CALIFORNIA DEPARTMENT OF FISH & GAME

IPOS Retail User Manual
Version 1.0

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Chapter 1: Introduction

The California Department of Fish and Game (DFG) Internet Point of Sale (IPOS) program is an easy-to-use system for the sale of all DFG hunting and fishing licenses and permits, controlled hunt applications, harvest reporting, and miscellaneous sales to the public.

This chapter includes the following topics:

About this Manual

This manual describes the Internet Point of Sale (IPOS) application and provides step-by-step instructions on how to perform all of its functions. Certain style and formatting techniques have been used throughout the manual to make the instructions clear and easy to follow. This section describes those techniques.

Format	Use	Example
✸	A star marks the beginning of a new process being described.	✸ **To Add an Individual Customer**
Bold	Navigation and button names are bolded.	Click the **Add New** button that appears on the screen.
Italics	Screen names and field names are in italics.	The *Verify Customer Profile* screen appears. Or Enter the customer's first name in the *First Name* field.
➔	When there are multiple possible outcomes or choices that result from a step in a process, the outcomes are listed individually and marked by an arrow.	➔ <u>If the system finds less than 50 results</u>, a list of all results is displayed below the search criteria. ➔ <u>If the system finds no results</u>, a message will pop-up.
<u>Underline</u>	An underline is used to make possible outcomes and choices stand out. Read the underlined sections to find the outcome you are experiencing and follow the directions that appear after it.	<u>If there is a list of search results:</u> click **Select** when the correct customer is found in the search results list.
a	When there are multiple requirements needed for a step in a process, they are listed individually and marked by a letter.	<u>Scan</u> is used to search for individual, business and vessel customers and requires: a Drivers license, ALDS License, or GoID b Card reader or barcode scanner.

Format	Use	Example
❖	A brown box is used to highlight useful information about the step that is being described.	❖ The **Back** button can be used at any time to return to the previous page.
"Title" on page 7	The title of another section, in quotes, with a page number in a page icon is clickable and will take you to that section.	"About this Manual" on page 7

About the Hardware

There is a specific set of hardware that the IPOS application requires in order to perform many of its functions. Active Outdoors will provide these items for you and you will be responsible for their care and maintenance. This section shows the hardware components needed for an IPOS terminal and their connectivity.

ELO Terminal

The ELO 15A2 Touch Computer runs the IPOS application and performs the processes described in this user manual. A mag stripe card reader comes with the computer and can be used for adding and accessing customer profiles.

The screen can adjust over a range of several degrees of movement to provide an ideal viewing angle. However, the unit does need to rest on a flat, stable countertop. Make sure the terminal will not be knocked over as employees and customers pass by.

To clean the screen, use a slightly moistened cotton towel or paper towel. Do not clean the screen with any chemicals or with an abrasive material that can scratch, such as a dry paper napkin.

The terminals are computer-based, which means they are not to be exposed to water, high temperatures, high humidity, excessive dust or abuse. The devices should never be exposed to rain or splashing water or other liquids. Placing the terminal near a strong source of heat will lead to premature failure. The devices should only be used in climate-controlled environments. The touch screen should never be used with dirty or wet hands.

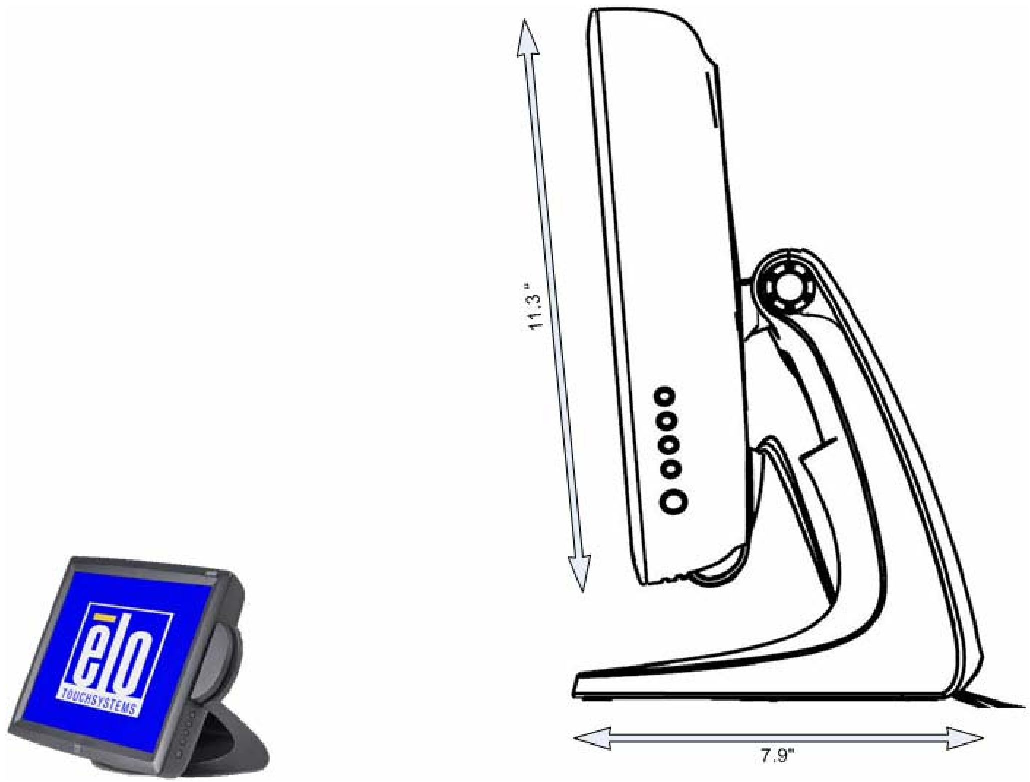


Figure 1: ELO Terminal Side

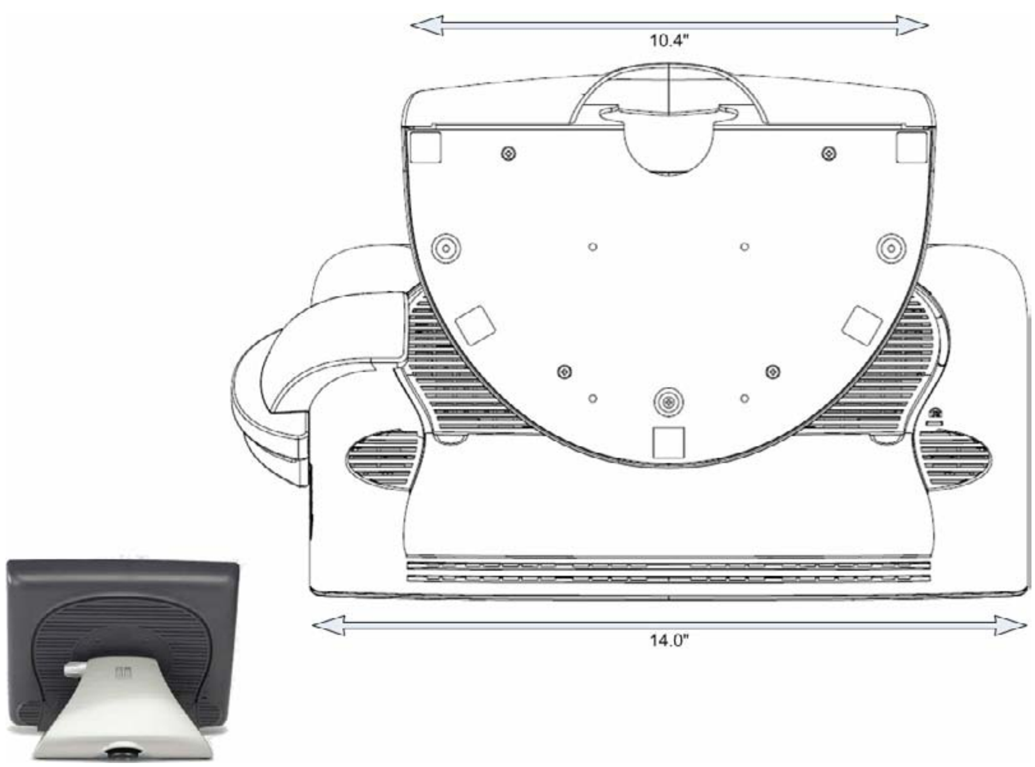


Figure 2: ELO Terminal Back

Scanner

The Metrologic MS1690 2D Barcode scanner will be used to scan customer's printed licenses, GO ID documentation, and DFG renewal notices. Position the scanner so that it will not tip over or be dropped on the floor. Clean the scanner with the same care given to the terminal.

Figure 3: Scanner

License Printer

The Ithaca iTherm 280 License Printer will print the customers license documents when a transaction has been completed. You do not need to power down the printer at night, it is designed to stay on at all times. Clean the printer with the same care given to the terminal.

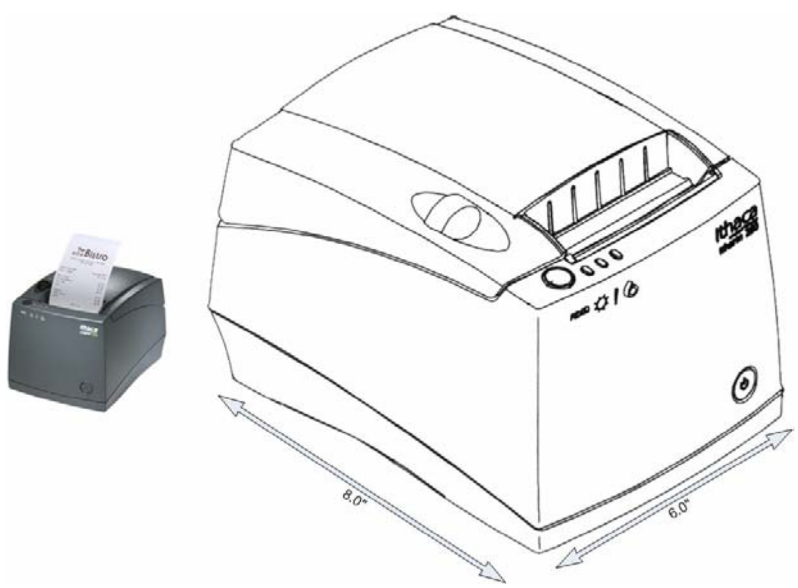


Figure 4: License Printer

Hardware Connectivity

Your Terminal should be installed and configured according to the Terminal Installation Manual. A surge suppressor with 6 outlets is provided as part of the package; please ensure both the license printer and terminal are always connected to this suppressor. Make sure you can provide stable, uninterrupted power. In the event of inclement weather which could cause power supply issues, please shut down and disconnect the terminal and printer from the surge suppressor completely to ensure no electrical damage.

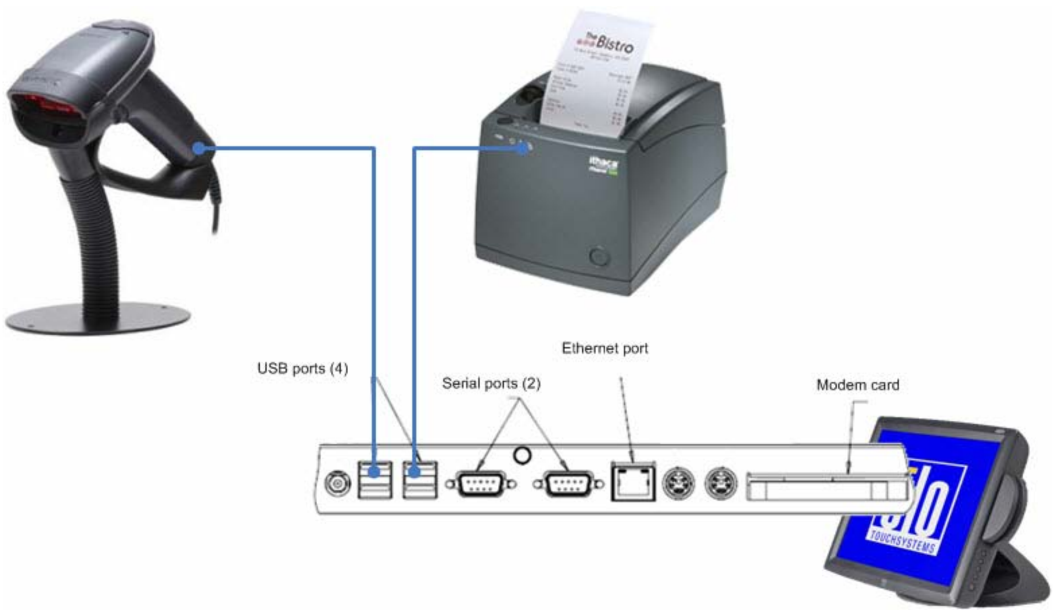


Figure 5: Hardware Connectivity Diagram

Terminal Functionality

All of the processes, navigation, and data entry performed in the IPOS application use the same standard elements. This section describes those elements and how to use them.

Touch Screen and Keyboard

A keyboard or mouse can be used with the ELO Terminal but are not required (see "To Turn the Touchscreen Keyboard On or Off" on page 72). The touch screen terminal operates through your touch. When you touch the screen, the terminal will respond by selecting the item you touch or by activating features useful in operating the terminal. Touching text areas, which will appear on your screen as empty white boxes, will cause an on-screen keyboard to appear on the screen and allow you to enter in the information you desire. The instructions in this manual use the word "click" to engage buttons and fields in the application. Everywhere the word "click" is used, it is meant to be synonymous with "touch" when using the touch screen keyboard. If you find that your touch screen is not selecting the items you touch, not displaying the on-screen keyboard, or regularly selecting the wrong keys on your on-screen keyboard, you may need to re-calibrate your touch screen.

To Use the Touch Screen Keyboard

If the Touch Screen Keyboard is not already on, begin by turning it on (see "To Turn the Touch Screen Keyboard On or Off" on page 72).

