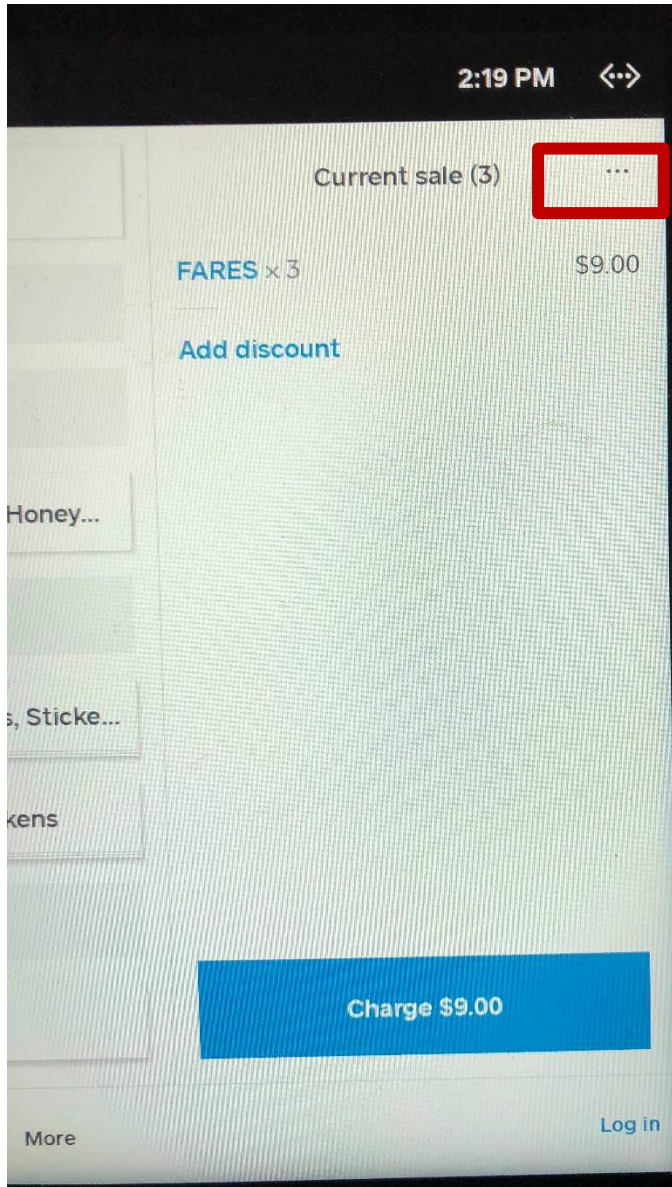


5. CORRECTING ERRORS BEFORE YOU MAKE THE SALE

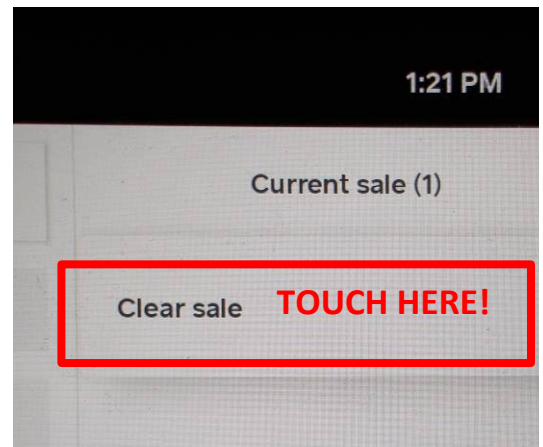
CLEAR THE ENTIRE SALE AND START OVER



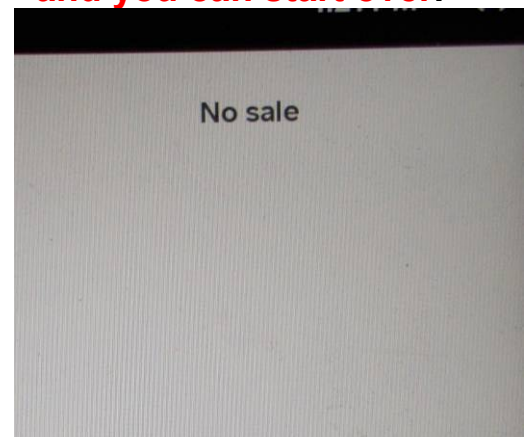
1. Touch the three dots to the right of the words "Current sale."



