

Roadside
Counter & Charge Accounts

The register's back office in Roadside, charge accounts and statements, and the Fencepost CRM farm tools for Whole Store.

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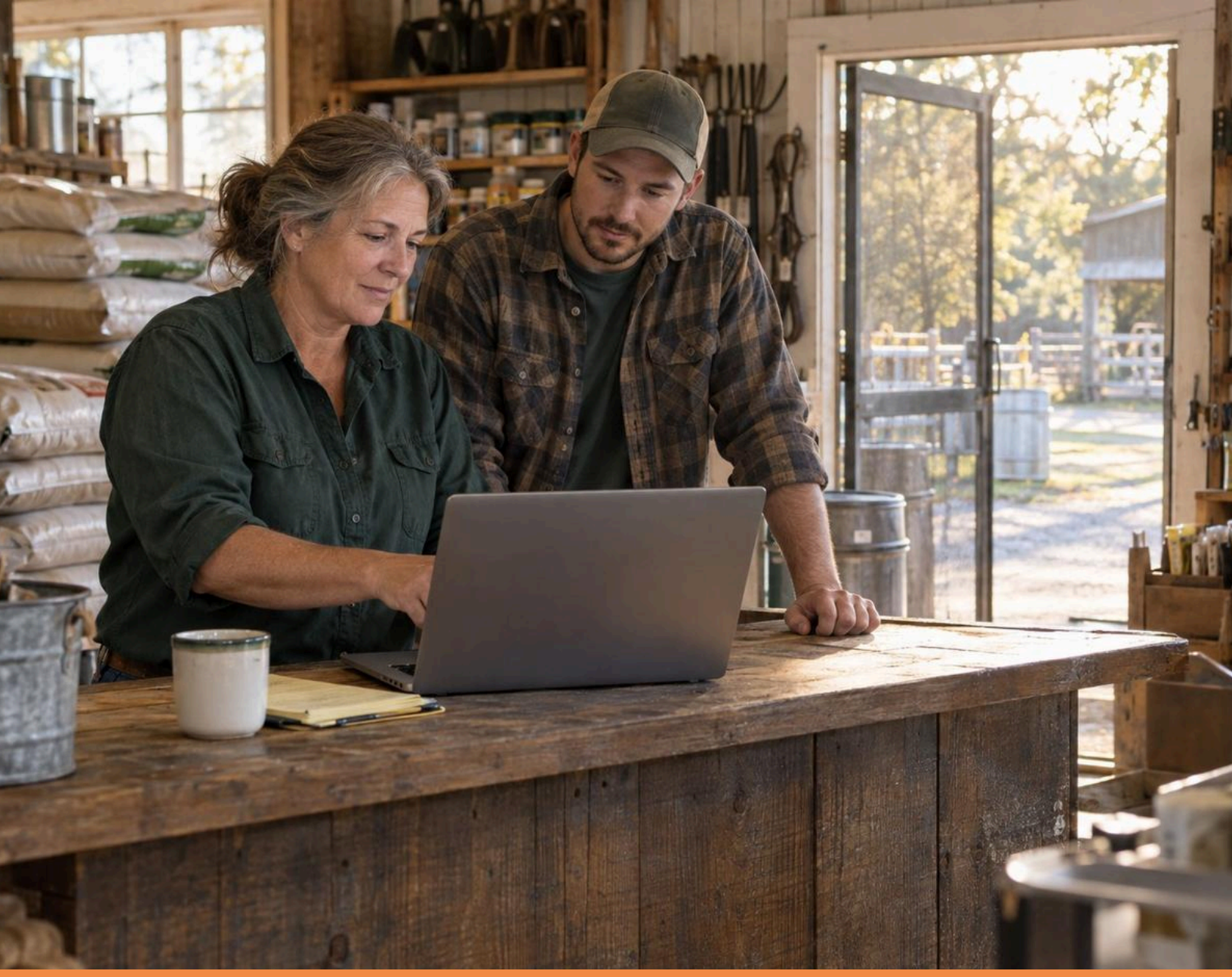


PART 1

The counter

The registers, the day's money and the tools your staff use at the counter.

1 See, move and retire a register

Dirt Road connects each counter computer to your store. Know where Roadside lists your registers, how to move one to another location, and how to cut off a register you no longer have.

IN THIS CHAPTER

- Where Roadside shows your registers, and what each screen is for
- How a counter computer gets connected, and what to ask Dirt Road for
- The Roadside page a register opens when a person signs in there
- Moving a register so it sells another location's stock
- What a connected computer may do, and who sets it
- Cutting off a register that is replaced, lost or stolen
- Naming a phone, tablet or office computer as its own register
- The dates that let a license or a VFD follow a sale

See the store's registers

WHERE TO FIND IT **Today → At the counter today** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

Roadside shows your registers in several places, each for a different job. Start with the **At the counter today** card on Today, which is there once the store has a register.

WORDS TO KNOW

Register

A counter computer or a web browser that rings up sales. Each register numbers its sales with its own letters, such as D1.

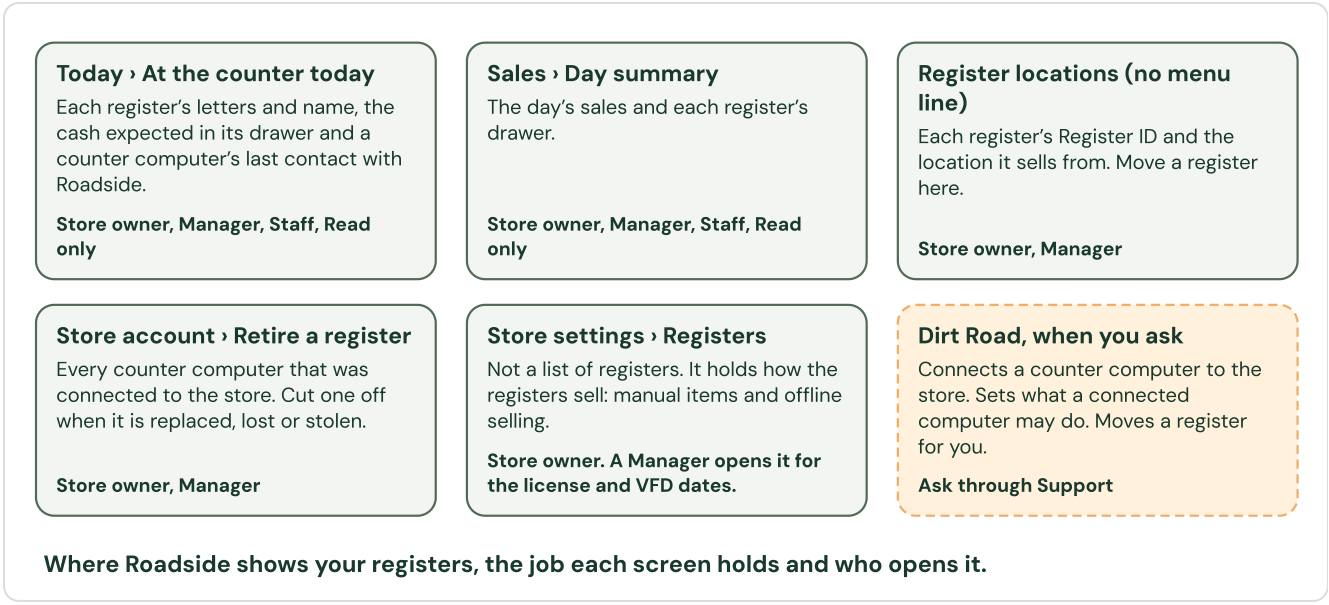
Register ID

The eight-character code printed on a register's receipts. It stays the same when the register is renamed.

The card has a line for each register, with its letters and name. For a register in use the line adds **Expected in drawer**, the cash that should be there. Under it, for a counter computer, Roadside says when the register last contacted it, or *Not heard from today*, or *Never connected*. A register in a web browser has no such line.

SCREEN	WHAT IT SHOWS OF A REGISTER	WHO OPENS IT
Today, the At the counter today card	Each register's letters and name, the cash expected in its drawer, and a counter computer's last contact with Roadside	Store owner, Manager, Staff, Read only
Sales, then Day summary	The day's sales and each register's drawer (Read the register's sales, cash and checks for a day, in Chapter 3 (page 21))	Store owner, Manager, Staff, Read only
Register locations	Each register's name, letters, Register ID and the location it sells from (Move a register to another location, in Chapter 1 (page 8))	Store owner, Manager
Store account, then Retire a register	Every counter computer that was connected to the store, with the buttons that cut one off (Retire a register or report it lost, in Chapter 1 (page 10))	Store owner, Manager

Registers, under Store settings, is not a list of registers. It holds how the registers sell: manual items (Decide whether cashiers may type in an item, in Chapter 10 (page 80)) and offline selling (Let registers keep selling while offline, in Chapter 6 (page 43)). A receipt carries the Register ID and never the register's name, so match the code on a receipt to the **ID** column of Register locations to tell which register printed it.



Where Roadside shows your registers, the job each screen holds and who opens it.

Get a counter computer connected

WHERE TO FIND IT **Store account** › **Support** › **New ticket** Store owner, Manager

Included on every plan except Static Website and Online Store.

Dirt Road connects each counter computer to your store: to add one or replace one, write to Dirt Road with the name you want and the location it should sell from. It is connected when it shows on the **At the counter today** card and on Register locations, with its own letters. Installing the register is part of your plan's setup, and no screen in Roadside lets a Store owner or a Manager connect one.

WORDS TO KNOW

Pairing code

A one-time code that connects one counter computer to the store. Dirt Road makes it. The register's own screen calls it *Connection code*.

1. **Decide what to call the computer.** Name it for where it sits, such as *Front counter*.
2. **Write to Dirt Road.** Open a ticket from **Support** (Send a question about Roadside, in “Ask Dirt Road for help” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/support-tickets)), or write to **support@dirtroadsoftware.com**. Give the name, and the location it should sell from if your store has more than one.
3. **When a replacement is working, retire the computer it replaces** (Retire a register or report it lost, in Chapter 1 (page 10)).

It worked when the register is on the **At the counter today** card and on Register locations, with its own letters. It starts at your store's default location, and each person's first sign-in on it goes through Roadside (Confirm your sign-in for the register, in Chapter 1 (page 7)). Your plan includes a set number of registers, and a register in a web browser counts as one.

A computer whose Crossroads POS opens on Connect this computer and asks for a **Connection code** is not connected to your store. The code comes from Dirt Road, works once, and lasts 15 minutes.

Roadside has no form to rename a register. A Manager or Store owner renames it at the computer, with **Name register** in Register settings: see Open Register settings in the Crossroads POS manual. Its letters and its Register ID stay the same.

Confirm your sign-in for the register

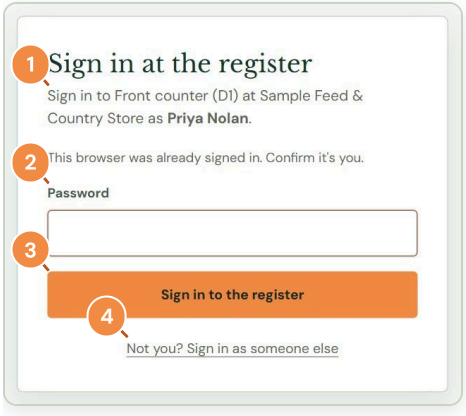
WHERE TO FIND IT **The register opens this page in a web browser (no menu line)**

Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

When a person signs in at a counter computer with their Roadside login, the register opens a Roadside page in that computer's web browser. Anyone on your team can finish it, Read only people included. What they may do at the register still follows their role.

1. **Read the line under Sign in at the register.** It names the register, your store and a person, such as *Sign in to Front counter (D1) at Sample Feed & Country Store as Priya Nolan*. A browser that is not signed in to Roadside asks for your usual sign-in first.
2. **If the name is not yours, press Not you? Sign in as someone else.** The browser is signed out and Roadside's sign-in opens.
3. **Confirm it is you when asked.** A browser that was already signed in says *This browser was already signed in. Confirm it's you.* Type your **Password** and, with two-step sign-in, the six-digit **Authenticator code**.
4. **Press Sign in to the register.** The page reads *You're signed in at the register*.
5. **Go back to the register.** Press **Back to the register** when the page has that button. Otherwise the page shows a code to type at the register, which works once, in the next 5 minutes. Then close the window.



1. Check the register, the store and the name before you go on.
2. Type your Roadside password.
3. Sign in to the register finishes the page.
4. Not you? Sign in as someone else signs this browser out so you can use your own login.

Sign in at the register, opened from the Front counter.

The register then shows your name. If the page reads *This sign-in has run out*, the register's link was used already or is more than 10 minutes old, so start again at the register. *Not on this store's staff* means the browser is signed in as someone who is not on your store's team: press **Sign in as someone**

else.

From then on, a person signs in at the register with their Counter PIN: see Sign in with your PIN in the Crossroads POS manual. Set your own Counter PIN, in Chapter 2 (page 15) shows how to set one.

Move a register to another location

WHERE TO FIND IT **Register locations (no menu line)** Store owner, Manager

Included on every plan except Static Website and Online Store.

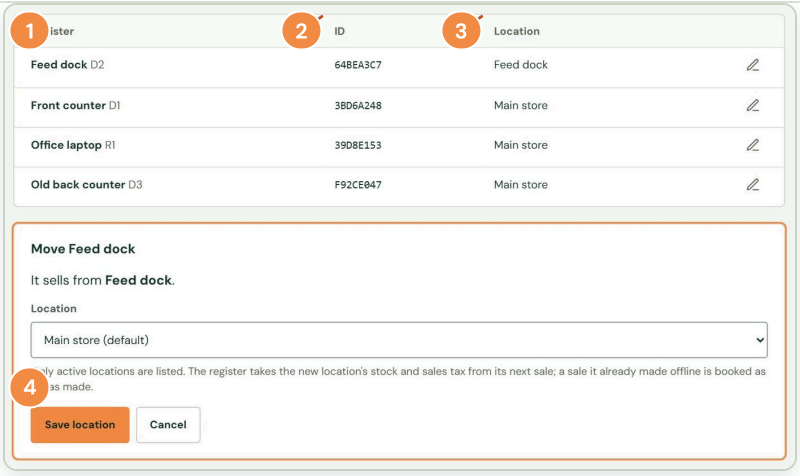
Each register sells the stock at its location and charges the sales tax there. A register starts at your store's default location, so a store with one location never needs this page. Move a register when the computer sits somewhere else, such as the feed dock.

Roadside's menu has no line for **Register locations**. The page opens at your Roadside address with `/pos/registers/locations` on the end. If you would rather not type an address, ask Dirt Road to move the register for you.