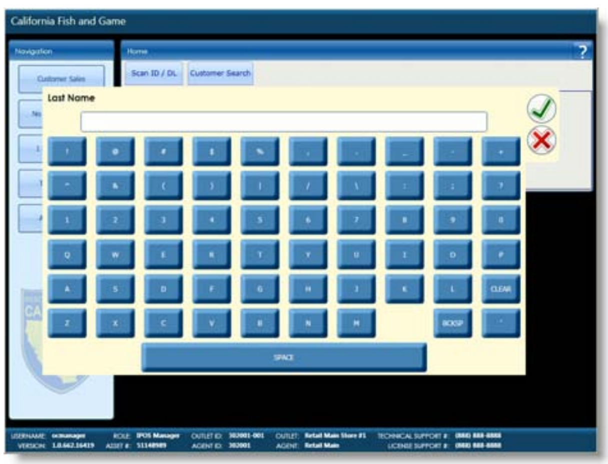


Figure 6: On-Screen Keyboard

1. Touch in the text area you want to enter information into.

2. The on-screen keyboard will appear, as shown in figure 6. The field name which the keyboard is taking information for will appear in the upper left hand corner of the keyboard.

   - If you'd like to close the keyboard without entering any information, touch the red X in the upper right hand corner of the keyboard.

3. Touch the letters or numbers you want to enter just as you would a physical keyboard.

4. When you've finished entering the information for that field, touch the green check mark in the upper right hand corner of the keyboard.

To Calibrate the Touch Screen

You must be on the *Terminal Main Menu* screen to access this functionality. To get to the *Terminal Main Menu* screen, see "Starting the Program" on page 18 or "Logging Out" on page 21 for detailed instruction.

Figure 7: Touch Screen Calibration Screen

1 If dust or dirt are present on the touch screen, gently clean the screen with a clean, soft cloth.

2 Press **Touch Screen Calibration** on the *Terminal Main Menu* Screen.

3 The *Touch Screen Calibration* screen will appear with a bulls-eye target in the upper left hand corner, as shown in figure 7.

4 Press the bulls-eye target as lightly and as close to the center of the target as possible to register a response from the touch screen.

5 A new target will appear on the bottom right hand side of the screen. Repeat step 4 for this bulls-eye.

6 After touching the bulls-eye in the bottom right hand corner, a new bulls-eye will appear in the top right hand corner. Repeat step 4 for this bulls-eye.

7 After touching the third bulls-eye, the terminal will prompt you to make sure the arrow cursor on the screen follows your finger.

8 Press a few times in random places on the screen. If the cursor is successfully following your finger, the arrow cursor should be underneath your finger whenever you lift it off the screen.

9 Depending on the success of the arrow cursor following your finger on the touch screen:

- ➔ If the cursor follows your finger, the touch screen has been properly calibrated. Press the green checkbox under the blue bar to finish calibrating the terminal.

➔ If the cursor does not follow your finger, the touch screen is not calibrating properly. Touch the red X under the blue bar or simply let the blue bar progress to the end. The touch screen will return to its previous calibration settings. Call the Help Desk for further assistance (phone number can be found in the IPOS footer)

10 The terminal will return to its *Main Menu* screen

Menus

This section describes the two menus that provide access to all the areas of the IPOS application: the main *Navigation* menu and the *Administration* sub-menu.

Main Menu: Navigation

The *Navigation* menu appears on the *Home* screen. If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved). This menu allows you to easily navigate to other areas of the application. The *Navigation* menu contains the *Administration* sub-menu. Depending on your account type and user security level, not all the navigation menu and admistration sub-menu items may appear.

Figure 8: Navigation Menu

The **Customer Sales** option navigates the IPOS user to the *Home* screen where they can access the *Scan* or *Basic* customer search tabs. Page 23

The **No Customer Sales** option allows the IPOS user to sell certain items without bringing up a customer account. Page 35

The **1 Day Sport Fish** option allows the IPOS user to quickly sell many 1 Day Sport Fishing licenses for the specified day. Page 35

The **Training Mode** option runs IPOS in a protected state which allows new users to learn the application without changing data. Page 55

The **Administration** option opens the *Administration* menu Page 15

Administration Menu

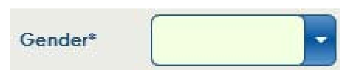
The Administration Menu appears when **Administration** is clicked on the Navigation Menu (see "Main Menu: Navigation" on page 14).This menu allows users to manage the non-sales areas of the application and requires Manager permissions for access to some areas.

The **Change My Password** option allows the IPOS user to create a new password for their personal user account.	Page 59
The **Order License Paper** option allows the IPOS user to view existing and create new orders for license printer paper.	Page 59
The **Reprint Last Transaction** option allows the IPOS user to view and reprint the documents from the last transaction processed.	Page 60
The **Cancel Document** option allows the IPOS user to cancel customer's documents, within a time limit, and notify DFG to mail the customer a refund.	Page 61
The **Messaging** option allows the IPOS user to view messages from CADFG. Managers only.	Page 63
The **User Management** option allows the IPOS user to view all user information as well as create new users or reset user passwords. Managers only.	Page 63
The **Order Regulations** option allows the IPOS user to view existing and create new Regulation and Controlled Inventory orders. Manager only.	Page 66
The **Reports** option allows the IPOS user to view and print reports over a specified period of time for available deer tags, inventory on hand and sales.	Page 68
The **Diagnostics** option allows the IPOS user to turn the touch screen keyboard on or off or open a trace log window for real time monitoring of the application's performance.	Page 72
The **Close Menu** option closes the Administration Menu and allows you to continue using the application in the current screen.	
The Exit option logs the user out of the IPOS application.	Page 21

Figure 9: Administration Menu

Input Fields

Fields are areas on the screen that require you to enter information or make a choice. Fields that have an asterisk beside them are required fields and no process can be completed until they are entered. Click or touch the field to enter the data. There are three types of input fields, which are described below.

Field	Description	Example
Text Area	Text areas are blank spaces where you type the requested information. Some text areas have specific formatting requirements which will be addressed in the related sections of the manual. Date fields require a MM/DD/YYYY, MMDDYYYY, or M/D/YYYY format.	
Drop down list	Drop down lists require you to make a selection. Click on the arrow on the right side of the field to open a window with a list of options. Click on the list item you want to select and the window will close.	 
Checkbox	A checkbox is a yes or no question. Click in a checkbox so that a check mark appears to signify 'Yes.' Leave a checkbox empty or click in it so that the check mark disappears to signify 'No.'	 

Chapter 2: Getting Started

This section describes the programs password requirements, how to get started using the program, things to remember during use, and how to end the program.

This chapter includes the following topics:

Starting the Program

To “wake up” the terminal, touch the screen or move the mouse (if equipped). If it does not respond after a few seconds, the unit may be shut down. To restart, touch the largest button on the bottom right hand edge of the monitor for 5 seconds. This is the *Terminal Main Menu* screen that appears after your terminal has finished its startup:

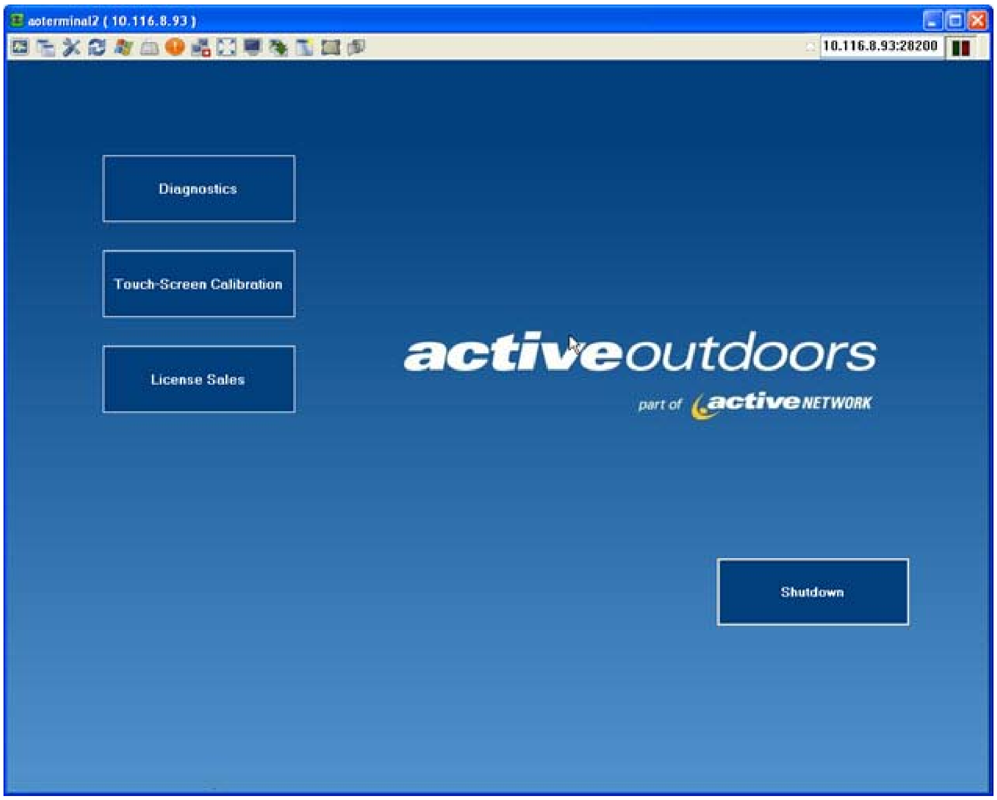


Figure 10: Terminal Main Menu Screen

Username and Password

DFG will provide a manager with a username and password at system setup. All other users will be provided their username and a password for first use by manager’s with IPOS access. Usernames cannot be changed, however, passwords must be changed regularly. To change your own password, login and click **Change My Password** in the Administration menu (see “To Change Your Password” on page 59 for detailed instruction). If you have lost or forgotten your password and cannot login, a manager can reset your password and provide you with the new one (see “To Reset a User's Password" on page 66 for detailed instruction).

Logging in for the first time or logging in after a password reset requires the user to enter a new password. Users will also be required to create a new password every 90 days. In these situations, an automatic prompt will request the new password after a normal login (see "To Log in for the First Time or After a Password Change" on page 19 for detailed instruction).

Passwords must be 1 to 30 characters in length and can include numbers, letters, and special characters. Usernames and passwords are not case sensitive.

Logging In

Once you have a login ID and password to identify you in the system, you will have access to the program. This section describes how to login.

To Log Into the IPOS Application

Figure 11: Login Screen

Figure 12: Home Screen/Scan Customer Search Screen

1. Click **License Sales** on the IPOS *Terminal* screen to start the application.
2. The *Login* screen will appear as shown in figure 11.

   - If you would like to close the application during login, click **Exit**.

3. Enter your user name in the *Login ID* field.
4. Enter your password in the *Password* field.
5. Click **Login**. The IPOS *Home* screen will appear, as shown in figure 12, displaying any alerts sent from DFG.

To Log in for the First Time or After a Password Change

These instructions apply to users logging in for the first time (see "To Add a User" on page 64), for the first time after a password reset (see "To Change User Information on page 66), or when required to change their password every 90 days.

Figure 13: Mandatory Change Password Screen

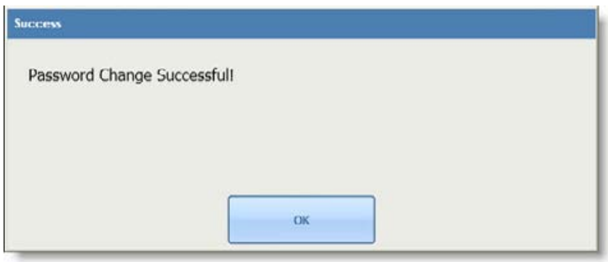


Figure 14: Password Change Confirmation Message

1 Begin by logging into IPOS (see “To Log Into the IPOS Application” on page 19 for detailed instruction).

2 The *Mandatory Change Password* screen will appear, as shown in figure 13.

3 Enter the new password you’d like to use in the *New Password* field (see "Username and Password" on page 18 for password requirements).

4 Enter the new password again in the *Confirm New Password* field.

5 Click **Change Password** to make the changes permanent.

6 The *Password Change Confirmation* message will pop-up, as shown in figure 14.

7 Click **OK**. The IPOS *Home* screen will appear.

Ongoing Use

- If at any time you need help, clicking on the question mark icon in the upper right hand corner will open the online help manual.
- To exit any screen and return to the previous screen, click **Cancel** or **Back**.
- To return to the *Home* screen from anywhere in the application, use **Cancel** or click **Customer Sales**.
- Exiting any screen by clicking **Cancel** or navigating away from the screen will discard changes unless you click **Save**.

Logging Out

To log out of the IPOS application, the Navigation Menu must be visible. If it is not, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved). Click **Administration** in the Navigation Menu and then **Exit** from the Administration sub-menu. Logging off of the IPOS application will return you to the *Terminal Main Menu* screen. If the application is not used for 30 consecutive minutes, the user will be automatically logged out.

- ***It is very important to log out of the IPOS application anytime you are not using it.*** All the changes made in the IPOS application are tracked in a change history and many processes are monitored for efficiency. All processes performed while the application is in use get tied to the username logged in at the time. To be sure that processes can be properly tracked to the person performing the process, it is important to log out when not using the application. The user performing the functions with IPOS should always be the user who is logged in. If you leave your computer without logging out, anyone who uses the application after you can also view or change personal information, such as your password. Additionally, there are certain items which are tracked by clerk when they are sold. Therefore, these items can only be sold by a clerk if stock is assigned to them to sell. If a user fails to log out, the stock assigned to them cannot be properly tracked and their inventory could be used.

Shutting Down the Program

You do not need to power down your equipment at night, your terminal will go into a power-saving mode after a period of inactivity. If you would still like to shut down the terminal, log out of the IPOS application, if necessary, to return to the *Terminal Main Menu* screen (see "Logging Out" on page 21 for detailed instruction). On the *Terminal Main Menu* screen, click **Shutdown**.

Chapter 3: Customer Accounts

This section describes how to access, add, and modify customer accounts as well as reprint a customer's licenses.

This chapter includes the following topics:

Finding a Customer

Opening a customer's account is the first step in customer sales using IPOS. There are two different ways to search for a customer: DL/ID Scan and Basic Customer Search. The search options and when to use them are as follows:

- Scan is used to search for individual, business and vessel customers and requires:
  - a. CA DMV DL/ID, Previous ALDS License, or GoID
  - b. Card reader or barcode scanner.
- Basic search is used to search for individuals only and requires three pieces of information:
  - a. Date of birth
  - b. Last name
  - c. *Dependent on Date of Birth:*
    - For youth (anyone under 18): First name
    - For adults (anyone over 18): ID number

When either of these searches find a single match, the customer's account is displayed. When more than one match is found, the application displays a list of customers. Select the correct customer from the list to display their account in the *Verify Customer Profile* screen and begin a sale.

