



**PREPARED BY:**  
CNIC N946

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# RECTRAC 3.1 CLERK PROCESSING

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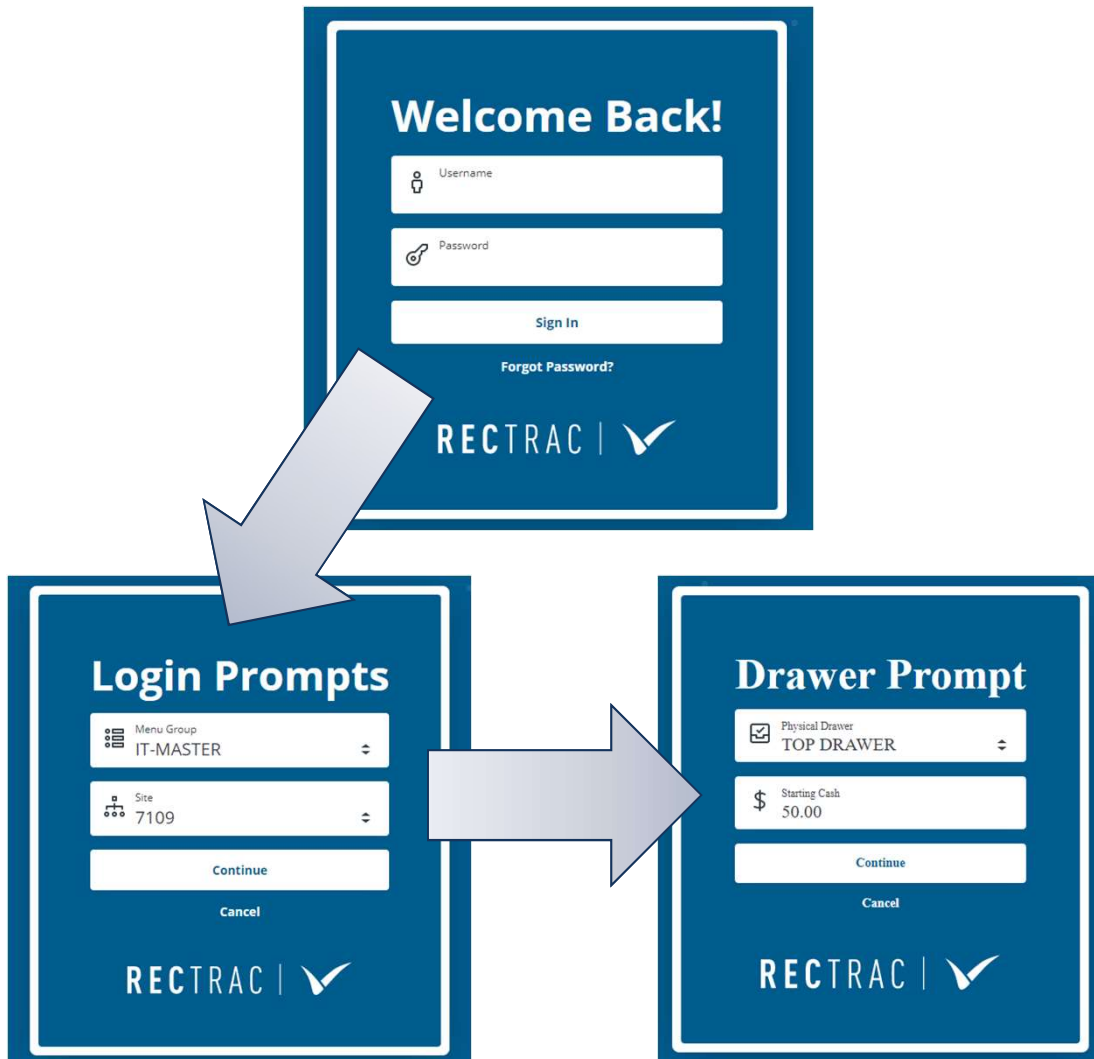
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FOR ASSISTANCE PLEASE CONTACT:  
+1.844.697.4357 | SUPPORT@CNICFFR.ORG



## RecTrac 3.1 Login Page



Enter in your RecTrac 3.1 Username and then your Password. Then Click 'Sign in'.

If you are linked to multiple user groups and/or sites, a secondary 'Login Prompts' window will appear. Select the appropriate options and click 'Continue'.