⚠ CAREFUL

Saving changes which location's stock count and sales tax every later sale on that register uses. A register that is offline when you save keeps selling from the old location until it is back online. Check the location's name before you save.

1. **Open Register locations and find the register.** The table gives each register's name and letters, its **ID** and its **Location**.
2. **Press the pencil button at the end of its row.** Its label is *Move*. A card opens headed *Move* and the register's name, and says where it sells from.
3. **Choose the Location.** Only active locations are listed, and your default one is marked *(default)*.
4. **Press Save location.** Roadside confirms with a message such as *Moved Feed dock to Main store. It sells Main store's stock from its next sale.*



1. Register: each register's name and letters.
2. ID: the Register ID its receipts print.
3. Location: where the register sells from.
4. Save location moves the register.

Register locations, with the Feed dock register being moved.

The move takes effect with the register's next sale, or once it is back online if it was offline. In the screen's words, *a sale it already made offline is booked as it was made*. If you pick the location it already has, Roadside says the register is there already and changes nothing. **Cancel** closes the card without a change.

A register at an inactive location cannot sell stock. The page warns you, for example *Feed dock's location is inactive, so it can't sell stock. Move it to an active location, or make the location active again on the Locations screen*.

> Included on Counter + Stock and Whole Store plans. Add or rename the locations themselves under Locations (“Set up locations and bins” in the Storehouse ERP guide, dirtroadsoftware.com/support/roadside-manual/storehouse-locations) in Storehouse ERP, where you can also make a location active again (“Set up locations and bins” in the Storehouse ERP guide, dirtroadsoftware.com/support/roadside-manual/storehouse-locations).

What a connected computer may do

WHERE TO FIND IT **Store account** › **Support** › **New ticket** Store owner, Manager

> Included on every plan except Static Website and Online Store.

Each connected computer carries its own permissions, and Dirt Road sets them. No screen in Roadside lets a Store owner or a Manager change them. Ask through **Support**, and name the register by its letters and name. Dirt Road answers the ticket when the change is in place. Three things can be set for one computer.

Customers at the counter. Allowed lets cashiers on that computer add customers, and record email sign-ups when your store collects them. Not allowed stops both, and a cashier can still find a customer and put them on a sale.

Time clock. Allowed lets people clock in and out on that computer (See who is on the clock and check a punch, in Chapter 12 (page 91)). Not allowed turns the time clock off there, and in Roadside's words *People clock in on another computer or the website counter*. To clock in, see Use the time clock in the Crossroads POS manual.

Register work only. This takes away changing and archiving customer accounts from that computer. It waits until Crossroads POS on the computer accepts it, and nothing the computer has waiting to send is lost.

A computer's permission never gives a person more than their role allows. What each person may do at a register follows their role, which you choose (Choose a role for someone on your team, in "Give the right people access to Roadside" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/team-roles)).

Retire a register or report it lost

WHERE TO FIND IT **Store account** › **Retire a register** Store owner, Manager

Included on every plan except Static Website and Online Store.

Retire a register lists every counter computer that was connected to the store, each on a card with its name and letters. A connected one has **Retire** and **Lost or stolen**.

WORDS TO KNOW

Retire

Stop a register's access to the store and have it clear the data it saved.

> ⚠ CAREFUL
> Either button stops the register at once, and Roadside cannot undo it. To use that computer again, Dirt Road has to connect it as another register. Retiring frees that register's place on your plan, so a store at its limit can add another. A retired register first tries to send the sales it is holding, and may go on sending them for 30 days. One reported **Lost or stolen** clears its saved data without sending anything. If the computer is in the store and holds sales it has not sent, read Bring in sales from a register that cannot connect, in Chapter 6 (page 48) first.

1. **Open Retire a register and find the computer's card.**
2. **Press Retire for a computer you are replacing.** Press **Lost or stolen** when you do not know where it is.
3. **Confirm.** Roadside asks *Revoke access and request local data removal for this register?*
4. **Check the card.** The message reads *Access revoked. Local removal is requested for the next connection.* and the card says *Access revoked.*



1. Retire stops a register you are replacing.
2. Lost or stolen stops a register you cannot find.
3. Access revoked. marks a computer that is already cut off.

Retire a register, with one computer already cut off.

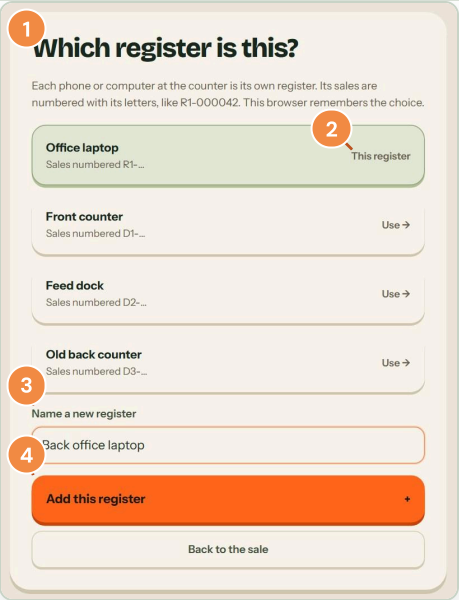
The register clears its saved data the next time it connects. A retired register's card keeps **Lost or stolen**, so you can still report it missing later. A register in a web browser is not a counter computer and is not on this page. Staff and Read only people do not have **Retire a register** in their menu.

Add a register in a web browser

WHERE TO FIND IT **The browser counter → Switch register** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

Crossroads POS also opens in a web browser, on a phone, a tablet or an office computer. That is the browser counter. It opens at your Roadside address with `/pos` on the end, and Roadside's menu has no line for it. Give each browser its own register, so its sales carry their own letters.



1. Which register is this? lists the store's registers.
2. This register marks the one this browser uses.
3. Type a name for this phone or computer.
4. Add this register makes the register and chooses it.

Which register is this? on the browser counter.

1. **On the browser counter, press Switch register.** The page is headed **Which register is this?** It explains: *Each phone or computer at the counter is its own register. Its sales are numbered with its letters, like R1-000042. This browser remembers the choice.*

2. **If this phone or computer is in the list, press Use on its row.** Each row gives the register's name and the letters its sales are numbered with. The one this browser uses reads *This register*.

3. **If it is not, type a name in Name a new register and press Add this register.** The name takes up to 60 characters, such as *Back office laptop*.

4. **Check the counter.** It shows the register's name and its letters. **Back to the sale** returns you to the sale.

A browser register is numbered R1, R2 and so on, and starts at your store's default location. Offline selling does not apply to it (Let registers keep selling while offline, in Chapter 6 (page 43)). If the name is taken, the page says *Another register is already called* and the name. A Read only person is told *Your role doesn't sell at the counter. Ask a manager.*

A browser register counts toward your plan's registers. When they are all in use, adding one is refused with a message such as *This store's Crossroads POS plan includes 2 registers, and it has 2. Disconnect a register it no longer uses. Need another register? Ask Dirt Road to add one.*

Let a known customer's license or VFD follow the sale

WHERE TO FIND IT **Store settings** › **Registers → Restricted-use pesticides and VFD feed**

Store owner, Manager

Included on the Whole Store plan.

This card shows when your store uses the Feed & Seed pack. The register checks the customer's paper before it sells a restricted-use pesticide or a VFD feed. The card says: *If it isn't on file, the cashier records the one the customer shows. No one can skip this check.*

Two dates on the card loosen that for a customer the store knows. Until the date, staff can finish the sale for a known customer whose license or VFD is not on file yet, and each such sale leaves a follow-up to collect the paper (Work through today's follow-ups, in Chapter 23 (page 180)). An empty date is off, and each date works on its own.

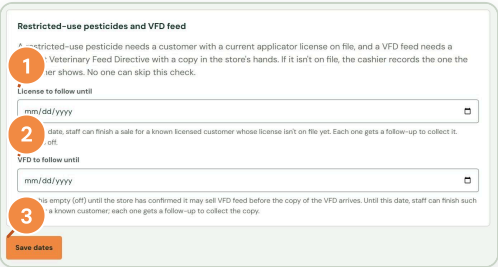
WORDS TO KNOW

Veterinary Feed Directive

A veterinarian's written order for medicated feed, abbreviated VFD on the account form.

CAREFUL

Your store decides whether it may sell before the paper arrives. Keep **VFD to follow until** empty until you have confirmed that with your veterinarian and your state's rules. This manual does not give legal advice.



1. License to follow until: the last day a sale may go through with the applicator license still to come.
2. VFD to follow until: the last day for a VFD feed sale with the copy still to come.
3. Save dates keeps both.

Restricted-use pesticides and VFD feed on Registers.

1. **Go to Store settings, then Registers, and find Restricted-use pesticides and VFD feed.**
2. **Set License to follow until, VFD to follow until, or both.** The date you choose is the last day it applies. Clear a date to turn it off.
3. **Press Save dates.** The message names both, for example *Saved. License to follow: through 2027-03-31. VFD to follow: off.*

A date Roadside cannot read is refused with *Enter each date as YYYY-MM-DD, or leave it empty for off.* If the card has no date boxes and says that finishing such a sale isn't open, Follow-up is not set up for your store. The Store owner sets it up on All of Roadside.

A Manager who opens **Registers** for this card does not see the **Manual items** card, which is the Store owner's. Record or correct a farm document, in “Check a customer's farm documents” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/compliance-pricing) shows how to put a license or a VFD on a customer's account, so the register finds it on file.

2 Set your Counter PIN

A Counter PIN is the short number a person types at the register instead of a password. Each person sets their own, and nobody else can set it for them.

IN THIS CHAPTER

- Setting your own PIN, and when the register accepts it
- Changing a PIN someone may have seen, or removing it
- What to tell a cashier whose PIN is refused

Set your own Counter PIN

WHERE TO FIND IT **My account** › **Sign-in & security → Counter PIN** Store owner, Manager, Staff, Read only

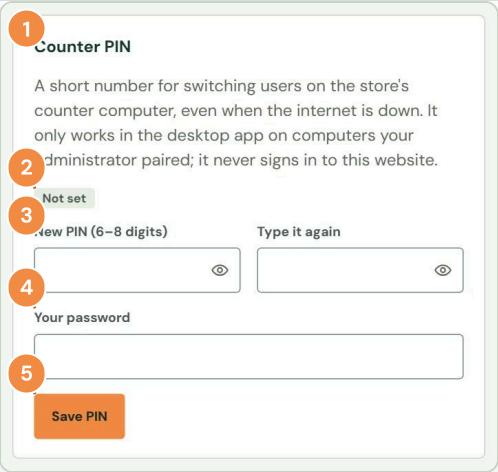
Included on every plan except Static Website and Online Store.

Everyone who works a register sets a PIN on their own **My account**. The card describes it this way: *A short number for switching users on the store's counter computer, even when the internet is down. It only works in the desktop app on computers your administrator paired; it never signs in to this website.*

WORDS TO KNOW

Counter PIN
A person's own number of 6 to 8 digits for the register. It is not a Roadside password and never signs in to Roadside.

Two-step sign-in
Roadside asks for a code from your authenticator app after your password, a step the screens call *two-factor*.



1. Counter PIN is on the Sign-in & security tab of My account.
2. Not set turns to Set, with the date, once you save.
3. Type the PIN here, and again in the box beside it.
4. Type your Roadside password, so Roadside knows it is you.
5. Save PIN keeps it.

The Counter PIN card before a PIN is set.

1. **Open My account, then Sign-in & security, and find Counter PIN.** The card reads *Not set* until you have one.
2. **Type the number in New PIN and again in Type it again.** A PIN is 6 to 8 digits. Pick one nobody would guess.
3. **Type Your password.** With two-step sign-in, type a current **Authenticator code** as well.
4. **Press Save PIN.** The message reads *Counter PIN saved. Paired counter computers pick it up at their next sync.* The card reads *Set* with the date, and Roadside emails you a notice headed *Your counter PIN was set*.

If you sign in with Google or Microsoft, the card has **Confirm with Google** or **Confirm with Microsoft** in place of a password box. Press it, confirm with that account, then choose your PIN.

ROADSIDE SAYS	WHAT TO DO
A counter PIN is 6 to 8 digits.	Use digits only, at least 6 and at most 8.
The two PINs do not match.	Type the same number in both boxes.
That the PIN could be guessed: *Avoid repeated digits, runs like 123456 and simple patterns.*	Choose a number without a pattern.
Too many attempts. Wait five minutes.	Wait, then check your password before you try again.

A register accepts the PIN after it has next been in touch with Roadside, so set yours while the registers are online. At the register you sign in with it: see Sign in with your PIN in the Crossroads POS manual. A Manager or Store owner types the same PIN to approve a counter discount (Have a manager approve a

counter discount, in Chapter 11 (page 87)) or a manual item (Decide whether cashiers may type in an item, in Chapter 10 (page 80)). A person needs a Counter PIN to clock in and out on the time clock (Choose who clocks in, in Chapter 13 (page 102)).

Nobody can set, change or read another person's PIN, a Store owner included. Each person does it from their own login.

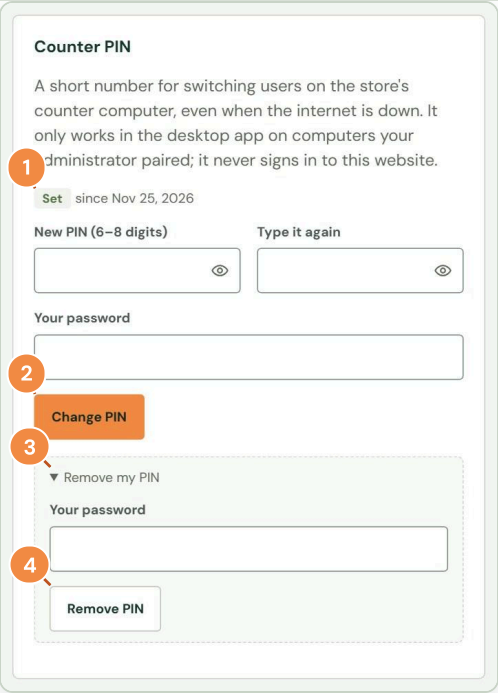
Change or remove your Counter PIN

WHERE TO FIND IT **My account** › **Sign-in & security → Counter PIN** Store owner, Manager, Staff, Read only

> Included on every plan except Static Website and Online Store.

Change your PIN when someone may have seen it, or when you have forgotten it. Roadside does not show or recover a PIN. You replace it, and Roadside asks for your password, not the old PIN.

