COMMON TRANSACTIONS AND FUNCTIONS

ENTERING ITEMS

MANUAL ENTRY – UPC/SKU/Description

› Select QUANTITIES (+/-) OR ITEMS.

› Enter UPC, SKU, or item description in "ITEM" field.

› Select desired item in window on right of screen.

› Continue to process transaction.

💡 **UPC is the middle 10 digits on an item's barcode. SKU is an item number assigned for inventory purposes.**

CORRECT AN ERROR

› Select UNDO to clear last item.

   OR

› Select CLEAR to clear transaction or screen.

USE HOT KEYS

› Hot keys allow entry of multiples of the same item.

› Select desired number HOT KEY.

› Select item.

› Continue to process transaction.

SCAN ITEM NOT IN SYSTEM

› Scan item.

› Select department from list in popup window.

› Enter price (if no price appears).

› Select ENTER.

› Continue to process transaction.

💡 **This task may vary from site to site.**

PROCESSING PAYMENT

CASH PAYMENT

› Enter item(s) and/or fuel.

› Select CASH & TENDERS.

› Ask customer to present loyalty. Select OKAY.

› Enter dollar amount received.

› Select ENTER. Provide change if necessary.

› Select ENTER on points message.

CARD PAYMENT – Debit, Credit, Fleet, Esso Gift Card

› Enter item(s) and/or fuel.

› Select CARDS.

› Ask customer to present loyalty. Select OKAY.

› Ask customer to follow pin pad prompts.

› Transaction will process and display "Transaction Complete."

› Select ENTER on points message.

COMMON TRANSACTIONS AND FUNCTIONS

PROCESSING PAYMENT

SPLIT PAYMENT

› Process cash or gift cards first. Then, if applicable, proceed with credit, debit or fleet card.

› Example transaction, customer presents cash and a debit card:

  ▪ Process cash first. Select CASH & TENDERS.

  ▪ Ask customer to present loyalty. Select OKAY.

  ▪ Enter dollar amount received. Select ENTER.

  ▪ Process debit next. Select CARDS. Follow prompts.

  ▪ Select ENTER on points message.

REPRINT RECEIPT – Current Shift

› Select REVIEW.

› Select –BACKWARD to find required transaction.

› Select PRINTER ICON when transaction found.

› Select receipt language. Receipt will print.

REFUND AN ITEM – For Sales Outside Current Shift

› Select QUANTITIES (+/-) OR ITEMS.

› Enter number of units in "Quantity" field.

› Select the – key.

› Enter item(s) to be refunded.

› Select repayment method.

› Select OKAY.

› Process refund payment.

💡 **When processing a refund by card, any credit card can be used.**

MANUAL CREDIT/LOYALTY CARD ENTRY

› Enter item(s) and/or fuel.

› Select CARDS.

› Ask customer to present loyalty. Select OKAY.

› Select KEY ENTER.

› Enter card number.

› Select ENTER.

› Enter expiry date.

› Select ENTER.

› Select ENTER on points message.

💡 **To help prevent fraud, always ask to verify card and validate signature.**

VOID TRANSACTION – Current Shift

› Select REVIEW.

› Select –BACKWARD to find required transaction

› Select VOID when transaction found.

› Select YES to confirm void.

› Original payment by:

  ▪ Card – customer follow pin pad prompts (original card must be used).

  ▪ Cash – transaction complete.

💡 **After voiding fuel, amount is held at screen bottom right. To resell, select the held amount. Only one fuel transaction can be held at any time.**

PRICE CHECK

› Select PRICE CHECK.

› Enter item(s).

› Select OK.

COMMON TRANSACTIONS AND FUNCTIONS

Esso™

SELLING FUEL

AUTHORIZE A PUMP

› Pump is idle.

› Customer lifts nozzle. Pump key flashes white and beeps repeatedly. Select pump key.

› Pump is authorized.

› Customer selects fuel grade. Pump key turns green and displays a nozzle.

› Customer replaces nozzle. Pump key turns purple and beeps twice. "Pay Inside" and sale amount are displayed.

› Customer comes inside. Select purple pump key.

› Process payment.

