

House Accounts

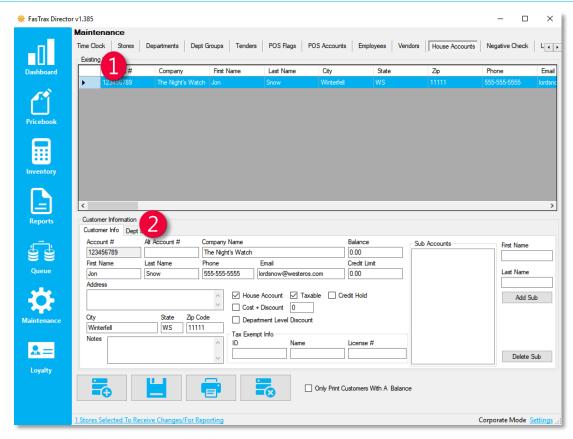
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Overview of House Accounts

House Accounts are a simple and intuitive way of tracking customer sales, with options of giving them department level discounts, cost plus pricing discounts, an in-store charge tab, or pre-programmed tax exemption options.

House accounts have the option of charging sales to a tab and then paying towards their owed balance over time. All of this data is easily reported on from within Director.



1 Existing Customers – A listing of all customers that have been previously entered

Customer Information – Fields that are editable when entering or editing customers

Creating a House Account

1. After logging into **Director**, choose the **Maintenance** module.



2. Within Maintenance, choose the House Accounts tab

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	Maintenance								
	Time Clock Stores	Departments Dept	Groups Tenders	POS Flags	POS Accounts E	mployees Ven	dors House Accounts	Negative Check	L + F
	Existing Vendors		,						
Dashboard	Account #	Company	First Name	Last Name	City	State	Zip	Phone	Email
	123456789	The Night's Watch	n Jon	Snow	Winterfell	WS	11111	555-555-5555	lordsnc
Pricebook									
Inventory									
	<								>
Reports	Customer Information								
		Lock Out							
	Account #		Company Name		Balan		Sub Accounts	First Name	- 11
	123456789		The Night's Watch	Email	0.00 Credit				
Queue	Jon			cmail ordsnow@wester				Last Name	- 11
	Address								
342			5 House	Accou	axab <mark>9</mark> Credit Ho	ld		Add Su	ь
			6 🗆 Cost +	Discount 0					_
Maintenance	City	State Zip Co		ment Level Discou	unt				- 11
	Winterfell	WS 11111	Tax Exemp	t Info					- 11
	Notes		^ ID	Name	Licen	se #			- 11
<u></u> _			~					Delete S	ub
Loyalty							[L		
			_ . •						
	= +				Only Print Custome	ers With A Balanc	e		
	1 Stores Selected To Re	ceive Changes/For Re	porting					Corporate Mode	ettings

- 1 Account Number The numerical house account number
- 2 Company Name The house account / company name
- **B**alance The current balance owed by the selected house account
- 4 Credit Limit The max credit limit allowed for the selected house account
- 5 Designates the house account
- 6 Cost + Discount pricing
- **7** Department level discount designation
- 8 Taxable or non-taxable designation
- 9 Designates house account charge hold

The "Dept Lock Out" tab allows house accounts to be locked out of purchasing from selected

POS Button Creation

1. After logging into the POS and going to the panel editor, create a button with the following parameters for the house lookup, which is used to add a house account to the sale

settings BU ⁻	tton details		*
button type:	House Account Lookup	•	Button Information
button size:	Medium	-	house account lookup Allows the cashier to add a House Account to the sale
caption:	House Lookup		
caption size:	Small	•	
background:	POS_Sq_Orange_Up	>	
gylph:		>	
	Manager Override Required	d	
register display:	Show Default	-	
go to panel:		•	
			button preview
			House Lookup
			cancel update

Button Information

•

settings | BUTTON DETAILS

button type: Tender

2. If utilizing house charges, create a button with the following parameters on the subtotal panel

3. If utilized house charges, house payments allows the

parameters on the subtotal panel	button size: caption: caption size: background: gylph: register display:	Allows the cashier to specify how the customer is to pay for the sale. Tender specifics are added based on the tender type. If more than one item is configured, a popup window will appear prompting the cashier to select one.		
	go to panel: tender type: Tender ID:		>	button preview House Charge
	settings BL	ITTON DETAILS		cancel update
If utilized house charges, house payments allows the account to pay towards their charged balance. Create a button with the following parameters.	button size caption caption size background gylph:	House Payment Small POS_Sq_Orange_Up Manager Override Required Show Default	>	Button Information house account payment Allows Payments on House Accounts button preview
Remember that a house charge is effectively a tab that allows house accounts to charge to and pay back at a later date.				House Payment

1. All activity from house accounts, sales, charges, and payments, can be seen via reporting from within Director reports

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•0	Reports List Reports Sales Rep Select Report To Run	nventory Report	s Scheduled Reports	Accounting Exports						
Dashboard	12 Week Sales Report	Buydown Sales Report	Campaign Sales Report	Commission Sales Report	Crosstab Sales Report	Customer Activity Report	Department Sales Report	î		
	Department Sales Comparison Report	E-Journal Report	Hourly Sales Report	Item Returns Report	Item Sales Report	Manufacturer Sales Details Report	Media Detail Report			
Pricebook	Negative Cashier Report	Non Sellers Report	Pay-In/Pay-Out Report	Reconciliation Report	Register Z Report	Retail Scan Data Incentive Report	Safe Drops Report			
	Customer Activity Rep	ort						_ •		
Inventory	Filter The Report By: Show All Customers									
Reports	Select Date Range For The Report									
	Start Date: 7/ 1/2017 💷 🛛 12:00:00 AM 🔄 Stop Date: 7/ 5/2017 🔤 🕇 11:59:59 PM 🔄 Quick Dates 🗋 Show Customer Tax Report									
Queue										
.										
Maintenance										
* =										
Loyalty										
	1 Stores Selected To Recei	ive Changes/For Report	ing			C	orporate Mode Settin	ngs .::		

For assistance with configurations, please contact Technical Support at Support@FasTraxPOS.com