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# 1. QUICK REFERENCE GUIDE

## START A SALE

1. Touch item (Fare, Donation etc.) to auto-populate the amount of sale or receive the calculator screen to input item amount. Touch once for one ticket, twice for two, etc.
2. At the store most sales will be taxable merchandise. Clothes (t-shirts & hats) are the only non-taxable merchandise items.
3. Touch the blue “Charge”, lower right to get the tender options or
4. Touch the “Current Sale”, upper right, to clear the entire sale and start over.

## CASH TENDER

1. Take the cash from the customer and touch the appropriate amount displayed on the screen, the system will identify the correct change or
2. Touch “Custom” and key in the amount received
3. Follow the screens to complete the transaction. Touch “No Receipt” for all sales under $50 (unless customer requests one).
4. Touch “New Sale”, upper left, for next transaction.

## CREDIT CARD TENDER

1. Most credit cards will be chip cards but a customer’s card may be a “tap” or “swipe” card. The card type determines how to proceed.
2. Swipe, tap or insert the card and follow the screens to complete the transaction. Touch “No Receipt” for all sales under $50 (unless customer requests one).
3. Sales amounts of $50 and above require a customer signature on the tablet.
4. Touch “New Sale”, upper left, for next transaction.

## REFUND/VOID A TENDERED SALE

1. Touch “Transaction”, upper left and select “Transactions” from the dropdown list.
2. For a credit card refund/void insert, swipe or tap the card. The sale to void will appear on the right.
3. Touch “issue refund” and follow the instructions on the screens until the “refund complete” screen is displayed. Touch done and select “Checkout” from the left to get to the main menu for next transaction.
4. For cash sale search the transactions on the left, select the correct amount and touch “issue refund”. Return money to customer. Touch done and select “Checkout” from the left to get to the main menu for next transaction.

**FOR HELP AT ANY TIME CALL KAREN KERTZMAN AT 612-387-6069**

# 2. HARDWARE

***<u>Ticket Booth Components:   Red Tablet</u>***

**1 Samsung Tablet** (with Power on/off button & sleep mode)

**2. Swipe Reader**

**3. Tap** (a) **& Chip** (b) **Readers**

**4. WiFi Hotspot**

1. **Samsung Tablet:** All cash and credit card transactions will be processed through the "Square" POS application (lower left icon on screen).
2. **Swipe Reader:** Swipe non-chip cards at time of sale.
3. **Tap** (a) **& Chip readers** (b)**:** Customer taps a tap card on the reader, chip cards are inserted in the front slot.
4. **WiFi Hotspot**: Provides network connectivity to allow the application to process credit card transactions.

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## ***1. Samsung Tablet***

- Runs the Square Application.
- Use the Square Application to process all sales, cash and credit card.
- Power tablet up at beginning of day, power off at end of day.
- System will go into sleep mode after 10 minutes of inactivity. Lightly tap power button to wake up system. Swipe screen to bring up the Square Application.

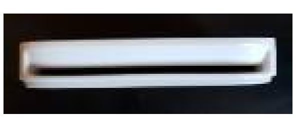
## ***2. Card swipe reader***

Swipe card reader plugs into the headphone jack, design showing. Swipe with front side of card facing and magnetic strip closest to tablet. Will not work with chip cards.

***3a. Tap Reader*** (The tap and chip reader are on the same device)

Customer taps their tap enabled credit card or tap device on symbol.

***3b. Chip Reader*** (The chip and tap reader are on the same device)



Chip reader slot
Place card chip in, face up

Black round power button
and charging port

Quick flash of lights
indicates power on

- Reader will time out after a few minutes of inactivity. Press black button on the back to power on. Green lights will flash briefly indicating power is on.
- Red lights on display indicate battery power is low.
- The customer should know if their card is a tap or chip card.

## ***4. Hotspot***


A


B

C

**Image A**

- Back side of the Hotspot device, ESL currently has 1 hotspot.

**Image B**

- Power button is on the right
- "Welcome" appears when the hotspot is powering up correctly ***(see Hotspot error message noted below)***. Messages will flash across the screen until it is fully powered up. Takes about 3 minutes.

**Image C**

- Blinking blue light indicates the device is active, it does not time out with inactivity.
- Power off at the end of day.

***Hotspot Error Message***

Sometimes the Hotspot does not power up correctly. If **"Bootloader"** is on the display rather than **"Welcome"** the battery needs to be removed and re-inserted.


A

B


C

**Image A**

Hotspot back, the circled area shows where you pull open the cover.

**Image B**

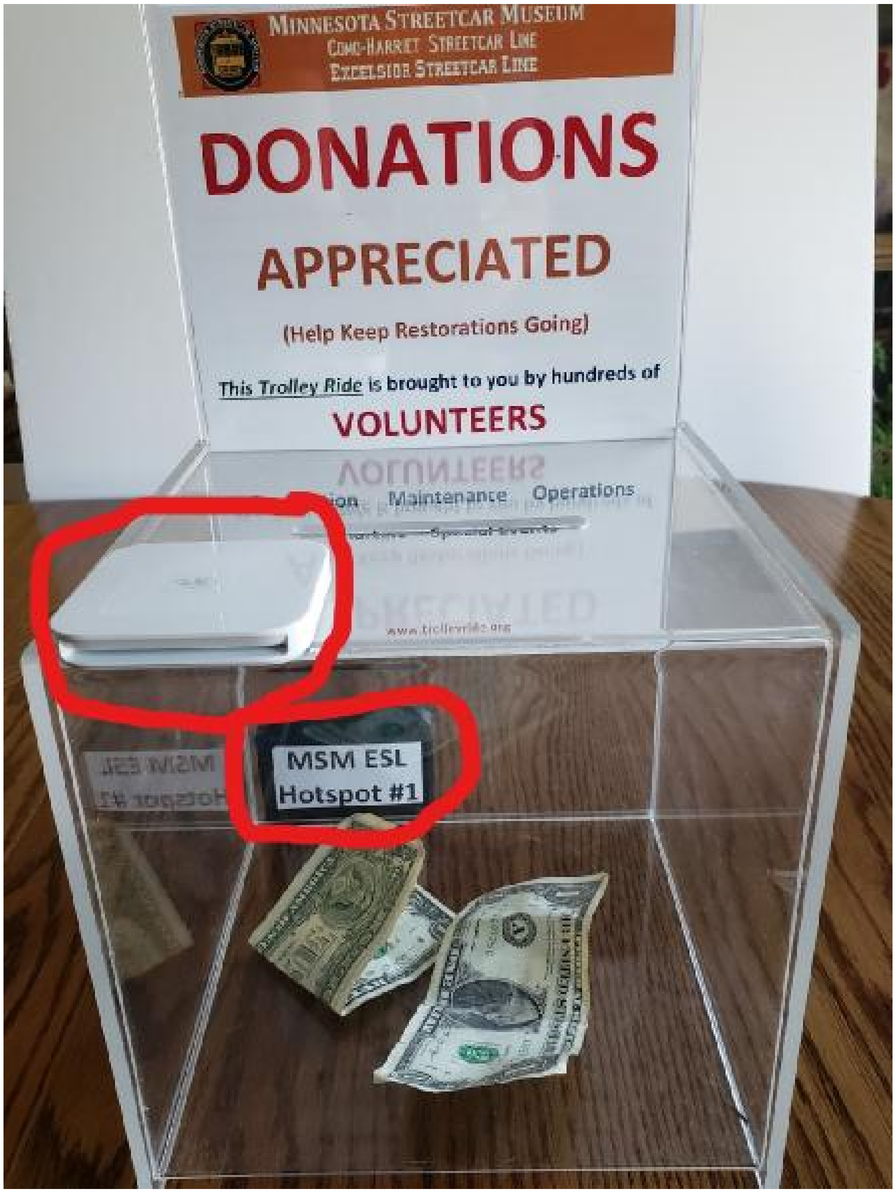
Image with the battery removed, notch to open cover is circled.

**Image C**

The hotspot components: front cover, the battery and the back cover

## ***Ticket Booth Components:*** ***Red Tablet (continued)***

The tap/chip & hotspot devices will be attached by Velcro to the Donation Box for ease of use and safekeeping. The procedure will be noted in the Foreman's instructions



## ***Carbarn Store Components:*** ***Black Tablet***

**1 Samsung Tablet** (with power on/off button and sleep mode)

**2. Swipe Reader**

**3. Tap** (a) **& Chip** (b) **Readers**

1. **Samsung Tablet:** All cash and credit card transactions will be processed through the "Square" POS application (lower left icon on screen).
2. **Swipe Reader:** Used to swipe non-chip cards at time of sale.
3. **Tap** (a) **& Chip** (b) **readers:** Customer taps a tap card on the reader, chip cards are inserted in the front slot.

## ***1. Samsung Tablet***

- Runs the Square Application.
- Use the Square Application to process all sales, cash and credit card.
- Power tablet up at beginning of day, power off at end of day.
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## ***2. Card swipe reader***

Swipe card reader plugs into the headphone jack with the design facing you. Swipe with front side of card facing and magnetic strip closest to tablet. Swipe mode will not work with chip cards.

***3a. Tap Reader*** (The tap (a) and chip (b) reader are on the same device)

Customer taps their tap enabled credit card or tap device on symbol.

***3b. Chip Reader*** (The chip (b) and tap (a) reader are on the same device)

Chip reader slot
Place card Chip in, face up

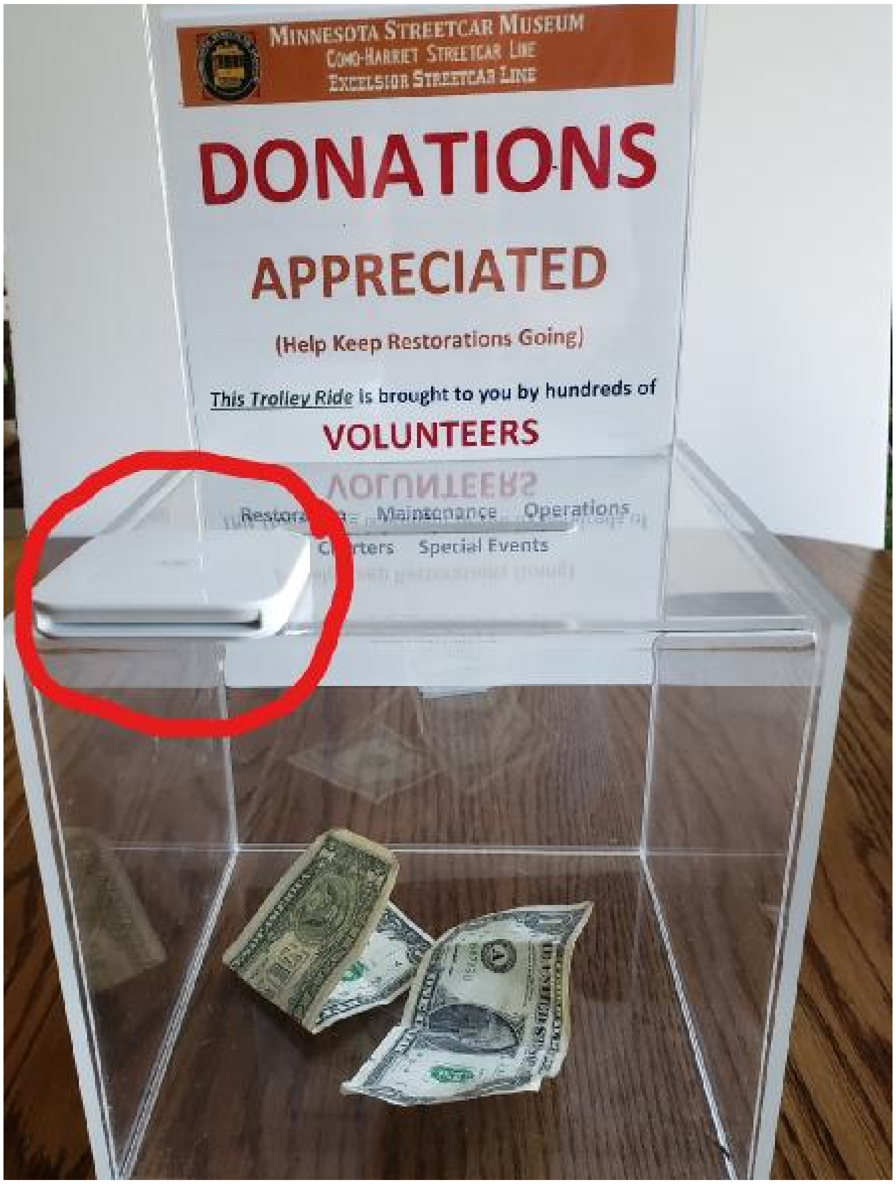
Black round power button
and charging port

Quick flash of lights
indicates power on

- Reader will time out after a few minutes of inactivity. Press the black button on the back to power on. Green lights will flash briefly indicating power is on.
- Red light displayed indicate battery power is low.
- The customer should know if their card is a tap or chip card.

## *Carbarn Store Components: Black Tablet (continued)*

The tap/chip device will be attached by Velcro to the Donation Box for ease of use and safekeeping. The procedure will be detailed in the Foreman's instructions.