💡 **Authorization process is the same for pay at pump and pay inside.**

PREPAID FUEL SALE

› Select PREPAY.

› Select desired pump key.

› Select fuel grade.

› Enter dollar amount of fuel to be sold.

› Select method of payment.

› Ask customer to present loyalty. Select OKAY.

› Process payment.

› Pump will display prepaid amount and display a yellow outline.

› When nozzle is lifted, authorize the prepaid pump by selecting the flashing pump key.

› Pump key will display gold (authorized) and then green (fueling).

› If pump displays purple with a dollar amount, change is due to the customer.

   NOTE: If customer paid by card, the card will be charged for the amount pumped only.

💡 **Pump must be authorized using paypoint that processed prepaid sale.**

PUMP ERROR

› Pump displays yellow.

› Customer must replace nozzle before error can be cleared.

› To clear error, select yellow flashing pump key.

› Process payment if due.

› Pump key will return to normal state.

💡 **Cannot clear an invalid pump transaction by selecting CLEAR.**

CANCEL PREPAID FUEL SALE

› Select PREPAY.

› Select prepaid pump key.

› Select YES on void message. Pump will return to normal state.

› If payment was in cash, return "Change

💡 **If pre-payment was by card, the system will process void without a card. Customer will not be charged.**

HALT A PUMP

› Select HALT A PUMP.

› Select desired pump key. An H will appear on the pump key.

› When ready to unhalt, select HALT A PUMP.

› Select the halted pump.

› Pump key will return to normal state.

COMMON TRANSACTIONS AND FUNCTIONS

SELLING FUEL

COMBINING FUEL SALES – Different Pumps

› Select first PUMP key.

› Select + FUEL.

› Select second PUMP key.

› Process payment.

A maximum of 2 fuel sales can be combined in one transaction.

MANUAL FUEL SALE

› Customer/attendant pumps fuel on manual pump.

› Select manual pump key.

› Select fuel grade.

› Enter dollar amount of fuel sold.

› Select ENTER.

› Process payment.

› Select ENTER on points message.

STACKED FUEL SALES – Same Pump

› Pump key will display purple with two dollar amounts. Select the pump key.

› Select BOTH on popup window message.

› Process payment.

DRIVE OFFS

› Select desired pump key.

› Select OVERRIDE.

› Select CUSTOMER DRIVE OFF.

› Dollar amount in Sales Information Area will be zero.

› Select CASH & TENDERS.

› Select ENTER.

Manual Fuel Sale and Drive Offs may not be applicable at all sites.

PROCESSING ESSO–SPECIFIC TRANSACTIONS

PURCHASE PRICE PRIVILEGES CARD PURCHASE & ACTIVATE GIFT CARD

› Select desired card push key (Gift or PRICE PRIVILEGES card).

› Swipe Gift/PRICE PRIVILEGES card being purchased.

› Select payment method.

› Select OKAY on loyalty message.

› Continue to process transaction.

› Select ENTER on points message.

Customer must activate PRICE PRIVILEGES card online.

CHECK GIFT CARD BALANCE

› Select FUNCTION key.

› Select desired "Card Balance".

› Swipe card.

› Balance displays. Receipt will print.

› Select CLEAR.

PRICE PRIVILEGES cards can be swiped any time throughout a transaction.

COMMON TRANSACTIONS AND FUNCTIONS

PROCESSING ESSO–SPECIFIC TRANSACTIONS

LOYALTY EARN – PC Optimum™

› Enter item(s) and/or fuel.

› Swipe loyalty card.

› Card number will appear in Sales Area.

› Select payment method.

› Continue to process transaction.

› Select ENTER on points message.

COMBINE – PRICE PRIVILEGES and PC Optimum™

› Enter item(s) and/or fuel.

› If fuel is present swipe PRICE PRIVILEGES card.

› Swipe PC Optimum™ card.

› Select payment method and continue to process transaction.

› Select ENTER on points message.

PC Optimum™ REDEMPTION – Fuel Purchase or Car Wash

› Select fuel to be sold.

› Swipe PC Optimum™ card.

› Select corresponding Reward by toggling "NO" to "YES."

› Select "Continue."