To Access a Customer Account Through a DL/ID Scan

To return to the *Home* screen if the Navigation Menu is not visible, click **Cancel** until the *Home* screen appears (clicking **Cancel** will lose any changes that have not been saved). If the Navigation Menu is visible, click **Customer Sales**.

1. The *Scan Customer Search* screen is the *Home* page for the IPOS and appears at start up. If necessary, click on the **Scan ID/DL** tab to navigate to this screen, as shown in figure 12.
2. There are three ways to bring up a customer:

- Swipe the *individual* customer's **CA Drivers License or Identification Card** through the card reader.
- Scan the bar code on the *individual*, *business* or *vessel* customer's **previously issued ALDS License** with the Barcode Scanner.
- Scan the *individual*, *business, or vessel* customer's **GoID** bar code with the Barcode Scanner.

3 The system will automatically search for a matching record:

- With a successful scan of a current customer, the application will navigate to the *Verify Customer Profile* screen for the customer.
- With a successful scan that finds more than one matching record, the application will return a list of results.
- If the scan was unsuccessful, an error message will pop-up and the application will remain on the *Home* screen. Try again, with the same or a new document, or try a new search method.

4 If there is a list of search results: when the correct customer is found in the search results list, click **Select** to navigate to the *Verify Customer Profile* screen.

To Access an Individual Customer Account Through a Basic Search

To return to the *Home* screen if the Navigation Menu is not visible, click **Cancel** until the *Home* screen appears (clicking **Cancel** will lose any changes that have not been saved). If the Navigation Menu is visible, click **Customer Sales**.

Figure 15: Customer Search Screen

Figure 16: Customer Search Screen for a Youth

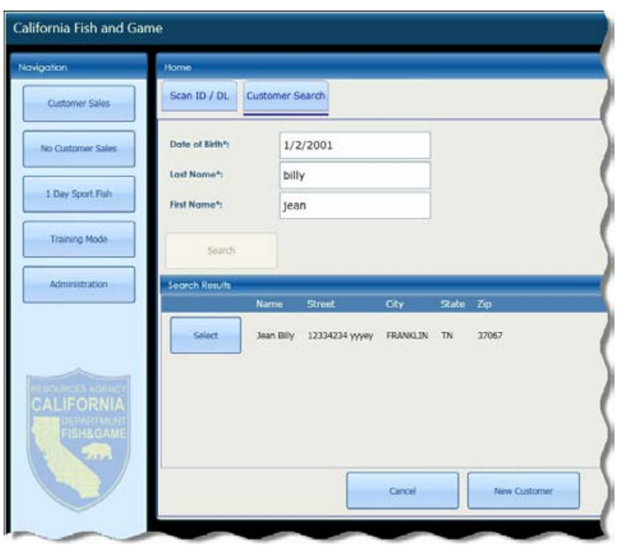


Figure 17: Customer Search Results Screen for a Youth

1. From the *Home* screen, click **Customer Search** from the tabs across the top of the screen, as shown in figure 12.

2. The *Customer Search* screen appears, as shown in figure 15.

3. Enter the customer's date of birth in the *Date of Birth* field.

4. Enter the customer's last name in the *Last Name* field.

5. Depending on the age of the customer:

   ➔ If the customer is under 18 years of age, the *First Name* field is added as a required field, as shown in figure 16. Enter the customer's first name in the *First Name* field.

   ➔ If the customer is over 18 years of age, the *ID Number* field is added as a required field, as shown in figure 18. Enter the customer's ID number in the *ID Number* field (Ex: CA DMV DL/ID, GO ID).

6. Click **Search**:

   ➔ If searching for a customer under 18 and a match is found, a list of all results is displayed below the search criteria, as shown in figure 17.

   ➔ If searching for a customer over 18 and a match is found, the application will navigate to the *Verify Customer Profile* screen.

Figure 18: Customer Search Screen for an Adult

- If the system finds no results, a message will pop-up and the application will remain on the *Basic Customer Search* screen. Try again or try a new search method.

7 If there is a list of search results: when the correct customer is found in the search results list, click **Select** to navigate to the *Verify Customer Profile* screen.

Adding a Customer

The option to add a new customer is only available after you have searched for an individual. If the search returns no results or if the search results do not include a record matching the individual, the application will automatically navigate to the *Add Customer* screen or the **Add New** customer button will appear.

To Add an Individual Customer

1 Perform either search method:

- Scan (see “To Access a Customer Account Through a DL/ID Scan” on page 23 for detailed instruction).

- Basic Customer Search (see “To Access an Individual Customer Account Through a Basic Search” on page 24 for detailed instruction).

2 When any of the search methods cannot find a matching record, the Add New functionality is enabled:

- If searching by an ID/DL Scan, the application will automatically navigate to the *Add Customer* screen.

➔ <u>If searching by a Basic Search</u>, click the **Add New** button that appears on the screen, as shown in figure 19.

Figure 19: Add New Button on Customer Search

3 The *Add Identity* screen appears, as shown in figure 20.

❖ All of the information provided by the scan or used as search criteria will automatically be entered into the appropriate fields and will not be editable. Any required fields that are not already populated will need to be entered manually.

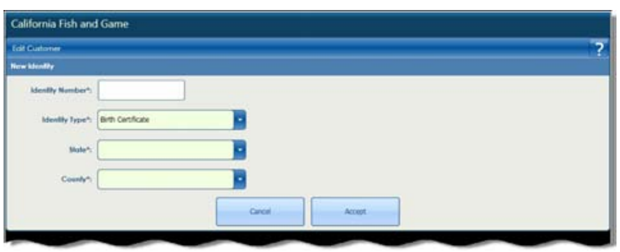


Figure 20: Add Identity on the Edit Customer Screen

4 Select the *Identity Type* for the ID Number entered or scanned.

5 Enter the *Country*, *State*, and/or *County* of the Identity, if applicable.

6 Click **Accept**. The *Edit Customer* screen appears, as shown in figure 21.

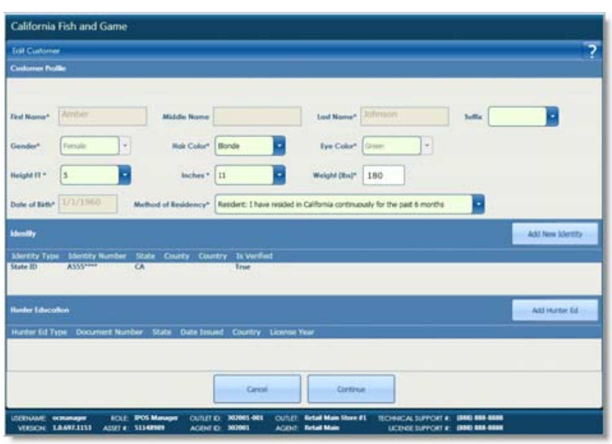


Figure 21: Edit Customer Screen

7 Enter the customer's first name in the *First Name* field.

8 Enter the customer's last name in the *Last Name* field.

9 Select the customer's gender from the *Gender* drop down list.

10 Select the customer's hair color from the *Hair Color* drop down list.

11 Select the customer's eye color from the *Eye Color* drop down list.

12 Select the number of whole feet in the customer's height from the *Height FT* drop down list.

13 Select the remaining number of inches in the customer's height from the *Inches* drop down list.

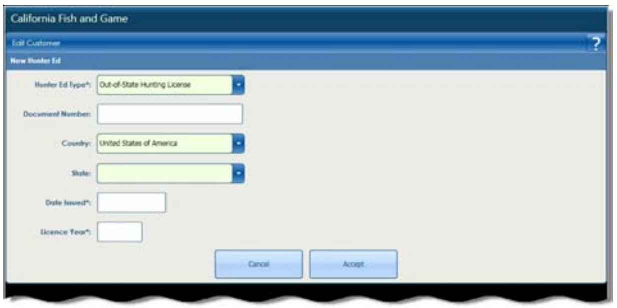


Figure 22: Add Hunters Ed on the Edit Customer Screen

14 Enter the customer's weight in the *Weight* field.

15 Enter the customer's date of birth in the *Date of Birth* field.

16 Select the customer's method of residency from the *Method of Residency* drop down list.

17 If the customer has hunter's education information, click **Add Hunters Ed**. Otherwise, skip to step 20.

18 The *Add Hunters Ed* screen will appear, as shown in figure 22.

19 Select the hunters ed type being added and the associated fields will appear below. Enter data and click **Accept** to navigate back to the *Edit Customer* screen.

20 Fill all other fields for which information is available.

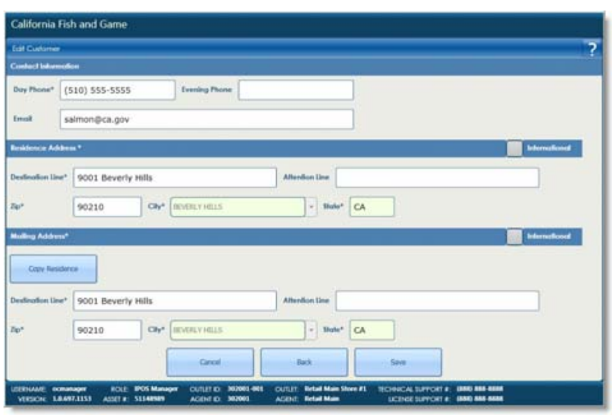


Figure 23: Page Two of the Edit Customer Screen

21 Click **Continue**. The second page of the *Edit Customer* screen will appear, as shown in figure 23.

- The **Back** button can be used at any time to return to the previous page.

22 Enter the customer's day phone number in the *Day Phone* field.

23 Enter the customer's street address in the *Destination Line* field of the Residence Address section.

24 Enter the customer's zip code in the *Zip* field in the Residence Address section.

25 Enter the customer's city in the *City* field in the Residence Address section.

26 Select the customer's state from the *State* drop down list in the Residence Address section.

27 Determine if the customer's mailing address is the same as their residence address:

- If the customer's mailing address is the same as their residence address, click **Copy Residence**.

- If the customer's mailing address is different than their residence address, repeat steps 23 through 26 for the Mailing Address section.

28 Fill all other fields for which information is available.

29 Click **Save**. The application will navigate to the *Verify Customer Profile* screen displaying the entered customer information. Click **Cancel** to discard all changes and return to the *Home* screen.

Changing Customer Information

Many parts of the individual customer profiles can be edited, however, the existing information in the Identities and Hunters Education sections cannot be edited. IPOS users can only add new information to these sections. Updating of these areas is reserved for specialized DFG employees, If any of these accounts or sections need to be changed, the customer must contact DFG.

To Change Individual Customer Information

1 Perform either search method to navigate to the *Verify Customer Profile* screen, as shown in figure 24.

- Scan (see "To Access a Customer Account Through a DL/ID Scan" on page 23 for detailed instruction).

- Basic Customer Search (see "To Access an Individual Customer Account Through a Basic Search" on page 24 for detailed instruction).

2 Click **Edit Profile**. The *Edit Customer* screen appears, as shown in figure 21.

3 In the *Edit Customer* screen, all Customer Profile section data can be edited. The Identities and Hunters Education sections can only be added to:

- To add an identity, click **Add Identity**. The *Add Identity* screen will appear as shown in figure 20. Select the identity type being added and the associated fields will appear below.

- To add hunters education, click **Add Hunters Ed**. The *Add Hunter Ed* screen will appear as shown in figure 22. Select the hunters ed type being added and the associated fields will appear below.

Figure 24: Verify Customer Profile Screen for an Individual

4 Enter data and click **Accept** to navigate back to the *Edit Customer* screen. Previously existing Identity and Hunters Ed data cannot be edited.

5 Click **Continue**. Page two of the *Edit Customer* screen will appear, as shown in figure 23.

6 In page two of the *Edit Customer* screen, all data can be edited.

❖ The **Back** button can be used at any time to return to the previous page.

7 Click **Save** to make the changes permanent or click **Cancel** to reset the profile to its original settings and return to the *Verify Customer Profile* screen.

Reprinting Licenses

Licenses can be reprinted as long as it is within the reprint time limit for the outlet and all licenses from the document have not expired. The IPOS application provides two ways to reprint licenses. The process described in this section is Customer Reprints, which requires the customer's account to be accessed. All printable documents for the specified customer, regardless of the issuing outlet, are listed here. The Last Transaction Reprints, described in "Reprint Last Transaction" on page 60, are through the Administration Menu and lists the most previous transactions at your outlet, no matter the customer.

To Reprint a License

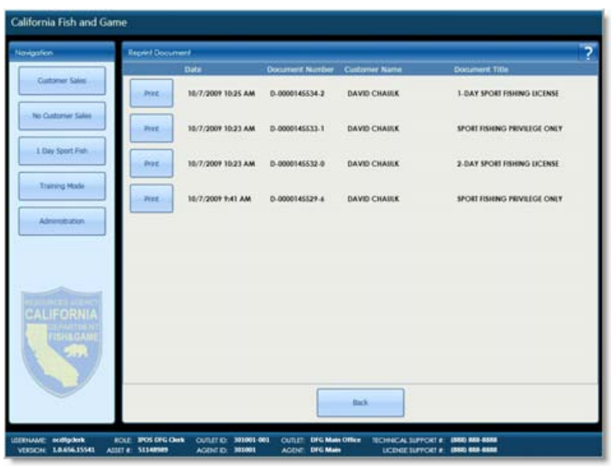


Figure 25: Reprint Document Screen

Figure 26: Reprint Confirmation Message

1 Perform either search method to navigate to the *Verify Customer Profile* screen, as shown in figure 24.

- Scan (see “To Access a Customer Account Through a DL/ID Scan” on page 23 for detailed instruction).
- Basic Customer Search (see “To Access an Individual Customer Account Through a Basic Search” on page 24 for detailed instruction).