## 3. Processing Sales:

At the beginning of the day or if the tablet goes into sleep mode these 2 screens may appear

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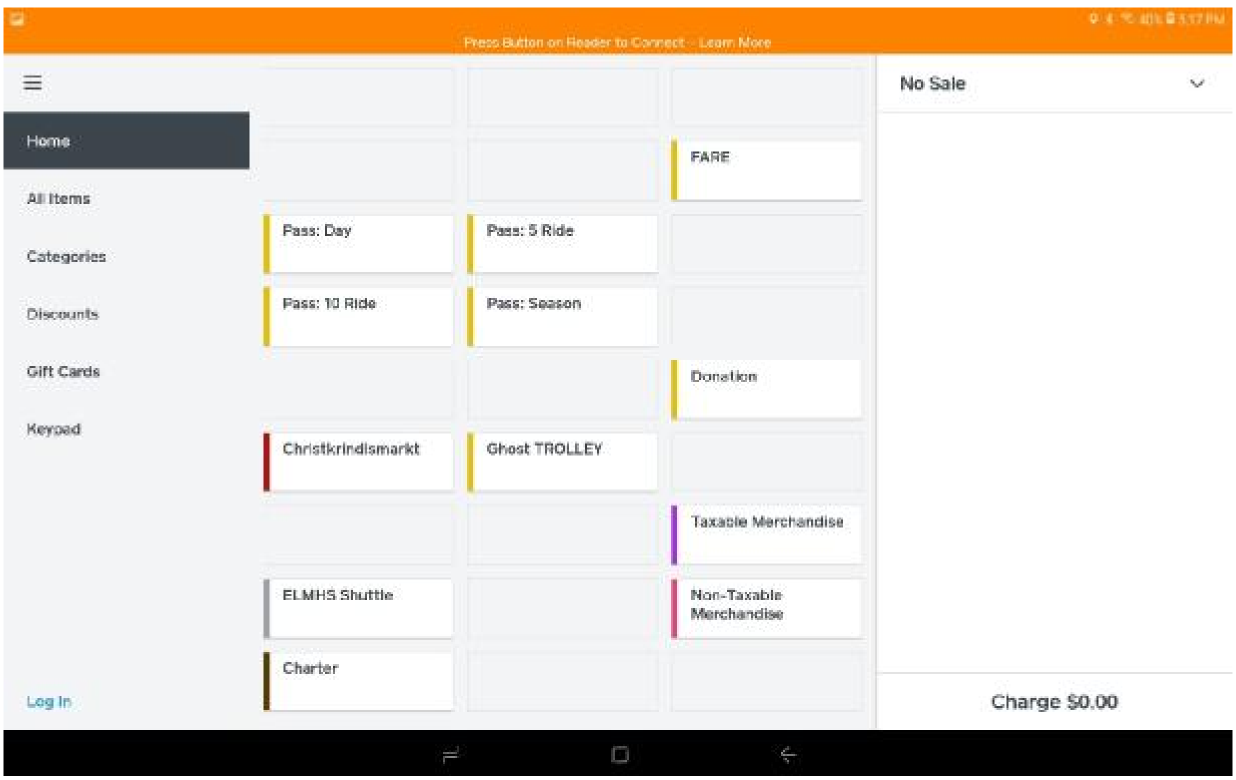
Touch the Square icon to open application

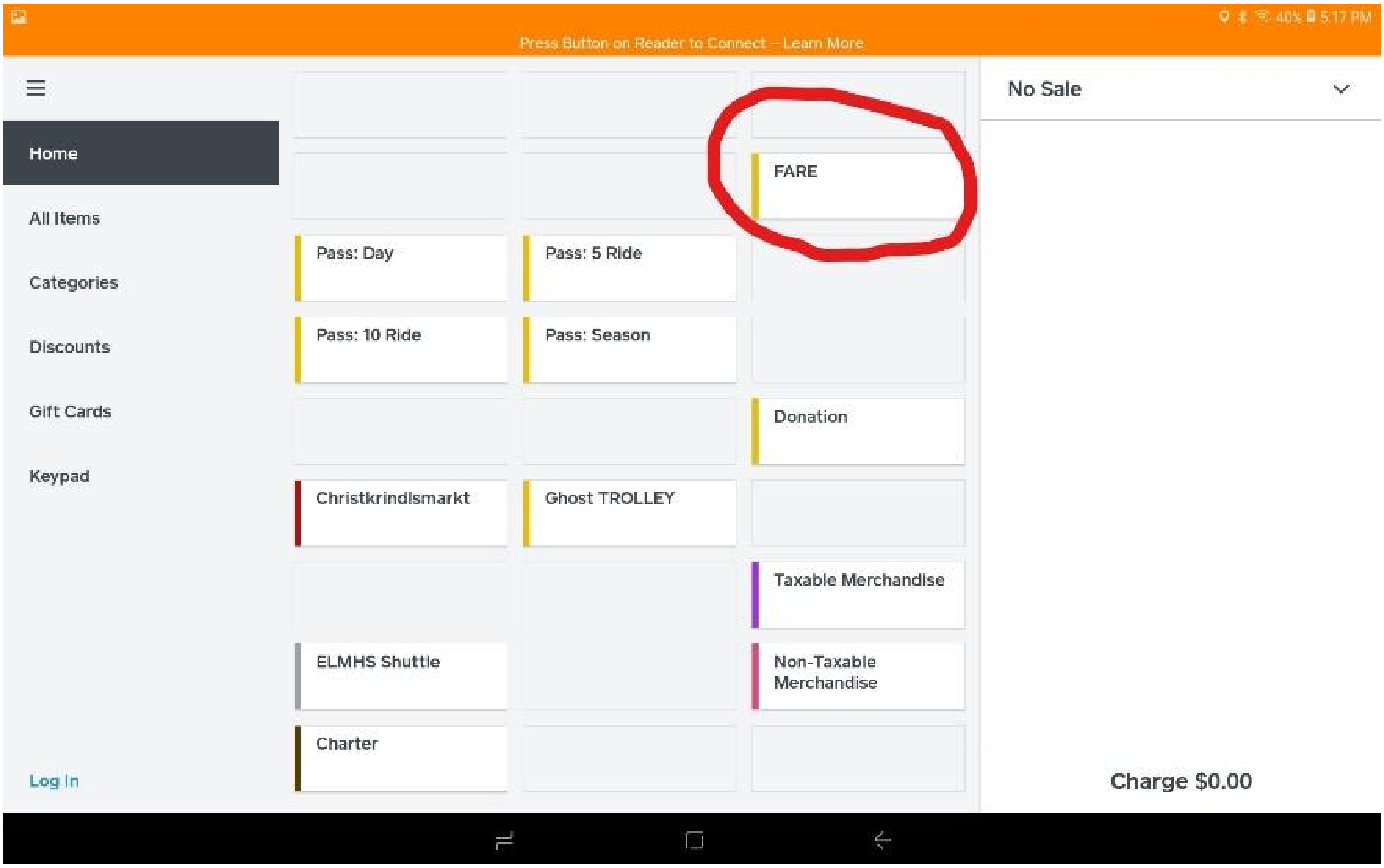
Touch OK to clear non-POS message

## Main Menu



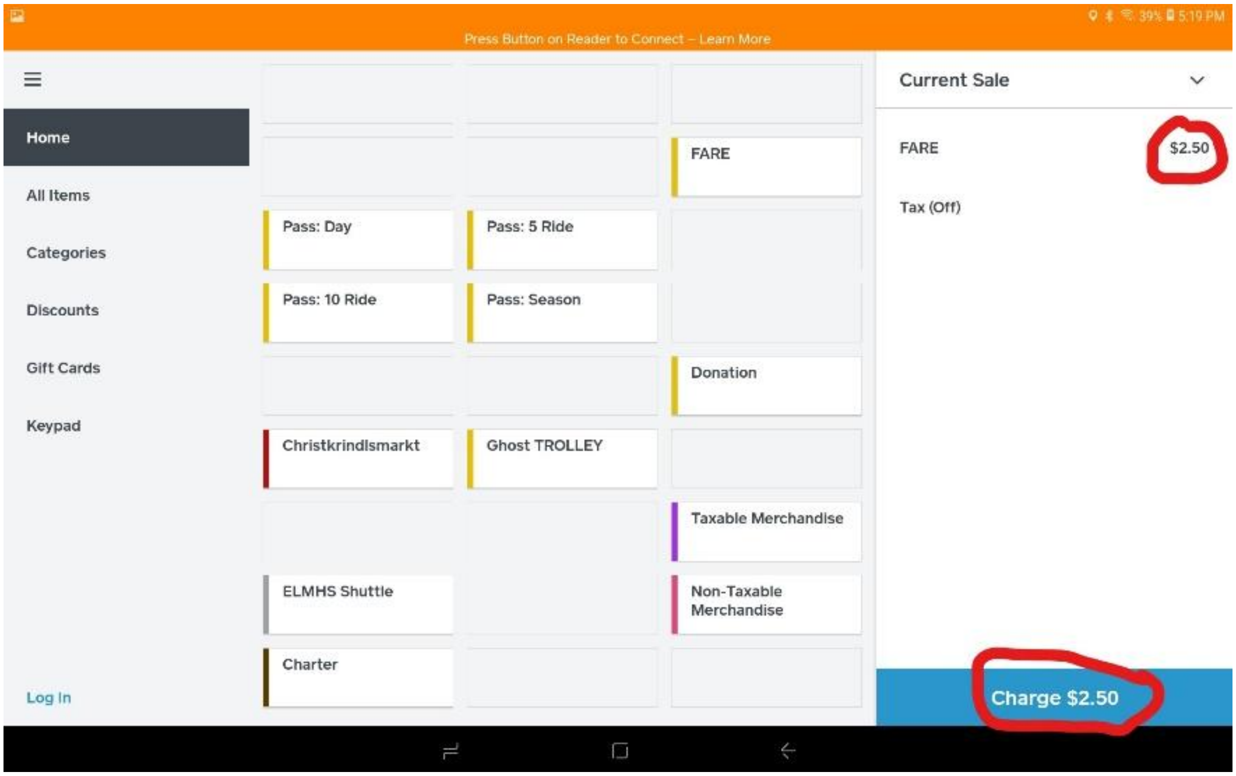

There are two types of sales, ***fixed*** and ***variable***.   A ***fixed*** price option populates the sale price automatically, a ***variable*** price option requires the price be added at time of the sale (think store sales).  On the image above fixed price transactions are Fare, Pass: Day, Pass: 5 Ride, Pass 10 Ride, Pass: Season, Christkindlsmarkt, Ghost Trolley and ELMHS Shuttle.  Variable price transactions are Donation, Taxable Merchandise, Non-Taxable Merchandise and Charter.  There may be a combination of fixed and variable items on any transaction (i.e. a "Fare" and a "Donation" may be sold on the same transaction).  The following will describe the steps for completing a fixed and a variable sale.  Payment tender options will be detailed later in the document.

***Fixed Price Item:*** For this exercise we will use the "Fare" item, it will work the same on Pass: Day, Pass: 5 Ride, Pass 10 Ride, Pass: Season, Christkindlsmarkt, Ghost Trolley and ELMHS Shuttle.



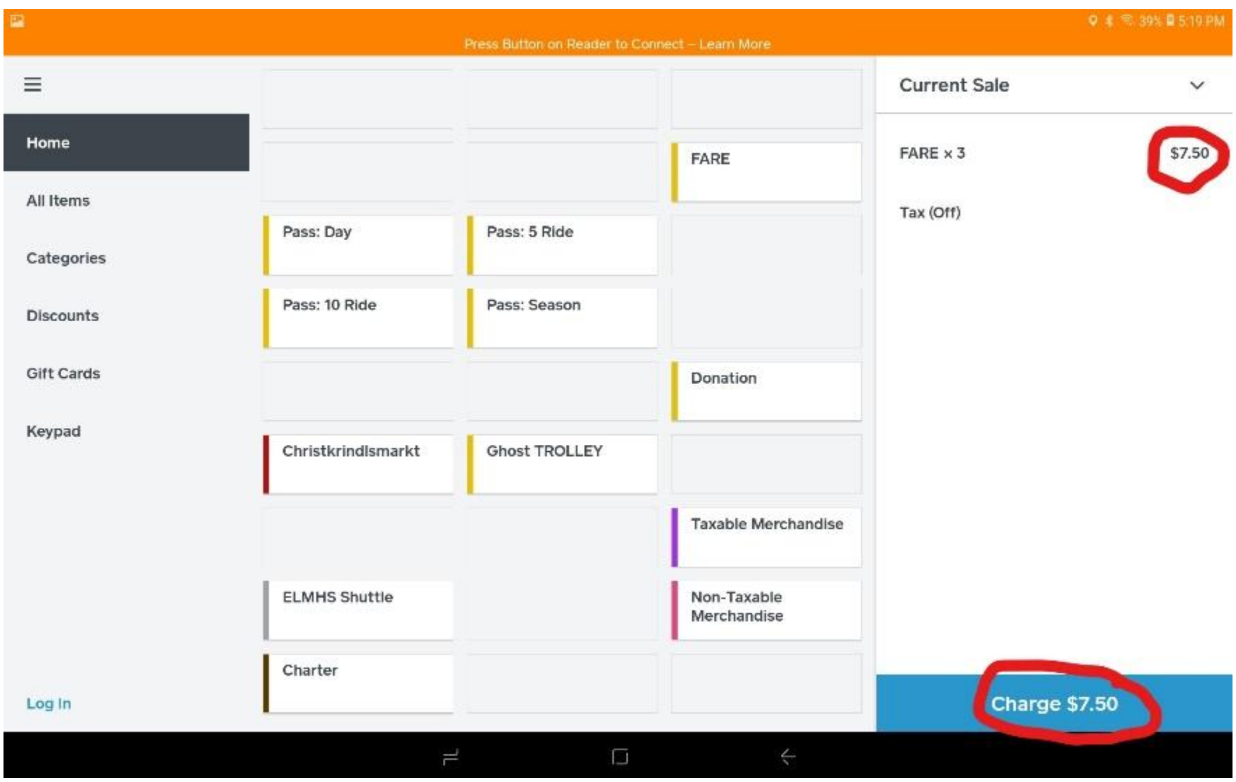

Touch the Fare option once to sell 1 ticket, touch 3 times to sell 3 tickets, etc. "No Sale" on the upper right will change to "current sale", items will be listed as "Fare" with their price and the "Charge" field on the lower right will add up the sale. Examples follow.