1. **Open Counter PIN on My account.** With a PIN set, the card reads *Set* and the date it was set.
2. **Type the replacement in New PIN and Type it again.**
3. **Type Your password,** and a current **Authenticator code** with two-step sign-in.
4. **Press Change PIN.** The card reads *Set* with today's date. Each register takes the change the next time it is in touch with Roadside.



1. Set, and the date the PIN was last saved.
2. Change PIN saves the replacement you typed.
3. Remove my PIN opens the part that takes the PIN away.
4. Remove PIN removes it, once you confirm.

The Counter PIN card with a PIN set and Remove my PIN open.

Remove your PIN

> ⚠ CAREFUL
> Without a PIN you cannot approve at checkout until you set one again. You still get into a register by signing in with your Roadside password while it is online.

1. **Press Remove my PIN on the card.**
2. **Type Your password,** and a current **Authenticator code** with two-step sign-in.
3. **Press Remove PIN and confirm.** Roadside asks *Remove your counter PIN?* The message then reads *Counter PIN removed.*, the card reads *Not set*, and you get an email headed *Your counter PIN was removed*.

Help a team member whose PIN does not work

WHERE TO FIND IT **My account** › **Sign-in & security → Counter PIN (the team member's own login)**

Store owner, Manager (to advise); the team member acts

Included on every plan except Static Website and Online Store.

You cannot fix someone's PIN for them. You can tell them why the register refuses it and what gets them selling again. The work is done by the team member, signed in to Roadside as themselves.

WHAT HAPPENED	WHY	WHAT THE TEAM MEMBER DOES
The register stopped taking a PIN that worked before	A register locks a PIN after 5 wrong tries.	Signs in at the register with their Roadside password while the register is online.
A PIN set or changed a moment ago is refused	A register takes a changed PIN the next time it is in touch with Roadside.	Waits until the register is online and has been in touch, then tries again.
They have forgotten the PIN	Roadside does not show or recover a PIN.	Sets another one (Change or remove your Counter PIN, in Chapter 2 (page 17)).
The Counter PIN card has no boxes to type in	Their account has no password and no Google or Microsoft account connected.	Asks for an invitation, sets a password with it, then sets the PIN.

In the last case the card says: *Your account has no password and no connected Google or Microsoft account to confirm it's you with. Ask your store's owner to send you a new invitation so you can set a password, then set your PIN here*. Give someone their own sign-in, in “Give the right people access to Roadside” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/team-roles) shows how to send the invitation link.

It worked when the team member's **Counter PIN** card reads *Set* and the register takes the PIN.

At the register, a Manager can use **Managerial override** on the lock screen of a register someone else locked, to open it or to sign that person out. It does not approve a sale and it does not reset anyone's PIN. See My PIN stopped working and Lock the register when you step away in the Crossroads POS manual.

3 Check the counter's sales for the day

Day summary adds up what the registers took: what was sold, how it was paid and what went back. Read it during the day and at closing, and email the day to the managers and owners.

IN THIS CHAPTER

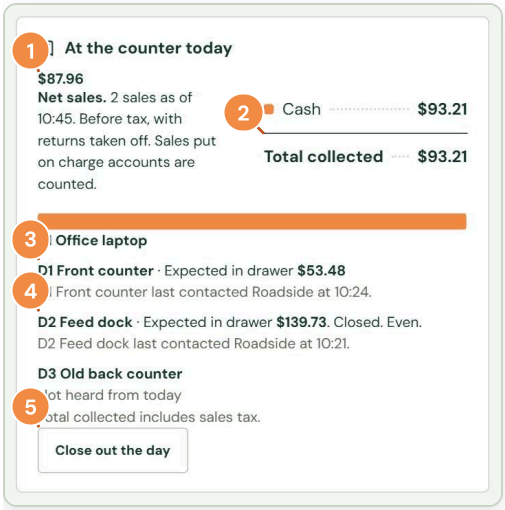
- Today's counter sales at a glance, and a register that has stopped reporting
- What each line of the day's totals means
- Emailing the day to the managers and owners

Glance at the counter from Today

WHERE TO FIND IT **Today → At the counter today** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

The **At the counter today** card on Today shows how the registers' day is going. It shows once the store has a register, and everyone who can open Orders sees it. The card only reads: nothing on it changes a sale or a drawer.



1. Net sales: today's sales before tax, with returns taken off.
2. Total collected: the money taken today, tax included.
3. Expected in drawer: the cash an open register's drawer should hold.
4. A closed drawer reads Closed with Even, Over or Short.
5. Close out the day opens Day summary at the drawers.

At the counter today, with one register open and one closed.

Net sales reads *Before tax, with returns taken off. Sales put on charge accounts are counted.* **Card**, **Cash** and **Checks** add up to **Total collected**, which includes sales tax and counts only money taken, so the two figures never match. **On charge accounts, unpaid** shows when a sale went on a charge account. Each register's line gives **Expected in drawer**, adds *Closed.* with *Even*, *Over* or *Short* once its drawer is closed, and says when it last reached Roadside: *last contacted Roadside at <time>*, *Not heard from today* or *Never connected*.

1. **Read each register's last contact.** Every register selling today should show a recent time.
2. **If the card shows a badge such as *1 register is behind*, find the line that adds *Today's totals may be incomplete*.** A register is behind when its drawer is open and its last contact with Roadside was 10 minutes ago or more. The badge never shows for a register in a web browser, or for one that has never connected. The card's totals leave out what that register has not sent. Check that the computer at that register is on and has internet. Chapter 6, Keep selling when the internet is down (page 43) explains what a register does while the internet is down.
3. **When the store closes, press Close out the day.** Day summary opens at its **Cash drawers** card (Count the cash and close a drawer, in Chapter 4 (page 28)).

A line reading *Changed since it was closed* means a cash sale, a cash refund or a cash payment on a charge account was counted on that register's day after its drawer was closed, so its cash expected changed (Reopen a closed drawer to count again, in Chapter 4 (page 30)).

Read the register's sales, cash and checks for a day

WHERE TO FIND IT **Sales** › **Day summary** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

Day summary puts one store day of the registers on one page: what was sold, how it was paid, what went back, and the cash each drawer should hold. Pick one register, or every register for the whole store.

WORDS TO KNOW

Day summary

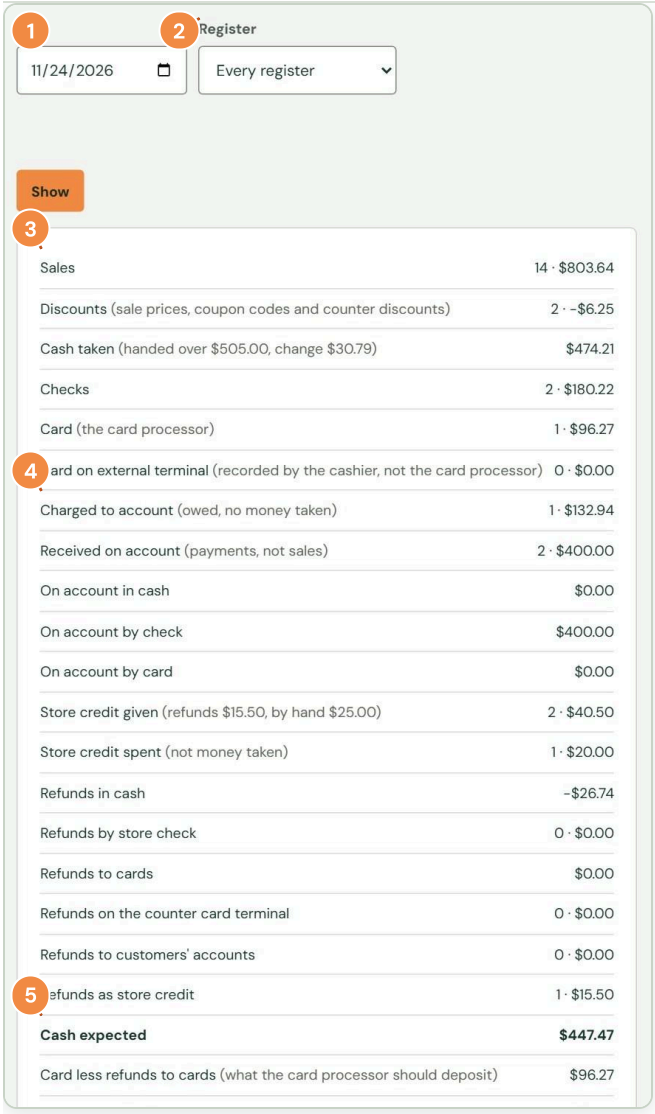
One store day of register sales, payments and refunds, with each drawer's count.

Cash expected

The cash customers handed over at a register, less the change and the cash refunds. It does not include the opening float.

Charged to account

A sale put on a customer's charge account. No money was taken, so no drawer holds it.



1. Day: the store day to show.
2. Register: one register, or Every register.
3. Sales: how many sales and their total.
4. Charged to account: owed, with no money taken.
5. Cash expected: the cash that should have gone into the drawers.

The top of the day's totals for every register.

1. **Open Day summary.**
2. **Choose the Day and the Register, then press Show. Every register** shows the whole store, with the deposit lists and the card deposit that only the whole store's day has.

3. **Check the line under the Day summary heading.** It names the day and the register you chose, or says *every register*.
4. **Read the totals at the top of the page.** The table below says what each line means.
5. **Press Print to keep a paper copy.**

LINE	WHAT IT MEANS
What was sold	
Sales	How many sales the registers made and their total.
Discounts (sale prices, coupon codes and counter discounts)	What discounts took off those sales.
Charged to account (owed, no money taken)	Sales put on charge accounts. They are owed, not paid.
How it was paid	
Cash taken	Cash kept at the registers, cash paid on account there included. The brackets give what customers handed over and the change given.
Checks	How many checks were taken and their total.
Card (the card processor)	Card payments that went through the card processor.
Received on account (payments, not sales)	Payments on charge accounts, split under it into **On account in cash**, **On account by check** and **On account by card**. The registers' part is already in Cash taken, Checks and Card above, so do not add it twice. **Every register** adds the payments taken in the office: their cash and card are in no drawer, and their checks are on the office list. One register's day has no office payments.
Store credit given, Store credit spent	On a day with store credit. It is not money, so no drawer holds it.
What was given back	
Refunds in cash, Refunds by store check, Refunds to cards, Refunds to customers' accounts	Refunds of counter sales, by how the money went back. **Refunds as store credit** joins them on a day with store credit.
What should be there	
Cash expected	Cash handed over, less change and less refunds in cash. Checks never count in it.

LINE	WHAT IT MEANS
Card less refunds to cards (what the card processor should deposit)	Card payments less card refunds.
Returned checks and offline sales	
Cash collected on returned checks (in the drawer, not in cash expected)	Cash paid back toward returned checks on this day. Cash expected leaves it out, so a drawer it went into is over by it.
Returned checks recorded	Checks marked returned on this day, with any fees.
Collected on returned checks (cash ..., card ..., check or money order ...)	All money paid back toward returned checks on this day, split in the brackets by how it was paid.
Offline sales (cash)	Every sale a register made while it was offline that Roadside has booked. The label says cash. The line also counts offline sales paid by check and sales put on a charge account, and a sale on account put no cash in a drawer.

Three lines about an external card terminal (**Card on external terminal**, **Refunds on the counter card terminal** and **External terminal less its refunds**) stay at zero.

A store day runs by the clock of the store's location, so a sale at 11:50 at night belongs to that day. A warning above the totals such as *2 offline sales from this day aren't booked yet ($41.50), so they aren't in these numbers. Their cash is in the drawer.* means Roadside is holding offline sales it has not booked, so Day summary leaves them out. For a held sale paid in cash or by check, a drawer holds money these numbers do not count yet. The warning counts a held sale on account too, and that sale put no money in a drawer and no charge on the account. Press **See Offline problems** (Check offline sales that need a look, in Chapter 6 (page 46)).

The same page holds the drawers, the checks for the bank and the card deposit. Counting and closing a drawer, and the deposit lists, are in Chapter 4, Count the drawers and take the day to the bank (page 28).

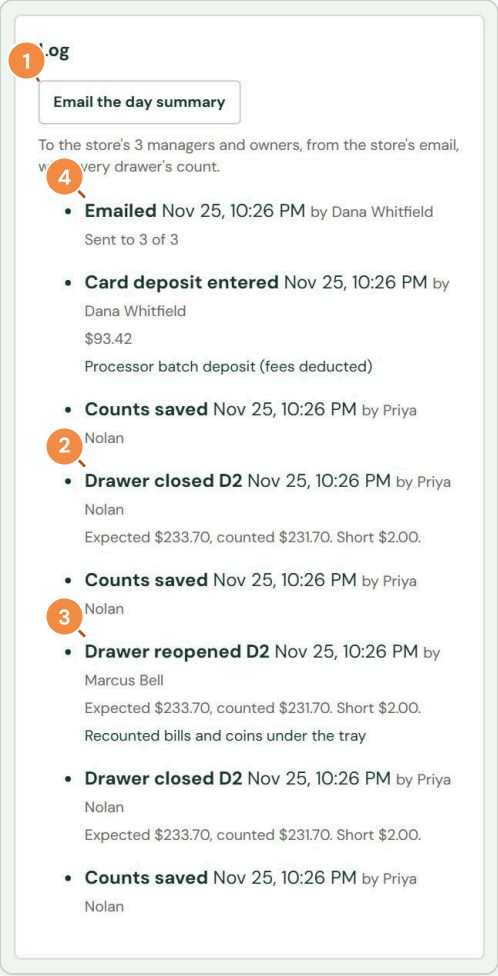
Read only people see no count forms. At the register, the cashier opens the same figures: see the Crossroads POS manual, Open the summary and Read the amounts.

Email the day to the managers and owners

WHERE TO FIND IT **Sales** › **Day summary → Log** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

Roadside can email the day's figures to the store's Managers and Store owners: sales, how they were paid, refunds, cash expected, the card deposit and every drawer's count. It goes from the store's email to every active Manager and Store owner who has an email address. Nobody picks the people one by one, and it never goes to a customer.



1. Email the day summary sends the day at once.
2. Drawer closed: when, by whom, and the count.
3. Drawer reopened, with the reason.
4. Emailed: how many people it was sent to.

The Log card for a day that was counted, reopened and emailed.

1. **Open Day summary for the day.** The **Log** card lists what happened to the day's drawers: *Counts saved*, *Drawer closed*, *Drawer reopened*, *Card deposit entered* and *Emailed*, each with the time and who did it.

2. **Send it once everyone has finished counting.** The email goes to every Manager and Store owner at once and cannot be called back. Press **Email the day summary**. The message reads *Emailing the day summary to <n> managers and owners*.