› Process payment.

› Select ENTER on points message.

If the consumer is eligible for PC Optimum™ redemption, the redemption prompt will display.

COMMON TRANSACTIONS AND FUNCTIONS

PERFORM A SHIFT CHANGE

› Select REPORTS.

› Select SHIFT CHANGE.

› Enter password.

› Select ENTER.

› Current shift will close and report will print. Select CLEAR.

› Select OK on "Perform Logon" message.

SAFE DROP

› When SAFE DROP icon is red, select it.

› Enter dollar amount.

› Select ENTER.

› Select YES.

› Receipt will print. Attach receipt to money and place in safe.

PAYOUTS

› Select PAYOUT.

› Select ENTER for list of payout categories.

› Select a payout category.

› Enter dollar amount.

› Select ENTER.

LAST SAFE DROP

› From Cashier screen select MENU.

› Select ACTIVITIES.

› Select FINAL CASH DROPS.

› Enter password.

› In "Last drop CAD" field, enter Canadian safe drop amount.

› In "Last drop USD" field, enter American safe drop amount.

› Select PREVIEW to get updated shift report, with Last Safe Drop amount.

› Receipt will print. Attach receipt to money and place in safe.

› Select YES to save and exit.

› Select EXIT multiple times to return to Cashier screen.

COMMON TRANSACTIONS AND FUNCTIONS

SITE MANAGEMENT

CHANGE FUEL PRICE

› Select MENU.

› Select ACTIVITIES – GASOLINE PRICES.

› Select CHANGE PRICES.

› Enter password. Select ENTER.

› Enter desired price change.

› Select ENTER.

› Select ACTIVATE.

› Select YES to continue.

› Select EXIT multiple times to return to Cashier screen.

CHANGE PUSH KEY

› Select CLEAR to ensure Sales Area is clear.

› Select and hold desired push key for 4 seconds.

› Select ID drop down menu and select an ID from list.

› Select ICON drop down menu and select an icon from list.

› Select "Full Image" YES or NO.

› Select a "Colour."

› Select "Double Sized" YES or NO.

› Select SAVE.

REPRINT RECEIPT – Outside Current Shift

› From Cashier screen select MENU.

› Select LOGS.

› Select SALES REVIEW and enter password.

› Select required shift from list.

› Select NEXT or PREVIOUS until transaction is displayed.

› Select PRINT.

› Select EXIT multiple times to return to Cashier screen.

💡 **The system will store receipt records for 60 days.**

RETRIEVE MAIL MESSAGE

› A YELLOW ENVELOPE appears when new mail message is present.

› To preview message, select envelope.

› Once selected, messages can be printed or deleted.

› Once viewed, a message must be deleted to view another message.

💡 **Mail cannot be stored. To retrieve a deleted message, call the Esso Helpdesk within 7 days of message send date.**

COMMON TRANSACTIONS AND FUNCTIONS

SITE MANAGEMENT

OVERRIDE ITEM PRICE

› Enter item.

› Select OVERRIDE.

› "Item Price Change" window pops up. Do *one* of the following:

- Select ENTER NEW PRICE. Enter price. Select reason.

- Select PERCENTAGE DISCOUNT. Enter percentage discount amount. Select reason.

- Select $ OFF DISCOUNT. Enter an amount. Select reason.

› Continue processing transaction.

SET UP A PAYOUT

› From Cashier screen, select MENU.

› Select PRICEBOOK – PAYOUTS.

› Enter password.

› In "Payout" field, enter a 13 digit code.

› Select ENTER.

› Enter an English and French description in the "Description" field.

› Select EXIT.

› Select YES.

› Select EXIT to return to Cashier screen.

💡 **To make site management updates available for use, after saving, always Activate the Pricebook and perform a Site Data Verification (see "Activate Store Data" and "Perform Site Data Verification" on this page).**

PERFORM ESSO END OF DAY

› Select REPORTS.

› Select ESSO DAY END.

› Day End will complete automatically and report will print.

› Select CLEAR on system message.

ACTIVATE STORE DATA

› From Cashier screen, select MENU.

› Select ACTIVATE on "Menu" screen.

› Enter password.