2 Click **Reprint Licenses**. The *Reprint Document* screen will appear, as shown in figure 25.

3 Click **Print** beside the document in the list that needs to be reprinted.

4 The *Reprint Confirmation* message will pop-up, as shown in figure 26. Click **OK** to close the message.

Chapter 4: Sales

This section describes how to sell licenses and the different items available for sale.

This chapter includes the following topics:

Selling Items

There are three types of sales that can be performed by outlets with permission:

- Customer Sales require a customer account to be accessed or created before the licenses can be sold. This method uses the item catalog to select the customer's items.

- No Customer Sales allow certain items to be sold without accessing a customer account. This method also uses the item catalog to select the customer's items, however, it is more limited than customer sales.

- 1 Day Sport Fish Sales allow many 1 Day Sport Fishing licenses to be sold quickly for the day specified by the IPOS user. Because this license is requested by customers so frequently, this specialized sales method saves time by reducing the amount of steps and information collected during a sale. Though some customer information will need to be collected, this sales process does not require a customer account, and because there is only one item sold, the item catalog is not used for this sales method.

  DFG is required by Federal regulation to gather a phone number during the 1 Day Sport Fish Sales process. The appropriate interval (ex: every fifth customer, every tenth customer) for collecting phone numbers will be set by DFG and a prompt will automatically open for the first customer and every customer thereafter that lands on the set interval, for the session. It is possible to bypass this if absolutely necessary, however, the prompt will continue to appear for every customer following a bypassed prompt until a phone number is collected. Once a phone number is entered, the prompt will then follow its normal interval schedule.

To Make a Customer Sale

If the *Home* screen is not visible, click **Customer Sales** in the Navigation Menu or click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1. Perform either search method to navigate to the *Verify Customer Profile* screen, as shown in figure 24.

   - Scan (see "To Access a Customer Account Through a DL/ID Scan" on page 23 for detailed instruction).

- Basic Customer Search (see "To Access an Individual Customer Account Through a Basic Search" on page 24 for detailed instruction).

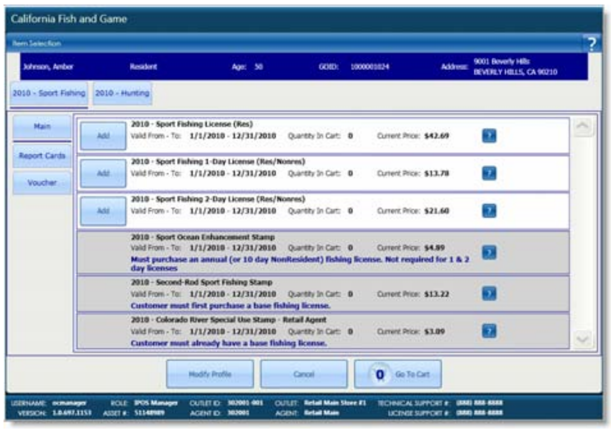


Figure 27: Item Selection Screen

2 Click **Sales**. The *Item Selection* screen will appear, as shown in figure 27.

> ❖ If the customer's physical address is not in California, a message will pop-up requiring the IPOS user to confirm that the customer has lived in California for the last six consecutive months, as shown in figure 28. Click **Continue to Sales** if their residency information is accurate. Click **Update Customer Residency** to enter their new residency information (see "To Change Customer Information" on page 29 for detailed instructions).

3 Click **Add** next to the item the customer wants to purchase. (For details on finding items see "Item Catalog" on page 37.)

- If the item does not require additional information, the application will remain on the *Item Selection* screen.
- If the item does require additional information, the **Add** button will navigate to the screen where this information can be entered (see "Item Catalog" for detailed instruction).

Figure 28: Customer's Residence State Message

4 If the customer wants to purchase additional items, repeat step 3 until all items have been added, otherwise, continue to step 5.

5 After all the items the customer wants to purchase have been added to the cart, see "To Check Out and Print" on page 53 for instructions on how to complete the sale.

To Make a No Customer Sale

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1 Click **No Customer Sales** in the Navigation Menu on the left side of the *Home* page.

2 The *Item Selection* screen for no customer sales will appear, as shown in figure 29.

3 Click **Add** next to the item the customer wants to purchase. (For information on how to find items see "Item Catalog" on page 37.)

- If the item does not require additional information, the application will remain on the *Item Selection* screen.

- If the item does require additional information, the **Add** button will navigate to the screen where this information can be entered (see "Item Catalog" on page 37 for detailed instruction).

4 If the customer wants to purchase additional items, repeat step 3 until all items have been added, otherwise, continue to step 5.

5 After all the items the customer wants to purchase have been added to the cart, see "To Checkout and Print" on page 53 for instructions on how to complete the sale.

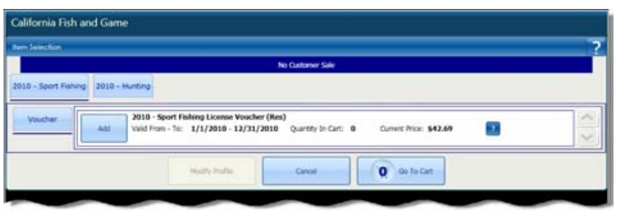


Figure 29: No Customer Item Selection Screen

To Make a 1 Day Sport Fish Sale

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1 Click **1 Day Quick Sale** in the Navigation Bar on the left side of the *Home* page.

2 The *1 Day Sport Fish Quick Sale Options* screen will appear, as shown in figure 30.

Figure 30: 1 Day Sport Fish Quick Sale Options Screen

3 Select the validity date for the licenses to be printed in this session from the *Select Date* drop down list.

4 Click **Proceed to Quick Sale**. The *1 Day Sport Fish Quick Sale* screen will appear, as shown in figure 31.

5 Depending on the availability of the customer's drivers license:

- <u>If the customer's CA DMV DL/ID is available</u>, swipe the DL/ID through the card reader to automatically generate the *Last Name on Drivers License* and *Birth Date on Drivers License* fields.

- <u>If these can not be used</u>, enter the customer's last name in the *Last Name* field and their birth date in the *Date of Birth* field.

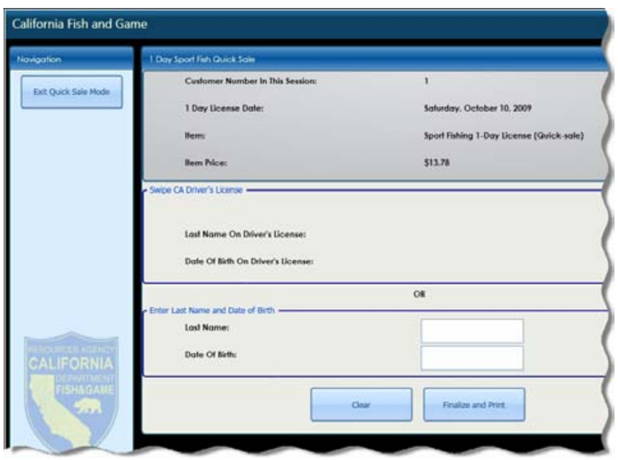


Figure 31: 1 Day Sport Fish Quick Sale Screen

6 Click **Finalize and Print**

- <u>If the *Enter Customer's Phone Number* screen does not appear</u>, skip to step 8.

- <u>If the *Enter Customer's Phone Number* screen appears</u>, determine if the customer's phone number is available.

7 Depending on the availability of the customer's phone number:

Figure 32: Enter Customer's Phone Number Screen

- <u>If the customer's phone number is available</u>, enter the customer's phone number in the *Phone Number* field and click **Finalize and Print**.

- <u>If the customer's phone number is not available</u>, click **Phone Number Not Available**.

8 The *Finalize and Print* checklist screen will appear and a receipt will print. The *1 Day Sport Fish Quick Sale* screen will refresh, ready for the next sale.

❖ Click **Exit Quick Sale** at any time to return to the *Home* screen and regular sales mode.

Item Catalog

On the *Item Selection* screen, products are arranged into categories. Each category is represented by a tab along the top of the screen. The sub-tabs, which group the products within the categories, will appear down the left side of the screen. When you click on a tab, all of the products in the first sub-tab will appear. Clicking on a sub-tab will show the products within that group. The tab and sub-tab for which products are displayed will be underlined. The *Item selection* screen will show only those products which the customer is allowed to purchase.

The products which the customer is currently qualified to purchase will appear in white and will have an **Add** button on the left side of the item row which will put the item in the cart. Some items in the catalog require additional information from the customer before the transaction can continue. In those cases, the **Add** button will gather the information needed to add the item to the cart. The following sections describe how to sell items with additional requirements.

There are some products the customer may be allowed to purchase but cannot until they meet certain criteria. The products which the customer is not currently qualified to purchase will appear in grey. The customer may not be currently qualified to purchase these items for a variety of reasons which include the requirement of hunter's education, a prerequisite item purchase, or the maximum number the customer is allowed to purchase has already been reached. These products will show the reason the customer cannot purchase the item below the validity date.

Some products may not appear on the customer's *Item Selection* screen at all. This could be because the outlet they are purchasing from does not sell the item or they do not meet criteria regarding: disabilities, Native American heritage, their customer type (individual, business, or vessel), state residency, age, or private land management status.

Figure 33: Sales Tabs and Sub-tabs

The tabs and their sub-tabs contain the following products:

Tab	Sub-tabs	Products
Fishing		Holds all the products sold by DFG for the purposes of recreational sport fishing.
	Main	Holds the general licenses and enhancement validations for recreational sport fishing.
	Report Cards	Holds the report cards for the species that have reporting and tagging requirements when caught.
	Misc Fish	Holds the remaining recreational sport fishing items, if any.
	Vouchers	Holds the gift voucher and gift voucher redemption fishing items.
Hunting		Holds all the products sold by DFG for the purposes of hunting.
	Main	Holds the general hunting items (licenses, stamp validations, and passes).
	Big Game	Holds the Big Game items (Deer, Bear, and Pig tags).
	Drawings	Holds the controlled hunt drawing applications (Deer, Elk, Antelope, Bighorn Sheep, and Waterfowl).
	Misc Hunt	Holds the remaining hunting items (Duplicate Hunter Ed Certificates, Bobcat tags).

Duplicates

Some licenses can be reprinted for customers who, for whatever reason, need a new copy of their document. A **Duplicate** button will appear on the right side of the item row on the *Item Selection* screen beside items which are allowed to be duplicated. Using **Duplicate** rather than **Add**, reprints a previously existing license rather than creating a new one. Though duplicates use their own button rather than the **Add** button, they carry a fee and behave like typical items during a sale.

Begin a sale as described in "To Make a Customer Sale" on page 33 and click **Duplicate** on the *Item Selection* screen to add the item to cart. Return to "To Make a Customer Sale" for instructions on continuing the sale.

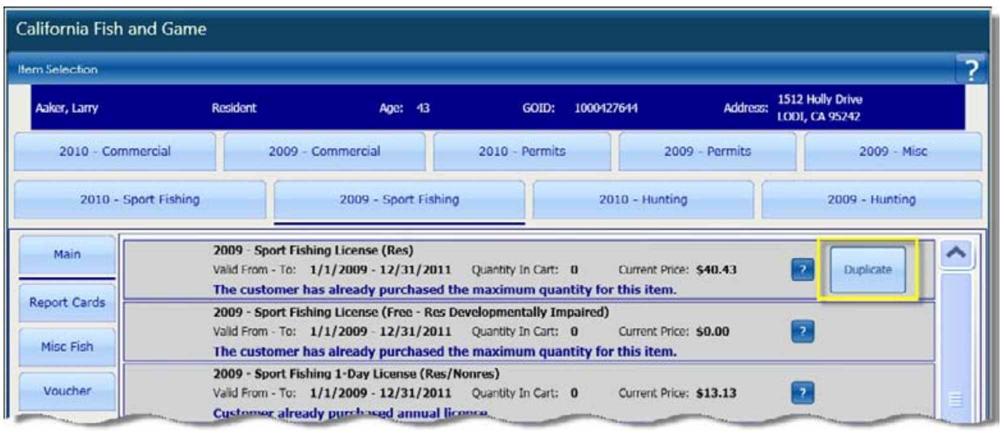


Figure 34: Duplicate Button

Sales Questions

Any item in the catalog can be set up at any time to gather additional information. This means that items may ask no questions at one time and begin asking questions later or vice versa. Because these questions are varied and unpredictable it is best to discuss the form in which these questions will appear and how to enter the desired answers.

This process begins on the *Item Selection* screen during a sale (after step 3 in "Selling Items" on page 33). Upon clicking **Add** beside an item with a sales question, the question box will pop-up.

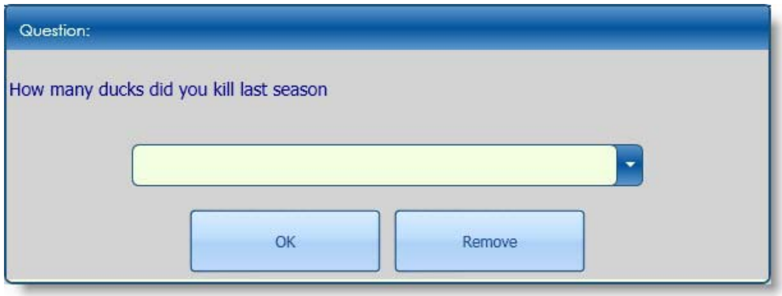


Figure 35: Sales Question with Drop Down List Answer

The question will appear at the top of the box, the method for answering the question will appear in the middle and the navigational buttons will appear at the bottom. There are three formats for answering a question. A drop down list will appear in green and have an arrow on the far right side of the answer field. Clicking on the arrow will open a box with the answer options. Clicking on an answer will enter it into the answer field.

Figure 36: Sales Question Drop Down List Options

A text area will appear as a blank white area. Text areas allow the IPOS user to enter the answer manually using the keyboard. Depending on the question, text areas may take plain text, numbers, currency, or dates.

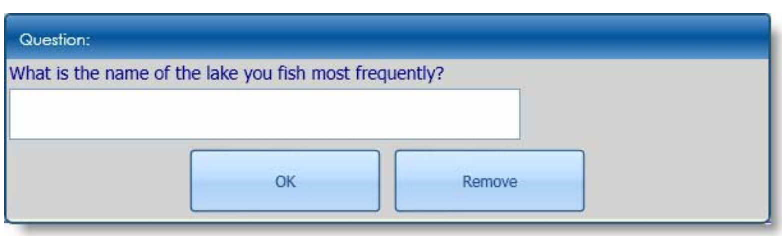


Figure 37: Sales Question with Text Field Answer

A question that allows multiple answers will appear as a list with check boxes beside each answer. Click or touch in the check boxes so that a check mark appears beside the applicable answers.