2. This tab magically appears: ↓



3. TaDa! The sale is gone and you can start over.



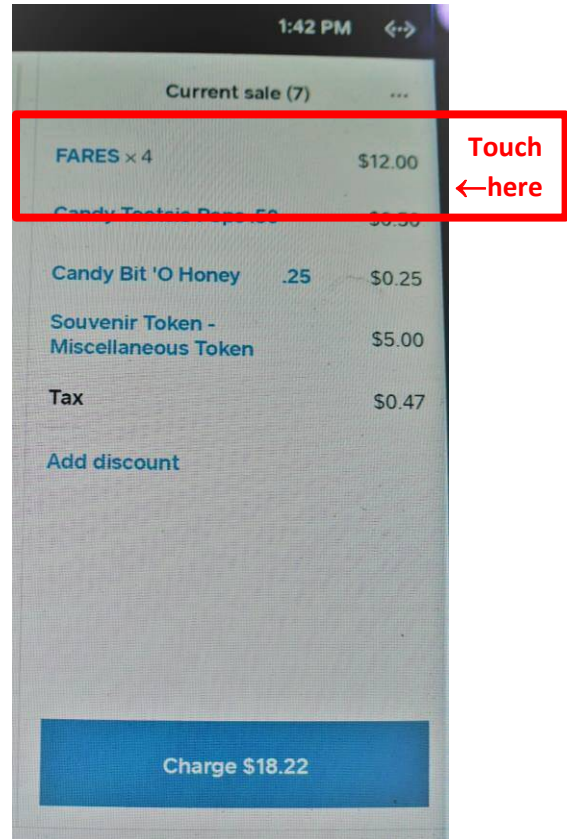
DELETING ITEMS OR CHANGING QUANTITY OF ITEMS PURCHASED

CHANGE THE NUMBER OF FARES OR ITEMS SOLD.

To change the quantity of or delete any item, touch that item in the Current Sale column. The Quantity Screen (see below) will appear and you can change the quantity or delete the item completely.

In this example, let's say the customer wants only 3 fares, not 4.

Touch FARES x 4.



Here's the **Quantity Screen** that appears:

×

FARES \$12.00

Save

QUANTITY

— 4 +

NOTES

To add additional sales of the item, touch the plus (+) sign above.

Touch the minus (-) sign to lower the number.

Then touch the blue SAVE button.

The Current Sale column will show the new amount.

DO NOT TOUCH ANY OF THE TAX ITEMS BELOW.

TAXES

Hennepin County 0.15% ☐

Hennepin County Transit 0.5% ☐

Minneapolis 0.5% ☐

Minnesota 6.875% ☐

You can also use this screen to REMOVE AN ITEM FROM THE SALE.

Remove Item

Just touch this REMOVE ITEM BUTTON.

This button then turns red and says CONFIRM ITEM REMOVAL.

JUST TOUCH IT AND YOU'RE RETURNED TO THE CURRENT SALE.

When **deleting an item or decreasing the quantity**, sometimes it's just easier to use the **Clear Items** option and start over. But, if you have a sale with numerous items, it's more efficient to change the quantity on an individual item or the number of fares.

DELETING OR REDUCING QUANTITY OF MERCHANDISE/FARES AFTER THE SALE IS COMPLETE. Well, this calls for a REFUND of the entire sale. **SEE SECTION 6: REFUNDS.**

ALWAYS take a moment -- **BEFORE YOU TOUCH THE BLUE CHARGE BUTTON** -- to *look at the Current Sale* to be sure you've rung up the correct number of fares and merchandise. If you find an error, **NOW** the time to stop and fix it. Refunding a credit card purchase means MSM is charged an extra fee by the credit card processing company, and having to stand around and wait for the refund to be processed surely will irritate customers waiting in line.