**Example of a 1 Fare sale:**




Note, the word "Fare" is now displayed on the upper right, "Charge" in the lower right is now $2.50

**Example of a 3 Fare Sale**




Note "Fare" in the upper right is now "Fare X 3 and "Charge" in the lower right is now $7.50

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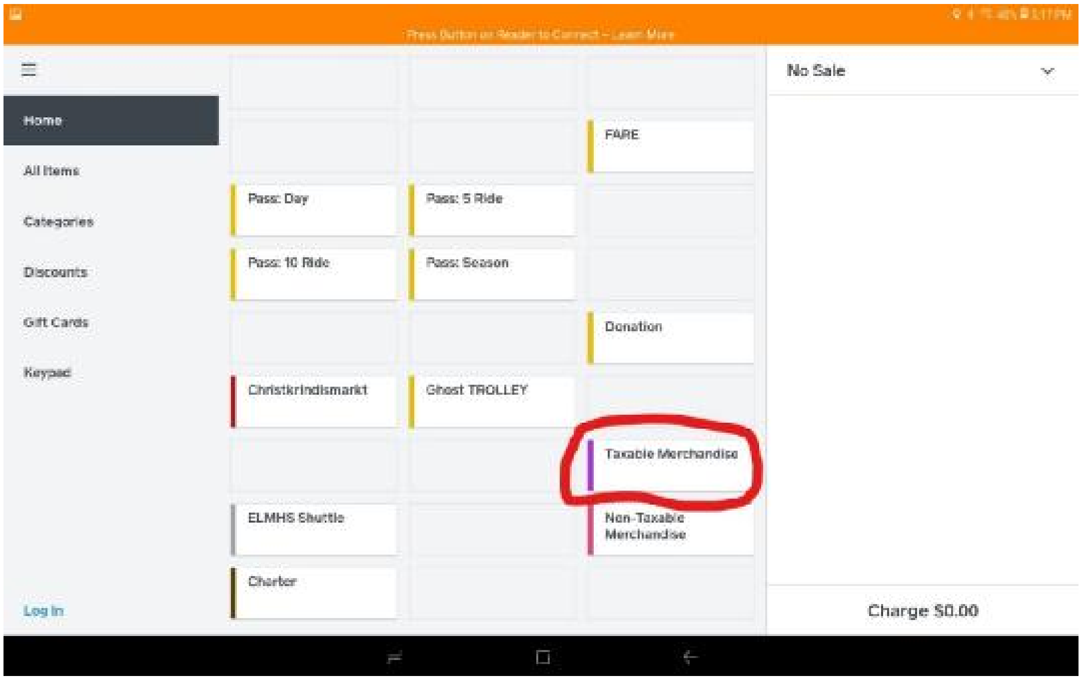
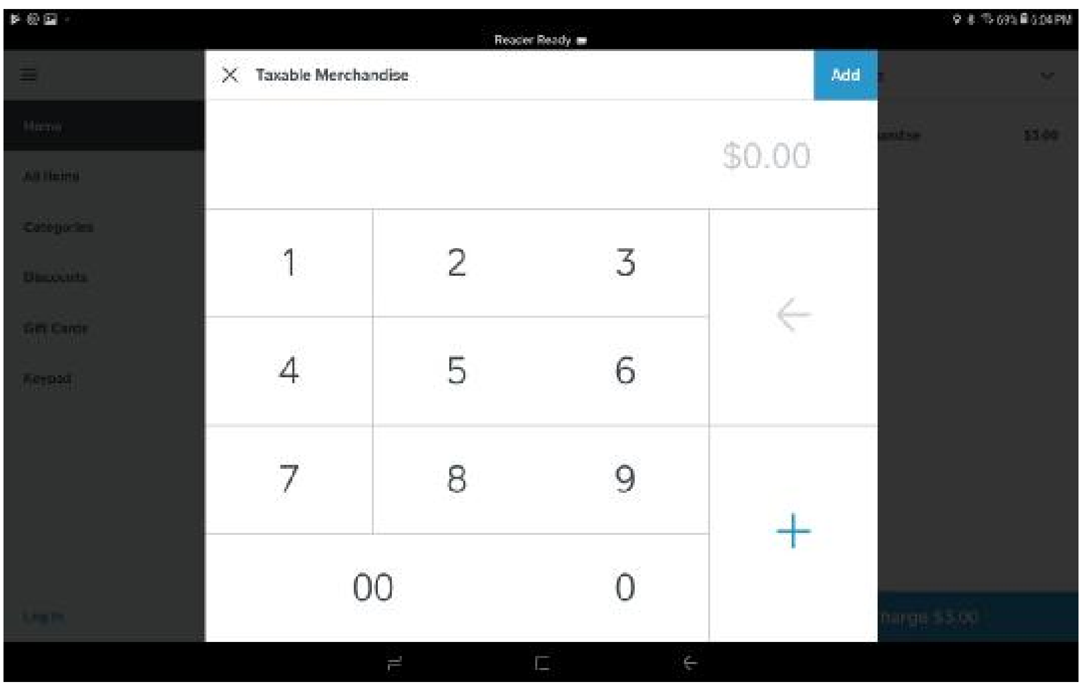
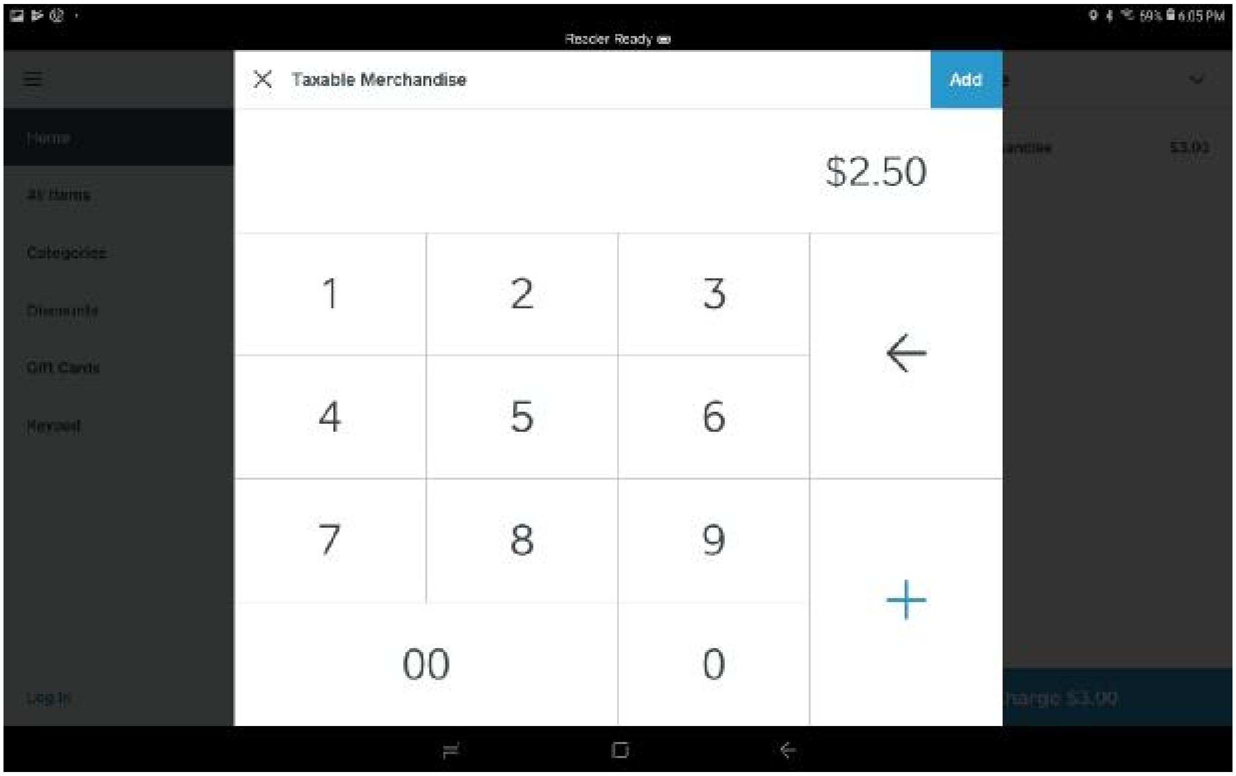
***Variable Price:*** For this exercise we will use the "Taxable Merchandise" item, it will work the same on Donation, Taxable Merchandise and Charter sales.



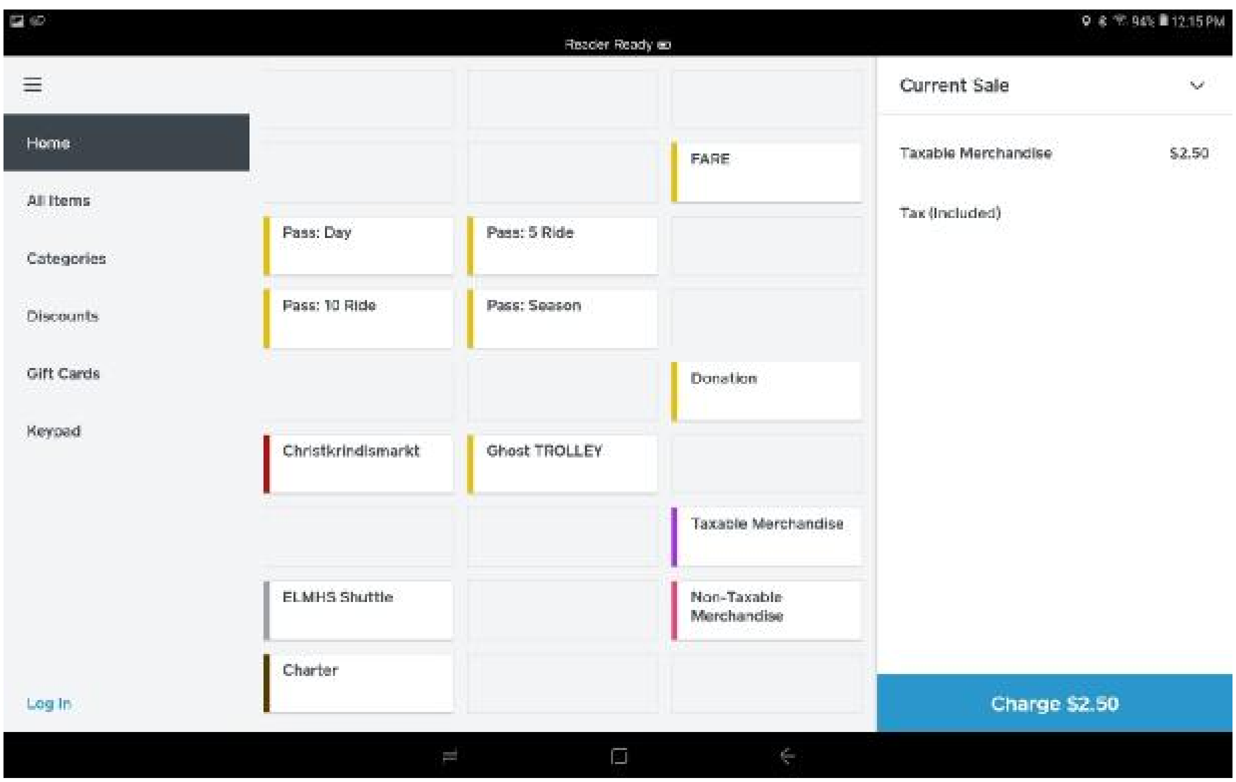

Touch the "Taxable Merchandise" option, you will be presented with the price input screen



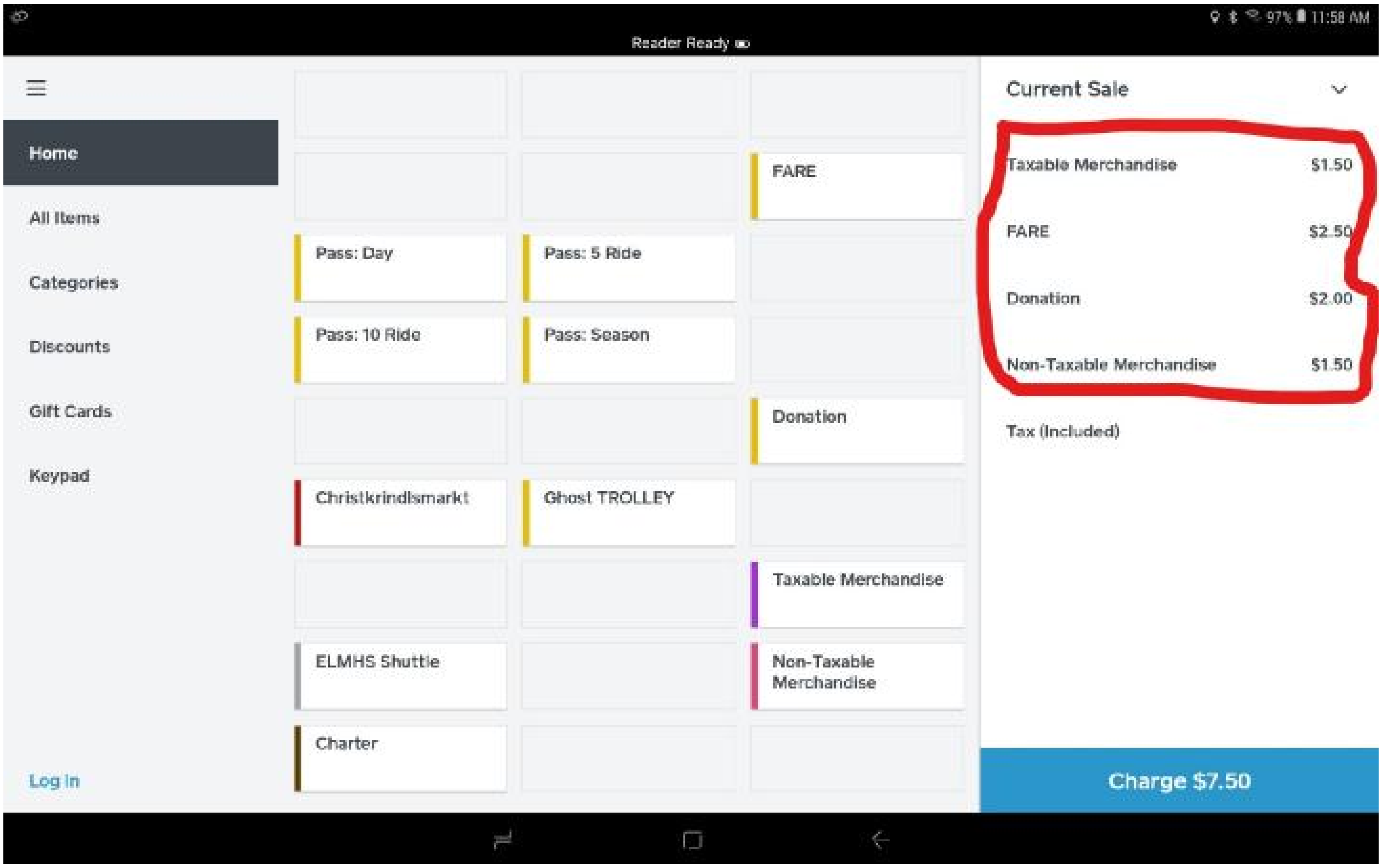

Key in the amount of the item, $2.50 in this example




$2.50 displays on the screen, touch "Add" at the top right or the + at the bottom right to add to the sale and to be returned to the menu screen



