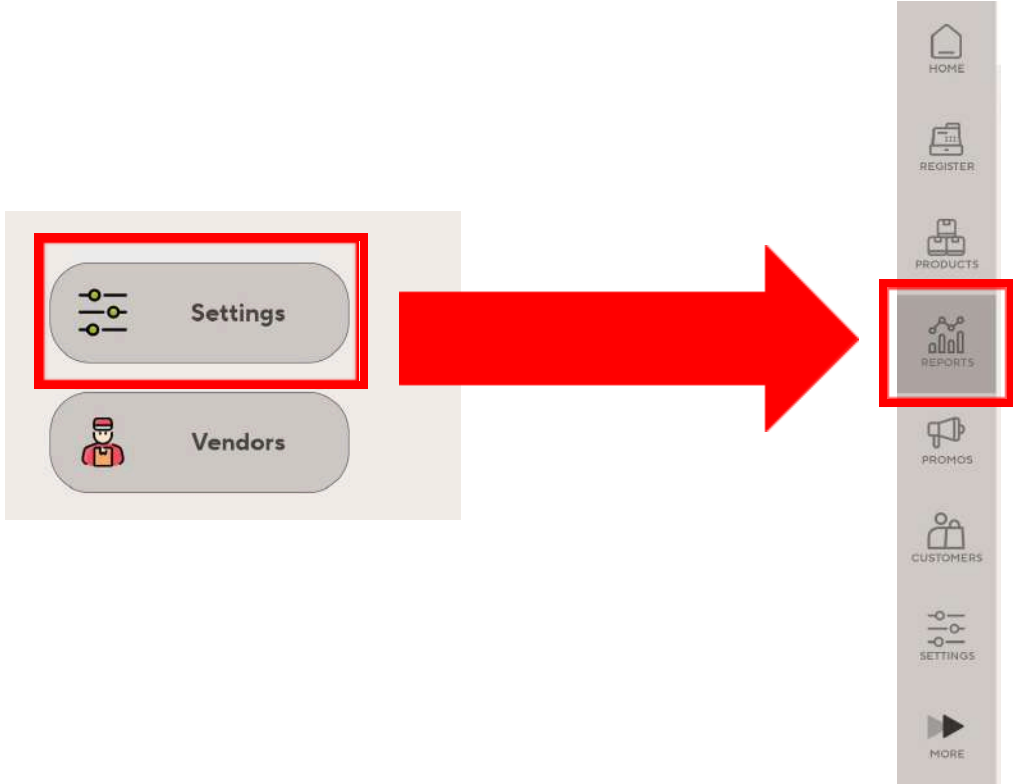
# Share transactions reports

Panther POS now allows users to share transaction reports directly from the reports system. Users can print reports using a thermal receipt printer or export them as a CSV file to their tablet.

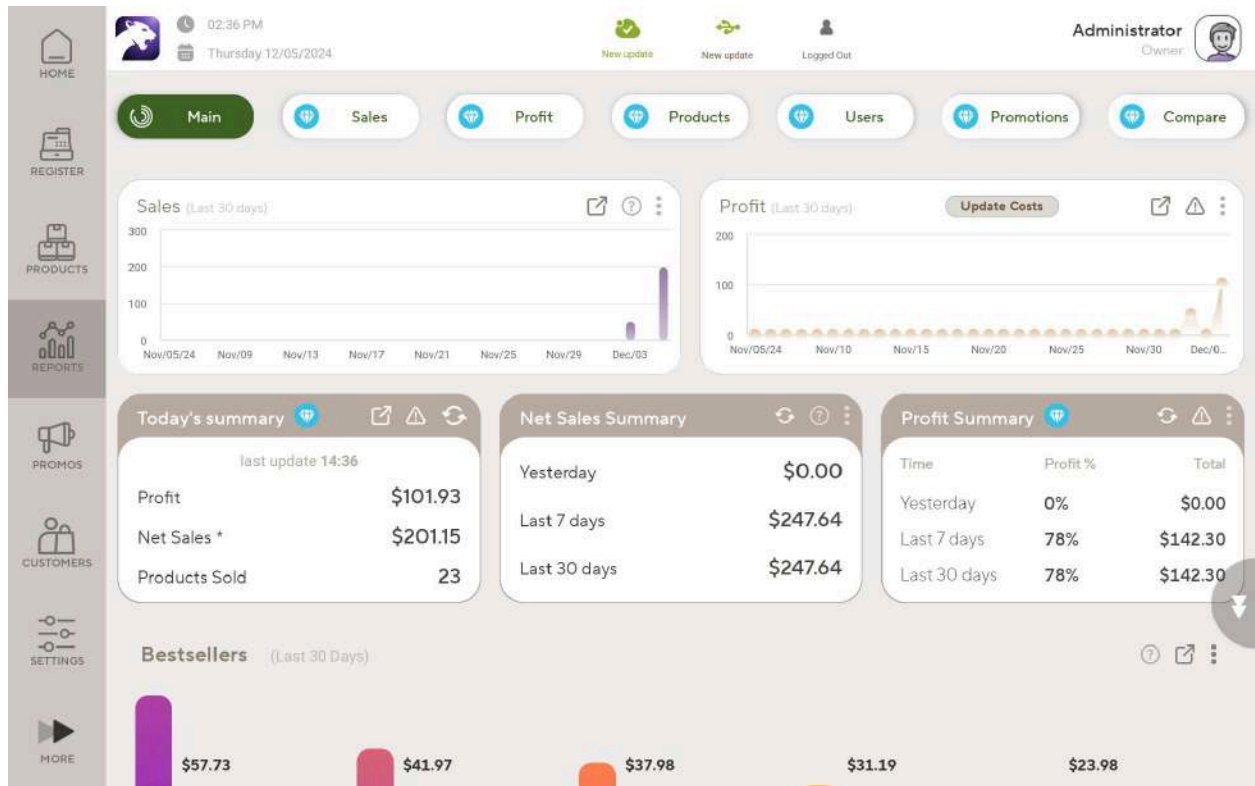
To navigate to the reports section, from the Main screen, select the BLUE Reports button on the top right hand side.