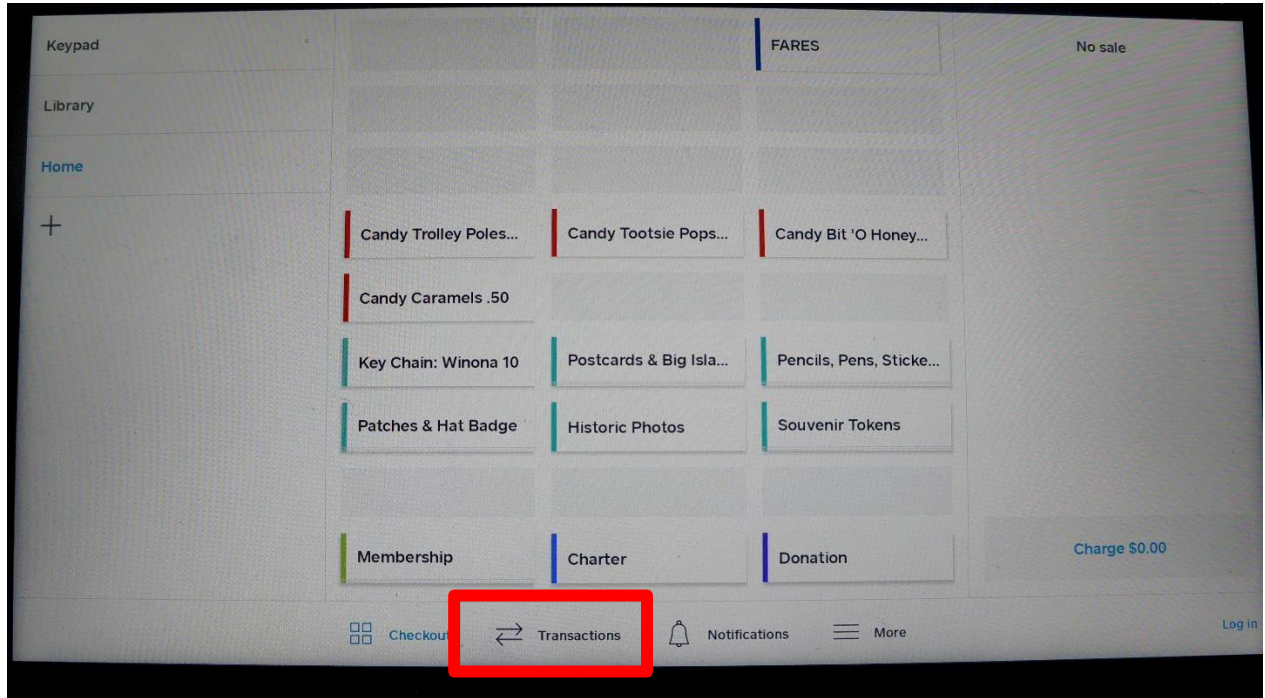
RETURNED ITEMS. Perhaps that T-shirt grandma bought for little Tommy isn't the right size. If there is a shirt in the right size in stock, just exchange it for the right size. If not, and grandma wants her money back, you'll have to **REFUND** the sale. Or, perhaps, a passenger waiting for the next trolley suffers an allergic reaction to the Laffy Taffy they ate and is too sick to ride. Again, this requires a **REFUND**. **SEE SECTION 6: REFUNDS.**