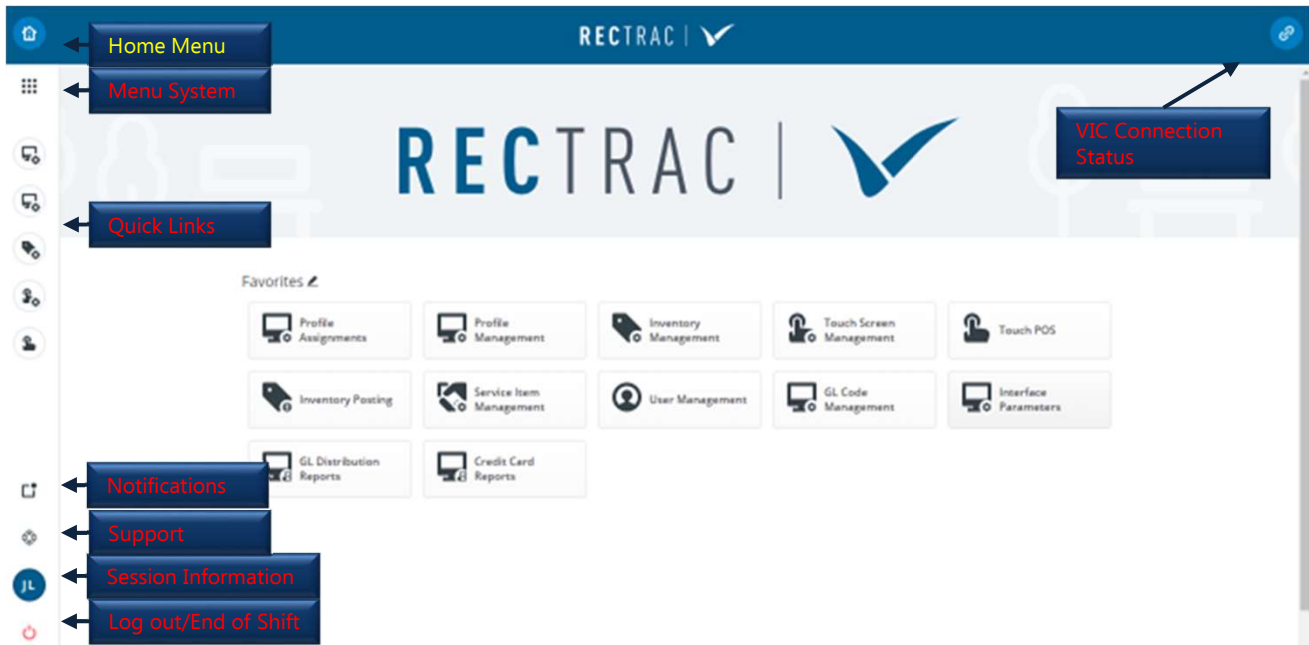
If this is a POS terminal used for taking money, a 'Drawer Prompt' window will appear. Select the appropriate drawer and adjust starting cash as needed. Click 'Continue' to log in.

For POS terminals, the Touch POS Processing screen will auto load for clerks.



## Main RecTrac Screen

**Note:** You can mouse over any icon for a pop up explaining what it is.



## Legend

	<p>VIC connection status. Flipped to the left with a red line through it means no hardware connection. Click this icon to reconnect all hardware to RecTrac.</p>
	<p>Session Information. Click on this to display: current user logged in, user group selected, workstation name, cash drawer number used for sales,</p>
	<p>Log out/End of Shift. Click here to log out of RecTrac. If you are in an open sales batch, you will be prompted to do an end of shift cash out.</p>
	<p>Home. Click here to return to the main home screen when you have multiple tabs open.</p>
	<p>Menu System. Click this to access the menu navigation system. Can browse through all menus, type search terms in to find items, click the 'star' next to an item to favorite it so it will display in the "Favorites" area.</p>
	<p>Notifications. Any system notifications will display in here.</p>
	<p>Support. Enable the in app help or search the help system.</p>



## Touch POS Processing Screen

**Menu Navigation Buttons**

**Shopping Cart**





**Main Sales Button Area**

**Shortcut Payment Keys**



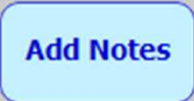
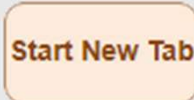
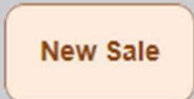
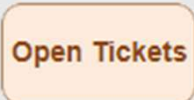
## Touch POS Processing Screen cont.

### Legend

Main Sales Button Area	All buttons used to sell items go here. Changes when using the menu navigation buttons.
Menu Navigation Buttons	Buttons that change from sales screen to sales screen.
Shopping Cart	Displays items currently being sold.
	Used to scan inventory items by their barcode/UPC code.
	Reverses the quantity sold of an item highlighted in the shopping cart. Used for refunds.
	Allows you to update a modifier without having to remove the whole order
	Removes an item from the shopping cart.
	Updates the price on an item in the shopping cart, if allowed.
	Allows you to update the quantity of an item being sold.
	Opens the cash drawer (if allowed).
	Takes you to the Payment Processing Screen. Used when the quick payment buttons don't apply.
	Cancels sale and removes all items from the shopping cart.