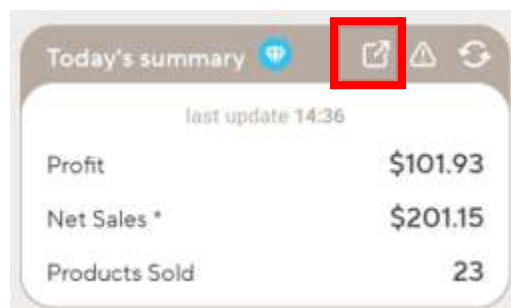
Or from the Main Screen select **Settings** and then from the sidebar select **Reports**.



Below is the Reports menu screen.



You will be able to see an expanded view of the days sales by selecting the expand button in the **Today's summary** section.



A new window will open showing the current day's sales. You can print this report on your receipt printer by selecting the BLUE Print Report button on the top right hand side of the screen.

02:37 PM Thursday 12/05/2024 Administrator

End of day report 12/05/2024 **Print Report**

All Shifts 48777 Start 10:08 End -

### Summary

Average Net Sale Value *	\$33.52
Baskets *	6
Transactions *	6
Products *	23
Average Products Per Basket *	3.8
Gross Sales *	\$201.15
Net Sales *	\$201.15
Cash On Hand *	\$228.76
GPI Total	\$0.00

### Payments

Payment Type	Number of Baskets	Payment Percentage	Total Amount
Cash	6	98%	\$228.76
Points	1	2%	\$5.00
<b>TOTAL</b>	<b>6</b>	<b>100%</b>	<b>\$233.76</b>

### Cash drops and payouts

Action Type	Number of Actions	Total Amount
Cash drops	0	\$0.00
<b>TOTAL</b>	<b>0</b>	<b>\$0.00</b>

### Sales by department

Name of Department	Number of Products	Sales Percentage	Total Sales
Prepared Food	5	25%	\$50.25
Hot Food	3	22%	\$44.27
Fountain Drinks	5	4%	\$7.07
Entrees	5	26%	\$53.25
Beverage	1	0%	\$0.35
Appetizers	3	18%	\$36.97
Alcohol	1	4%	\$8.99
<b>TOTAL</b>	<b>23</b>	<b>100%</b>	<b>\$201.15</b>

### Other information

Action Type	Number of Baskets	Total Amount
Tips	4	\$32.61
Taxes	0	\$0.00
Refunds	0	\$0.00
GPI	0	\$0.00
Fees	0	\$0.00
Basket discounts	0	\$0.00

### Promotions

Name of Promotion	Promotion Usage	Total Sales
<b>TOTAL</b>	<b>0</b>	<b>\$0.00</b>

### Customer Account Pay Off

Payment Type	Number of Payments	Payment Percentage	Total Amount
<b>TOTAL PAY OFF</b>	<b>0</b>	<b>100%</b>	<b>\$0.00</b>