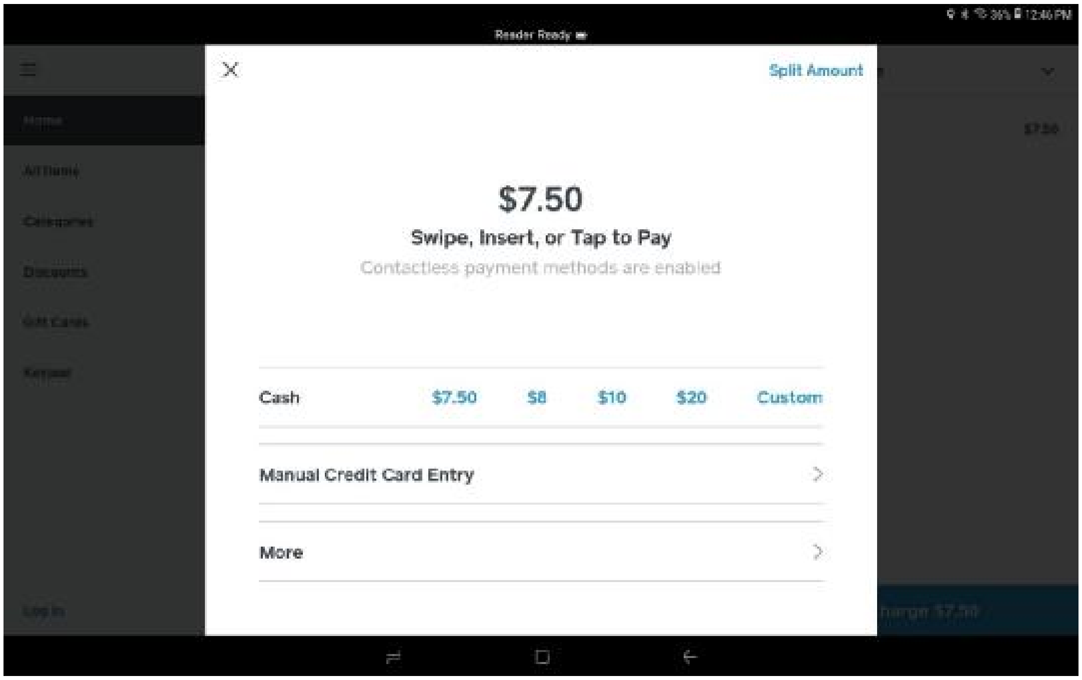

Additional items may be added to the sale (see next screenshot) or proceed to payment options (described later in document).




Screenshot with multiple items; Taxable Merchandise, Fare, Donation and Non-Taxable Merchandise. To add items continue to select from Menu until all the customers items are included. The “Charge” button will turn blue. Touch it to tender transaction (documented later in the pocedure).

# 4. TENDERING SALES

Touch the blue Charge $7.50 on the lower right corner (see previous screen). It will bring you to the payment screen for select of tender type for the transaction.

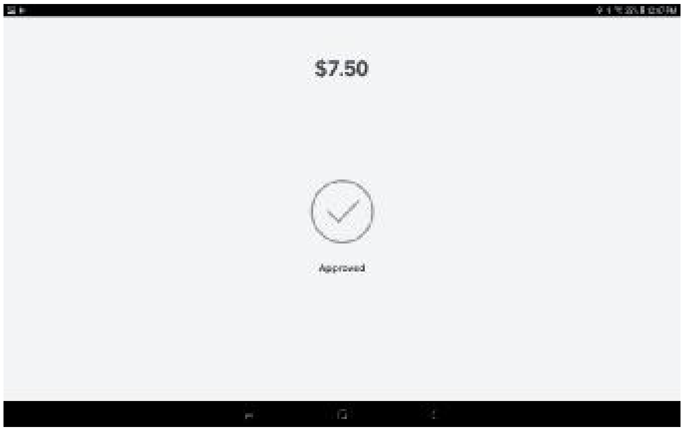



There are two options, credit card (Swipe, Insert or Tap) or Cash.

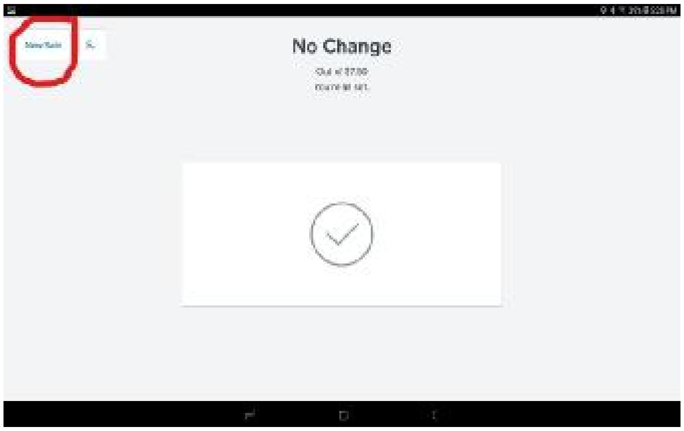
***<u>Credit Card transaction</u>***

Credit Card options; swipe, inset chip card, or use their tap card. The customer's card type will determine which credit card option is used. Two screens will be displayed (example below). One acknowledges credit card approval, the second displays the "New Sale" option (upper left) signaling the transaction is complete and you can move on to the next sale.

1.

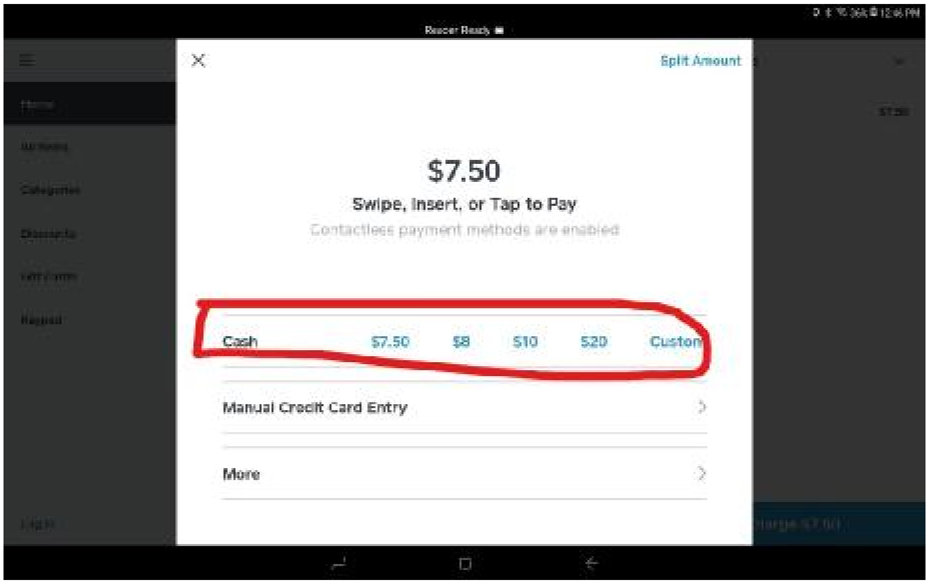



2.

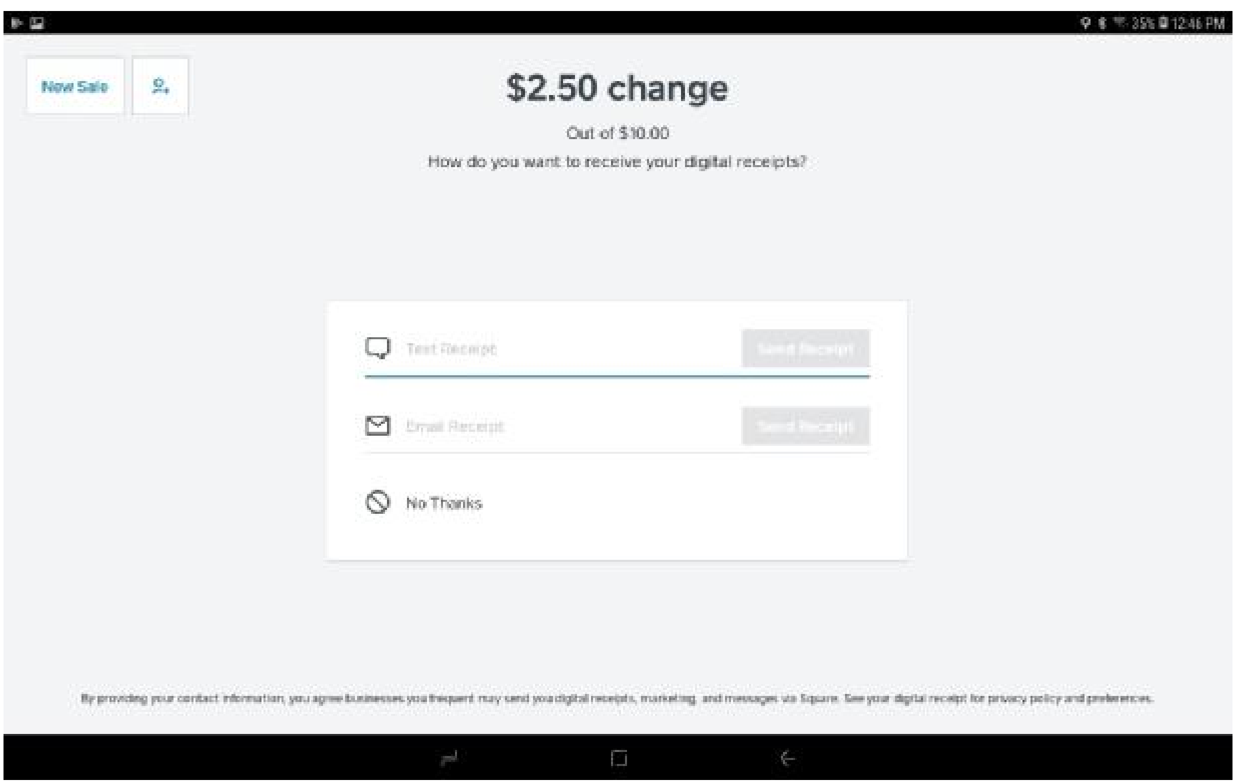



No receipt is required for credit card sales under $50. Over $50 it will ask about a receipt similar to cash option described later. Touch "New Sale" on upper left to return to menu screen for next sale.

***Cash transaction***




The cash line displays choices of cash options the customer may present. The options vary by the amount of the sale. In this case the customer may present the exact amount $7.50, or they may give you $8, $10 or $20. Touch the amount given and the system will calculate the change. The "custom" option is used if they hand you an amount not displayed, i.e. $8.50 for a $7.50 sale. A new screen will be displayed when you touch "custom" allowing the amount to be entered. At the end of the transaction the following receipt screen will be displayed.



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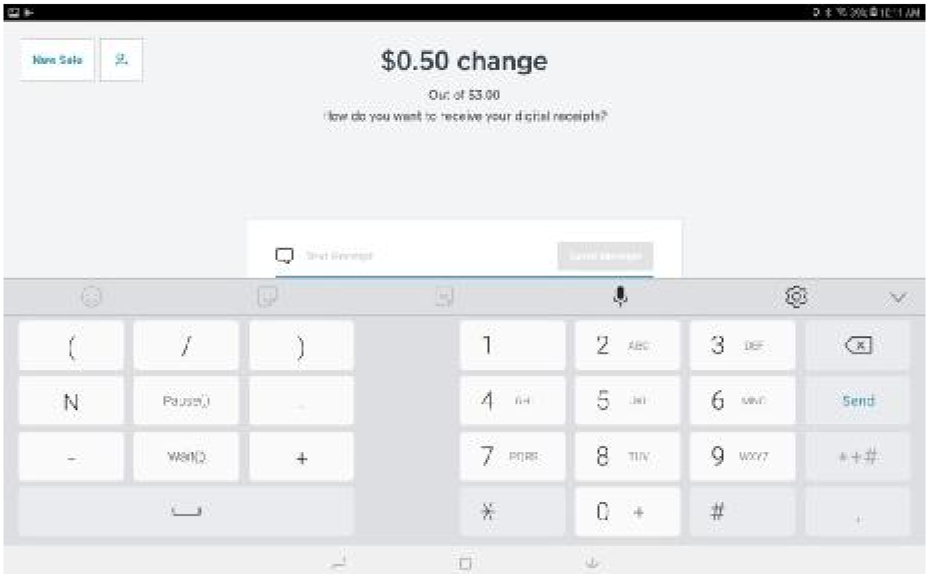
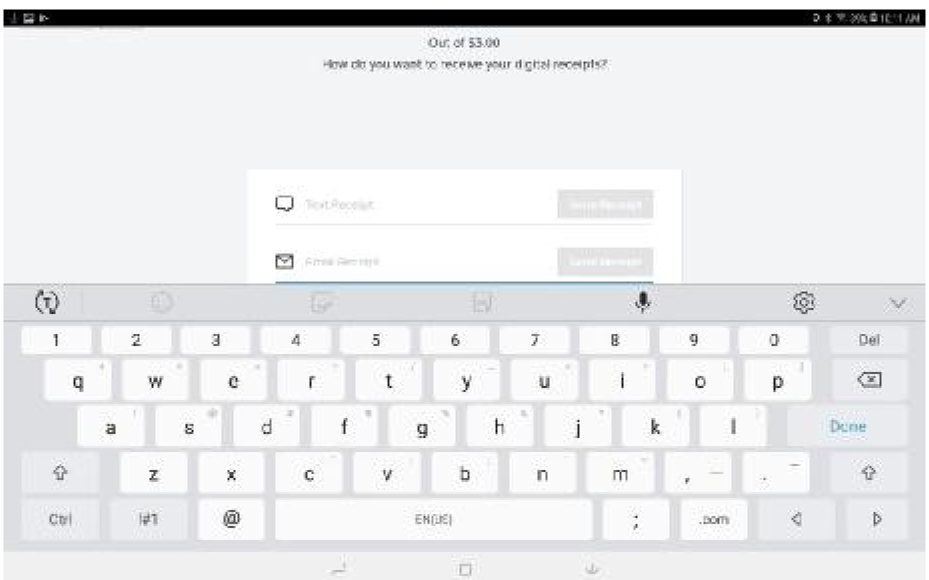
Because there is no printer, ESL can only text and email customer receipts.  We do not require a receipt for a purchase under $25, touch on the “No Thanks”.   If the customer requests a receipt ask them if they want it by text or email.