The email also goes by itself when the day's last drawer closes while the box **When the last drawer is closed, email the day to the store's managers and owners** is ticked, as it is to begin with. Untick it before you close to send nothing.

The subject reads *Day summary for <day>: <state> (<store>)*, where the state is the day's over or short, *not every drawer closed* or *no drawers closed*. It worked when the **Log** lists *Emailed* with *Sent to* and the count.

- *This day's summary is already on its way. It goes out within a minute or two.* Wait for the first one.
- *Nobody to send it to: the store has no managers or owners with an email address. Add one under Admin > Users.* A Store owner gives someone a Manager sign-in (Give someone their own sign-in, in "Give the right people access to Roadside" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/team-roles)). Nobody in the store can add a Store owner: write to **support@dirtroadsoftware.com** for that.

4 Count the drawers and take the day to the bank

At closing, count the cash in each drawer on Day summary and close it. Then take the checks to the bank with a list that matches, and check the card processor's deposit when it arrives.

IN THIS CHAPTER

- Counting the cash and closing each drawer
- Reopening a drawer that was counted wrong
- Finding a drawer nobody closed
- The checks to take to the bank
- Typing in what the card processor deposited

Count the cash and close a drawer

WHERE TO FIND IT Sales › Day summary → Cash drawers — Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

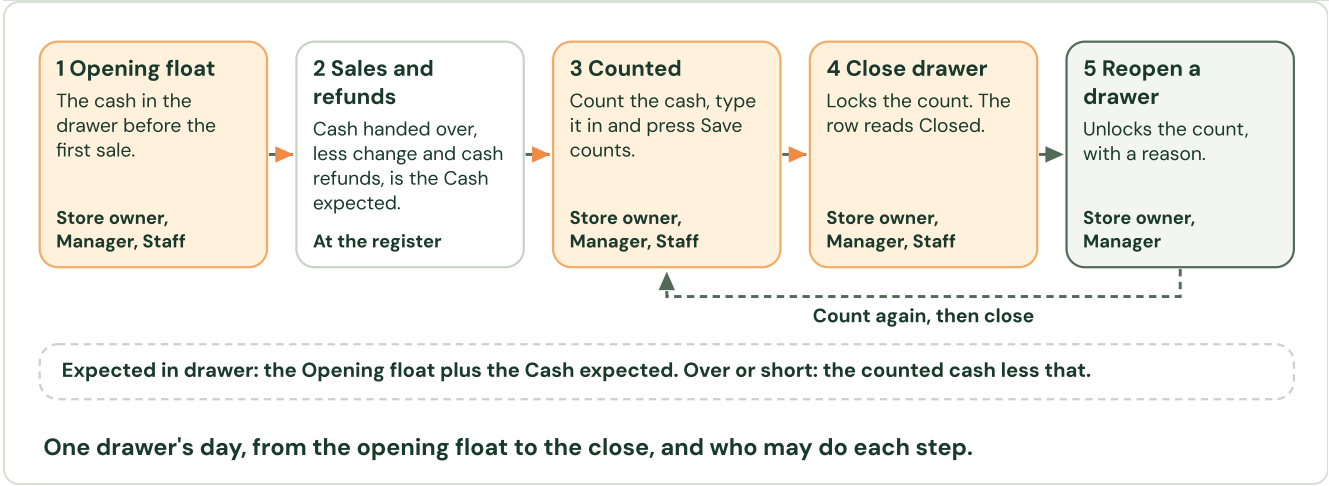
Each register has one drawer a day. Count it on the **Cash drawers** card, then close it. Staff can count and close a drawer, as can Managers and the Store owner. Closing is done here in Roadside: the register's own day summary does not close the drawer.

WORDS TO KNOW

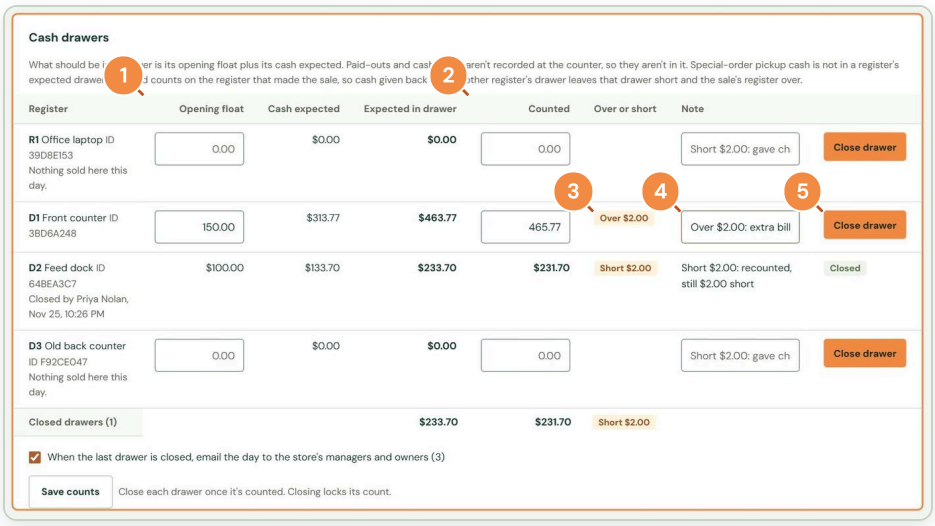
Opening float
The cash put in the drawer before the first sale, for making change.

Over or short
The counted cash less what should be in the drawer. Over means more cash than expected, short means less.

Expected in drawer is the **Opening float** plus the **Cash expected**. Cash from special-order pickups stays in the office, in no drawer. What Cash expected and the other lines of the day's totals mean is in Read the register's sales, cash and checks for a day, in Chapter 3 (page 21).



One drawer's day, from the opening float to the close, and who may do each step.



1. Opening float: the cash the drawer started with.
2. Counted: the cash you counted at the end.
3. Over or short: the difference from Expected in drawer.
4. Note: why the drawer is over or short.
5. Close drawer locks this row's count.

Cash drawers, with one drawer counted and one already closed.

1. **Open Day summary, choose the Day and press Show. Close out the day** on Today opens the same card for today.
2. **Type each register's Opening float.** The box can start with the last shift's float, marked *From the last shift*. Change it if the drawer started with a different amount.
3. **Count the cash in the drawer and type it in Counted.**

4. **If the drawer is over or short, type why in Note,** such as *Short $2.00: gave change twice*. A note takes up to 300 characters.

5. **Press Save counts.** The message reads *Counts saved. Close each drawer once it's counted.*

6. **Close the drawer once its count is right.** Closing locks the count and keeps the day's figures as they stand. After that only a Manager or the Store owner can reopen it, and the old count stays in the log. The box **When the last drawer is closed, email the day to the store's managers and owners** starts ticked. Left ticked, closing the day's last open drawer emails the day to every Manager and Store owner, and that email cannot be called back. Untick it first to send nothing. Press **Close drawer** on that register's row. The message reads *Drawer closed. Even.*, or gives the amount over or short.

It worked when the row shows **Closed** with *Closed by*, the person and the time, and the **Log** card lists *Drawer closed*. The email is in Email the day to the managers and owners, in Chapter 3 (page 26).

A drawer closes only with a count: *Enter the counted cash for <register>, then close its drawer*. If two people count at once, the second save answers *Someone else changed the counts for <register> after you opened this page. Nothing was saved.* and shows their numbers to check. Staff count today and the 7 days before it. Older days answer *Drawers more than 7 days old are for managers. Ask a manager to count one.*

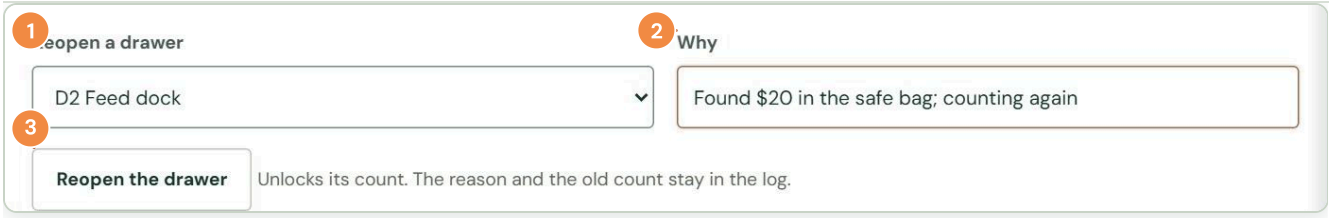
Before you put an over or short down to a counting mistake, check what Day summary cannot see. A refund counts on the register that made the sale, so cash handed back from another drawer leaves that drawer short and the sale's register over. Cash from offline sales not booked yet is in the drawer but not in Cash expected, and so is cash paid back on a returned check, if it went into a drawer. Paid-outs and cash drops are not recorded.

Reopen a closed drawer to count again

WHERE TO FIND IT **Sales** › **Day summary → Cash drawers → Reopen a drawer** Store owner, Manager

Included on every plan except Static Website and Online Store.

A closed drawer's count is locked. To correct it, a Manager or the Store owner reopens it with a reason. Do this too when a row reads *Changed since it was closed: cash expected is now <amount>. Reopen it to count again*. Reopening changes no sale. It only unlocks the count.



1 Reopen a drawer: choose the closed register.
2 Why: the reason, kept in the log.
3 Reopen the drawer unlocks its count.

Reopen a drawer, under the Cash drawers table.

1. **Open Day summary for the day and choose the register under Reopen a drawer.** The form is under the drawers while one of that day's drawers is closed.
2. **Type the reason in Why,** such as *Found $20 in the safe bag; counting again*. It is required and takes up to 300 characters.
3. **Press Reopen the drawer.** The note beside it says *Unlocks its count. The reason and the old count stay in the log*. The message reads *Drawer reopened. Staff can change its counts and close it again*.
4. **Correct the count and close the drawer again** (Count the cash and close a drawer, in Chapter 4 (page 28)).

It worked when the **Log** lists *Drawer reopened* with your reason and the old count, and the row takes a new count. Without a reason the form answers *Say why the drawer is being reopened, for example "Found $20 in the safe bag"*.

Look back at past drawer counts

WHERE TO FIND IT **Sales** › **Day summary → Past register shifts** Store owner, Manager

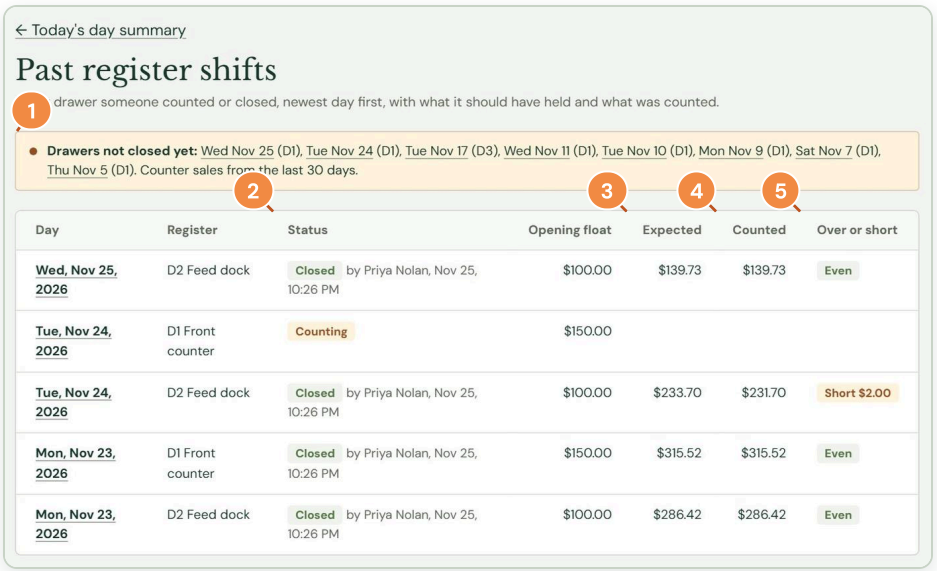
> Included on every plan except Static Website and Online Store.

Past register shifts lists every drawer anyone counted or closed, and warns about recent days where a drawer with sales was never closed. Press **Past register shifts** at the top of Day summary. The page opens with *Every drawer someone counted or closed, newest day first, with what it should have held and what was counted.*

WORDS TO KNOW

Register shift

One register's drawer for one store day. It has nothing to do with the hours a person works.



1. Drawers not closed yet: recent days with a drawer still open.
2. Status: Closed with who and when, Reopened, or Counting.
3. Expected: what the drawer should have held.
4. Counted: the cash counted when it closed.
5. Over or short for that drawer.

Past register shifts, with one day still to close.

1. **Read the Drawers not closed yet warning at the top, if there is one.** It names each day of the last 30 that had counter sales on a register whose drawer nobody closed, with the registers in brackets.
2. **Press a day in the warning.** Day summary opens at that day's drawers. Count and close each one (Count the cash and close a drawer, in Chapter 4 (page 28)).
3. **To look up an old count, find its row.** Each row gives the **Day**, the **Register**, the **Status** and the **Opening float**. **Expected**, **Counted** and **Over or short** fill in once the drawer is closed. The list is newest first, 60 rows a page, with **Older** and **Newer**.

It worked when the warning is gone after the drawers it named are closed. A store that has never counted a drawer sees *No register shifts yet. They show up here once someone counts a drawer on the day summary.*

Take the checks and cash to the bank

WHERE TO FIND IT **Sales** › **Day summary → Checks to deposit** Store owner, Manager, Staff, Read only

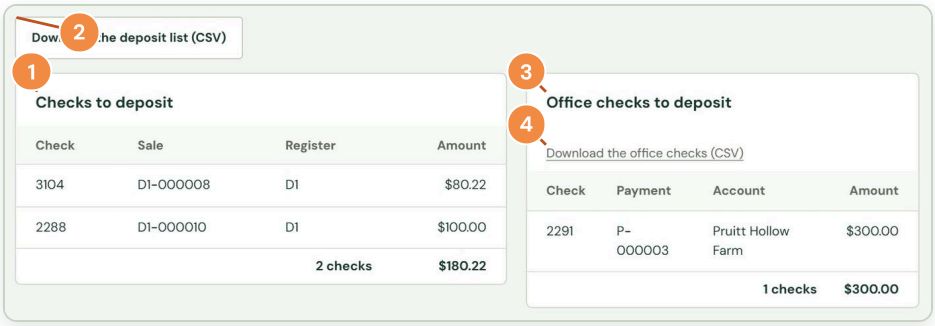
Included on every plan except Static Website and Online Store.

Day summary lists every check to take to the bank, so the deposit slip and the list match. Registers' checks and checks taken in the office are on separate lists.

