Print/Email Folio: House Accounts (POS System Overview)

Using the House Account system as a simple Point of Sale (POS) system

Manage House Accounts with Search, Print and Email functions. To learn more on House Accounts and managing folios see, House Accounts Folios. Go to **FRONT DESK | HOUSE ACCOUNTS** to experience this flexible POS system. The MyPMS system provides basic POS (point of sale) function, capable of handling bars, small restaurants, or gift shops. There is no additional fee to use it, and for basic needs, the 'Charge' and 'Payments' process of using the House Account works fine for 'cash' customers, while managing via the folio works great for 'in-house' guests. The MyPMS can be programmed to work with just about any Mac or Windows-Based **POS printer,** so delivering thermal, impact, or laser printed receipts is easy.

When one gets into needing a truly robust POS system for food & beverage sales, then you exceed the reach of the BookingCenter POS system and then should look into a full fledged POS. BookingCenter interfaces in real-time with more than 60 different vendors, including the most popular such as Micros, Aloha, Squirrel, etc. We do this via our 'Guest Services' Module, where you can read the details available here.

Print or Email a House Account Folio

MyPMS provides a simple way to print or email an **entire Folio** in the House Accounts area. The sis especially useful if you use a 'New Folio' to create new Folios for each day/week/concept area (such as 'car rentals') and you want to report the days sales/receipts. 'If you wish to select only a few Charges and/or Payments to print out, look for the 'Print Selected' below to make a selection of just a few items to Print/Email.

- First click on the specific Folio by choosing at the top. Most properties don't create multiple House Account Folios, but there is no limit on how many you can have. We've seen customers use them for areas such as 'Car Rentals', "Kayak Rentals', 'Bar", etc. There is no limit to using a unique folio to collect Charges and Payments for your various 'POS' needs.
- Click on the Print or Email links in the top right, above the folio, to print/email the Folio selected. A new window will appear with a statement of the transactions (Charges and Payments) in the particular folio.

Dynamically create a statement with *specific items* from a House Account folio. Select any combination of Charges and./or Payments and then choose the

- *hint*: while the basic Print/Email is adequate for many tasks, consider making a custom 'Point of Sale' Letter that has branding, formatting, and supports whatever media you want to use for a 'receipt'. Popular options include emailing, using a thermal printer, or a small impact printer so that each receipt uses only a fraction of the paper and ink needs that an 8.5 "x 11" paper receipt would use.

  BookingCenter doesn't recommend any specific POS printers, but there are hundreds that can be setup to print a Letter that is formatted to any printer that can be used with a Macintosh, Window, iOS, or Android platform.

- To use a custom POS Letter, after creating and formatting the Letter, set it as 'default' to use automatically when 'selecting items' and *print/email* to **POS Printer** is chosen*.* The specific merge field '%%print-folio-pos%% merge element sused by the House Account POS system.

Dynamically craft a new 'Folio' from House Account Charges/Payments:

First Add a new folio

- Go to the primary folio and select the items by checking the box next to the transactions and then go to the "Transfer checked items to" below the folio and choose the newly created folio from the drop-down list.
- Go to the newly created folio and print or email a statement with only those folio items. If you need to add or edit information to the statement, then choose the email function. Print versions can not be edited.

'Print Selected' to make a unique POS 'receipt': The House Account system makes it easy to operate a simple Point of Sale system See, Customized Receipt Function Note: you must have a POS Letter set as 'default' to use these function.

In this section
- Add Folio: House Accounts - Edit Folio: House Account - Add Charge: House Accounts - Close Folio: House Accounts - POS Receipt Function - Search Folio: House Accounts - Add Payment: House Accounts - Print/Email Folio: House Accounts (POS System Overview)