### Touch POS Processing Screen cont.

Legend	
 A blue rounded rectangular button with the text "Add Notes" in white.	Used to add special notes or cooking instructions to a sales item. Highlight an item in the shopping card, click 'Add Notes', enter in the note and click 'Continue'. Will print out to the kitchen.
 An orange rounded rectangular button with the text "Start New Tab" in white.	Used to add special notes or cooking instructions to a sales item. Highlight an item in the shopping card, click 'Add Notes', enter in the note and click 'Continue'. Will print out to the kitchen.
 An orange rounded rectangular button with the text "New Sale" in white.	This will start a new sale when processing in an open ticket/tab environment. Example: you update a customers tab and then a new customer walks up. Click New Sale to save the tab you were on and start another transaction.
 An orange rounded rectangular button with the text "Open Tickets" in white.	Takes you to the open ticket/tab listing screen to view all open tickets/tabs for your location.



## Payment Processing Screen

The screenshot displays the RecTrac 3.1 interface for processing a payment. The main title is "Global Sales Payment for Daily Sales Account". The interface is divided into three main sections:

- Shopping Cart Listing:** Located on the left, it shows a table with one item: "Chicken Tenders (SE7...)" with a total due of \$ 8.75. A red arrow points from this section to the "Payment Options" section.
- Payment Options:** Located in the center, it contains fields for "Total Due" (\$ 8.75), "Total Paid" (\$ 8.75), "Pay Code" (03 - Credit Card), and two "Payment Reference" fields. A green "Process" button and a blue "Add Split Payment" button are at the bottom. A red arrow points from this section to the "Split Payment Listing" section.
- Split Payment Listing:** Located on the right, it shows a table with columns "PC", "Description", "Pay Ref 1", and "Pay Ref 2". The table is empty, with the text "No records were found." below it. A blue "Delete Line Item" button is at the bottom. A red arrow points from this section back to the "Shopping Cart Listing" section.

Additional annotations include a red arrow pointing from the "Shopping Cart Listing" section to the "Payment Options" section, and another red arrow pointing from the "Payment Options" section to the "Split Payment Listing" section. A blue box labeled "Shopping Cart Listing" is positioned over the shopping cart table, and a blue box labeled "Split Payment Listing" is positioned over the split payment detail table.



## Payment Processing Screen cont.

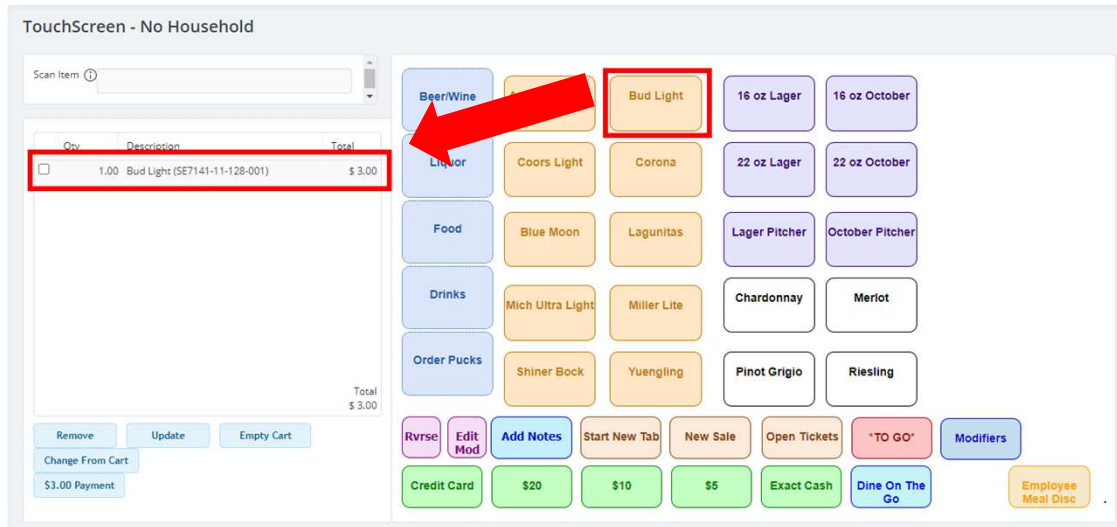
<b>Legend</b>	
Shopping Cart Listing	Lists all items that are being sold during this sale. Informational only on this screen, use the '<<Back' button to go back and remove any items
Payment Options	Options for entering payments. Choose the applicable Pay Code needed, enter in any Payment References required. Options in this area will change based on it being a sale vs. refund vs. gift certificate etc.
Split Payment Listing	If doing a split payment (customer paying with multiple tenders or multiple credit cards in the same sale), tenders add will be listed here.
<b>Process</b>	Complete the transaction and print the receipt.
<b>&lt;&lt; Back</b>	Go back to the sales processing screen.
<b>Add Split Payment</b>	If doing a split tender payment, this button will add the current tender amount to the Split Payment Listing.
<b>Delete Line Item</b>	Remove a split payment tender from the listing.
<b>Name Lookup</b>	Link or change the customer account linked to this transaction. Only used when using customer accounts for sales.