WORDS TO KNOW

Office check

A check taken for a payment on a charge account in Roadside, not at a register. It is in no drawer.



1. Checks to deposit: every check taken at the registers.
2. Download the deposit list (CSV) saves that list as a spreadsheet file.
3. Office checks to deposit: checks for payments on account taken in Roadside.
4. Download the office checks (CSV) saves the office list.

The deposit lists for every register.

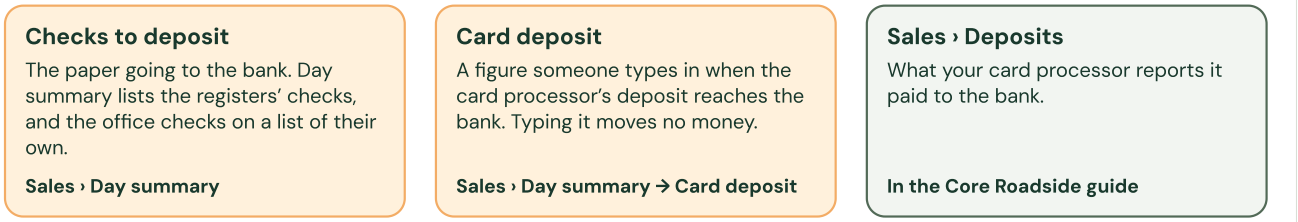
1. **Open Day summary, choose the Day and Every register, and press Show.**
2. **Read the Checks to deposit list.** Each row gives the **Check** number, the **Sale**, the **Register** and the **Amount**, with the count and total at the foot. A day without any reads *No checks this day.*
3. **Press Download the deposit list (CSV) or Print, both at the top of the page.** The file has the columns Date, Sale, Register, Check number and Amount, with a Total row.
4. **Read the Office checks to deposit list and press Download the office checks (CSV), inside that list.** Its rows give the **Check**, the **Payment**, the **Account** and the **Amount**.
5. **Lay the checks beside the lists and tick each one off.**

It worked when the counts and totals of the lists match the checks on the deposit slip.

Included on Counter + Stock and Whole Store plans. Special-order pickups (office) lists the cash and checks taken when a special order ("Order an item for one customer" in the Storehouse ERP guide, dirtroadsoftware.com/support/roadside-manual/storehouse-special-orders) was picked up. That money stays in the office, in no drawer. Its checks download with Download the special-order checks (CSV).

⚠ CAREFUL

Three things on Roadside are called a deposit. **Checks to deposit** is the paper going to the bank. **Card deposit** on this page is a figure someone types in (Match the card processor's deposit, in Chapter 4 (page 34)). **Sales > Deposits** is what your card processor reports it paid to the bank (Match a processor deposit with the bank, in "Resolve payments and give money back" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/payments-refunds)).



The three things Roadside calls a deposit, and where each one is.

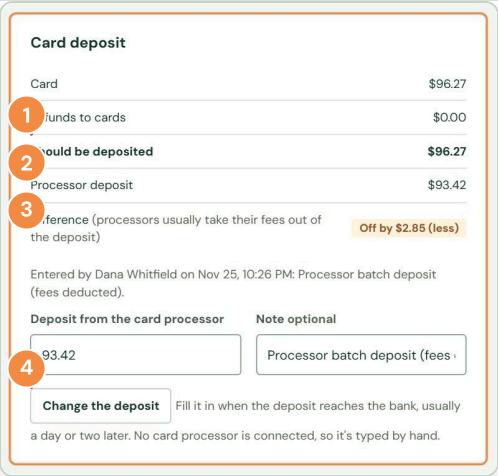
Match the card processor's deposit

WHERE TO FIND IT **Sales** › **Day summary → Card deposit (with Every register chosen)**

Store owner, Manager, Staff (once every drawer is closed, only a Store owner or Manager changes an entered deposit)

Included on every plan except Static Website and Online Store.

The **Card deposit** card checks the card processor's deposit for a day against the day's card sales. Roadside does not read the deposit from the processor. A person types it in when it reaches the bank, usually a day or two later. Typing it moves no money.



1. Should be deposited: card sales less refunds to cards.
2. Processor deposit: the amount you typed in.
3. Difference: Matched, or Off by an amount.
4. Change the deposit corrects the amount.

Card deposit, with the processor's deposit entered.

1. **Open Day summary, choose the Day and Every register, and press Show.** The card lists **Card**, **Refunds to cards** and **Should be deposited**. **Processor deposit** reads *Not entered yet*.
2. **Type the amount from the bank in Deposit from the card processor,** such as `812.40`.
3. **Add a Note, marked *optional*, if it helps,** such as *Bank deposit Oct 17*. It takes up to 300 characters.
4. **Press Save the deposit.** The message reads *Card deposit saved*.
5. **Read the Difference line.** Its label adds *(processors usually take their fees out of the deposit)*, and it reads *Matched*, or *Off by* an amount marked *(less)* or *(more)*.

It worked when the card shows *Matched*, or an *Off by* amount you can explain with the processor's fees, and the line under it names who entered it and when. To correct the figure, type the new amount and press **Change the deposit**. The **Log** keeps each change, with the amount it replaced.

Staff can enter the card deposit within 7 days. Once every drawer of the day is closed and a deposit is in, only a Manager or the Store owner can change it, and Staff see *Every drawer of this day is closed, so only a manager can change the card deposit*.

5 Find a register sale and its receipt

Every sale rung up at a register is an order in Roadside. Open it to see how the customer paid, what went back, and the receipt they took home.

IN THIS CHAPTER

- Finding a sale rung up at a register
- How it was paid and what was refunded
- Recording a refund given back at the counter
- Why a counter sale is not cancelled on the order screen
- Printing a receipt again, and what a receipt shows
- A customer's optional signature on a receipt

Find a register sale and see how it was paid

WHERE TO FIND IT **Sales** › **Orders** Store owner, Manager, Staff, Read only

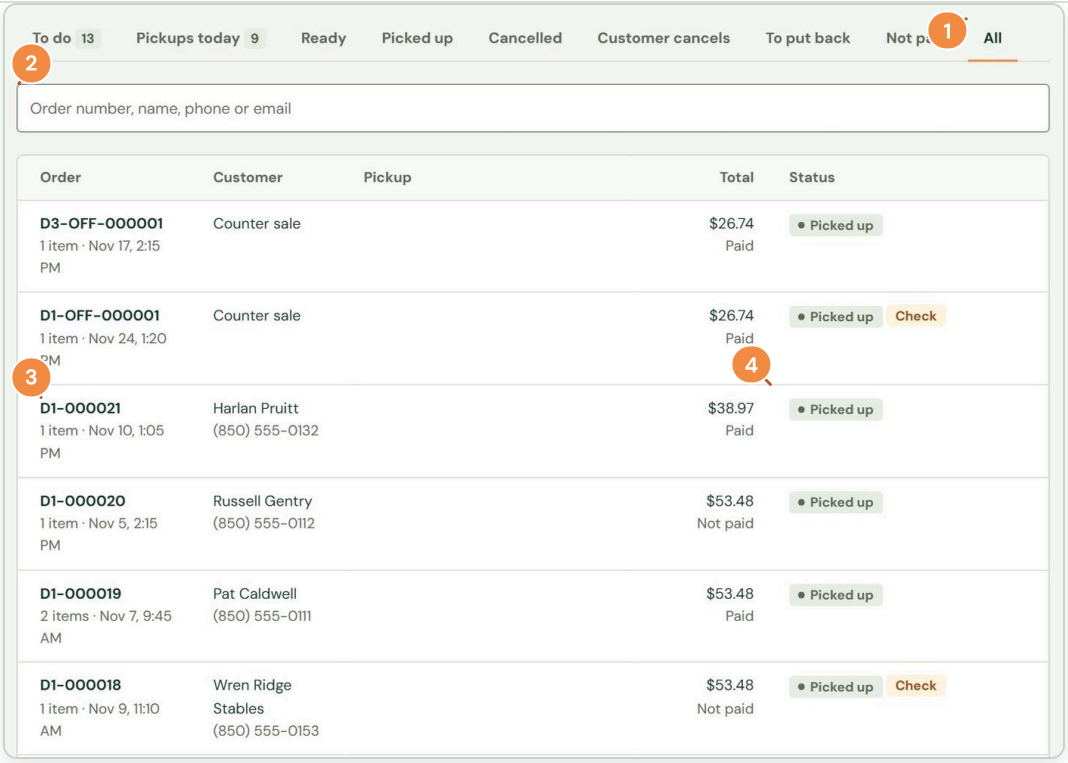
Included on every plan except Static Website and Online Store.

Each sale rung up at a register is an order you can open, with its payments, its refunds and its history. The list's tabs and search work as Find an order even if it is not in To do, in “Find, prepare or cancel an order” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/orders) describes.

On the Counter and Counter + Stock plans: The line under the Orders heading reads Sales rung up at the register, and their refunds.

WORDS TO KNOW

Counter sale
A sale rung up at a register, kept in Roadside as an order.



1. All: every order, finished counter sales included.
2. Search: an order number, a name, a phone number or an email.
3. A counter sale's number starts with its register's letters.
4. Status: where the sale stands.

Counter sales on the All tab of Orders.

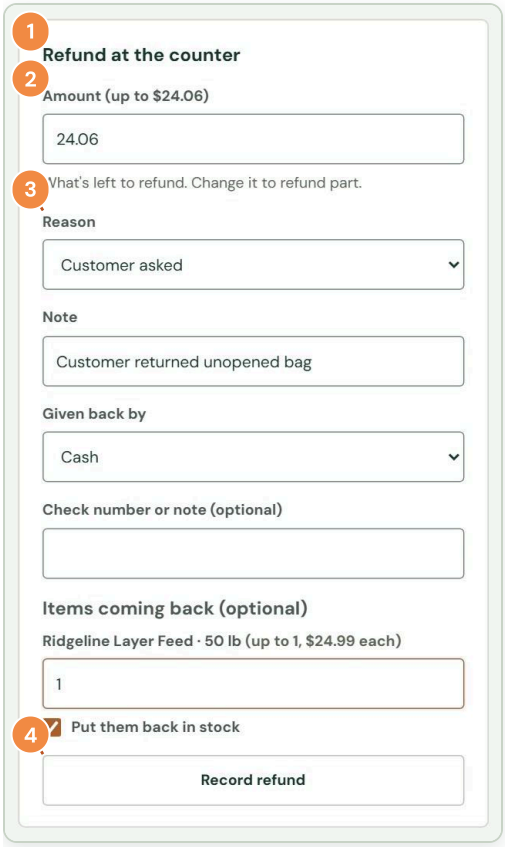
1. **Open Orders and press All.** A finished counter sale is not in **To do**.
2. **Type in the search box.** It takes an *Order number, name, phone or email*. A counter sale's number starts with its register's letters, such as `D1-000042`.
3. **Press the order number to open the sale.** The payment shows how the customer paid, and any refund is listed under it with its amount and who recorded it.

A *Check* badge in the list means Roadside wants someone to look at the sale. On a counter sale it comes from a sale a register made offline (Check offline sales that need a look, in Chapter 6 (page 46)) or from a check the bank sent back (Mark a check the bank sent back, in Chapter 8 (page 59)). To find a sale at the register itself, see the Crossroads POS manual, Find a sale.

Record a refund given back at the counter

Refunds of counter sales are usually made at the register, which gives the money back and returns the goods to stock: see the Crossroads POS manual, Refund a sale. On the order screen, a Store owner or Manager can record one too. The card is headed **Refund at the counter**, and it records money a

person hands back. It sends nothing to a card. Staff and Read only people do not see it.



1. Refund at the counter records money handed back at the store.
2. Amount starts at what is left to refund.
3. Reason, chosen from a list.
4. Record refund saves it once you confirm.

Refund at the counter on a paid cash sale.

1. **Give the money back first, then open the sale.**
2. **Set the Amount.** It starts at what is left to refund. Type less to record part of it.
3. **Choose a Reason,** and add a **Note** if it helps the next person.
4. **Choose how the money went back under Given back by.** The box under it takes a check number or a short note.
5. **If goods came back, type how many under Items coming back (optional).** Leave **Put them back in stock** ticked to add them back to the shelf count.
6. **Record it once. Record refund** records that the money already went back. It hands nobody money. A refund made at the register is on the order already, so check the payment's refunds before you record another. Press **Record refund**, and confirm *Record this refund as given back at the counter?*

It worked when the message reads *Refund of <amount> recorded* with how it went back, and the refund is listed on the payment with its amount and your name. A counter sale's refund on this screen follows the store's return rules for counter sales. If the screen refuses one, its message says why, such

as a sale past the store's return window. More on refunds is in Give money back for an order, in “Resolve payments and give money back” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/payments-refunds).

> ⚠ CAREFUL
> A counter sale is not cancelled on the order screen. On an open counter sale, the **Cancel order** card has no button and reads *This is a counter sale, so it isn’t cancelled here. Open it on the counter: a paid sale finishes there, and a finished sale is refunded under the store’s return rules.* A finished counter sale has no **Cancel order** card. Give the money back with a refund instead.

Print a receipt or the store's copy

WHERE TO FIND IT **Sales** › **Orders → open the sale → Receipt (PDF)** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

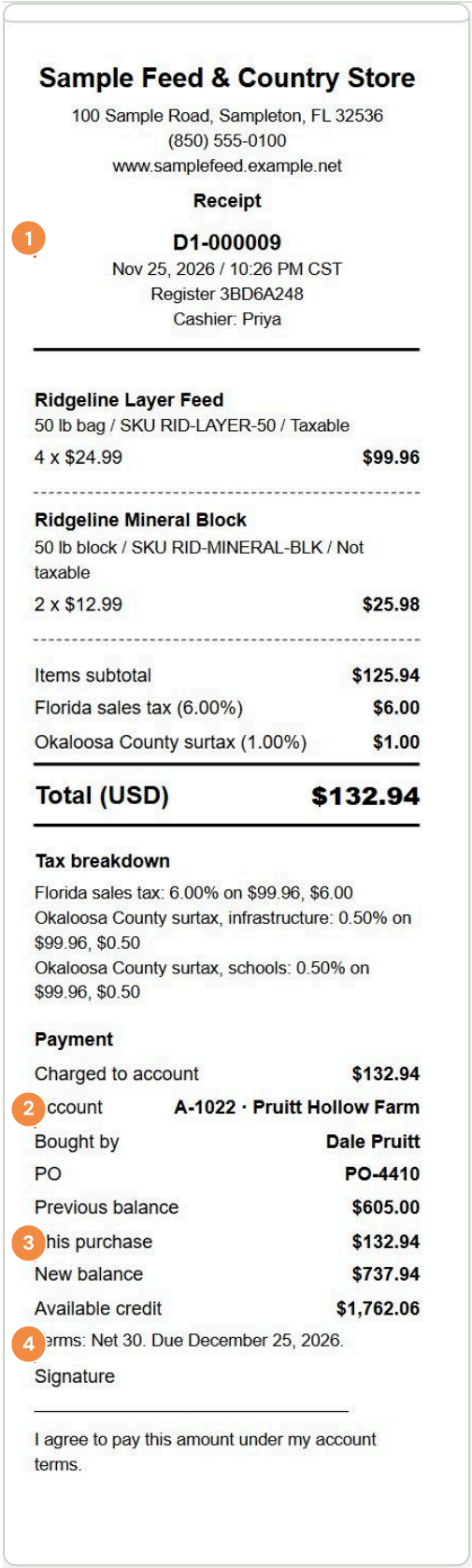
A paid sale has a **Receipt (PDF)** button at the top of its order, beside **Print pick ticket**. It opens the receipt as a letter-size PDF in a new tab, to print on the office printer or save. A sale that is not paid has no receipt.