6. REFUNDS

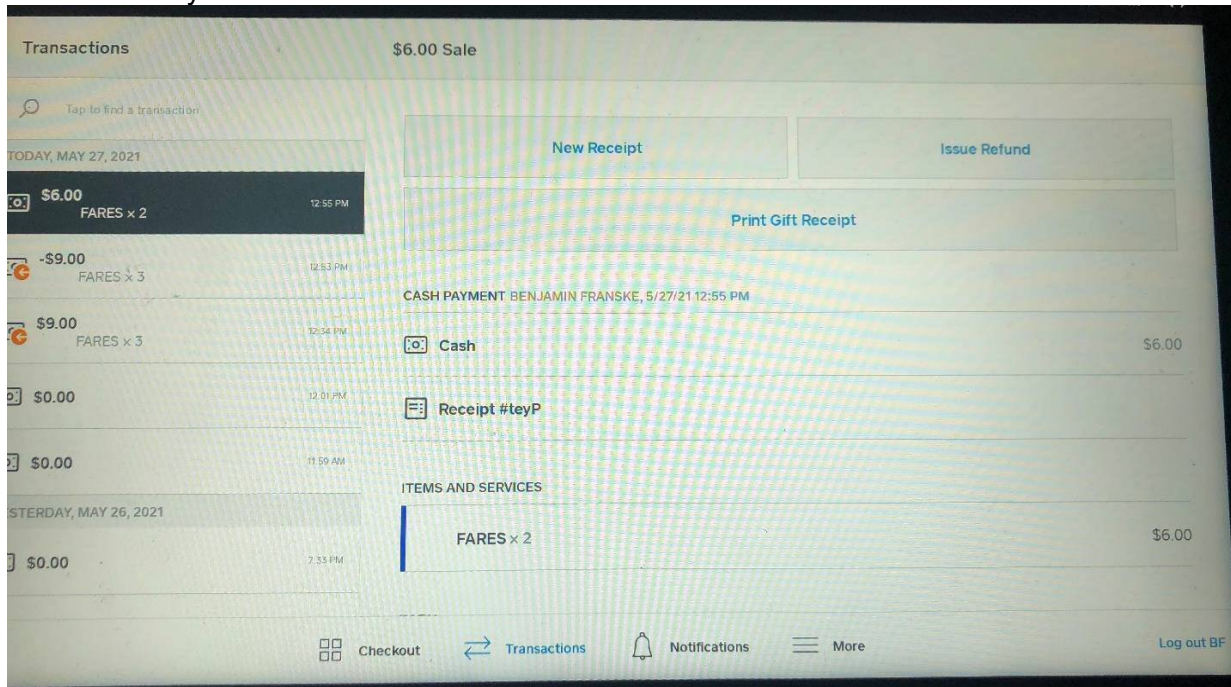
Processing a refund involves several steps, which are illustrated below. **To maintain the accuracy of sales tax payments and our inventory, A TRANSACTION MUST BE COMPLETELY REFUNDED;** that is, all items in the sale are refunded, not just one or two on the sale. After the refund is complete, the non-returned items must be rung up in a new sale.