Test panther Order2

14:38 12/05/2024

Terminal reports

From 2024-12-05 00:00:00 to 2024-12-05 23:59:59

Baskets	6
Transactions	6
Products	23
Average Products per Basket	3.8
Average Net Sale Value	\$33.52
Gross Sales	\$201.15
Net Sales	\$201.15
Cash On Hand	\$228.76
GPI Total	\$0.00

### Payments:

Type	Baskets	Percentage	Sales
Cash	6	98%	\$228.76
Points	1	2%	\$5.00
<b>TOTAL</b>	<b>6</b>	<b>100%</b>	<b>\$233.76</b>

### Sales by department:

Department	Products	Percentage	Sales
Prepared...	5	25%	\$50.25
Hot Food	3	22%	\$44.27
Fountain...	5	4%	\$7.07
Entrees	5	26%	\$53.25
Beverage	1	0%	\$0.35
Appetizers	3	18%	\$36.97
Alcohol	1	4%	\$8.99
<b>TOTAL</b>	<b>23</b>	<b>100%</b>	<b>\$201.15</b>

### Payments:

Type	Baskets	Percentage	Sales
<b>TOTAL PAY OFF</b>	<b>0</b>	<b>100%</b>	<b>\$0.00</b>

### Others:

Type	Baskets	Amount
Refunds		\$0.00
Taxes	0	\$0.00
Fees	0	\$0.00
Basket Discounts	0	\$0.00
Tips	4	\$32.61
Online Orders		None

### Promotions:

Name	Usage	Sales
<b>TOTAL</b>	<b>0</b>	<b>\$0.00</b>

Or you can export the transaction report as a CSV to your tablet. If you navigate to the bottom of the screen you will see the Transaction log list. You can select the dates that you want to see and choose the one you want to download as a CSV.

Transactions 12/04/2024 → 12/04/2024

Date	Number of transactions	Products Sold	Average product per transaction	Average Net Sale Value	Transactions with promo	Net Sales	GPI value	Profit
12/05/2024	6	23	3.8	\$33.52	0	\$201.15	\$0.00	\$101.93

Tap the line that you are looking for. A new window will open showing you all the transactions during the period of time that you have selected.

← 12/05/2024

Search: Search

Share

Time	Payment Method	Total Products	Total Taxes	Total Fees	Total Promotions	Total Paid	Net Sales	Profit
13:44	Cash	5	\$ 0.00	\$ 0.00	\$ 0.00	\$ 75.10	\$ 59.61	\$31.17
13:43	Cash	3	\$ 0.00	\$ 0.00	\$ 0.00	\$ 38.98	\$ 32.27	\$24.59
13:43	Cash	4	\$ 0.00	\$ 0.00	\$ 0.00	\$ 20.96	\$ 20.96	\$0.00
13:42	2	4	\$ 0.00	\$ 0.00	\$ 0.00	\$ 30.63	\$ 25.36	\$10.40
13:41	Cash	5	\$ 0.00	\$ 0.00	\$ 0.00	\$ 29.97	\$ 29.97	\$24.36
13:40	Cash	2	\$ 0.00	\$ 0.00	\$ 0.00	\$ 38.12	\$ 32.98	\$11.41

Tap each line if you want to see individual transaction detail.

← Transaction ID 478811516253

UPC/PLU	Product Name	Cash Price	Quantity	Total
200001000003	Brick Oven Pizza	\$14.29	1	\$14.29
499263090260	Friday Special	\$18.99	1	\$18.99
200009000005	Seafood Tacos	\$13.99	1	\$13.99
499263090093	Medium Drink	\$0.35	1	\$0.35
200006000008	Boudin egg roll w/ remoulade or...	\$11.99	1	\$11.99
	Consumer Tip			\$15.49

<b>Date</b>	12/05/2024
<b>Time</b>	13:44
<b>Customer Id</b>	N/A
<b>Customer Name</b>	N/A
<b>Cashier Name</b>	Administrator
<b>Receipt Id</b>	478811516253
<b>Terminal</b>	48777
<b>Number Of Promotions</b>	0
<b>Number of Products</b>	5
<b>Total \$\$\$</b>	\$75.10
<b>Payment Method</b>	Cash