Touch “Text Receipt” to produce this screen.  Customer can type in their cell phone number.




Touch “Email Receipt” to produce this screen.  Customer can type in the email address.

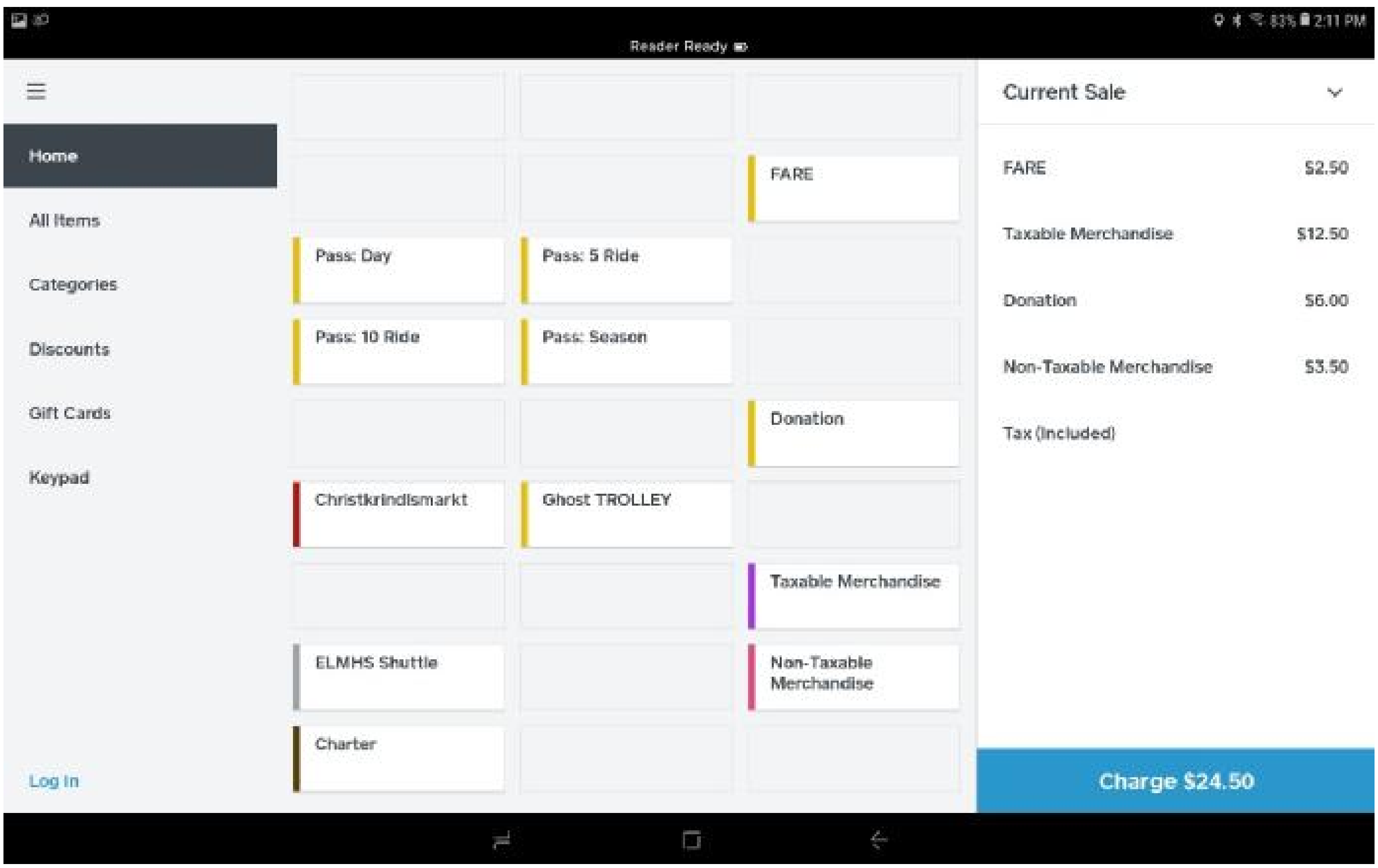
**Note:** If a credit card customer has used the Square application in the past, at any vendor, their text or email information will already be populated.

Touch the highlighted “Send Receipt” to complete transaction.  Touch “New Sale” in the upper left to return to menu screen for the next transaction.

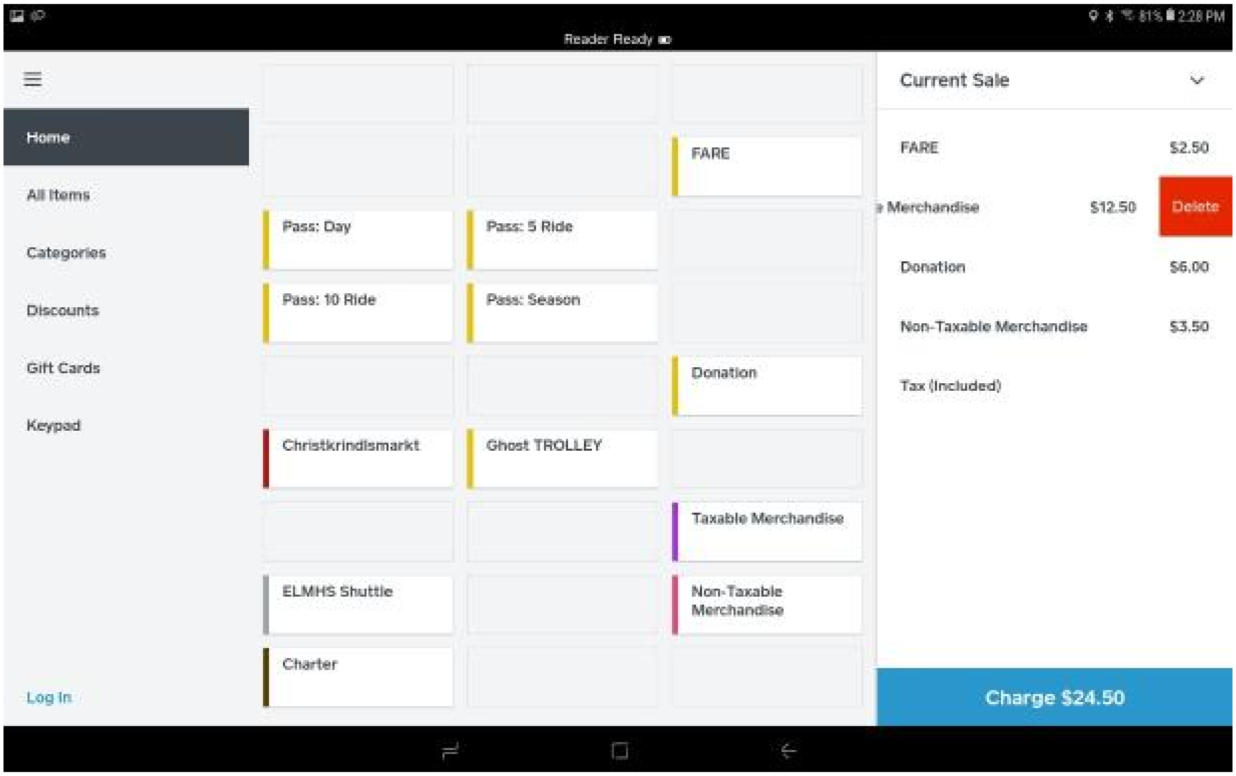
## 5. Correcting a sale before tendered:

There are two options for deleting or correcting an item **BEFORE** the sale is complete and tendered. The first is to delete the line item you want to remove or change. The second is to clear the whole transaction and start over.

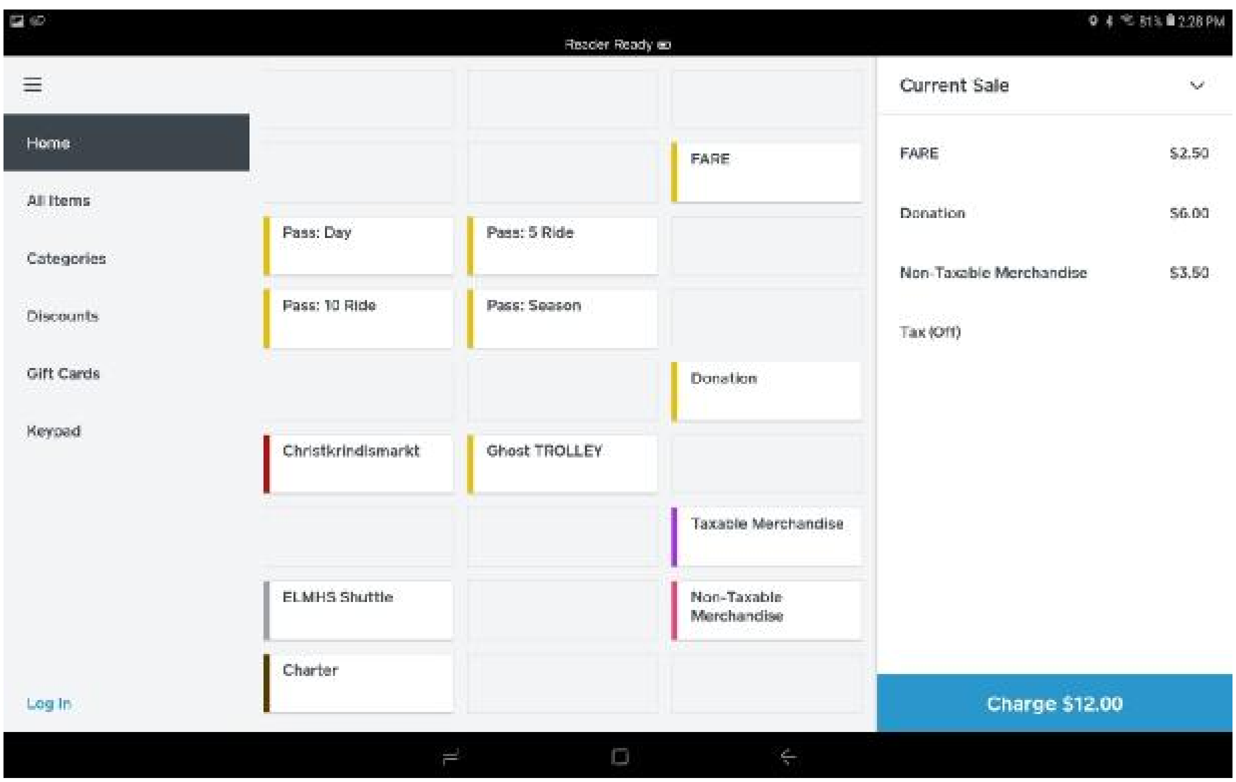
***Delete line item***




The blue **Charge** field displays a total sale of $24.50. The customer decides not to buy the taxable merchandise item for $12.50. Lightly touch and swipe ***left*** the “Taxable Merchandise” item of $12.50. A Delete option will appear as shown on the next page.




Touch the “Delete” button to remove the line item noted above.




The $12.50 “Taxable Merchandise” has been deleted. The “Charge” field total is now at $12.00. Touch Blue Charge button to finish the sale.