THE REFUND STEPS

STEP 1. Touch TRANSACTIONS at the bottom of the home screen

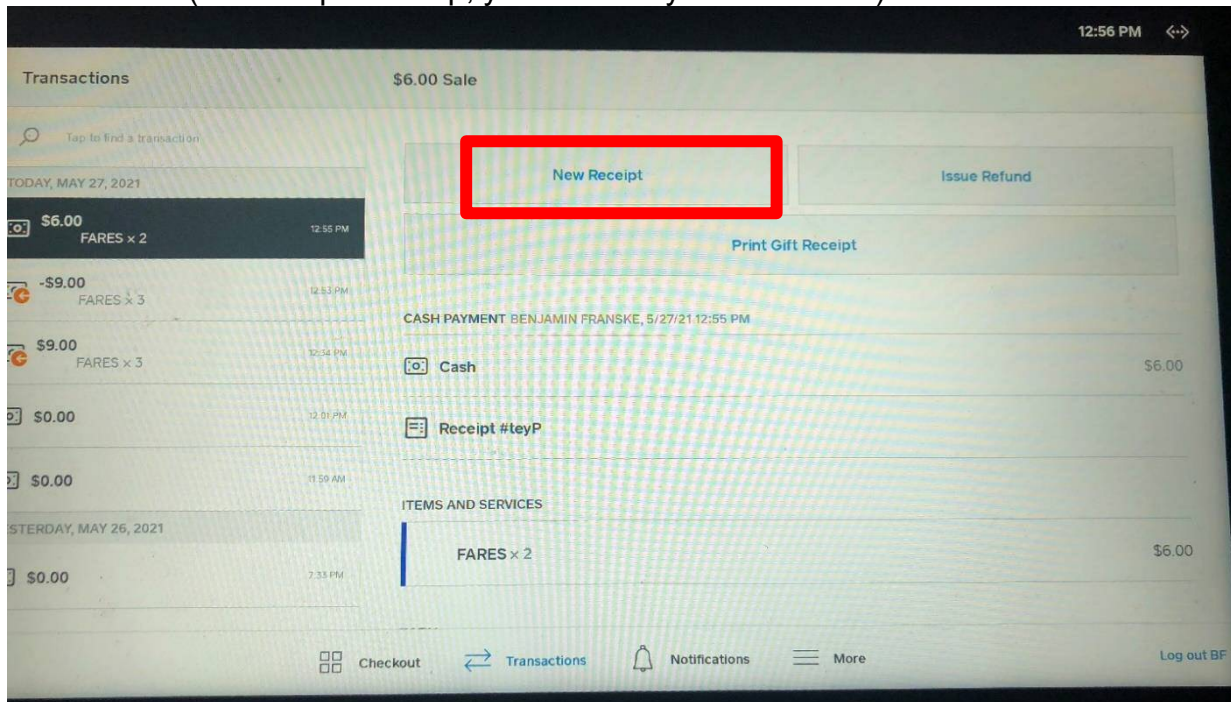


That will take you to a screen that looks like this:

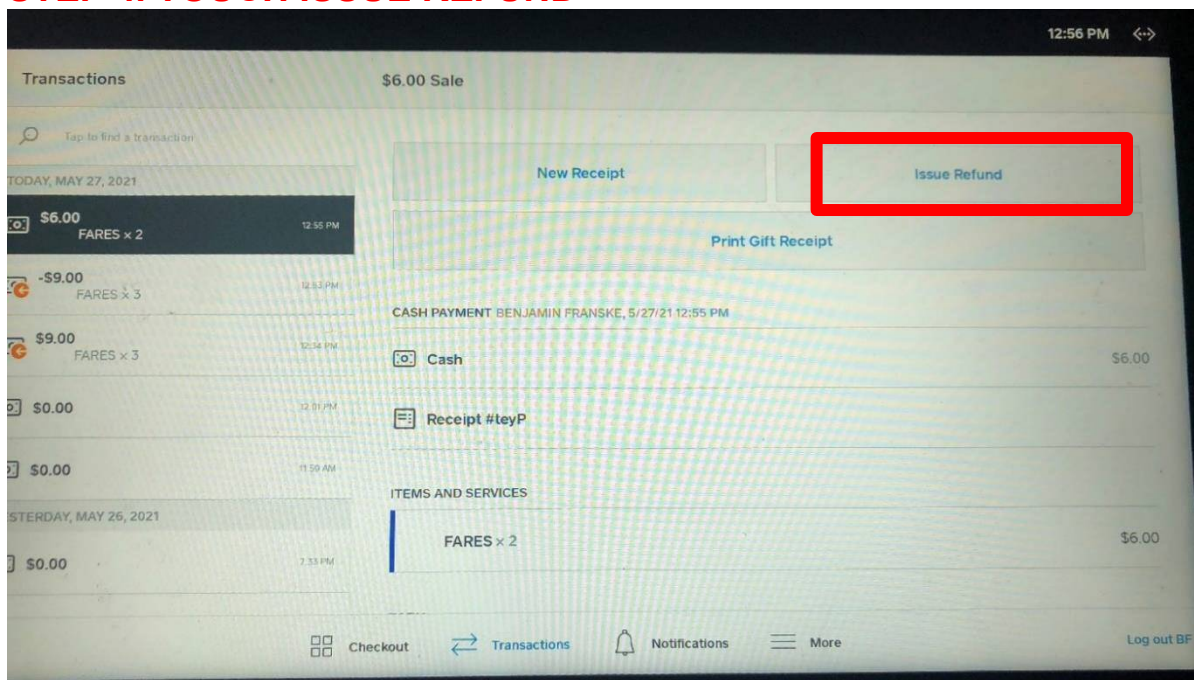


STEP 2. Have the customer insert his credit/debit card in the card reader (just like the customer was going to make a purchase). **SQUARE** automatically finds the purchases made with this card. Look at the date on the sale--make sure it's the right one. You'll notice there's a brief description of the sale (i.e., "\$6.00 FARES x 2"). Ask the customer if that's what they bought.