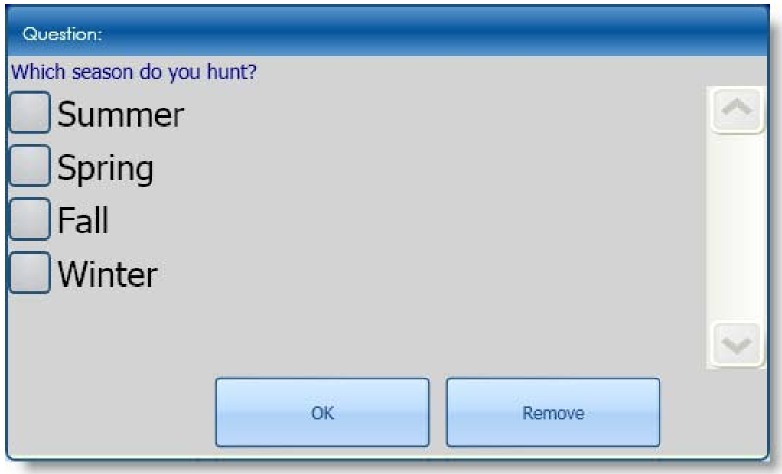


Figure 38: Sales Question with Check Boxes

Once the answer that applies to the customer in focus has been entered into the answer field, click **OK** to navigate to the next question or add the item to the cart and return to the *Item Selection* screen. Some questions can affect the sale of an item, which means that answering in a certain way may add or remove another item to or from the cart. For example, the purchase of a fishing license may populate a question asking if the customer will be engaged in steelhead fishing. An affirmative answer could also automatically add a steelhead catch card item to the order.

Clicking **Remove**, at any time, will close the question box and return to the *Item Selection* screen without the item added to the cart. Items with questions must be answered to be added to the cart.

After all the items the customer wants to purchase have been added to the cart, the sale can be completed. See “To Checkout and Print” on page 53 for detailed instruction.

HIP Items

There is a federal regulation that requires customers who hunt ducks, band-tailed pigeon, dove, geese, black brant, snipe, coots, and gallinules to register with the Migratory Bird Harvest Information Program (HIP). The United States Fish and Wildlife Service implemented this program to provide wildlife biologists with the data needed to make wildlife management decisions, such as the creation of hunting regulations, that ensure migratory game bird will be around for future generations. When a HIP license is added to the cart, a questionnaire will automatically pop-up and must be completed before the item will be placed into the cart. The questions asked during the HIP survey appear and are answered in the same fashion as typical sales questions. For details on how to complete the survey see "Sales Question" on page 39.

Short Term Licenses

Short term licenses provide basic privileges for a specific number of consecutive days. For example, a 1 Day Sport Fishing License. The date the license becomes active is chosen by the customer and must be entered before the item can be added to the cart.

To Sell a Short Term License

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Short Term License Question* screen will appear, as shown in figure 39.

2 If the desired start date of the license is not the current date, enter the desired start date in the *Enter Desired Start Date* field.

- If multiple short term licenses are purchased, the desired start date of each license must be different.

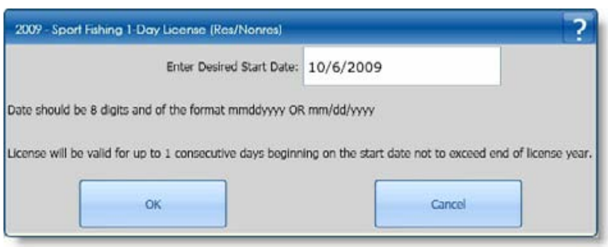


Figure 39: Short Term License Question

3 Click **OK**. The application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

Variable Quantity Items

Variable quantity items are items which customers can purchase more than one of. The quantity purchased is decided by the customer and must be entered by the IPOS user before the item can be added to the cart.

To Sell a Variable Quantity Item

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Variable Quantity* screen will appear, as shown in figure 40.

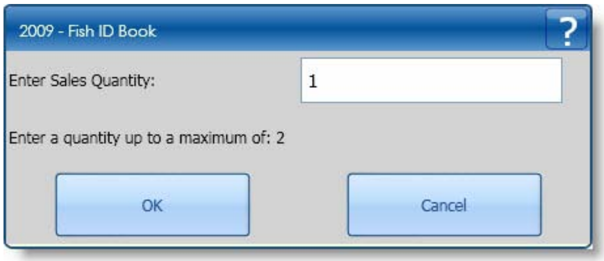


Figure 40: Variable Quantity Screen

2 if the desired quantity is not 1, enter the desired quantity in the *Enter Sales Quantity* field.

❖ The sales quantity entered cannot be greater than the maximum shown below the sales quantity field.

3 Click **OK**. The application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

Gift Vouchers

Some items can be purchased in the form of a Gift Voucher. When a gift voucher is purchased it is good for only the item which is associated with the voucher. For example, there may be a Sport Fishing Voucher which can be redeemed for only a Sport Fishing license. These items do not print as a license but as a document for proof of prepayment which can be brought to an agent and redeemed for an actual license at a later date, for no additional cost. A redemption code is printed on the document and is required in order to redeem the voucher. There is also an option to print a recipient's name on the document for personalization.

When the a customer brings a voucher in to be redeemed for a license, there will be a coordinating item for the redemption of the voucher type purchased. For example, for a customer redeeming a Sport Fishing Voucher, you will add a Sport Fishing Voucher Redemption item to the cart. After the document has been validated and the redemption code has been entered, the item will be added to the cart with no charge. After checkout, a typical license will be printed for the customer.

To Sell a Gift Voucher

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Gift Voucher* screen will appear, as shown in figure 41.

Figure 41: Gift Voucher Screen

2 Enter the name of the person who will be receiving the gift voucher in the *Gift voucher for* field, if available.

3 Click **Accept**. The application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

To Redeem a Gift Voucher

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

Figure 42: Voucher Redemption Screen

1 The *Voucher Redemption* screen will appear, as shown in figure 42.

2 Depending on the ability to use the scanner:

- If the scanner can be used, scan the gift voucher the customer wants to redeem.
- If the scanner can not be used, manually type the Document Number from the gift voucher the customer wants to redeem into the text area and click **Validate**.

3 The *Redemption Code* screen will appear, as shown in figure 43.

4 Enter the redemption code that appears on the gift voucher into the *Redemption Code* field.

5 Click **Redeem**. The license will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

Figure 43: Redemption Code Screen

Packages

A package is a group of catalog items that can be purchased together, as one item, potentially at a discounted price. Packages include typical items from the catalog which are valid for a limited time. These must be purchased in their entirety, individual items cannot be removed from a package. This means that the customer must qualify for all parts of the package in order to be able to purchase it.

Adding a package to the cart will take the IPOS user to a screen displaying all the items in the package and which items require additional information. Since the items within a package are the same items available in the item catalog, use this "Item Catalog" section to find detailed instructions on how to gather any information required to add a package to the cart.

To Sell a Package

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

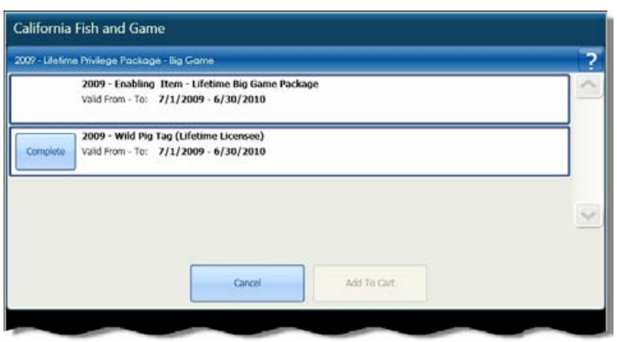


Figure 44: Package Screen

1. The *Package* screen will appear, as shown in figure 44, listing all the items in the package.

2. If the customer is eligible for an item, the item will be white. If the customer is not eligible for an item, the item will be grey. Grey items cannot be purchased by the customer (click **Cancel** to return to the *Item Selection* screen).

3. Some items may require additional information:

   - ➔ If an item does not require additional information, there will be no **Complete** button beside it. Skip to step 6.

   - ➔ If an item requires additional information a **Complete** button will appear beside it.

4. Click **Complete** beside the package item. The application will navigate to the screen where the information can be entered (see "Item Catalog" on page 37 for detailed instruction).

5 After completing the additional information, the application will navigate back to the *Package* screen.

6 Depending on the items in the package:

- If there are more items which require additional information, repeat steps 3-4 until no **Complete** buttons appear on the *Package* screen.
- If there are no more items which require additional information, the **Add to Cart** button will be enabled.

7 Click **Add to Cart**. The application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

Controlled Hunt Sales

For hunts that have restrictions on the number of an animals that can be harvested or when the DFG needs to collect harvest data, harvest is controlled through the use of tags. A tag allows for a single animal to be harvested and may be assigned to hunters by a random drawing or may be issued upon request (IUR). Random drawings provide a non biased way to allocate a limited number of opportunities to hunters while accommodating a large demand for tags.

Applications and tag purchases require the customer to specify which area, and in some cases what days, the application or tag is for. Additionally, deer, elk, antelope and bighorn sheep hunts provide customers the option of applying with a party, which allows a group of hunters to apply for the tag together. All of this information must be gathered by the IPOS user at the time of sale. In order to enter a random drawing, a customer must purchase an application. The available applications and tags are as follows:

- A Deer Tag Drawing Application may be used by a customer to enter the big game drawing for a deer tag, with up to three hunt area choices. If drawn, the customer will be mailed a deer tag for the specified zone. If not drawn, they will either receive a refund they will be mailed a deer tag drawing notice which may be used to apply for any deer tags remaining after the drawing.

- Elk, Antelope and Bighorn Sheep Drawing Applications may be used to enter the customer into a drawing for tags for these species with one hunt choice per species. If drawn, the customer will receive a notice in the mail that they are eligible to purchase the associated tag. If not drawn, there will be no further action. For elk and antelope hunts, resident hunters may apply as a party of two hunters. Nonresidents must apply as single applicants.

- A Waterfowl Multi Choice Application can be used to enter a customer into drawings for waterfowl hunts in as many areas and on as many dates as selected by the customer. If drawn, the customer will be mailed a hunting reservation. If not drawn, there will be no further action.

- A Waterfowl Season Long Application can be used to enter a customer into drawings for every Saturday, Sunday and/or Wednesday waterfowl hunt of the season for the selected areas and on the selected days. If drawn, the customer will be mailed a hunting reservation.. If not drawn, there will be no further action.

- Deer, Bear, Wild Pig, and Bobcat Hunt Tags are not associated with the random drawing and are issued upon request until the tag and/or harvest quota has filled or the season has closed.

To Sell a Deer Tag Drawing Application

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

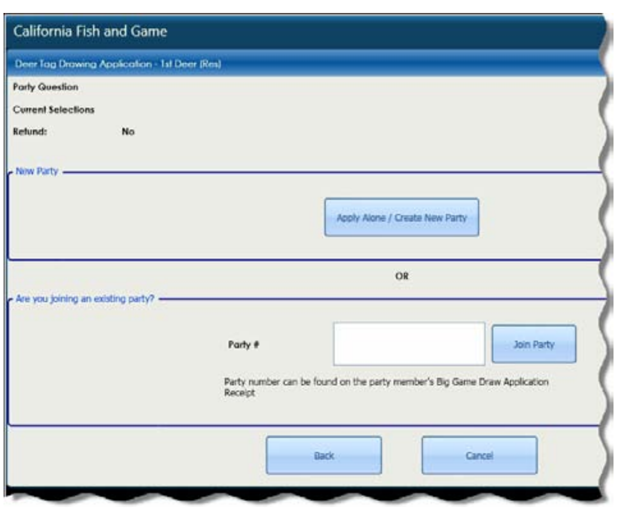


Figure 45: Party Question Screen with no Party in the Cart

1. The *Party Question* screen will appear, as shown in figures 45 or 46.

   - If the customer is not joining a party, click **Apply Alone/Create New Party**.

   - If the customer is joining a party and is not joining a transaction already in progress, enter the party number in the *Party #* field and click **Join Party**.

   - If the customer is joining a party on a transaction already in progress, select the party number from the *Party #* drop down list and click **Join Party**.

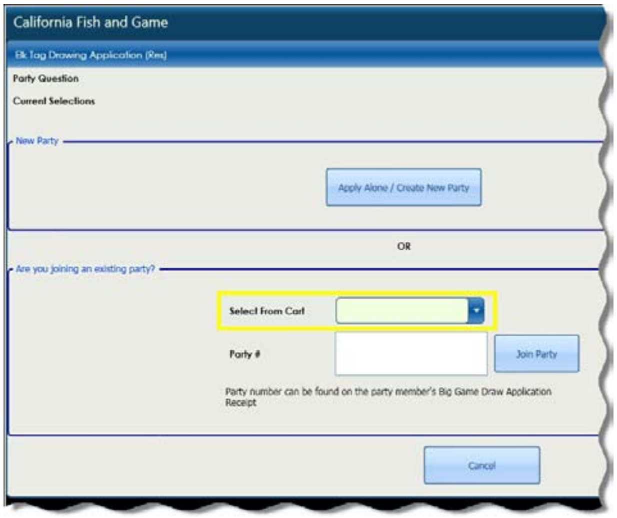


Figure 46: Party Question Screen with a Party in the Cart

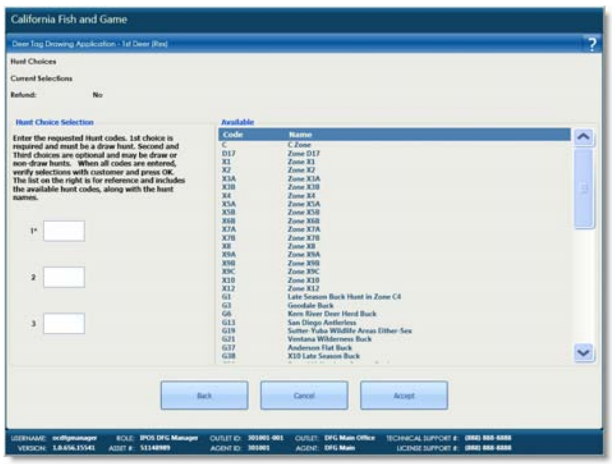


Figure 47: Hunt Choices Screen

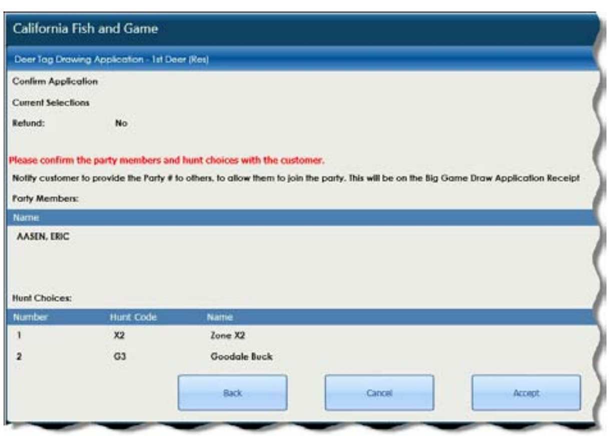


Figure 48: Confirm Application Screen

- The *Party #* drop down list will automatically contain the party number for the party selected or created by the first customer on the transaction.