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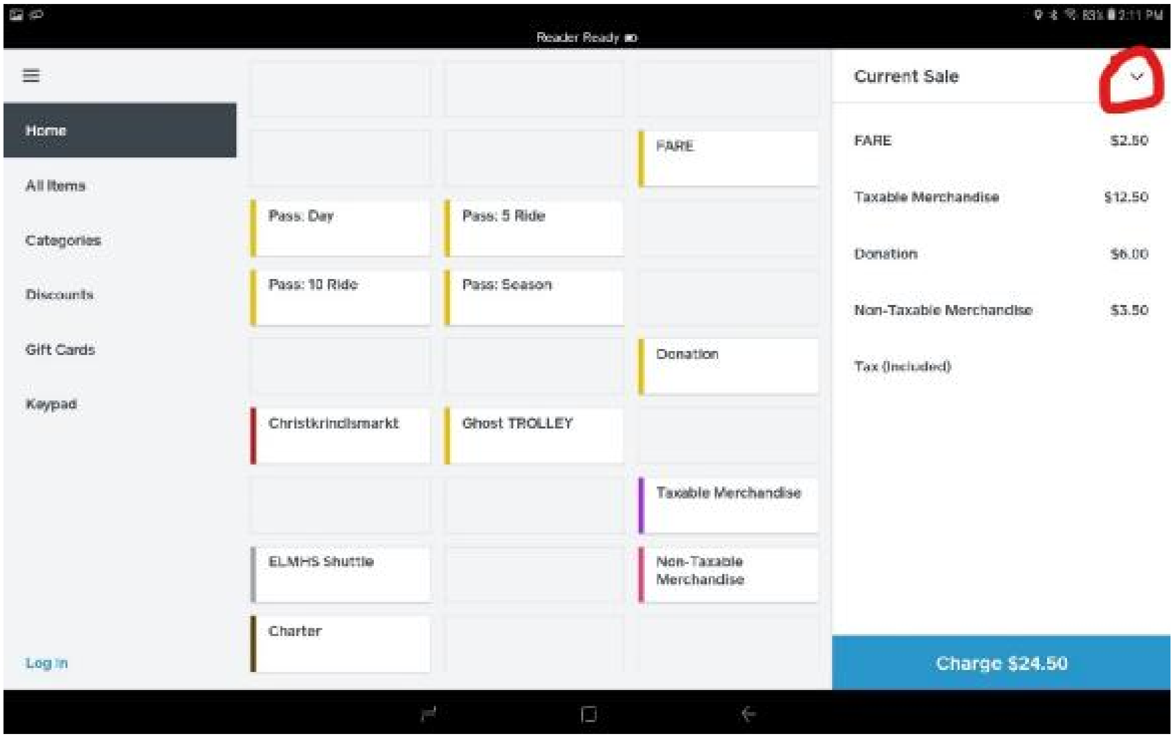
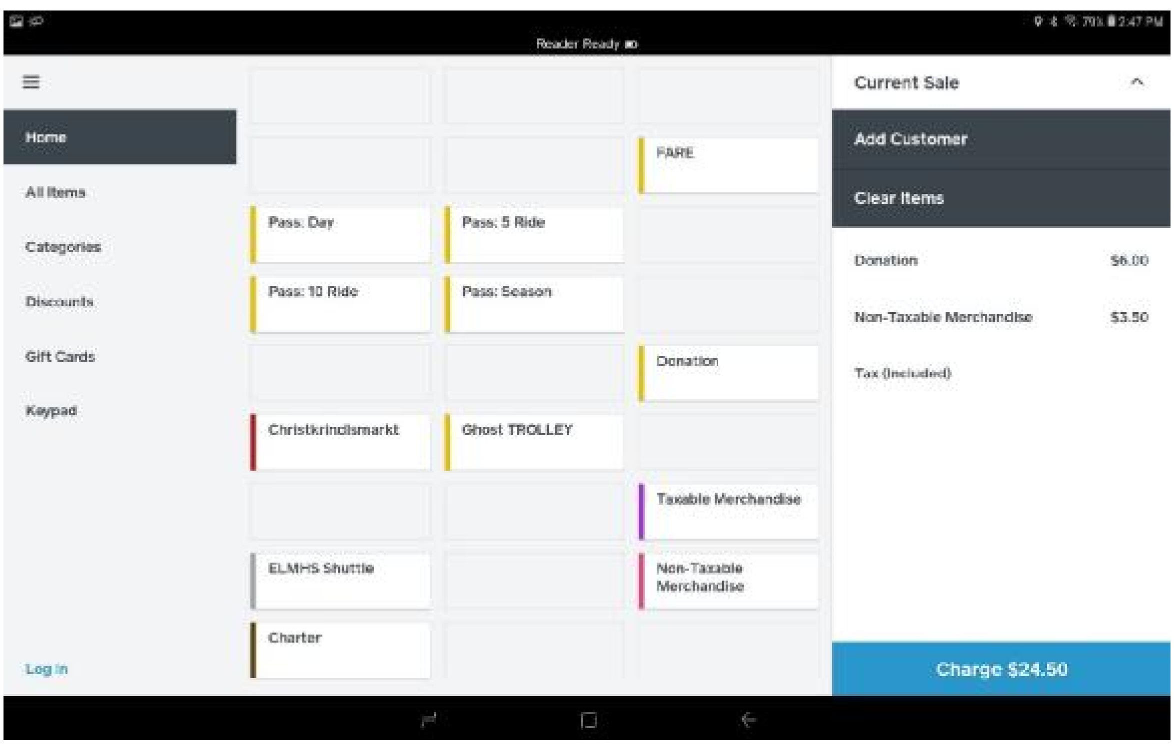
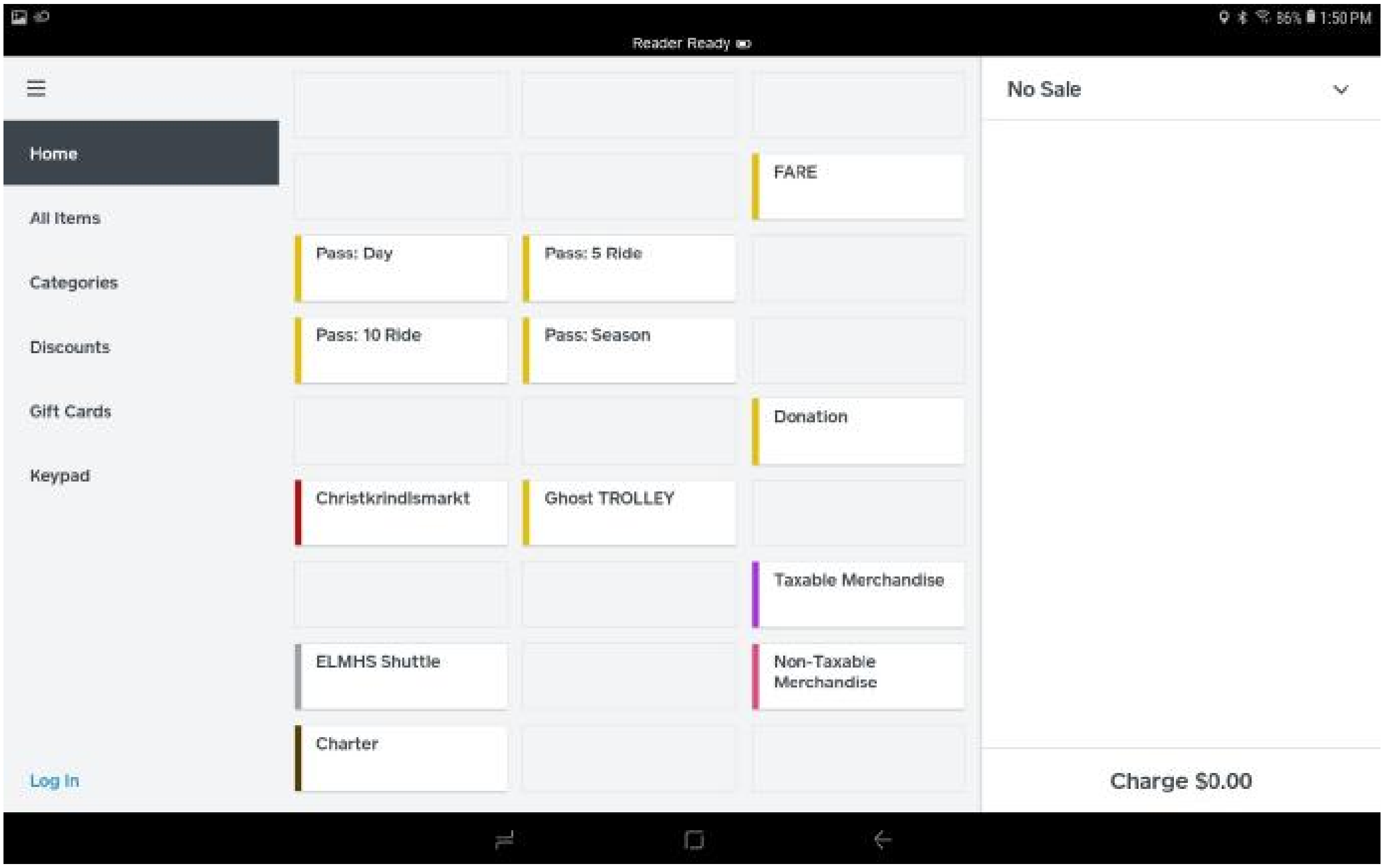
## *Clear Total Sale*




Touch the dropdown menu to the right of “Current Sale” to get list of options.




Touch “Clear Items” from the dropdown.




All items are removed from the “current sale” list. Re-enter the correct items to complete the sale.

## 6. REFUNDS

To correct a transaction after it has been tendered **all items** in the transaction must be refunded. Due to tax and reporting requirements we cannot refund a partial transaction.

Same as in sales there are two types of refunds, **cash/check** or **credit cards** (swipe, chip, or tap). If you are not comfortable doing a full refund check to see if another crew member has more experience with refunds or call Karen Kertzman (612 387 6069) or Todd Bender (952 334 4065).

Because we do not issue paper receipts cash refunds can only be made the day of purchase. A few reasons for a refund could be:

- Ride was canceled after tickets were sold due to a change in weather or mechanical problems
- Customer decided not to wait until the car returns (child problems)
- Customer bought tickets for more people than they intended too
- Customer decided they didn't want the merchandise they purchased
- Customer purchased defective merchandise

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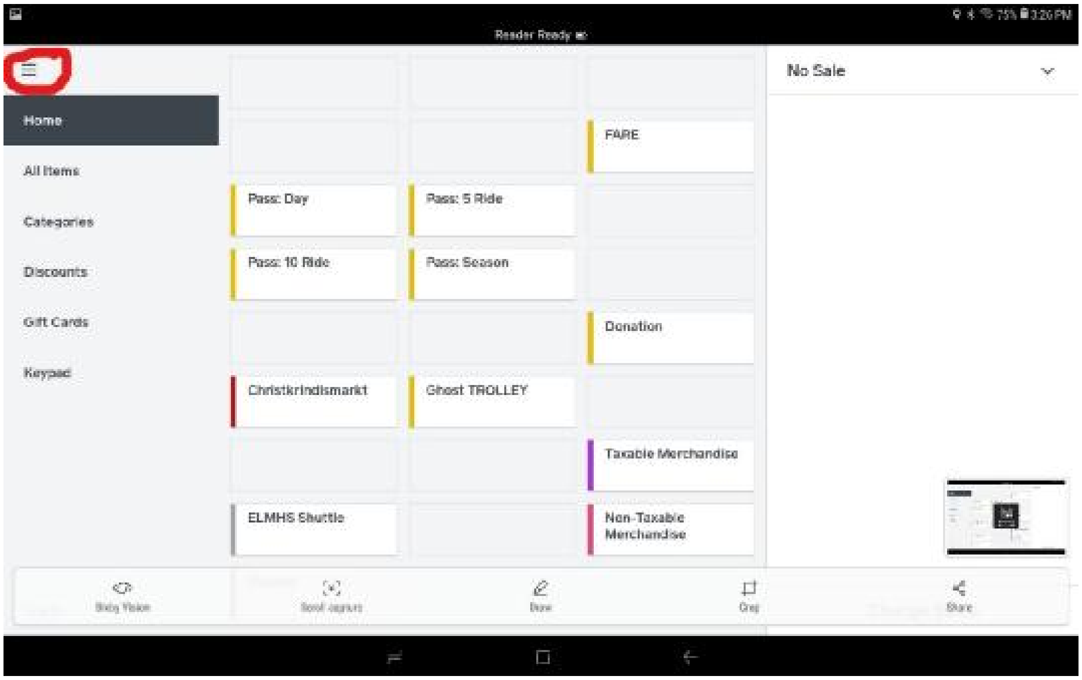
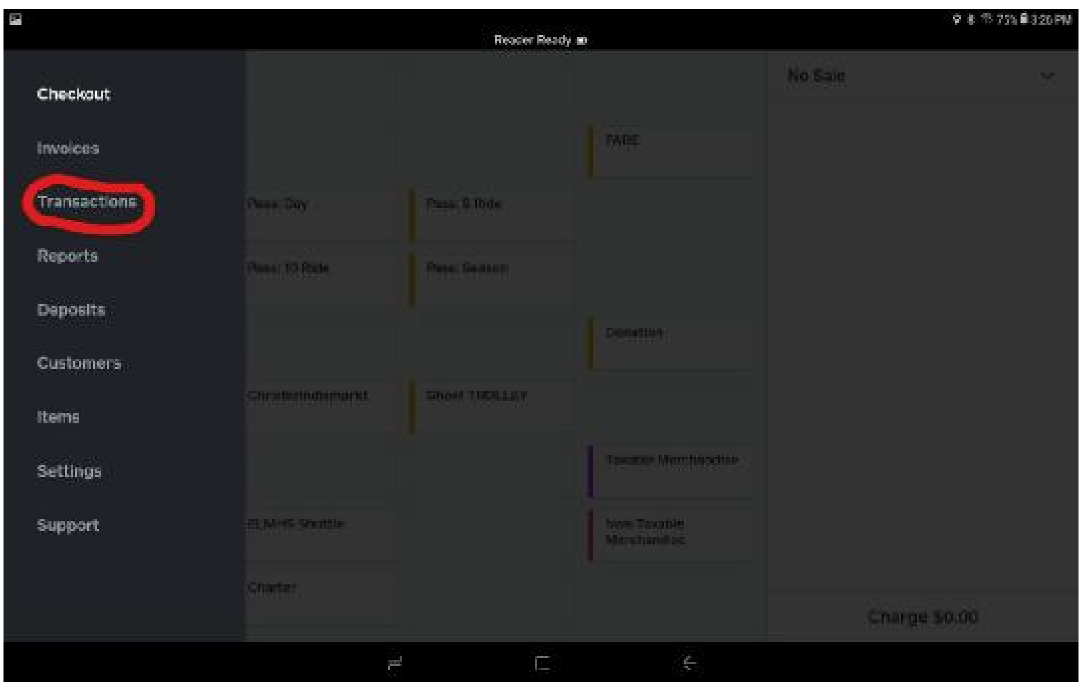
## ***Cash Refunds***

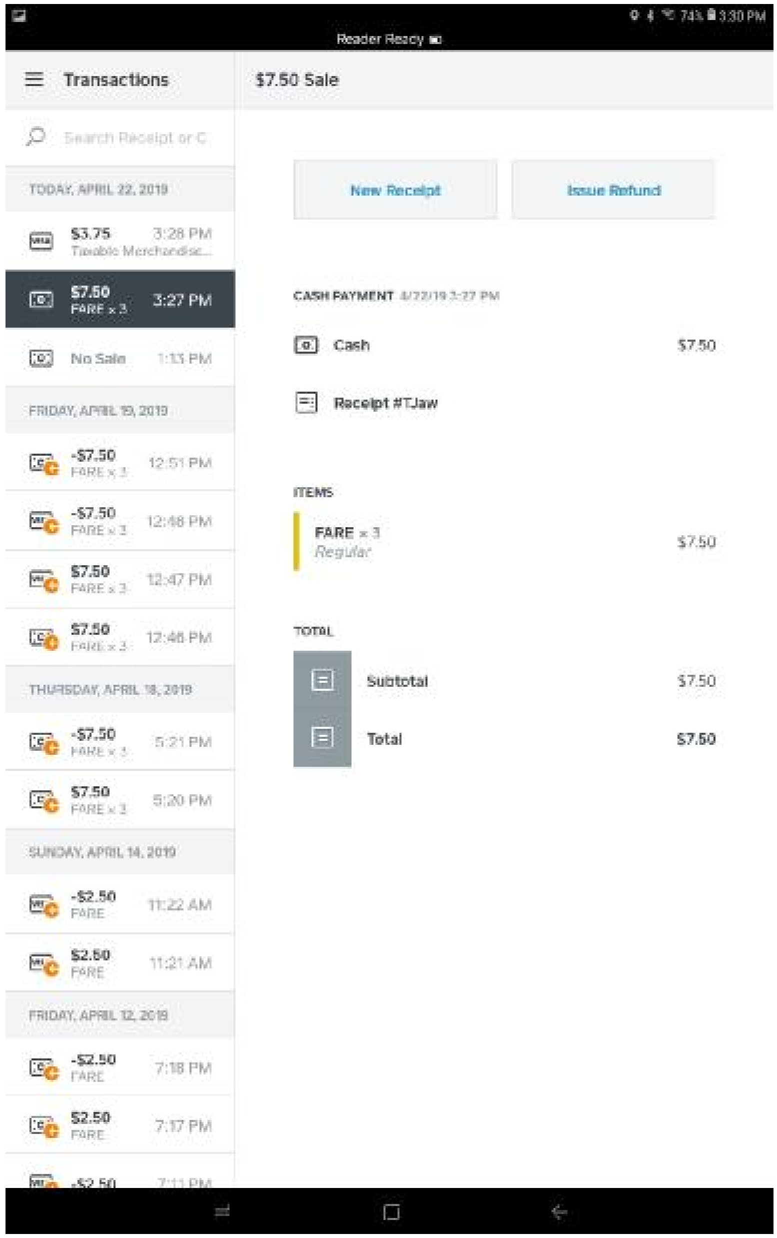
On the top left hand side of the Menu page there are 3 bars similar to this ≡




Touch ≡ at the top left corner of the screen to receive menu options for starting refund process. The following screen will be displayed.