STEP 3. After you've determined it's the correct transaction , PRINT A RECEIPT. (Don't skip this step; you'll see why in a moment.)



STEP 4. TOUCH ISSUE REFUND



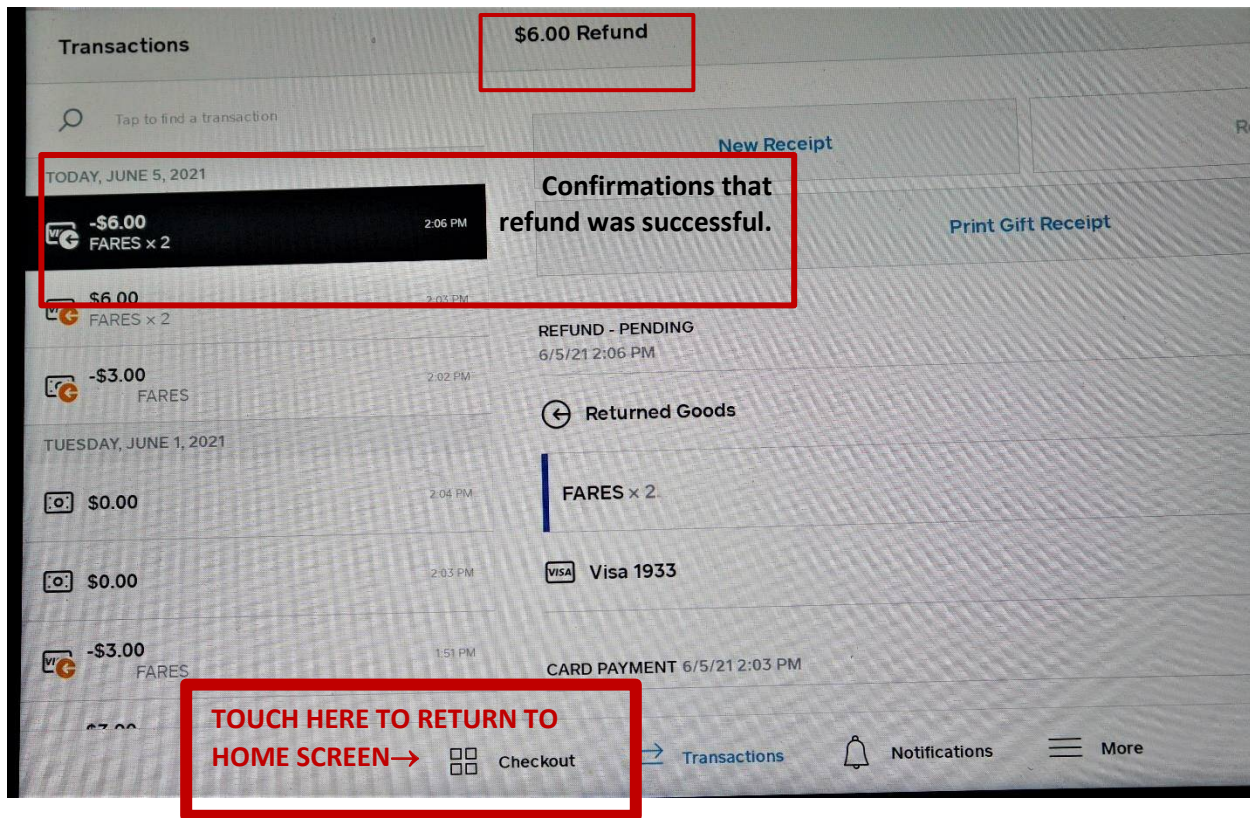
STEP 5. This will take you to this screen, where you first touch the **SELECT ALL ITEMS BUTTON**. Then touch the blue **NEXT** button in the upper right corner.