# RecTrac 3.1 Clerk Processing

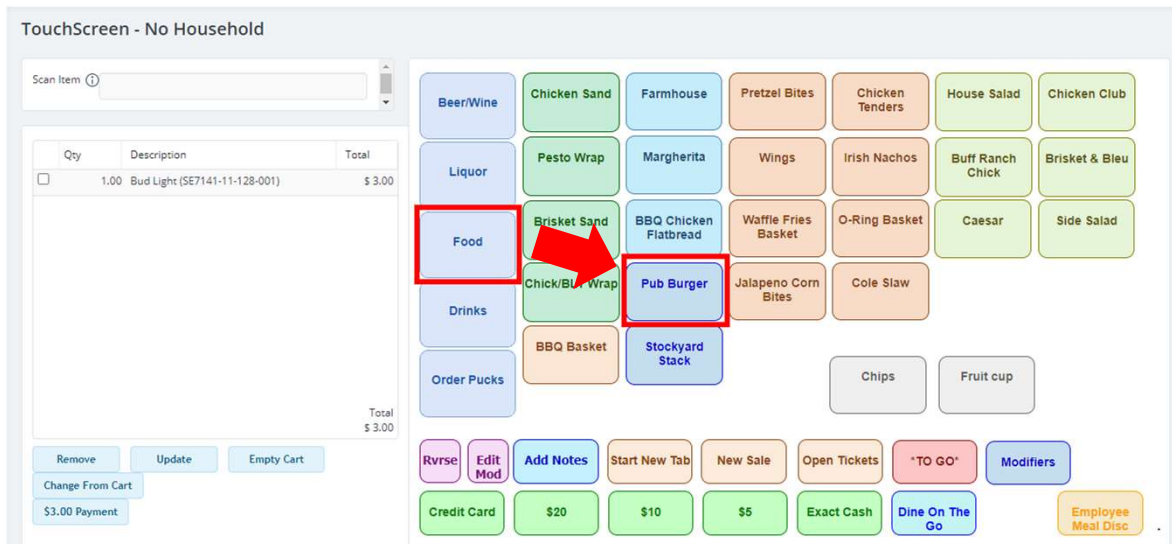


**Example Transaction – Customer orders a Bud Light and the Pub Burger with cheddar, bacon and waffle fries.**

1) Touch the Bud Light Button on the Beer/Wine menu to ring up a Bud light in the shopping cart.



2) Touch the Food menu button to switch to the Food menu. Then touch the Pub Burger button. You will then be prompted for the modifiers that go along with that burger.

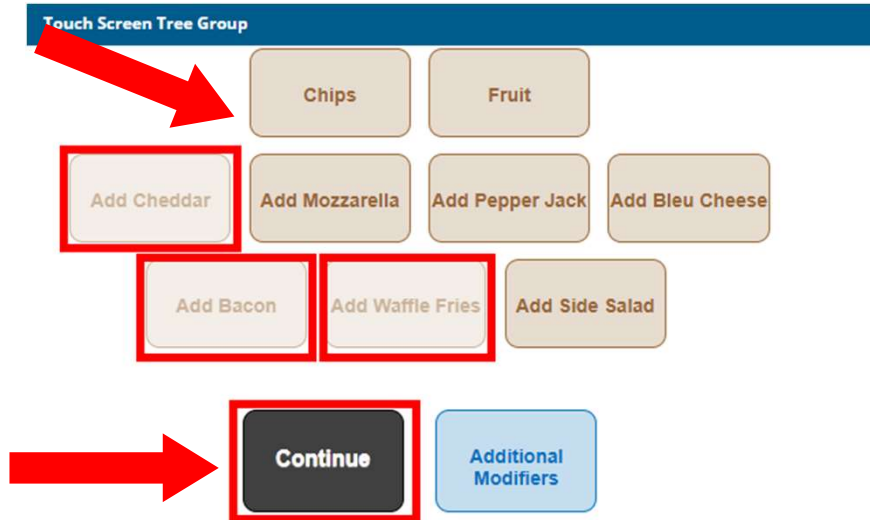


# RecTrac 3.1 Clerk Processing



## Example Transaction cont.

3) On the modifier screen, press the Add Cheddar, Add Bacon and Add Waffle Fires buttons. Notice how selected modifiers change color once press so you know they have been selected. When finished with the modifier selection, hit continue.



4) Items selected are now listed in the shopping cart. Since that completes the order, press one of the quick payment keys to finish the transaction.