Touch the "Transaction" option to view all the sales for the day and to select the correct transaction. The following screen will be displayed.




In the left column there will be a listing of all transactions, both cash and credit, sorted by time of sale. Credit card sales are noted by type of card, in this example it's a Visa card. The list will show all sales at the ticket booth and the store adding to the complexity of searching for the item to refund. In this example a cash fare sale has been highlighted for a refund. The details of this transaction are listed on the right. There are two action options, **"New Receipt"** or **"Issue Refund"**. At this time we are not issuing receipts, ignore the "New Receipt" option. Touch **"Issue Refund"**. The following screen will be displayed.

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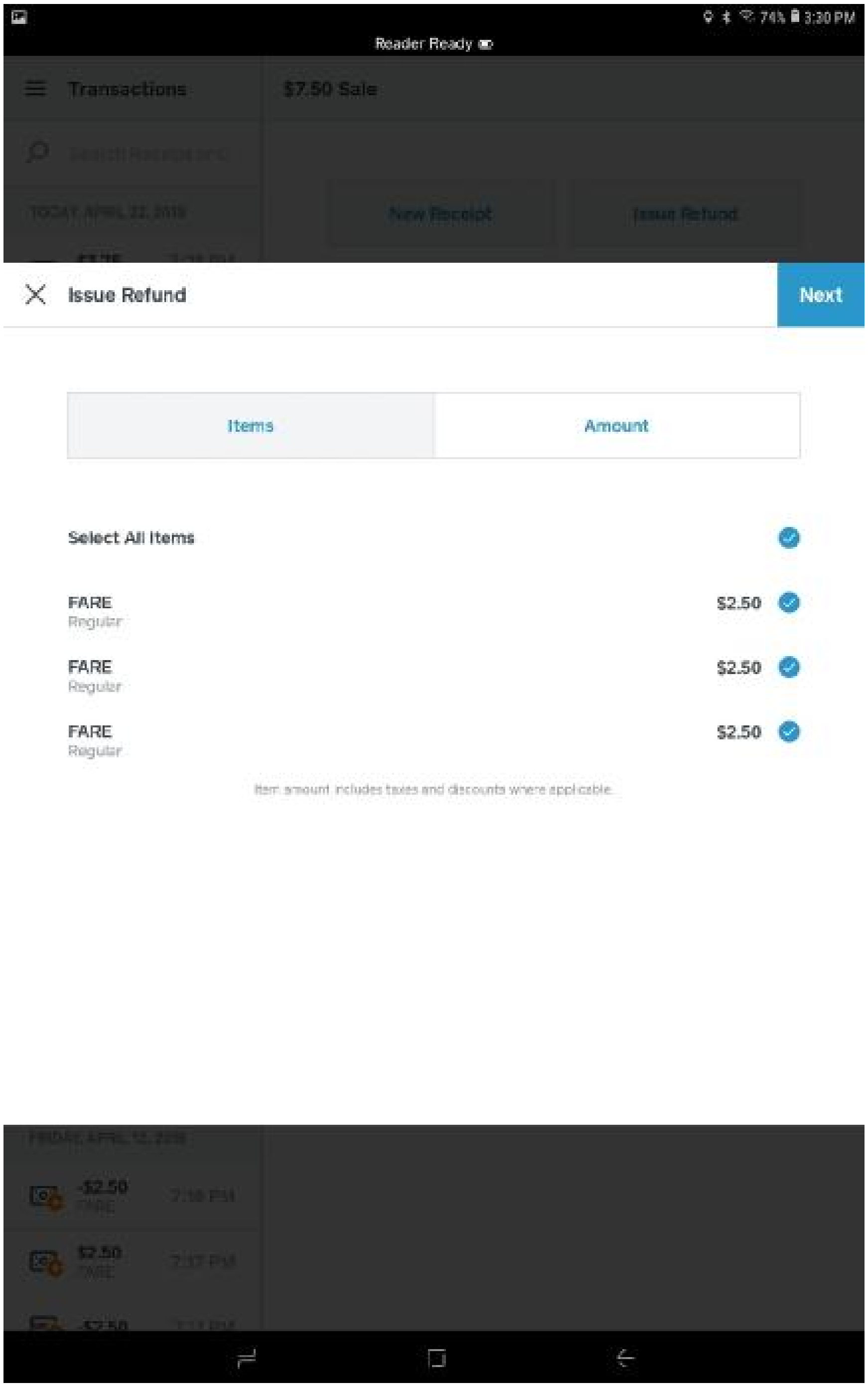
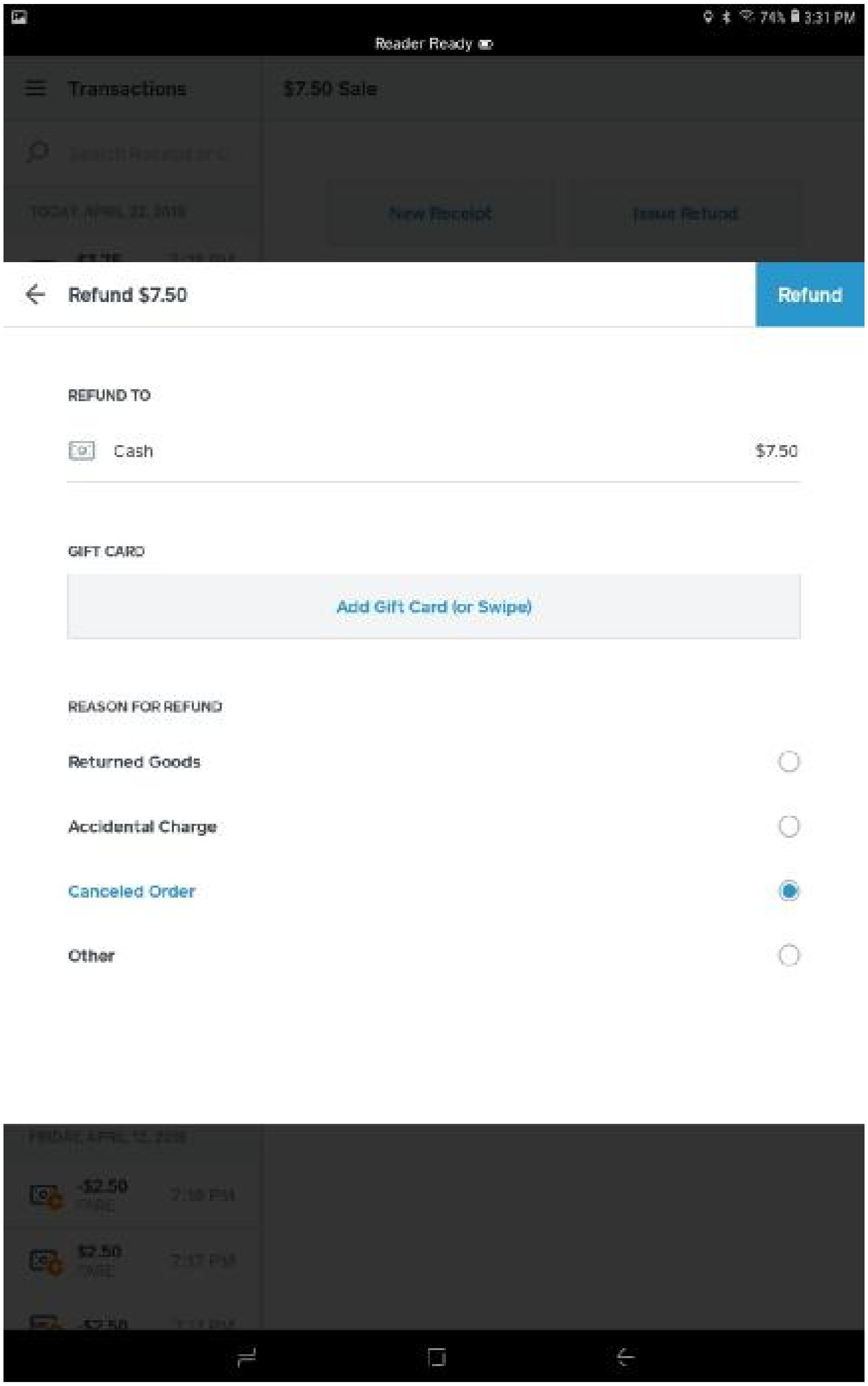
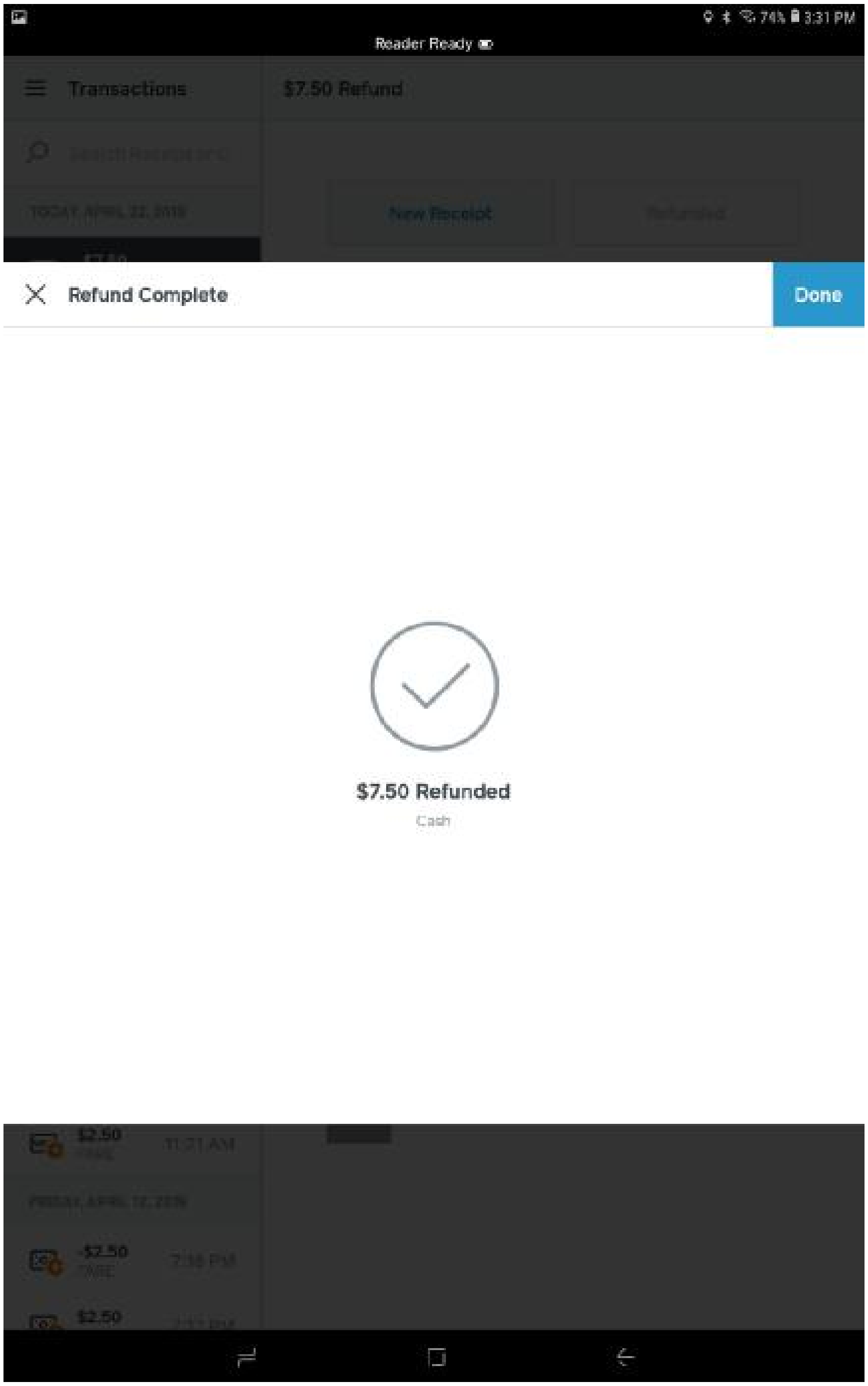


