

10: Local Account Credit by Name

Credit by Local Account Name, enables credit payments to be made to local accounts, **without the need to swipe a card.**

From the front POS screen select Menu -> Function -> Account Credit by Name

1 Using the on-screen keyboard, enter the search criteria.

Note: Only information that is present in the back-office account screen, in each field, can be searched on, i.e. if a phone number is not entered in the back-office, it cannot be searched on.

Account Search

Account Name	Card Name
	smith
PostCode	Telephone number
	Card Number

2 All matching cards will be displayed on the right. Once highlighted, full account details will be displayed on the left. Allowing the cashier to confirm the correct account is selected before continuing.

Customer Details

Account Name: Smith Autocare
Card Name: Miss Mary Smith
City: Little City
PostCode: EH21 123
Phone: 013112345567
Card Number: 9826119700000426

Account Name	Card Name	PostCod
Smith Autocare	Mr John Smith	EH21 123
Smith Autocare	Mr James Smith	EH21 123
Smith Autocare	Miss Mary Smith	EH21 123
Green Garden Cent	Gardner Smith	EH21 655

3 Highlight to select the required customer from the list. Press the green circle to confirm the selection.

Local Account Payment

Amount: 30.00

Card Number: 9826119700000020

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4 The chosen card number will be displayed. Enter the amount.

5 The customer can pay by their chosen method.

10: Local Account Purchase by Name

Purchase by Local Account Name, enables purchases to be made to local accounts **without the need to swipe an account card**.

When payment is required: From the front POS screen select **Other Payments -> Account Purchase by Name**

1 Using the on-screen keyboard, enter the search criteria.

Note: Only information that is present in the back-office account screen, in each field, can be searched on, i.e. if a phone number is not entered in the back-office, it cannot be searched on.

Account Search		
Account Name	Card Name	
	smith	
PostCode	Telephone number	Card Number

The screenshot shows the evoPOS interface with a 'Stop pumps' button and a 'Customer Details' section. On the left, account details for 'Smith Autocare' are displayed. On the right, a list of matching accounts is shown with the selected one highlighted in blue.

Account Name	Card Name	PostCode
Smith Autocare	Mr John Smith	EH21 123
Smith Autocare	Mr James Smith	EH21 123
Smith Autocare	Miss Mary Smith	EH21 123
Green Garden Cent	Gardner Smith	EH21 659

2 All matching cards will be displayed on the right. Once highlighted, full account details will be displayed on the left. Allowing the cashier to confirm the correct account is selected before continuing.

3 Highlight to select the required customer from the list. Press the green circle to confirm the selection.

4 As per a local account transaction by card, evoPOS will prompt for mileage and registration prompts will be displayed if required.

5 A receipt will be printed for the customer to sign and retain in-store and another for the customer to keep.



For added security, always confirm customer details before charging goods to an account.