<b>Total Products</b>	5
<b>Total Price</b>	\$59.61
<b>Total Taxes</b>	\$0.00

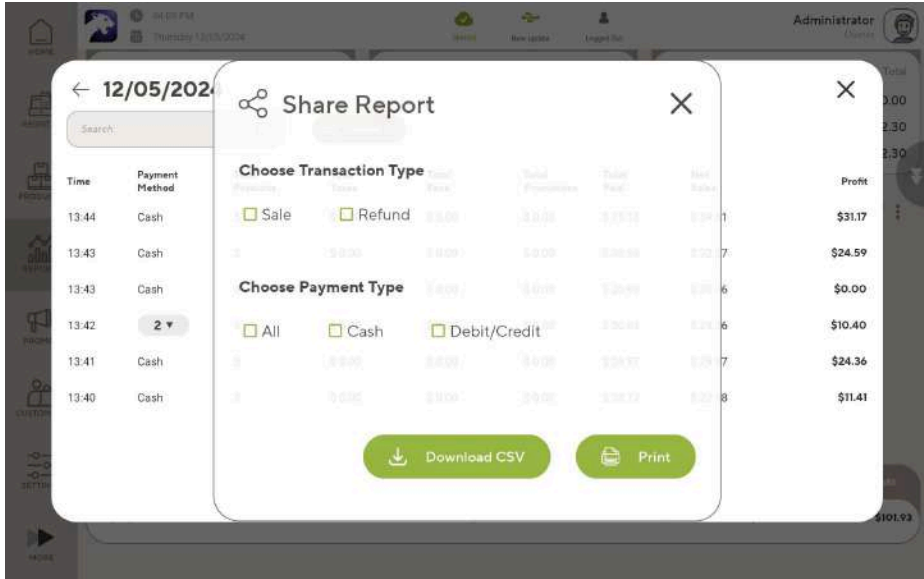
SMS Print

Notes:

You can then either print or send an SMS the individual transaction detail



Or you can press the back arrow and select **Share** on the top of the transaction report. This will open up the **Share report**



You must select the type of transaction (Sale or Refund) and the payment type (cash or credit/debit)

Once your selections have been made you will have the ability to print or download data as a CSV by selecting the appropriate corresponding button. If you choose to download the report will be saved to the Downloads folder as a transaction log.





Here is what your report will look like as a printout from the receipt printer.

Date / Time	Terminal	Amount	PayType	CardNo
12/05/24 13:40	48777	\$38.12	Cash	
12/05/24 13:41	48777	\$29.97	Cash	
12/05/24 13:42	48777	\$30.63	Points	
12/05/24 13:43	48777	\$38.98	Cash	
12/05/24 13:43	48777	\$20.96	Cash	
12/05/24 13:44	48777	\$75.10	Cash	

## Key Features:

### 1. Report Sharing Options:

- **Print Option:** Reports can be printed on a thermal receipt printer.
- **CSV Export:** Users have the ability to export reports as CSV files directly to their tablet.

A "Share Report" button has been added to the transaction popup in the reports section that is located on the bottom of the page.

### 2. Shared Report Structure: Reports shared using this feature include detailed lines for each transaction in the specified period, with the following data points:

- **Date and Time:** Each transaction is stamped with its date and time.
- **Terminal:** The terminal ID from which the transaction was processed.
- **Amount:** The transaction amount.
- **Payment Type:** Indicates the type of payment, with the last four digits displayed for card transactions

# Expanded support for camera

Users can now use the camera of the tablet as a barcode scanner in various places in Panther.

## NEW Supported Areas for Camera Scanning:

**Product Creation:** Quickly scan and register new products using the camera. From the main menu select **Products**.



From the products screen select **Create a New Product**.



In the create a new product screen we have added the functionality to use the tablet camera to scan new product barcodes. You can select the barcode camera icon to activate the camera on the tablet.



**Product Search:** You can also use the camera to scan barcodes when searching for products within the main screen, pricebook, and other product-related search functionalities.

1. **Not Supported Areas for Camera Scanning:** "Product View" and "Register Product View" do not allow scanning.
2. **User Interface Adjustments:** The camera icon has been added to search bars and relevant interfaces to allow ease of use.

# Cash in/Out/Drop Printouts

Merchants can now configure automatic printing of cash in, cash out, and cash drop events.

## Key Features:

1. **Configurable Print Settings for Cash Actions:**
  - **Automatic Printing Toggle:** A new setting, "Print Cash Events," has been added under Register Settings → Configuration. This toggle, set to "off" by default, allows users to enable or disable automatic printouts for cash in, cash out, and cash drop actions.
  - **Conditions for Printouts:** Printouts are generated only when the transaction amount is greater than zero.
2. **Detailed Cash Action Printouts:**
  - When enabled, each cash action printout includes essential details to support clear documentation and accountability:
    - **Store Name**
    - **Date and Time** of the transaction
    - **Cashier** performing the action
    - **Terminal ID**
    - **Cash Action Type** (e.g., Cash In, Cash Out, Cash Drop)
    - **Cash Amount** (with negative values indicating cash out)
    - **Cash Balance** after the transaction