1. **Open the sale in Orders** (Find a register sale and see how it was paid, in Chapter 5 (page 36)).
2. **Press Receipt (PDF).**
3. **Print or save it from the new tab.**

Paper receipts and the store's copy

Receipt-roll copies print from a print page. The register opens it when the cashier prints a receipt (see the Crossroads POS manual, Reprint or email a receipt). The store's copy opens from **Print store copy** on the Receipt acknowledgement page (Keep a customer's signature with a receipt, in Chapter 5 (page 41)). Either way the page opens the browser's print window with the hint *Choose the receipt printer (80 mm roll), or Save as PDF, in the print window.*, or the 58 mm roll for a store that uses it. **Print again** opens the print window again and **Close** closes the page.

The page cannot tell whether paper came out. After the print window closes it says *Print dialog closed. If nothing printed, check the printer and press Print again.* It worked when the receipt is in your hand.



Sample Feed & Country Store

100 Sample Road, Sampleton, FL 32536
(850) 555-0100
www.samplefeed.example.net

Receipt

1 **D1-000009**
Nov 25, 2026 / 10:26 PM CST
Register 3BD6A248
Cashier: Priya

Ridgeline Layer Feed
50 lb bag / SKU RID-LAYER-50 / Taxable
4 x $24.99 **$99.96**

Ridgeline Mineral Block
50 lb block / SKU RID-MINERAL-BLK / Not taxable
2 x $12.99 **$25.98**

Items subtotal	**$125.94**
Florida sales tax (6.00%)	**$6.00**
Okaloosa County surtax (1.00%)	**$1.00**
Total (USD)	**$132.94**

Tax breakdown
Florida sales tax: 6.00% on $99.96, $6.00
Okaloosa County surtax, infrastructure: 0.50% on $99.96, $0.50
Okaloosa County surtax, schools: 0.50% on $99.96, $0.50

Payment

Charged to account	**$132.94**
2 ccount	**A-1022 · Pruitt Hollow Farm**
Bought by	**Dale Pruitt**
PO	**PO-4410**
Previous balance	**$605.00**
3 his purchase	**$132.94**
New balance	**$737.94**
Available credit	**$1,762.06**

4 erms: Net 30. Due December 25, 2026.
Signature

I agree to pay this amount under my account terms.

1. Register: the register's ID, not its name.
2. Bought by: the person who charged it, with the PO.
3. New balance: what the account owes after this sale.
4. The signature line for the store's signed copy.

The store's copy of a charge sale on the 80 mm roll.

A receipt gives the store's name, address, phone and website, the receipt number, the date and time, **Register** with the register's ID and **Cashier** with a name. A refund receipt adds **For receipt** and the number of the sale it refunds. The ID is eight characters, made of the digits 0 to 9 and the capital letters A to F. It is not the name your staff use for the register. The **Cash drawers** card on Day summary shows each register's ID beside its name.

A sale put on a charge account adds **Account**, **Previous balance**, **This purchase** and **New balance**. **Bought by** prints when the sale names a buyer, **PO** when it has a PO, and **Available credit** when the account has a limit. On paper it can carry the line *Signature* _____ with *I agree to pay this amount under my account terms.* for the store's signed copy. The PDF and an emailed receipt never have that line. The store's copy also ends with a **Store copy** part that shows a saved receipt acknowledgement, or says *No receipt acknowledgement signature saved.*

The words on every receipt are set in Change the name, color and words on a receipt, in "Put the store's name and words on receipts" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/receipts). The paper width, and a sample receipt to check, are in Check an email or paper receipt before using it, in "Put the store's name and words on receipts" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/receipts). The Crossroads POS manual's What a receipt shows covers the receipt as the cashier sees it.

Keep a customer's signature with a receipt

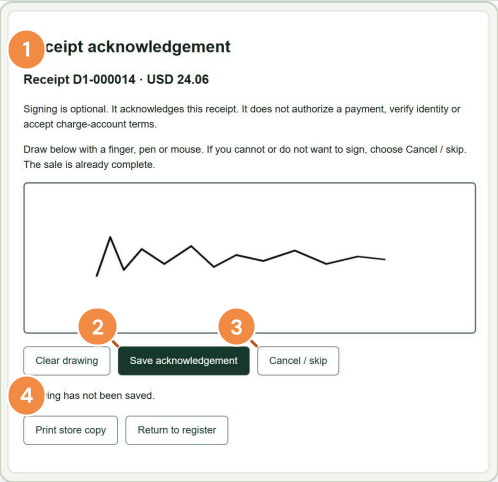
WHERE TO FIND IT **A paid counter sale's receipt → Receipt acknowledgement (optional)**

Store owner, Manager, Staff (Read only can look, not save)

> Included on every plan except Static Website and Online Store.

A customer can sign for a receipt, so the store keeps a signed acknowledgement with it. On a paid counter sale's receipt at the register, the link **Receipt acknowledgement (optional)** opens the **Receipt acknowledgement** page in a new tab. The page names the receipt, as *Receipt <number> · <currency> <total>*, and says:

Signing is optional. It acknowledges this receipt. It does not authorize a payment, verify identity or accept charge-account terms.



1. The receipt being signed for, with its total.
2. Save acknowledgement keeps the drawing for good.
3. Cancel / skip discards the drawing.
4. Print store copy prints the receipt with the signature.

Receipt acknowledgement with a drawing not yet saved.

1. **Have the customer sign in the box** with a finger, a pen or the mouse.
2. **If the drawing is wrong, press Clear drawing** and have them sign again.
3. **Save only a drawing you want to keep.** A saved acknowledgement is final for that receipt and cannot be replaced. Press **Save acknowledgement**. The page reads *Acknowledgement saved at <time>*. and offers **Check saved acknowledgement**.
4. **Press Print store copy for a paper copy with the signature,** or **Return to register**.

It worked when the page shows **Signature saved** with the drawing, and the store's copy prints it under **Receipt acknowledgement**. Both give the time in UTC, not the store's clock, and name the person who saved it as *staff user* with a number.

To skip signing, press **Cancel / skip**. The page reads *Drawing discarded. The sale is complete. Any acknowledgement already saved remains on the receipt.* A sale is complete with or without a signature. A receipt that has one already answers *This receipt already has a saved acknowledgement. It cannot be replaced.* A drawing too large to keep answers *This drawing is too large to save. Clear it and use a simpler signature, or cancel.*

Staff, Managers and Store owners can save an acknowledgement. Read only people can open the page and look. This signature is not the customer's agreement to charge-account terms: that is the signature line on the store's paper copy of a charge sale (Print a receipt or the store's copy, in Chapter 5 (page 39)).

6 Keep selling when the internet is down

A counter computer can keep selling while the internet is out, if the Store owner allows it. It takes cash, a check when your store takes checks, and a sale on a charge account. It never takes a card. Afterwards, check the sales it brought back and deal with any that need a person.

IN THIS CHAPTER

- Allowing sales while a register is offline, and the most one cash or check sale may total
- What a register takes offline, and what waits for the connection
- Reading Offline problems: sales that were held and sales booked for a check
- Getting the sales off a register that cannot connect
- Stopping a lost or stolen computer from sending anything
- What happens when two people change the same customer detail during an outage

Let registers keep selling while offline

WHERE TO FIND IT **Store settings** › **Registers → Offline selling settings** Store owner

Included on every plan except Static Website and Online Store.

Offline selling is off until the Store owner turns it on. The screen explains what it does: *When the internet is down, a counter computer can keep taking cash sales for up to 72 hours since it was last online. They upload when it's back.*

The screen speaks of cash. Its one box also lets a register take a check, when your store takes checks at the counter, and put a sale on a charge account, when your store has charge accounts. Neither has a switch of its own. Without a second manager's Counter PIN, one sale on account may be up to $500.00 and one account may take up to $1,000.00 while a register is offline, never past the credit available. An account on hold is refused. The rest is in Know what a register may put on a charge account while offline, in Chapter 7 (page 52).

WORDS TO KNOW

Offline

The register cannot reach Roadside, because the internet or the store's network is down.

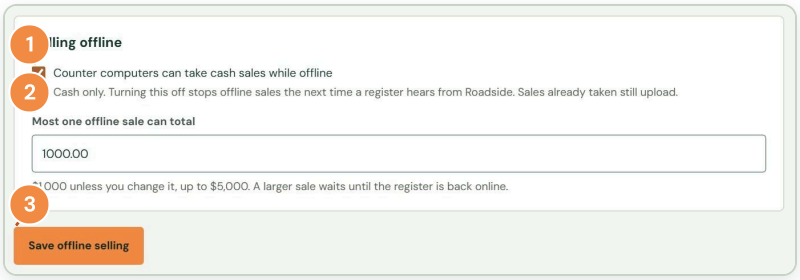
Offline sale

A sale a register saves on its own computer until it can send it to Roadside.

AT AN OFFLINE REGISTER	WHAT HAPPENS
Cash	Taken, up to the most one offline sale can total.
A check	Taken when your store takes checks at the counter, up to the same amount.
A sale on a charge account	Taken when your store has charge accounts, within limits of its own (Know what a register may put on a charge account while offline, in Chapter 7 (page 52)).
A card	Never taken while the register is offline.
Store credit, a payment on a charge account, a refund	Not taken. Each waits until the register is back online.

CAREFUL

With this on, a register finishes sales Roadside has not seen yet. When the register is back online, Roadside checks each sale. It books the ones it accepts: the money, or the charge to the account, and the stock. It holds the others without booking them. A sale put on a charge account is checked against the account only then.



1. Tick the box to let counter computers sell while offline.
2. Most one offline sale can total: type your limit for one cash or check sale.
3. Save offline selling keeps both.

The Selling offline card on Offline selling.

1. **Go to Store settings, then Registers, and press Offline selling settings.** The button is on the **Offline selling** card.
2. **Tick Counter computers can take cash sales while offline.** The note under the box begins *Cash only*. The box allows the checks and the sales on account in the table above as well.
3. **Set Most one offline sale can total.** It is $1,000 unless you change it, and it can be from $1.00 to $5,000.00. A larger cash or check sale waits until the register is back online. The register does not hold a sale on account to this amount, because that sale has fixed limits of its own. Roadside still lists every offline sale over your amount, a sale on account included, on Offline problems (Check offline sales that need a look, in Chapter 6 (page 46)). One it books reads *Booked, needs review*. One it cannot book, such as a sale on an account that was closed in the meantime, reads *Held, not booked*.
4. **Press Save offline selling.** The message begins *Offline selling saved*. A register that is online gets the change within 15 minutes.

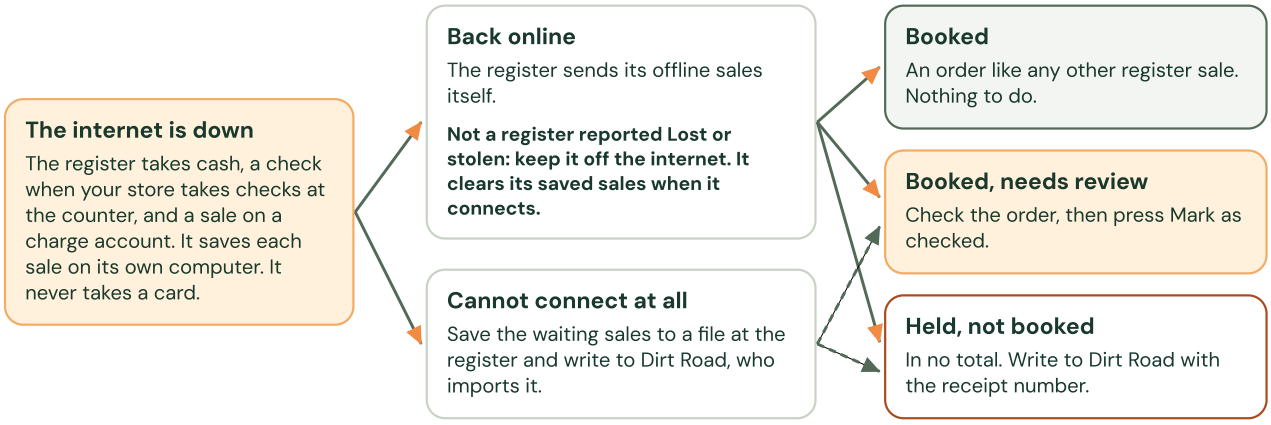
To stop offline selling, untick the box and save. The screen says: *Turning this off stops offline sales the next time a register hears from Roadside. Sales already taken still upload*. An amount outside the range is refused with *The most one offline sale may total is between $1.00 and $5,000.00*.

Offline selling is for connected counter computers. It does not apply to a register in a web browser. A Manager cannot change it, and does not see the **Offline selling** card on Registers.

What the cashier sees and does is in the Crossroads POS manual: Get ready while connected, When the connection drops, What works without Roadside and Put a sale on account while offline.

Once a register is back online, each offline sale ends one of these ways.

WHAT HAPPENED TO THE SALE	WHAT YOU DO
The register sent it and Roadside booked it	Nothing. It is an order like any other register sale.
Roadside booked it and wants it looked at	Check the order and mark it checked (Check offline sales that need a look, in Chapter 6 (page 46)).
Roadside held it without booking it	Write to Dirt Road with the receipt number (Check offline sales that need a look, in Chapter 6 (page 46)).
The computer cannot connect to send it	Save the register's waiting sales to a file and write to Dirt Road (Bring in sales from a register that cannot connect, in Chapter 6 (page 48)).