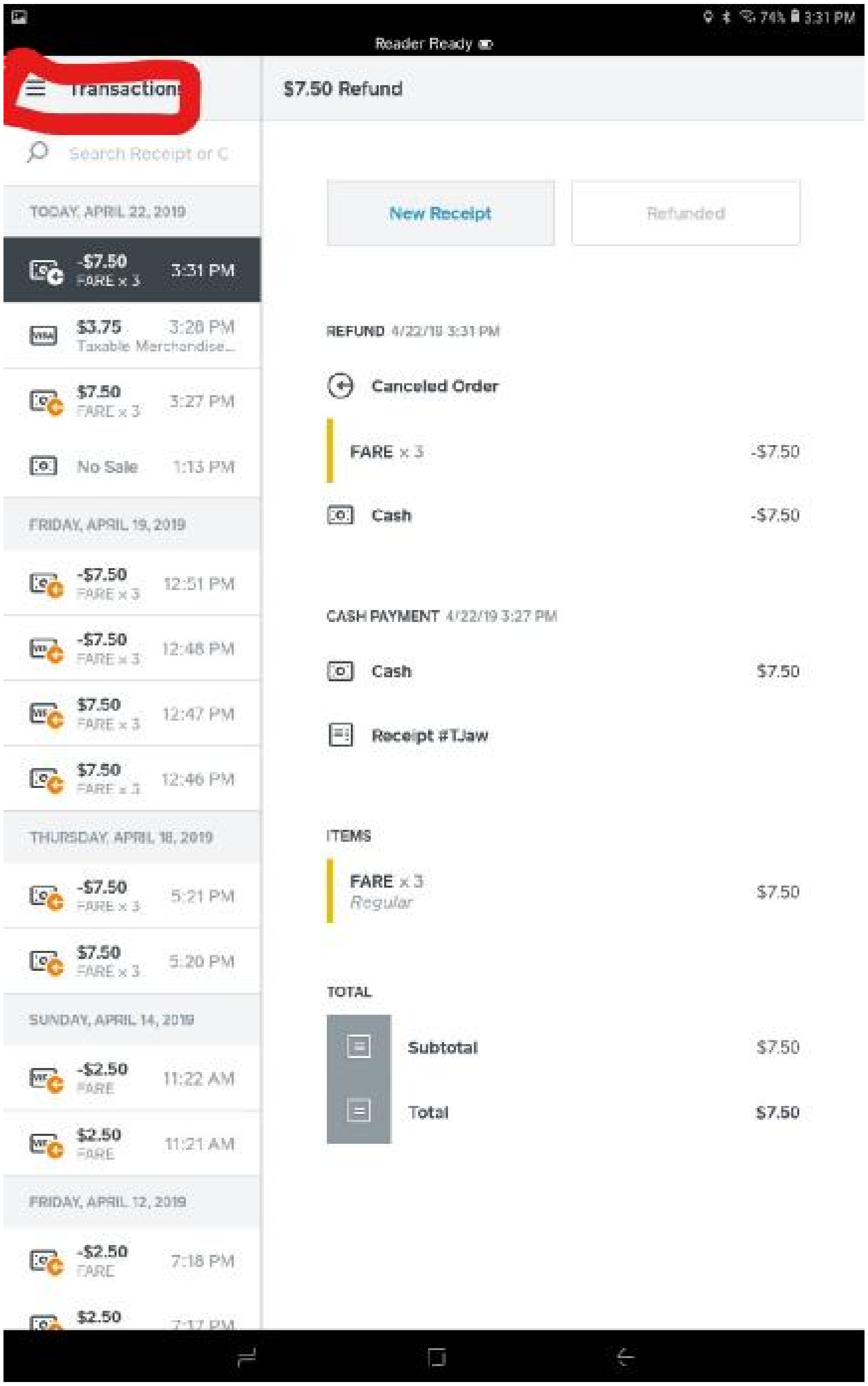

Touch on the "Select All Items" option, the items below it will automatically be highlighted as well. Touch on "Next" in the upper right corner. The following screen will be displayed.



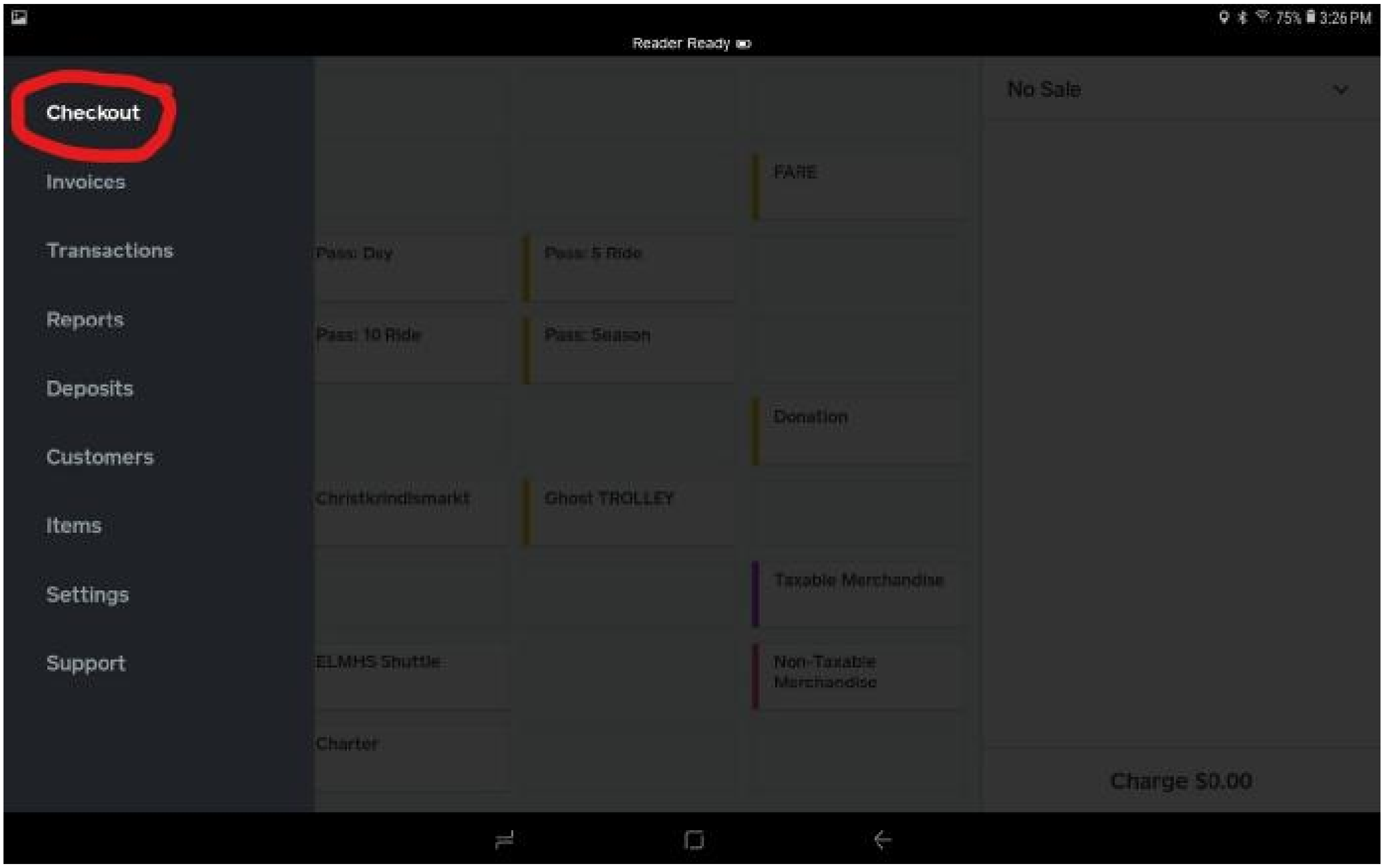

Touch on one of the "Reason For Refund" options and then touch on "Refund" in the upper right corner. The following screen will be displayed.




The cash refund is complete. Take the refunded amount of cash from the cash box and give it to the customer, ***if they paid with a check return the check do not give them cash***. Touch "Done" in the upper right corner. The following screen will be displayed.




The summary page will show the initial cash transaction ($7.50) and the refunded transaction (-$7.50). To get back to the Home Menu Touch “Transaction” in the upper left corner. The following screen will be displayed.

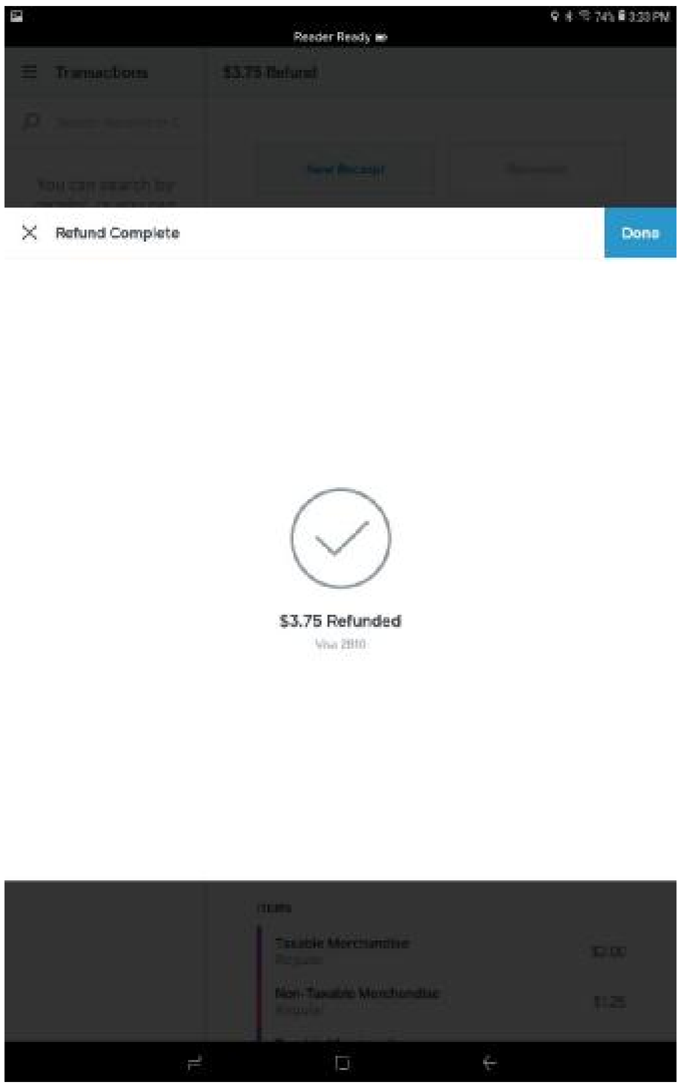



Touch on “Checkout” in the upper left to bring up the Home Menu screen for the next transaction.

***__Credit Card Refunds__*** *(swipe, chip or tap)*

The credit card refund process is the same as cash refunds with a few exceptions.

1. To find the correct credit transaction have the customer either swipe, insert chip card or tap the card reader (the same mode as their original purchase) at the transaction log screen (**SEE PAGE 24 AND 25 ON HOW TO GET TO THE TRANSACTION SCREEN)**. The correct transaction will appear on the right.
2. Do not refund cash back to the customer. This screen will be displayed to complete the credit card refund versus the cash refund screen.




3. The type of credit card and the last 4 digits appear on the screen above
4. Depending on the day of the week and/or the time of the transaction the refund may not show up in the customer's account until the following day due to Square's transactions processing schedule.

# 7. FOREMEN INSTRUCTIONS

**Beginning of Day**

- Retrieve all POS hardware components from the charging station next to the black cabinet. "A" below, shows the components at the charging station.
    1. Red Tablet
    2. Ticket Booth Hotspot
    3. Ticket Booth Card Reader
    4. Store Black Tablet
    5. Store Card Reader
- Power up the black store tablet and card reader.
- Place the tablet in the store and velcro the card reader to the Velcro strip on the Donation Box ***(page 9 of the documentation).***
- Place the red tablet, ticket booth hotpot and card reader in their noted places ***in the black case with the ticket booth cash***.
- Place the black ticket booth cash case on the trolley.
- Upon arrival at the ticket booth power up the red tablet, the hotspot and the card reader.
- Velcro the card reader to the Velcro strip on the top of the Donation Box, Velcro the hotspot to the Velcro strip on the back of the Donation Box ***(page 6 of documentation).***

**A.** All 5 components will be plugged into one unit for charging. *This photo will be updated when the charging station is complete*. Each component and its corresponding cable is labeled with a matching number. Remove cable connection at the component, leave cables plugged into the charging station. See page 33 for a close up of the numbering system.

## End of Day

- Count the money in the Donation Box. On the red tablet touch the "Donation" item and input the amount counted from the Donation Box. Put the donations cash with the ticket sales money.
- Remove the card reader and hotspot, on Velcro strips, from the Donation Box at the ticket booth (Donation Box remains at the ticket booth).
- Power off the red tablet, hotspot and card reader.
- Return ***all three*** to the cash case with the ticket booth money red pouch.
- Place on the trolley to return to the carbarn.
- In the carbarn count the money in the store Donation Box, if possible leave $2.00 in the box. On the black tablet touch the "Donation" item and input the amount counted from the Donation Box. Put the donations cash with the store sales money.
- At the carbarn remove the card reader from the Donation Box.
- Power down the black store tablet and the card reader.
- Place all five components back on their correct charger. Match the number on the cable to the number on each device (***see "A & B" below***).
- Count the cash from the ticket booth returning $100 to the red cash pouch. The remaining cash is the "Fares" sales for the day. Write the **"Fares"** total on daily run sheet.
- Count cash from the store cash box returning $100 to the cash box. The remaining cash is the "Store" sales for the day. Write the **"Sales"** total on the daily run sheet.
- Put cash and daily run sheet into the appropriate pouch in the black cabinet


**A.** Ticket Booth Components
Match the 1's, 2's and 3's as shown


**B.** Store components
Match the 4's and 5's as show

## 8. MISCELLANEOUS

# *Karen still working on this page*

Always  power on card reader after any period of inactivity (part of procedure)
Procedure for 2 person crew
Receipt request when sale should be under $25
System keeps track of money, don't need to specify donations or merchandise type

Depending on the day of the week and/or the time of the transaction the refund may not show up in the customer's account until the following day due to Square's transactions processing schedule.