2 Depending on whether the customer is joining a party or applying alone/creating a new party:

- If the customer is joining a party, the hunt choices have already been selected, skip to step 6.

- If the customer is applying alone/creating a new party, the *Hunt Choices* screen will appear, as shown in figure 47.

3 Enter the hunt code for the first choice hunt in the **1*** field.

- A list of the available hunts and their codes appears on the right side of the screen for reference.

4 Enter the hunt codes for the second and third choice hunts in the **2** and **3** fields, if available.

5 Click **Accept**.

6 The *Confirm Application* screen will appear, as shown in figure 48. Review the selections to be sure they are correct.

- If a selection is not correct, click **Back** to return to the previous screen.

7 Click **Confirm**. The item will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

To Sell an Elk, Antelope, or Bighorn Sheep Drawing Application

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Party Question* screen will appear, as shown in figures 45 and 46.

- If the customer is not joining a party, click **Apply Alone/Create New Party**.
- If the customer is joining a party and is not joining an order already in progress, enter the party number in the *Party #* field or and click **Join Party**.
- If the customer is joining a party on an order already in progress, select the party number from the *Party #* drop down list and click **Join Party**.

> ❖ The *Party #* drop down list will automatically contain the party number for the party selected or created by the first customer on the transaction.

2 Depending on whether the customer is joining a party or applying alone/creating a new party:

- If the customer is joining a party, the hunt choices have already been selected, skip to step 5.
- If the customer is applying alone/creating a new party, the *Hunt Choice* screen will appear, as shown in figure 49.

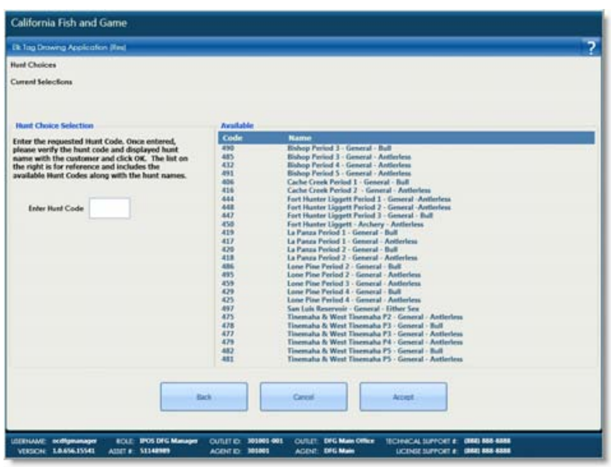


Figure 49: Hunt Choice Screen

3 Enter the hunt code for the hunt choice in the **Enter Hunt Code** field.

- ❖ A list of the available hunts and their codes appears on the right side of the screen for reference.

4 Click **Accept**.

5 The *Confirm Application* screen will appear, as shown in figure 48. Review the selections to be sure they are correct.

- ❖ If a selection is not correct, click **Back** to return to the previous screen.

6 Click **Confirm**. The item will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

To Sell a Waterfowl Multi Choice Application

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Waterfowl Multi Choice Application* screen will appear, as shown in figure 50.

Figure 50: Waterfowl Multi Choice Application Screen

2 Click **Modify Choices** beside the hunt area in the list that the application is for.

3 The *Modify Choices* screen will appear, as shown in figure 51, displaying a calendar with check boxes in the dates available for hunting in the selected area.

4 Click in the check boxes so that a check mark appears in the dates the application is for.

- ❖ The buttons on the right side of the screen can be used to easily check or uncheck multiple dates at once.

5 Click **Accept** after all the desired dates have been selected.

Figure 51: Modify Choices Screen

6 The application will navigate back to the *Waterfowl Multi Choice Application* screen with the *Selected* and *Fee* values updated.

7 Click **Next**. The *Confirm Waterfowl Choices* screen will appear, as shown in figure 53. Review the selections to be sure they are correct.

- ❖ If a selection is not correct, click **Back** to return to step 1.

8 Click **Confirm**. The item will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

To Sell a Waterfowl Season Long Application

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Waterfowl Season Long Application* screen will appear, as shown in figure 52.

2 Click in the check box(es) so that a check mark appears beneath the day(s) of the week and in the row of the area(s) the application is for.

- ❖ The numbers beside the check boxes tell how many slots are available on that day, in that hunt area.

Figure 52: Waterfowl Season Long Application Screen

3 Click **Next**. The *Confirm Waterfowl Choices* screen will appear, as shown in figure 53. Review the selections to be sure they are correct.

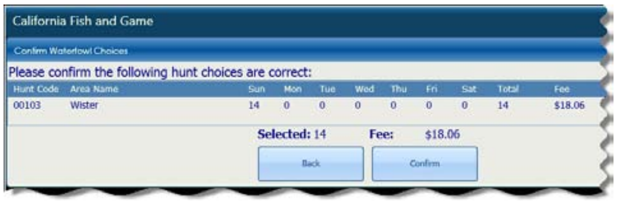


Figure 53: Confirm Waterfowl Choices Screen

❖ If a selection is not correct, click **Back** to return to step 1.

4 Click **Confirm**. The item will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

To Sell an Issued Upon Request (IUR) Deer Hunt Tag

This process begins after you click **Add** beside the item in the *Item Selection* screen (after step 3 in "Selling Items" on page 33).

1 The *Hunt Choice* screen will appear, as shown in figure 49.

2 Enter the hunt code for the hunt choice in the **Enter Hunt Code** field.

❖ A list of the available hunts and their codes appears on the right side of the screen for reference.

3 Click **Accept**. The item will be added to the cart and the application will navigate back to the *Item Selection* screen. (For instructions on continuing the sale, return to "Selling Items," step 4, on page 33.)

Checkout and Print

Once all the items the customer wants to purchase have been added to the cart, the checkout process can begin. This process is the same for any type of sale including customer, no-customer, or 1 day sport fish sales. Keep in mind that even when a customer has a gift voucher to redeem for an item, the gift voucher redemption will be added to the cart like any other item and the checkout process will complete the sale as described here. The result of a checkout is the printing of the license(s), therefore, the process must be completed.

To Checkout and Print

This process begins at the end of the sales process (see "Selling Items" on page 33 for detailed instruction) .

Figure 54: Shopping Cart Screen

Figure 55: Shopping Cart Screen with Multiple Customers

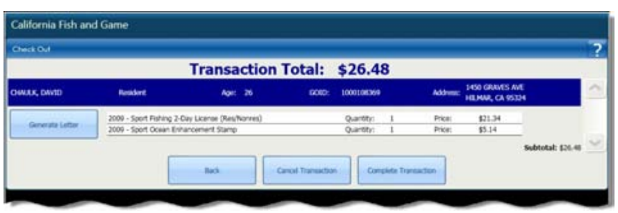


Figure 56: Check Out Screen

Figure 57: Check Out Screen with Multiple Customers

1 On the *Item Selection* screen, click **Go To Shopping Cart**.

2 The *Shopping Cart* screen will appear, as shown in figure 54 or 55. Review the transaction to be sure it is correct:

- If the transaction is correct, go on to step 3.

- If an item requiring additional information is not correct, click **Edit** next to the item to reopen the related screens and change the information.

- If the customer no longer wants to purchase an item, click **Remove** next to the item.

> ❖ There are some items which are required to be in the cart in order for related items to be in the cart. Removing these items will remove the related items at the same time. A pop-up alert will warn you before completing the removal.

- If the customer wants to add additional items to the transaction, click **Continue Shopping for this Customer**.

- If another customer wants to join the transaction, click **Add Another Customer**. The *Home* screen will appear and the sales process is started again (see "To Make a Customer Sale" on page 33 for detailed instruction).

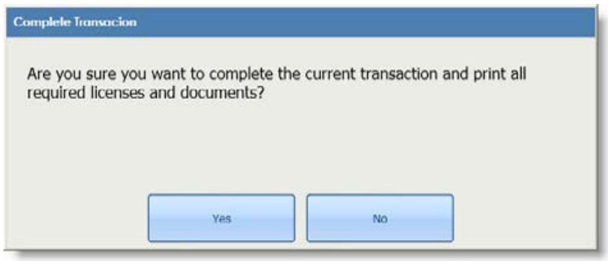


Figure 58: Complete Transaction Confirmation Message

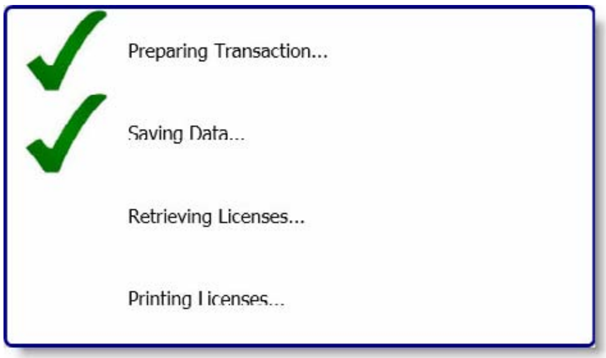


Figure 59: Finalize and Print Screen

3 Click **Continue to Check Out** when all items are correct. The *Check Out* screen will appear, as shown in figure 56 or 57.

4 Click **Complete Transaction**:

- To modify the transaction or continue shopping for this customer, click **Go Back to Cart**. Click **Cancel** to discard the transaction completely and return to the *Home* screen.

5 The *Complete Transaction Confirmation* message will appear, as shown in figure 58.

6 Click **Yes.** The *Finalize and Print* screen will appear, as shown in figure 59.

7 Give the customer their license from the License Printer. The application will navigate back to the *Home* screen.

Chapter 5: Training

Training Mode allows new users to learn the IPOS application by using it in a "protected" state. The application works much like normal in Training Mode with some exceptions that help to ensure data integrity. The Navigation bar no longer contains its typical menu, therefore, IPOS functionality normally accessed through the Navigation Bar cannot be accessed in training mode. This includes No Customer Sales, 1 Day Sport Fish Sales and the entire Administration menu. Only customer find, add, change, and sales can be accessed in Training Mode. These functionalities are as described in this manual with the exception that no data modifications can be saved and no printing can take place.

This chapter explains how to enter training mode and provides a few scenarios to help learn the system.

To Use Training Mode

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

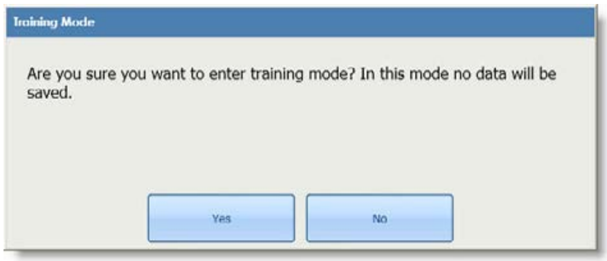


Figure 60: Training Mode Confirmation Message

Figure 61: Training Mode Screen

1. Click **Training Mode** in the Navigation Bar on the left side of the *Home* page.
2. The *Training Mode Confirmation* message will pop-up, as shown in figure 60.
3. Click **Yes**. The IPOS application will begin running in training mode, as shown in figure 61.

❖ Click **Exit Training Mode** at any time to return to the *Home* screen and regular sales mode.

Training Scenarios

➔ Scenario 1: You decide to set yourself up as a customer so that the next time you want to go fishing, buying a license will be quick and easy.

*Use the "To Add an Individual Customer" instructions on page 26 to add yourself as a new customer using the Scan search method.

➔ Scenario 2: John Smith has come in to be set up as a customer so that his parents can buy him the hunting license he asked for as a birthday gift.

*Use the "To Add an Individual Customer" instructions to add John as a new customer using the Customer search method.

John's information:

Middle Name: Joseph

Hair Color: Brown

Eye Color: Brown

Height: 5 feet 11 inches

Weight: 150 pounds

Date of Birth: 3/2/1993

He is a resident of California

He is using a State ID, Identity Number: A1234567

He has California Hunters Education, Document Number: 890, Issued Date: 4/3/2009

Phone: 916-555-1234

Residence and Mailing Address: 100 Main St.
Sacramento, CA 95816

➔ Scenario 3: Dick Clark, a regular customer, has come in to purchase this years Sport Fishing License, Second Rod Sport Fishing Stamp, and Sturgeon Fishing Report Card.

*Use the "To Make a Customer Sale" instructions on page 33 sell these items to Mr. Clark. Use the barcode below to Search for him using the Scan method.

Barcode

➔ Scenario 4: Sarah Johnson, a regular customer, has come in to purchase a Deer Tag Drawing Application and a Waterfowl Multi-Choice Application for the coming hunting season.

*Use the "To Make a Customer Sale" instruction to sell these items to Mrs. Johnson. Use the Customer Search method to retrieve her account. See "Controlled Hunt Sales" on page 46 for instructions on selling hunting applications.