› Select ENTER.

› Select YES.

› Select OK.

› Select EXIT to return to Cashier screen.

PERFORM SITE DATA VERIFICATION

› Select FUNCTION.

› Select VERIFY SITE DATA.

› Select OK if Site Verification was successful.

💡 **If Site Verification was not successful, an error message will provide the reason. Error must be corrected before being able to sell. Examples of errors include tax being removed, an item being sold from an invalid Esso department or fuel grade was changed.**

COMMON TRANSACTIONS AND FUNCTIONS

SITE MANAGEMENT

CREATE A PRICE GROUP

› From Cashier screen select MENU.

› Select PRICEBOOK – PRICE GROUP.

› Enter password. Select ENTER.

› Assign number in "Price Group" field.

› Enter description in English and French.

› Assign a price.

› Select SAVE and EXIT.

  ▪ Select STORE ITEMS on the "Menu" screen.

  ▪ Select an item to be assigned to the new Price Group.

  ▪ Under "Optional", select new Price Group from drop down list.

  ▪ Price will now be updated as per new Price Group.

  ▪ Select SAVE.

› Repeat steps (a) through (e) above for all items to be assigned to new PRICE GROUP.

› Activate Store Data and perform a Site Data Verification (see tasks on page 9).

› Select EXIT to return to Cashier screen.

💡 **Quantity pricing section of item will be updated when you save. The Price Group will show immediately in drop-down menu. The Quantity Pricing section will show the discounts when the item is opened again.**

ADD A STORE ITEM

› From Cashier screen select MENU.

› Select STORE ITEMS.

› Enter password. Select ENTER.

› Enter NEXT #.

› Enter description in English and French.

› Assign default price for item in "Price" field.

› Select "Department" drop-down menu and choose a department from the list.

› Assign correct tax by sliding left or right in each tax field to select YES or NO.

› Enter item "UPC."

› Complete as many of the fields as possible.

› Select SAVE.

› Select EXIT to return to Main Menu.

› Activate Store Data and perform a Site Data Verification (see tasks on page 9).

› Select EXIT to return to Cashier screen.

💡 **Should you need to Activate an Esso department that is not currently activated in your system, call Esso Helpdesk for assistance.**

COMMON TRANSACTIONS AND FUNCTIONS

SITE MANAGEMENT

SETTING UP COUPONS AND TENDERS

› From Cashier screen select MENU.

› Select PRICEBOOK – COUPONS AND TENDERS.

› Assign number 1 in "Item" field for Gasoline Coupons.

› Enter description in English and French.
English: "Gasoline Coupons"
French: "Bons d'essence"

› Select discount type from drop-down menu - "Cash-Like Tender."

› Select YES on the "Available always" option.

› Select SAVE.

› Repeat for Manufacturer Coupons.

› Assign number 2 in "Item" field for Manufacturer Coupons.

› Enter description in English and French.
English: "Manufacturer Coupons"
French: "Bons fabricant"

› Select discount type from drop-down menu – "Cash-Like Tender."

› Select YES on the "Available always" option.

› Select SAVE.

› Repeat for Cash Off Coupons.

› Assign number 3 in "Item" field for Cash Off Coupons.

› Enter description in English and French.
English: "Cash Off Coupons"
French: "Bons réduction"

› Select discount type form drop-down menu – "Cash-Like Tender."

› Select YES on the "Available always" option.

› Select SAVE.

› Repeat for Gift Certificates.

› Assign number 4 in "Item" field for Gift Certificates.

› Enter description in English and French.
English: "Gift Certificates"
French: "Certificat-cadeau"

› Select discount type form drop-down menu – "Cash-Like Tender."

› Select YES on the "Available always" option.

› Select SAVE.

› Repeat for Other Coupons.

› Assign number 5 in "Item" field for Other Coupons.

› Enter description in English and French.
English: "Other Coupons"
French: "Autres bons"

› Select discount type form drop-down menu – "Cash-Like Tender."

› Select YES on the "Available always" option.

› Select SAVE.

› Activate Store Data and perform a Site Data Verification (see tasks on page 9).

› Select EXIT to return to Cashier screen.