An offline sale, from the register to the three ways it can end.

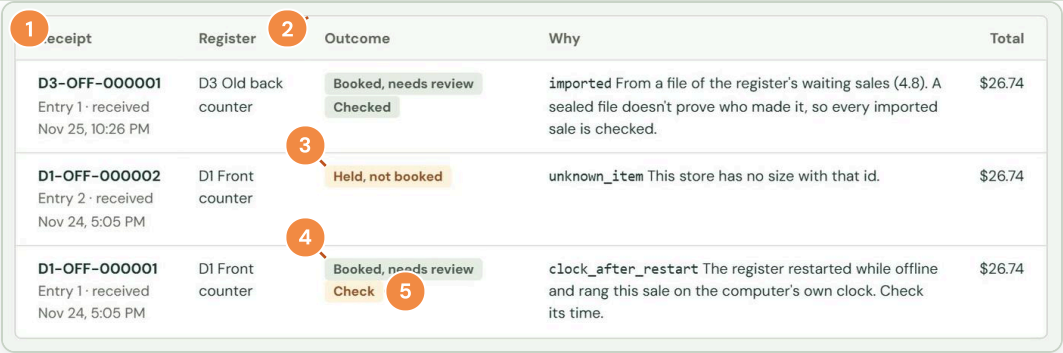
Check offline sales that need a look

WHERE TO FIND IT **Sales** › **Offline problems**

Store owner, Manager, Staff, Read only (to read); Store owner, Manager, Staff (to mark an order checked)

Included on every plan except Static Website and Online Store.

Most offline sales are booked without anyone looking at them. **Offline problems** lists the ones that need a person. The line joins the Sales menu once your store has such a sale. Before that the menu does not show it. The page opens with the words *Cash sales a counter computer took while it was offline that need a person.* It lists offline sales paid by check and sales put on a charge account as well.



1. Receipt: the receipt number. On a booked sale, press it to open the order.
2. Outcome: whether Roadside held the sale or booked it.
3. Held, not booked: the sale is in no total.
4. Booked, needs review: money and stock were booked.
5. Check stays until someone marks the order checked.

Offline problems, with a held sale, a booked sale to check and an imported sale already checked.

The table has the columns **Receipt**, **Register**, **Outcome**, **Why** and **Total**, newest first, up to 200 rows. Under each receipt number is the time Roadside received the sale. **Why** gives Roadside's reason.

OUTCOME	WHAT IT MEANS
Held, not booked	Roadside kept the sale as the register sent it and did not book it. It is in no total and it changed no stock count. The cash or check the cashier took is in the drawer. A held sale on account took no money and put no charge on the account.
Booked, needs review	The money and the stock were booked, and the sale is an order. The order shows *Check* until someone marks it checked.

A counter computer whose Windows restarts with no internet keeps selling for up to 12 hours from that restart, sales on account included. Roadside lists every sale it rings in that time here. One it books reads *Booked, needs review*, with the reason *The register restarted while offline and rang this sale on the computer's own clock. Check its time.* One it cannot book reads *Held, not booked*, with the reason it was held.

A sale that was booked

1. **Open Offline problems and find a row marked *Check*.**
2. **Press the receipt number.** The order opens with the notice *Check this order.* at the top and **Mark as checked** beside it. The notice gives no reason. The reason is in the row's **Why**, and in the order's **History** on a line that begins *Check this offline sale:*.

3. **Compare the order with the register's own record of the sale.** Read the row's **Why** first, then the order's items, total and **History**.

4. **Press Mark as checked.** The message reads *Marked as checked.* and the notice is gone from the order. On **Offline problems** the row's badge reads *Checked*.



1. The notice that asks someone to check this order.
2. Mark as checked clears it, once you have looked.

A booked offline sale, open as an order.

Store owners, Managers and Staff can mark an order checked. Read only people can read the list and the order. At the register the same sales read *Synced with differences* or *Manager review needed*: see Sales saved on this register in the Crossroads POS manual.

A sale that was held

Nothing on this screen books a held sale or clears it. Write to Dirt Road through **Support** and give the receipt number from the row (Send a question about Roadside, in “Ask Dirt Road for help” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/support-tickets)). Do the same for a row whose **Why** reads *Compromised export key* or *Compromised signing key*.

Until a held sale is settled, the drawer holds money that Day summary does not count. Day summary says so for that day, for example *1 offline sale from this day isn't booked yet ($42.79), so it isn't in these numbers. Their cash is in the drawer.* A held sale that was paid by check put a check in the drawer, not cash. The warning counts a held sale on account too, and that one put nothing in the drawer. Keep that in mind when you count the drawer (Count the cash and close a drawer, in Chapter 4 (page 28)).

A sale on account

A sale put on a charge account offline has reasons of its own in **Why**, and a held one leaves the customer with a receipt and no charge on the account. The reasons and what to do about each are in A sale on account that Offline problems lists, in Chapter 7 (page 54).

Bring in sales from a register that cannot connect

WHERE TO FIND IT **Store account** › **Support** › **New ticket** Store owner, Manager

Included on every plan except Static Website and Online Store.

A register that is online sends its offline sales itself, so first try to get the computer back on the internet. The one exception is a register you reported **Lost or stolen**: keep it off the internet, because it clears its saved sales when it connects. A retired register can still send the sales it holds for 30 days. When a computer cannot connect at all, its sales come in by file. The register saves the file. Ask Dirt Road to import it: the import page is reached from a screen that a Store owner or a Manager cannot open.

WORDS TO KNOW

Waiting sales

Sales a register has taken and not yet sent to Roadside.

Acknowledgement

The file Roadside gives back after an import, so the register knows which sales arrived and can clear them.

CAREFUL

Importing books the sales: the money is counted and stock counts change. Do not ring the same sales up again while you wait. Roadside books each sale once, even when a file is imported twice or the register had already sent part of it.

1. **At the register, press *Save waiting sales to a file* and keep the file.** Recover this register in the Crossroads POS manual shows that screen. The import it describes is the part Dirt Road does for you.
2. **Write to Dirt Road.** Open a ticket from **Support**, or write to **support@dirtroadsoftware.com**. Name the register by its letters and name, and say you have its file of waiting sales.
3. **Load the acknowledgement on the register.** An import ends with a file for the register, so ask Dirt Road for it. The register calls it *Roadside's signed settlement file*. Once it is loaded there, the register clears those sales.
4. **Check the sales on Offline problems.** A sale Roadside booked from the file is marked for a check, and one it could not book reads *Held, not booked*. A sale Roadside already had keeps its earlier result and is not booked twice (Check offline sales that need a look, in Chapter 6 (page 46)).

It worked when the sales are orders in Roadside and the register has cleared its waiting sales. A sale the import could not book is listed on **Offline problems** as *Held, not booked*.

Stop a lost computer from uploading

WHERE TO FIND IT **Store account** › **Retire a register → Lost or stolen** Store owner, Manager

Included on every plan except Static Website and Online Store.

A computer that has gone missing should not go on sending sales to your store. **Lost or stolen** on **Retire a register** stops it. The page says of the data a register keeps: *A lost or stolen register removes them without uploading.*

⚠ CAREFUL

This cannot be undone. The computer is cut off from the store at once, and it clears its saved data without sending anything the next time it connects. Sales it had not sent do not reach Roadside that way. If the computer turns up with those sales still on it, keep it off the internet and write to Dirt Road before anything else: once it connects, it clears them.

1. **Open Retire a register and find the computer's card.** It carries the computer's name and letters.
2. **Press Lost or stolen and confirm.** Roadside asks *Revoke access and request local data removal for this register?*
3. **Check the card.** The message reads *Access revoked. Local removal is requested for the next connection.* and the card says *Access revoked.*

The button is also on the card of a register you retired earlier. Press it there when a retired computer goes missing during the 30 days it may still send sales. Retire a register or report it lost, in Chapter 1 (page 10) has the picture of this page and covers retiring a computer you still have.

Check a customer edit made while offline

WHERE TO FIND IT **Customers** › **Accounts** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

A counter computer that is offline can still change a customer's details. If someone changes the same detail in Roadside in the meantime, both edits cannot stand. Roadside keeps the one that was saved first and does not apply the other.

Roadside sets the edit it did not apply aside on a list that Dirt Road can read. No screen a Store owner or a Manager opens shows that list, and Roadside sends no notice about it. What you can do is check the customer.

1. **After an outage, ask the cashiers which customers they changed at the register,** such as a phone number they corrected.
2. **Open each customer under Accounts and read the detail.** If it still shows the old value, the cashier's edit was not applied.
3. **Make the change again on the account.** Add or correct a customer's account, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers) shows how to correct an account.

To learn exactly which edits were set aside, write to Dirt Road through **Support** and give the day of the outage and the register.

7 Put sales on charge accounts while a register is offline

A register that is offline can put a sale on a customer's charge account. It asks for a second manager past fixed amounts, and it never charges an account that is on hold. Know what it will charge, and check the sales Roadside lists once the register is back online.

IN THIS CHAPTER

- Which accounts an offline register charges, and which it refuses
- The two fixed amounts, and when a second manager's Counter PIN is needed
- The receipt of a sale put on an account offline
- What Offline problems shows for these sales, a held one included

Know what a register may put on a charge account while offline

WHERE TO FIND IT **Customers** › **Charge accounts** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

An offline register can put a sale on a customer's charge account. It works from the copy of your charge accounts it saved the last time it was online: each account's status, limit, balance and buyers as they stood then. A payment you take or a hold you place in Roadside during the outage does not reach that register until it is back online. The Store owner turns offline selling on first (Let registers keep selling while offline, in Chapter 6 (page 43)).

THE ACCOUNT	WHAT AN OFFLINE REGISTER DOES
Not on the register	Does not offer it. The account has to reach the register while it is online, so an account opened during the outage waits.
Closed	Does not offer it.
On hold	Refuses the charge and gives the hold's reason. No manager can approve it offline, although online a second manager can. An account that Roadside holds by itself for an invoice long past due is refused the same way.
Active	Charges it, within the credit available and the two amounts below.

The register starts from the credit available when it last heard from Roadside: the credit limit, less the balance, less website orders charged to the account that are waiting for pickup. From that it takes off the sales on account it has made itself since then. An account with no limit has no credit check. On top of that, two amounts apply to every account:

- One sale on account offline may be up to $500.00.
- One account may take up to $1,000.00 in all from a register while that register is offline. The count starts again once the register has been back online.

Past either amount, or past the credit available, the sale needs a second manager, who approves it at the register with their own Counter PIN (Set your own Counter PIN, in Chapter 2 (page 15)). The person ringing the sale cannot approve it. Roadside fixes the two amounts: they are not settings, no screen shows them, and **Most one offline sale can total** does not change them.

The cashier names who is buying, the account's owner or one of its authorized buyers, and types the PO or job number when the account needs one. The whole sale goes on the account. It cannot be split with cash or a check.

1. **Go to Customers, then Charge accounts, and read Status and Available.** Registers carry these figures as they were when each one was last online.
2. **Release a hold while the registers are online if that customer should be able to charge during an outage** (Put an account on hold, or close it, in Chapter 16 (page 128)). A held account cannot be charged offline by anyone.
3. **Check that each manager who works the counter has a Counter PIN.** Without a second manager's PIN, a sale past the amounts above waits for the connection.

The receipt of such a sale is headed *SALE ON ACCOUNT · SAVED ON THIS REGISTER (OFFLINE)* and has a number like D1-OFF-000001. The printed copies carry the line *Signature* with *I agree to pay this amount under my account terms*. The store's copy adds *Approved offline by* and the manager's name

when a second manager approved the sale. Keep the signed store copy: the charge is not on the account until the register is back online.

When the register is back online, Roadside checks the sale against the account as it stands then. Most are booked as an ordinary charge. Some are booked and listed for a check, and a sale on an account that was closed in the meantime is held with no charge on the account: A sale on account that Offline problems lists, in Chapter 7 (page 54). The cashier's steps are in the Crossroads POS manual, Put a sale on account while offline.

A sale on account that Offline problems lists

WHERE TO FIND IT **Sales** › **Offline problems**

Store owner, Manager, Staff, Read only (to read); Store owner, Manager, Staff (to mark an order checked)

Included on every plan except Static Website and Online Store.

Roadside checks a sale put on a charge account offline against the account as it stands when the sale arrives. The row's **Why** begins with one of these codes, followed by Roadside's sentence.

WHY BEGINS	OUTCOME	WHAT IT MEANS
`account_unavailable`	Held, not booked	The account was closed in the meantime, the customer has no charge account, or the buyer is not on the account. Nothing was charged.
`account_on_hold`	Booked, needs review	The account was put on hold after the register last saw it, and was still on hold when the sale reached Roadside.
`account_over_limit`	Booked, needs review	The charge took the account over its limit. The sentence gives what was owed and what was available before it. A sale a second manager approved at the register is listed this way too when it is still over the account's credit as it reaches Roadside. One approved only for the $500.00 or the $1,000.00 amount, with credit available, is booked as an ordinary charge.
`account_over_offline_cap`	Booked, needs review	The sale was past $500.00, or took the account past $1,000.00 offline, without a second manager's approval that Roadside accepts.
`account_approval_invalid` `account_not_authorized`	Booked, needs review	The person who approved the sale, or the cashier who rang it, was not allowed to.

WHY BEGINS	OUTCOME	WHAT IT MEANS
`account_buyer_changed`	Booked, needs review	The buyer may not buy on the account any more, or the account needs a PO number and the charge has none.
`over_limit`	Booked, needs review	The sale, on account or not, was over **Most one offline sale can total**.

Several of the booked sentences end *The charge is on the account; check it*. In every booked case the customer owes the amount, and it is on their statement and on Aging. Settle the cause with the customer or the cashier, for example by raising the limit, asking for a payment or releasing the hold, then mark the order checked (Check offline sales that need a look, in Chapter 6 (page 46)).

A held sale on account needs you first. The customer left with the goods and a receipt that says the sale was charged, and the account shows no charge. The stock count still includes the goods. Roadside's sentence gives the cause and what is left to do, as in *<customer>'s account is closed, so it takes no new charges. Collect the sale another way.* Keep the store's copy of the receipt and agree with the customer how they will pay. Write to Dirt Road with the receipt number before you record the sale any other way, so that it is counted once.

8 Handle a check the bank sent back

When the bank returns a customer's check, mark it on the order it paid for. Roadside then shows what the customer owes, with the store's fee, until it is paid back or written off.