Sarah's Information:

Date of Birth: 5/4/1975

ID Number: 555692378

Chapter 6: Administration and Reporting

All functionality aside from sales is contained in the Administration Menu. From here, supplies can be ordered, documents can be cancelled, messages can be accessed, user accounts and passwords can be created, licenses can be printed, and reports can be run. It is also in the administration menu that the onscreen keyboard can be turned on or off. This section details all the functions available in the Administration Menu.

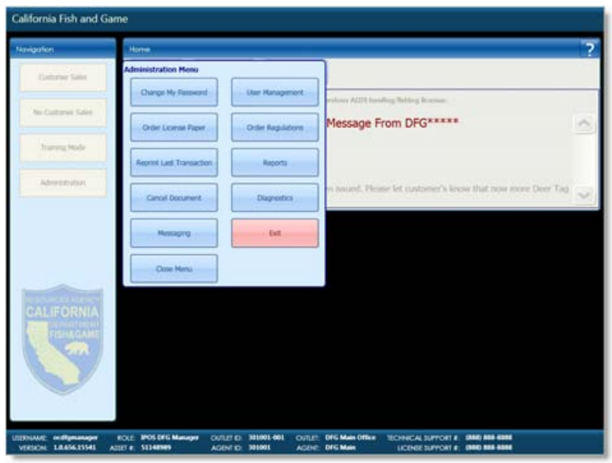


Figure 62: Administration Menu Option

This chapter includes the following topics:

Change My Password

If users wish to change their password and do not want to wait until the 90 day forced change, the Change My Password option is available in the Administration Menu.

To Change Your Password

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1. Click **Administration** on the Navigation Menu.
2. Click **Change My Password** in the Administration Menu that opens, as shown in figure 62.
3. The *Change My Password* screen will appear, as shown in figure 63.
4. Enter your current password in the *Old Password* field.
5. Enter the new password you'd like to use in the *New Password* field.

   ❖ See "Username and Password" on page 18 for password requirements.

6. Enter the new password again in the *Confirm New Password* field.
7. Click **Change Password** to make the changes permanent or click **Cancel** to discard changes and return to the *Home* screen.

Figure 63: Change My Password Screen

Order License Paper

The Order License Paper section allows an agent to order the rolls of license paper that is required for the printer associated with the IPOS. After ordering the paper, this screen also displays a list of placed orders and their statuses until 30 days after shipment. The list is organized by the date the order was placed, but can be sorted by any column by clicking on the column name.

To View License Paper Orders

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

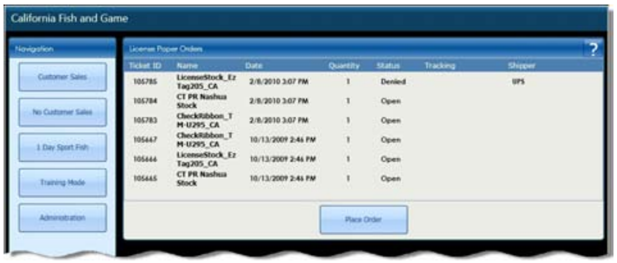


Figure 64: License Paper Orders Screen

1. Click **Administration** on the Navigation Menu.
2. Click **Order License Paper** in the Administration Menu that opens, as shown in figure 62.
3. The *License Paper Orders* screen will appear, as shown in figure 64.

To Order License Paper

Begin by navigating to the *License Paper Orders* screen (see “To View License Paper Orders” on page 60 for detailed instruction).

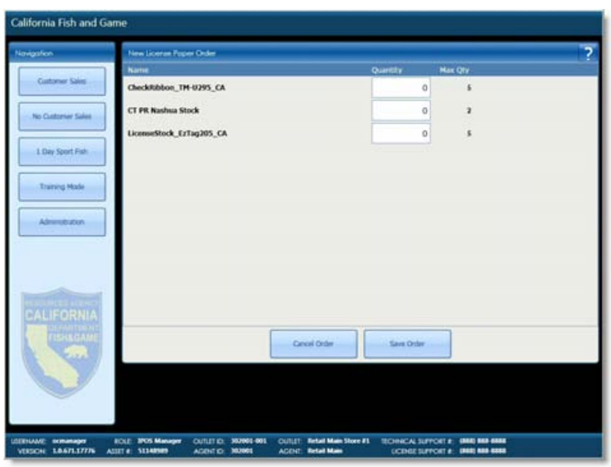


Figure 65: New License Paper Order Screen

1. Click **Place Order**. The *New License Paper Order* screen will appear, as shown in figure 65.
2. Enter the quantity of paper needed in the *Quantity* field.

   - The Quantity entered must be equal to or less than the Max Quantity allowed to be purchased (The Max Quantity appears to the right of the *Quantity* field).

3. Click **Save Order** to place the order or **Cancel Order** to discard changes and return to the *License Paper Orders* screen.

Reprint Last Transaction

Licenses can be reprinted as long as it is within the reprint time limit for the outlet and all licenses from the document have not expired. The IPOS application provides two ways to reprint licenses. The process described in this section is Last Transaction Reprints, which are through the Administration Menu and lists only the most previous transaction at your outlet, no matter the customer. Customer Reprints, described in "Reprinting Licenses" on page 31, requires the customer's account to be accessed. All printable documents for the specified customer, regardless of the issuing outlet, are listed there.

To Reprint a Transaction

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

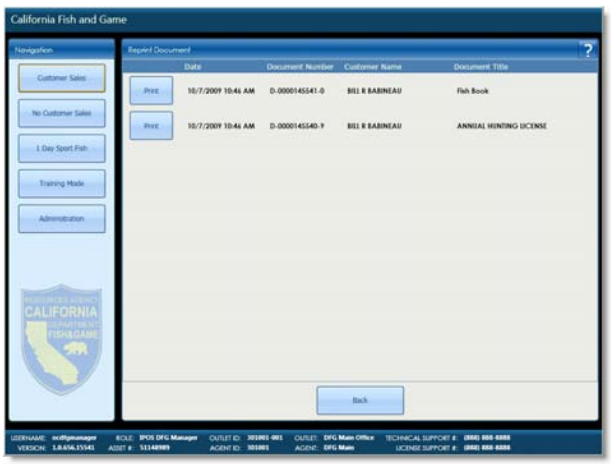


Figure 66: Reprint Last Transaction Screen

1 Click **Administration** on the Navigation Menu.

2 Click **Reprint Last Transaction** in the Administration Menu that opens, as shown in figure 62.

3 The *Reprint Last Transaction* screen will appear, as shown in figure 66.

4 Click **Print** beside the document that needs to be reprinted.

5 The document will print and the *Reprint Confirmation* message will pop-up, as shown in figure 26.

Cancel Document

The Cancel Document section allows managers or clerks "with cancel" IPOS permissions to cancel documents that were sold in error to a customer. Once processed, the returned documents must be mailed to DFG within the specified time limit or you will be charged a fee. In order to be eligible for a cancel, the document must meet the following requirements:

a It is returned to the outlet which performed the sale

b It is returned within the time limit specified for the outlet and the license

c It is not a prerequisite for separately purchased dependant document that has not been canceled

d It does not contain any inactive licenses

- No uncanceled duplicates exist for any license on the document

Cancelling a document cancels all of the items on the document, it is not possible to cancel parts of a document.

To Cancel a Document

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

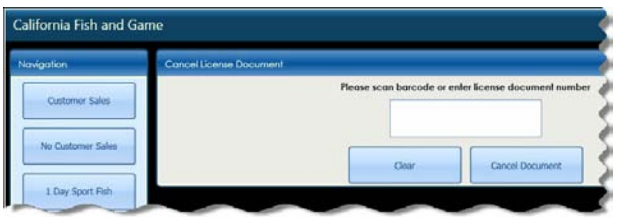


Figure 67: Cancel Document Screen

Figure 68: Cancel Document Detail Screen

Figure 69: Cancel Document Confirmation Message

1. Click **Administration** on the Navigation Menu.
2. Click **Cancel Document** in the Administration Menu that opens, as shown in figure 62.
3. The *Cancel Document* screen appears, as shown in figure 67.
4. Depending on the ability to use the scanner:
   - If the scanner can be used, scan the document the customer wants to cancel.
   - If the scanner can not be used, manually type the Document Number from the license the customer wants to cancel into the text area and click **Cancel Document**.
5. The *Cancel Document Detail* screen will appear, as shown in figure 68.
6. Confirm that the information is correct, then click **Confirm.**
7. The *Cancel Document Confirmation* message will pop-up, as shown in figure 69. Click **OK** to navigate back to the *Home* screen.

Messaging

The DFG will communicate with agents through the IPOS messaging system. The *Home* page will display the number of unread messages which agents can access by clicking **Read Messages** or through the Administration Menu's Messaging option, as described in this section. Only managers will have access to Messages and they can only be viewed, they cannot be created.

To View Messages

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

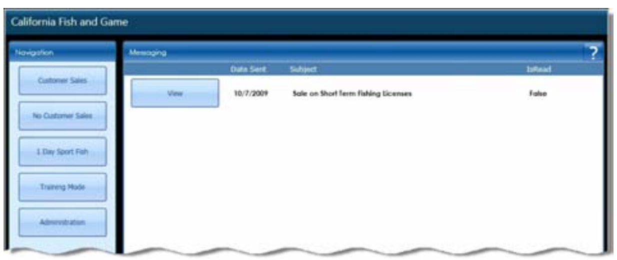


Figure 70: Messaging Screen

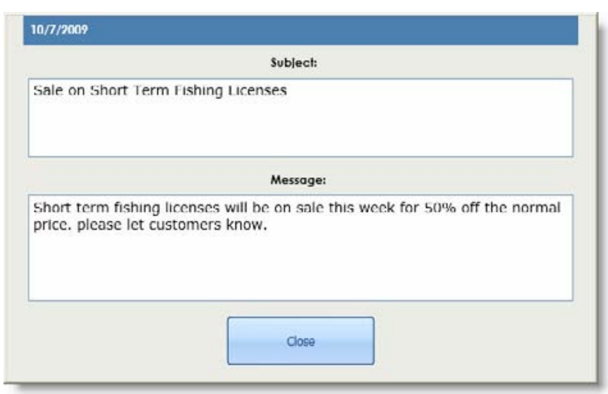


Figure 71: Message Window Screen

1 Click **Administration** on the Navigation Menu.

2 Click **Messaging** in the Administration Menu that opens, as shown in figure 62.

3 The *Messaging* screen appears, as shown in figure 70.

4 Click **View** next to the message you wish to display.

5 The message will open in a new window, as shown in figure 71.

User Management

User Management is the functionality that allows IPOS user accounts to be created and modified, including password resets. Users cannot be deleted, however, accounts can be changed to become inactive. Only managers have access to the User Management area of IPOS.

To Access User Information

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

Figure 72: Manage Users Screen

1 Click **Administration** on the Navigation Menu.

2 Click **User Management** in the Administration Menu that opens, as shown in figure 62.

3 The *Manage Users* screen will appear with all information for each user contained in a row, as shown in figure 72.

4 Find the user in the list. From here, users can be added or edited (see "To Add a User" on page 64 or "To Change User Information" on page 65 for detailed instruction).

To Add a User

Begin by navigating to the *Manage Users* screen (see “To Access User Information” on page 64 for detailed instruction).

Figure 73: New User Details Screen

1 Click **New User**. The *New User Details* screen will appear, as shown in figure 73.

2 Enter the user’s first name in the *First Name* field.

3 Enter the user’s last name in the *Last Name* field.

4 If available, enter the user’s email address in the *Email Address* field.

5 Select a user’s user type from the *User Type* drop down list, as shown in figure 74.

Figure 74: User Type Drop Down List

Figure 75: New User Confirmation Message

6 Click **Save** to make the changes permanent or click **Cancel** to discard changes and return to the *Manage Users* screen.

7 The *New User Confirmation* message will pop-up with the user's login ID and temporary password displayed, as shown in figure 75. Record this information for the user and click **OK**.

- The login ID will be the user's first initial, followed by their last name. If necessary, a number will follow the last name to make a unique ID. The password will be 8 alphanumeric, randomly generated characters.

8 The user will be prompted to change their password at their first login after a password change. See "To Login for the First Time or After a Password Change" on page 19 for detailed instructions.

To Change User Information

Begin by navigating to the *Manage Users* screen (see "To Access User Information" on page 64 for detailed instruction).

Figure 76: Edit User Details Screen

1 Click **Edit** next to the user you wish to edit. The *Edit User Details* screen will appear, as shown in figure 76.

2 All data in the *Edit User Details* screen can be edited. The *First Name*, *Last Name*, and *User Type* fields are required.

3 Click **Save** to make the changes permanent or click **Cancel** to discard changes and return to the *Manage Users* screen.

To Reset a User's Password

Begin by navigating to the *Edit User Details* screen (see "To Change User Information" on page 65 for detailed instruction).

Figure 77: Reset Password Screen

1 Click **Reset Password**. A message will pop-up with the new randomly generated, 8 alphanumeric character, temporary password generated for the user, as shown in figure 77.

2 Record this information for the user and click **OK**. The application will navigate back to the *Manage Users* screen, as shown in figure 72.

3 The user will be prompted to change their password at their first login after a password change. See "To Login for the First Time or After a Password Change" on page 19 for detailed instructions.

Order Regulations

The Order Regulations section allows managers to order regulation booklets (ex: Big Game Digest, Freshwater Sport Fishing Regulations) and controlled inventory items, if any. This screen displays a list of placed orders and their statuses until 30 days after shipment or cancellation. The list is organized by the date the order was placed, but can be sorted by any column by clicking on the column name.