The screenshot shows the 'Issue Refund' screen. At the top left is a close button (X) and the title 'Issue Refund'. At the top right is a blue 'Next' button. Below the title is a table with two columns: 'Items' and 'Amount'. Under the 'Items' column, there is a 'Select All Items' button with a blue checkmark icon to its right. A red box highlights this button and the 'Next' button, with the text: 'FIRST: TOUCH SELECT ALL ITEMS ↓ THEN TOUCH THE BLUE NEXT BUTTON (ABOVE)'. Below the table, the word 'FARES' is visible, and to its right is '\$3.00' with a blue checkmark icon. At the bottom, there is a text box that says 'Which takes you to STEP 6.....' and a smaller text below it: 'Item amount includes taxes and discounts where applicable.'

STEP 6. REASON FOR REFUND

The screenshot shows the 'Refund \$6.00' screen. At the top left is a back arrow and the title 'Refund \$6.00'. At the top right is a blue 'Refund' button. Below the title is a section labeled 'REFUND TO' with a 'VISA' logo and the text 'Visa 1933'. To the right of this is the amount '\$6.00'. A red box highlights this section with the text: 'SQUARE knows which credit card the refund goes to, but have a look at the amount just as a double check.' Below this is a section labeled 'GIFT CARD' with a text box and the text 'Add Gift Card (or Swipe)'. A red box highlights this section with the text: 'IGNORE THIS BOX.' Below this is a section labeled 'REASON FOR REFUND' with four radio button options: 'Returned Goods', 'Accidental Charge', 'Canceled Order', and 'Fraudulent Charge'. A red box highlights this section with the text: 'Select a REASON for the refund. Generally it's Returned Goods, but it really doesn't matter what you select, except don't use "Fraudulent Charge." THEN TOUCH THE BLUE REFUND BUTTON ABOVE, which takes you to Step 7.....' The 'Returned Goods' option is selected.

STEP 7. REFUND COMPLETE. You're back to the Transactions page and there are two confirmations that the refund was successful!



You're almost done! Just one more step.....

STEP 8. RE-RING UP THE NON-REFUNDED MERCHANDISE. If the sale contained only one item OR if it contained several items and the customer returned all of the items for a refund, you're done and can send the customer on his/her way. BUT, if any item on the sale was NOT returned (either fares or merchandise), you now have to re-ring up the part of the sale the customer didn't want refunded to assure that sales tax is paid properly.



Because you printed the receipt back at Step 3 of the Refund process, it's easy to see the items and quantities that were originally sold.

So, take that receipt you printed and re-ring up those items just as you would any other sale.

For CARD sales: Have the customer insert his card in the card reader, just like any other sale.

For sales by CHECK: Retrieve the first check from the cash drawer, give it to the customer, and ask them to write a new check.

7. FOREMEN'S INSTRUCTIONS

REPORTS.

Guess what--**no need to run any reports!** All the data from the shift is automatically transmitted to the accountant!

START OF SHIFT

Be sure all the lights are turned on at the start of the shift--**INCLUDING THE LIGHT IN THE DISPLAY CASE (the switch is in the cubby below the POS).**

HOUSEKEEPING

See Miscellany, page 9.1

Give Bill Arends a call or text message or email if you see something in the depot during your shift that looks like it needs attention.

Bill Arends: cell 612.419.4930
motormanbill@gmail.com

THE CLOCK ON THE WALL

This beautiful clock is older than any of us and at least an 8-day clock.

Re-wind it *only* it when it stops:

The key is inside the clock.

Open the face window gently, insert the key in the clock face and
GENTLY re-wind it COUNTER-CLOCKWISE.

Sometimes the clock gets bumped a bit and isn't hanging level, which causes it to stop. Gently straighten it, give the pendulum a gentle nudge and it should start ticking again.

END OF SHIFT:

Close the windows,

Turn off all the lights and fans

Close up shop.