To View Existing Supply Orders

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

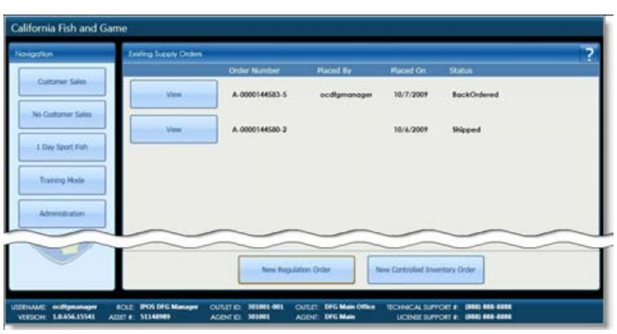


Figure 78: Existing Supply Orders Screen

1 Click **Administration** on the Navigation Menu.

2 Click **Order Regulations** in the Administration Menu that opens, as shown in figure 62.

3 The *Existing Supply Orders* screen will appear, as shown in figure 78.

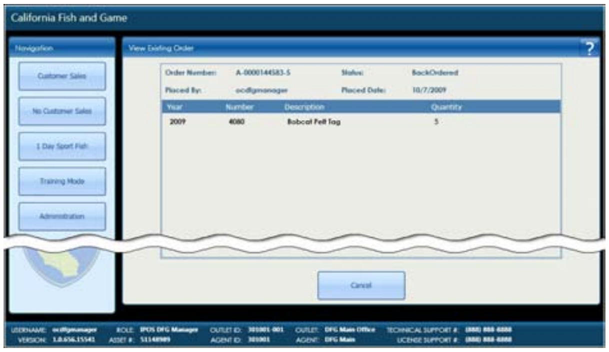


Figure 79: View Existing Order Screen

4 Click **View** next to the order you wish to display.

5 The *View Existing Order* screen for the selected order will appear, as shown in figure 79.

To Place a New Regulation or Controlled Inventory Order

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

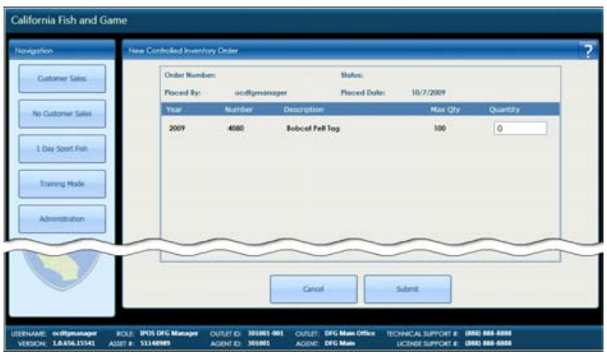


Figure 80: New Regulation/Controlled Inventory Order Screen

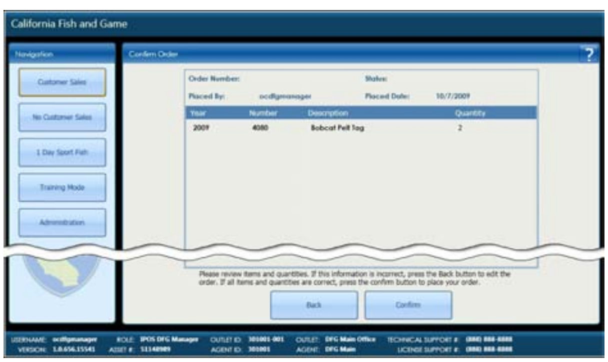


Figure 81: Regulation/Controlled Inventory Confirm Order Screen

1 Click **Administration** on the Navigation Menu.

2 Click **Order Regulations** in the Administration Menu that opens, as shown in figure 62.

3 The *Existing Supply Orders* screen will appear, as shown in figure 78.

4 Click **New Regulation Order** or **New Controlled Inventory Order**. The *New Regulation/Controlled Order* screen will appear, as shown in figure 80.

5 Enter the quantity of each item needed in the corresponding *Quantity* fields.

- The Quantity entered must be equal to or less than the Max Quantity allowed to be purchased for each item. (The Max Quantity appears to the left of the *Quantity* field).

6 Click **Submit**. The *Confirm Order* screen will appear, as shown in figure 81.

Figure 82: Successful Order Message

7 Review the items and quantities to be sure they are correct.

- If the order is correct, click **Confirm** to place the order. When the order was placed successfully, a message will pop-up, as shown in figure 82.

- If the order is incorrect, click **Back** to return to the *New Regulation/Controlled Inventory Order* screen to modify quantities.

Reports

There are six report options available in the Administration Menu's Reports section:

- The ACH report displays the electronic payment history for the date range entered by the user.

- The Available Deer Tag report displays the current number of deer tags available for purchase. These results are separated by their hunt code and remaining quota.

- The Inventory on Hand report displays the current inventory for serialized and non serialized inventory items consigned to your outlet.

- The Canceled Documents report helps outlets manage their canceled documents. This report will display all the documents canceled at your outlet and their status for the date range entered by the user. This helps to ensure that documents are returned on time and unreturned document charges are avoided.

- The Sales report displays data that helps to facilitate reconciliation and audit of sales for an outlet. The user must enter a date range and select one of two ways to display the data. The Sales Summary report displays all *items* sold during the date range entered by the user and is limited to a maximum of 31 days. The Sales Detail report displays all *transaction detail rows* (sales and voids) for sales during the date range entered by the user and is limited to a maximum of seven days. Both of these reports give the user the option of having the results grouped by the clerk who performed the transaction.

- The Statements report shows billing information for a given billing cycle. It shows current charges, outstanding charges unpaid from the last statement, a summary of sales for the current billing cycle, a listing of documents canceled during this period, documents canceled in a previous period that need to be returned to DFG, documents that were billed this period because they were not returned to DFG, and the amount that will be collected electronically via ACH for this billing cycle.

To Access/Print Reports for ACH, Available Deer Tags, Inventory on Hand, or Canceled Documents

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1 Click **Administration** on the Navigation Menu.

2 Click **Reports** in the Administration Menu that opens, as shown in figure 62.

3 The *Reports Menu* screen will appear, as shown in figure 83:

- To view/print the ACH report, click **ACH Report** from the Reports Menu.
- To view/print the Available Deer Tags report, click **Available Deer Tags** from the Reports Menu. Skip to step 8.
- To view/print the Inventory on Hand report, click **Inventory on Hand** from the Reports Menu. Skip to step 8.
- To view/print the Canceled Documents report, click **Canceled Documents** from the Reports Menu.

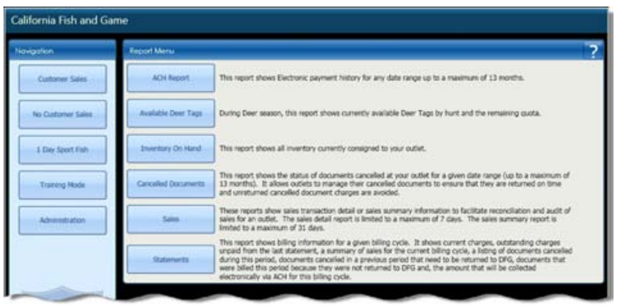


Figure 83: Reports Menu Screen

4 The *Date Range* screen will appear, as shown in figure 84.

5 Enter the date you'd like the report to begin in the *From* field.

6 Enter the date you'd like the report to end in the *To* field (can't be more than 13 months from the *From* date).

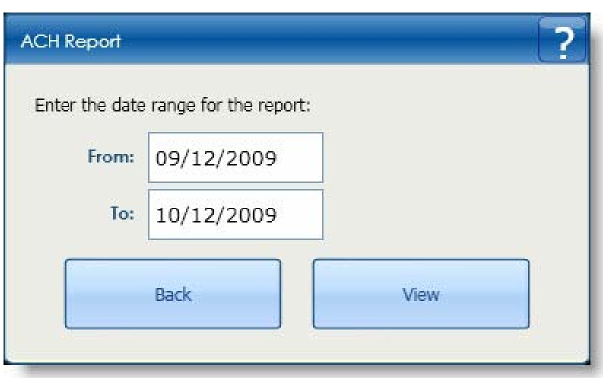


Figure 84: Date Range Screen

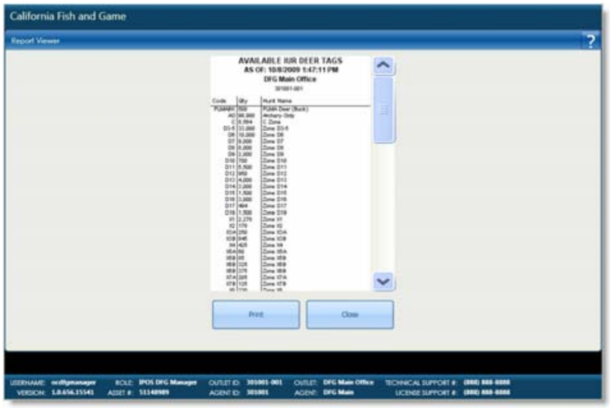


Figure 85: Reports Screen

- No criteria is required to be entered, the *From* and *To* fields will default to the last 30 days. Click **Back** at any time to return to the *Reports Menu* screen.

7 Click **View**.

8 The *Report* screen will appear, as shown in figure 85.

9 If you'd like to print the report, click **Print**.

To Access/Print the Sales Reports

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1 Click **Administration** on the Navigation Menu.

2 Click **Reports** in the Administration Menu that opens, as shown in figure 62.

3 The *Reports Menu* screen will appear, as shown in figure 83.

4 Click **Sales**. The *Sales Report Criteria* screen will appear, as shown in figure 86.

5 Enter the date you'd like the report to begin in the *Sales From* field.

6 Enter the date you'd like the report to end in the *Sales To* field.

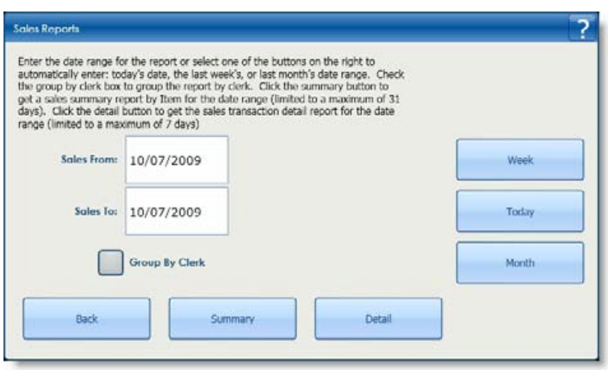


Figure 86: Sales Report Criteria Screen

- If you'd like the sales report for the current day, the last full week or the last full month, the **Today**, **Week**, and **Month** buttons can be used to automatically enter those dates in the *Sales From* and *Sales To* fields.

7 If you'd like the report results to be grouped by clerk in addition to item year, click the *Group by Clerk* check box so that a check mark appears. Otherwise, the report will be grouped by Item Year only.

8 Depending on the type of sales report needed:

- If a detail report is needed, click **Detail** to display all transaction detail rows (sales and voids) and all documents canceled during the specified date range.

- If a summary report is needed, click **Summary** to display all items sold during the specified date range.

9 The *Report* screen will appear, as shown in figure 85.

10 If you'd like to print the report, click **Print**.

To Access/Print the Statements Report

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

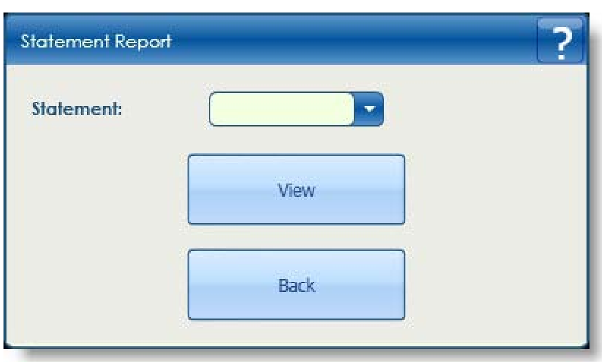


Figure 87: Statements Report Criteria Screen

1 Click **Administration** on the Navigation Menu.

2 Click **Reports** in the Administration Menu that opens, as shown in figure 62.

3 The *Reports Menu* screen will appear, as shown in figure 83.

4 Click **Statements**. The *Statements Report Criteria* screen will appear, as shown in figure 87.

5 Select the date of the statement you would like to view from the *Statement* drop down list.

6 Click **View**. The *Report* screen will appear, as shown in figure 85.

7 If you'd like to print the report, click **Print**.

Diagnostics

The Diagnostics section is where the user will go to turn the touch screen keyboard on or off. There is also an option to turn on a diagnostic trace. The Trace Log Viewer is a window that will open to display a log of the actions the application performs as it is being used. This can be used to watch over the activity taking place on the machine or to help figure out where errors are occurring if the application is not performing correctly.

To Turn the Touch Screen Keyboard On or Off

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

1 Click **Administration** on the Navigation Menu.

Figure 88: Diagnostics Screen

2 Click **Diagnostics** in the Administration Menu that opens, as shown in figure 62.

3 The *Diagnostics* screen appears, as shown in figure 88.

4 The second button on this screen is labeled according to wether the touchscreen keyboard is currently on or off.

➔ If the touchscreen keyboard is currently on, the button will read Turn Keyboard Off. Click **Turn Keyboard Off** to use the desktop keyboard.

- If the touchscreen keyboard is currently off, the button will read Turn Keyboard On. Click **Turn Keyboard On** to use the touchscreen keyboard. (For instructions on how to use the touch screen keyboard see "Touch Screen and Keyboard" on page 11.)

To Run the Diagnostics Trace

If the Navigation Menu is not visible, click **Cancel** until you are returned to the *Home* screen (clicking **Cancel** will lose any changes that have not been saved).

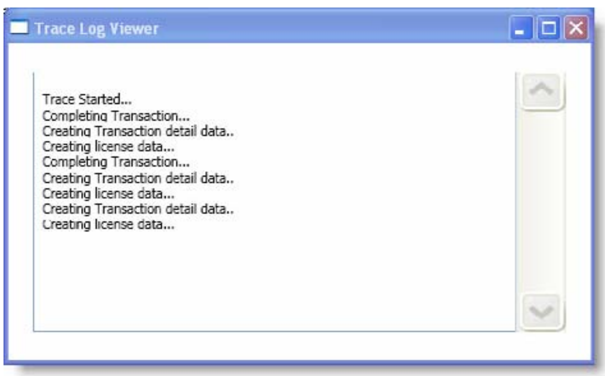


Figure 89: Trace Log Viewer Screen

1. Click **Administration** on the Navigation Menu.
2. Click **Diagnostics** in the Administration Menu that opens, as shown in figure 62.
3. The *Diagnostics* screen appears, as shown in figure 88.
4. Click **Show Diagnostic Trace**. The *Trace Log Viewer* screen will pop-up, as shown in figure 89.

Revision History

The following revisions have been made to the California Department of Fish & Game IPOS Retail User Manual:

Version	Date	Change	Author

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