IN THIS CHAPTER

- Whether the registers take checks, and the store's returned-check fee
- Marking a check returned on the order it paid for
- Recording what the customer pays back
- Moving what is owed to the customer's charge account
- Waiving the fee, or writing the check off

Set the store's rules for checks

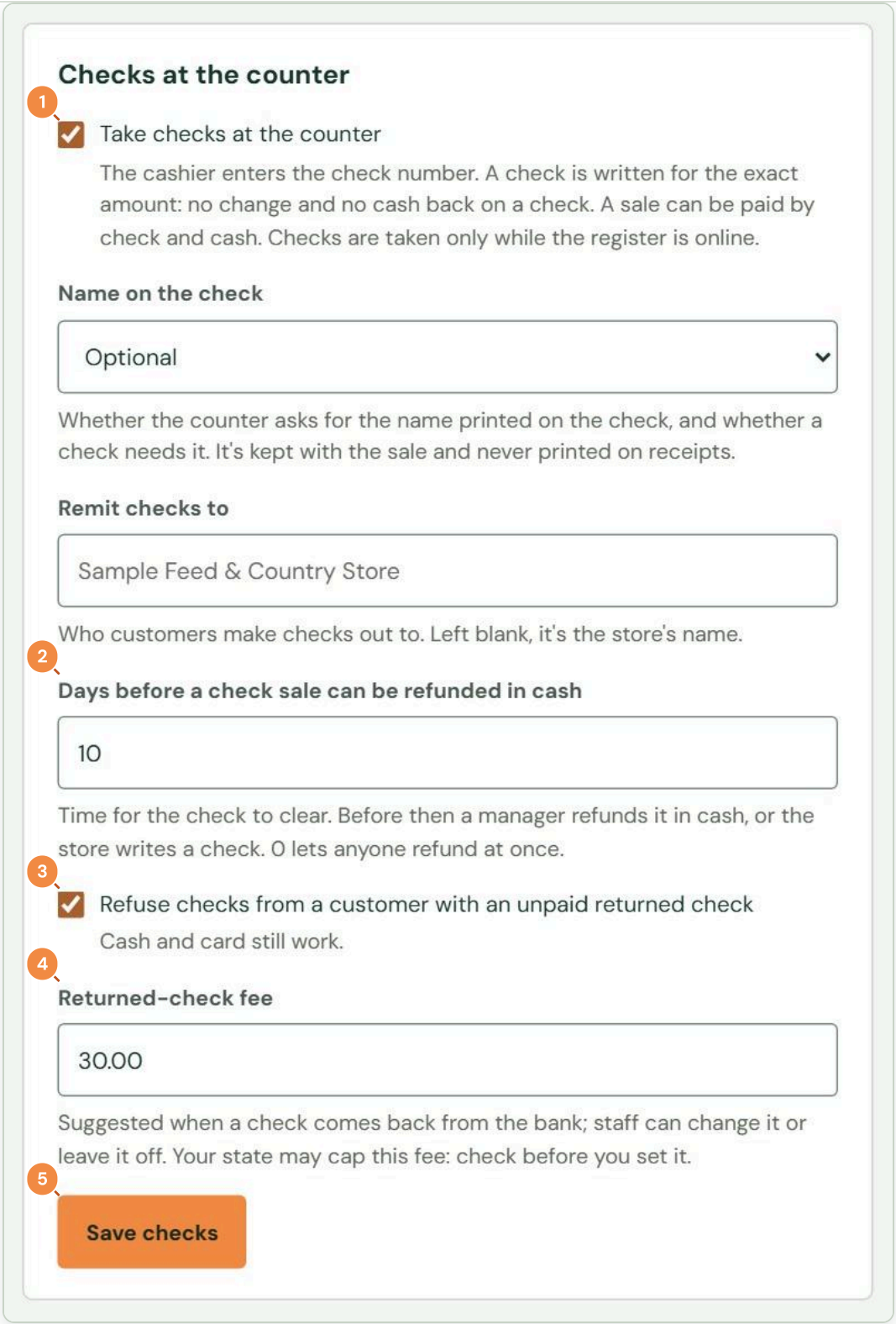
WHERE TO FIND IT **Store settings** › **Payments → Checks at the counter** Store owner, Manager

Included on every plan except Static Website and Online Store.

The **Checks at the counter** card on the Payments screen decides whether the registers take checks. While they do, it also holds the rules for checks: who checks are made out to, how long a check sale waits before a cash refund, and the fee suggested when a check comes back. The rest of the Payments screen is in Choose how the store takes payment, in “Resolve payments and give money back” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/payments-refunds).

WORDS TO KNOW

Returned check
A check the bank sent back unpaid. Store owners also call it a bounced check or an NSF check.



1 Take checks at the counter turns checks on at the registers.

2 Days before a check sale can be refunded in cash: time for a check to clear.

3. Refuse checks from a customer who still owes on a returned check.
4. Returned-check fee: suggested when a check comes back.
5. Save checks keeps the card's settings.

Checks at the counter, with checks on and a fee set.

1. **Go to Store settings, then Payments, and tick Take checks at the counter.** Its note reads *The cashier enters the check number. A check is written for the exact amount: no change and no cash back on a check. A sale can be paid by check and cash. Checks are taken only while the register is online.*
2. **Press Save checks.** The message reads *Saved. The counter takes checks.* The rest of the card shows once checks are on.
3. **Choose Name on the check:** *Don't ask*, *Optional* or *Required*. It decides whether the register asks for the name printed on the check. The name is kept with the sale and never printed on receipts.
4. **Type Remit checks to if checks are made out to another name.** Left blank, it is the store's name.
5. **Set Days before a check sale can be refunded in cash,** from 0 to 60. Its note reads *Time for the check to clear. Before then a manager refunds it in cash, or the store writes a check. 0 lets anyone refund at once.* A Manager or the Store owner still gives the refund: 0 only removes the wait.
6. **Tick or untick Refuse checks from a customer with an unpaid returned check.** Ticked, the register refuses that customer's checks. *Cash and card still work.*
7. **Type a Returned-check fee, or leave it empty for none.** This is money your customers are charged when their check comes back. The note says *Suggested when a check comes back from the bank; staff can change it or leave it off. Your state may cap this fee: check before you set it.* Roadside takes up to $100.00 and does not know your state's limit.
8. **Press Save checks.**

Taking a check at the register is in the Crossroads POS manual, Take a check, with what the cashier sees when a customer's checks are refused.

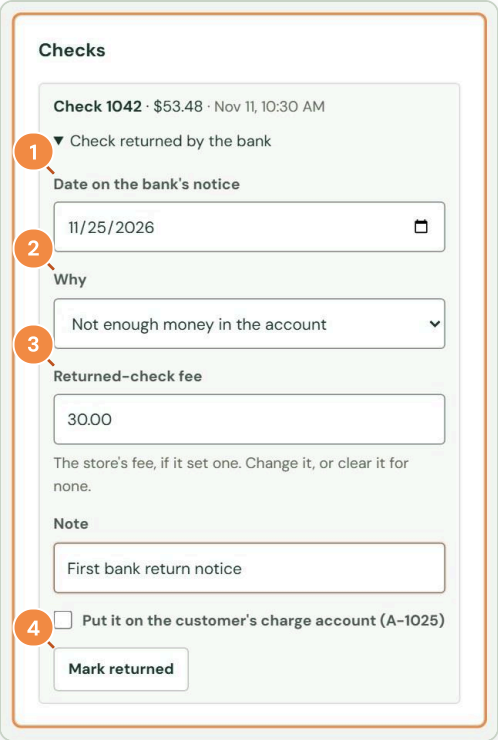
Unticking **Take checks at the counter** and saving gives *Saved. The counter doesn't take checks.* The registers stop taking checks and no further check can be marked returned. Returned checks the store already has stay listed, and you can still record payments on them and settle them.

Mark a check the bank sent back

WHERE TO FIND IT **Sales** › **Orders → open the order → Checks** Store owner, Manager

Included on every plan except Static Website and Online Store.

When the bank's notice comes, mark the check returned on the order it paid for. The order then shows what the customer owes, and the check joins the **Returned checks** list. Store owners and Managers mark a check returned. Staff cannot.



1. Date on the bank's notice: today to begin with.
2. Why: the reason the bank gives.
3. Returned-check fee: the store's fee, which you can change or clear.
4. Mark returned records the bank's return.

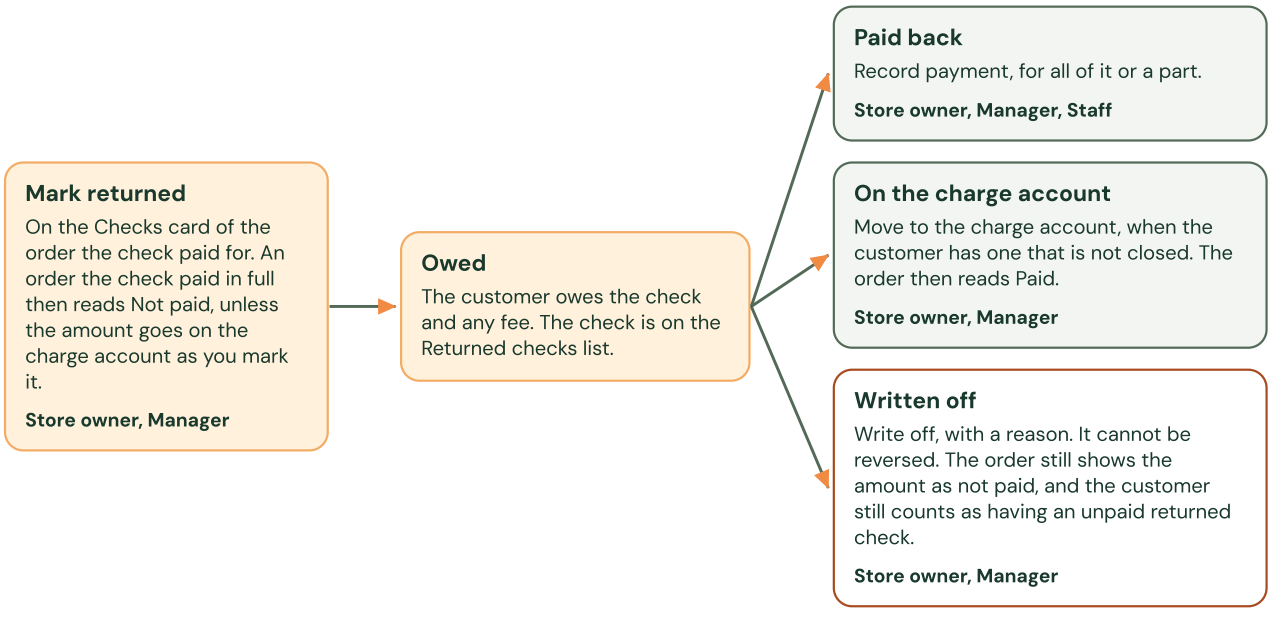
Check returned by the bank, filled in on a counter sale paid by check.

1. **Find the order the check paid for.** Search **Orders** by the customer's name or phone. On Day summary, the **Checks to deposit** list for the day the check was taken gives each check number with its sale (Take the checks and cash to the bank, in Chapter 4 (page 33)).
2. **Open the order and find the Checks card.** It lists each check the order was paid with: *Check <number>*, the amount and when.
3. **Press Check returned by the bank under the right check.**
4. **Set Date on the bank's notice.** It starts at today.
5. **Choose Why:** *Not enough money in the account*, *Account closed*, *Payment stopped* or *Other*.

6 **Check the Returned-check fee.** It starts at the store's fee. Change it for this check, or clear it for none. Add a **Note** of up to 500 characters. If the reason you chose is *Other*, the note is required: say why there.

7 **Mark it returned only for the right check.** The check's amount comes off what the order has been paid: an order the check paid in full reads *Not paid*, and one with other money on it still reads *Paid*, for the smaller amount. When what is owed goes on the customer's charge account, the order reads *Paid*. The customer owes the check and any fee. While it is owed, a refund on this order is refused with *A check on this order came back from the bank and isn't settled. Settle the returned check first, then refund.*, and, if the store refuses checks from a customer with an unpaid returned check, the register refuses this customer's checks. No button undoes a mark. If you mark one in error, send the order number to Dirt Road (Send a question about Roadside, in "Ask Dirt Road for help" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/support-tickets)) before you write anything off. Press **Mark returned**, and confirm *Mark check <number> returned? Its <amount> comes off what's been paid.*

The message reads *Check <number> marked returned. The order shows what's owed: <amount>.* It worked when the check carries the badge *Returned · Owed*, the order has a *Check* badge in the order list, and **Returned checks** appears under Sales with a count. Find a check the bank sent back, in "Resolve payments and give money back" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/payments-refunds) explains the list.



What can happen to a returned check after the bank's notice.

Included on every plan except Static Website and Online Store. When the customer has a charge account that is not closed, the form has a box, Put it on the customer's charge account, that moves what is owed there as you mark it (Put a returned check on the customer's charge account, in Chapter 8 (page 63)). A check that paid a payment on account always goes back on that charge account, whatever the account's status. While Charge accounts is off for the store, such a check cannot be marked returned.

When the mark is refused

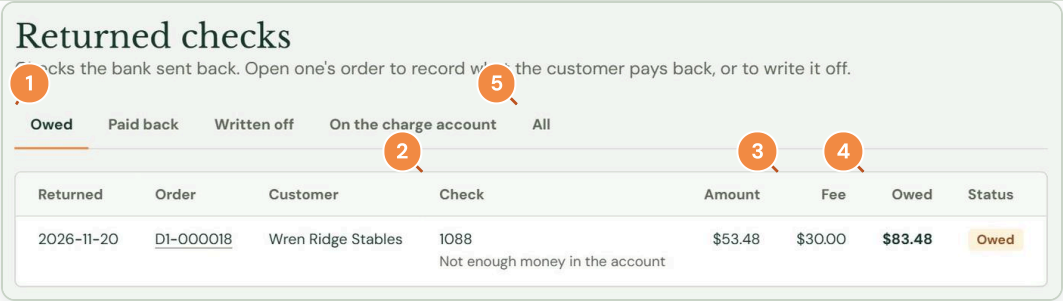
- *Choose why the bank sent the check back*. or *Enter the date on the bank's notice*. Fill in the field it names.
- *A returned-check fee set here is at most $100.00*. Type a smaller fee.
- *Check <number> is already marked returned*. Someone marked it already. The order's **Checks** card shows where it stands.
- *The store doesn't take checks now (Store settings, Payments), so checks aren't marked returned here*. Turn checks on first (Set the store's rules for checks, in Chapter 8 (page 56)).

Record what the customer pays back

WHERE TO FIND IT **Sales** › **Returned checks → open the order → Checks** Store owner, Manager, Staff

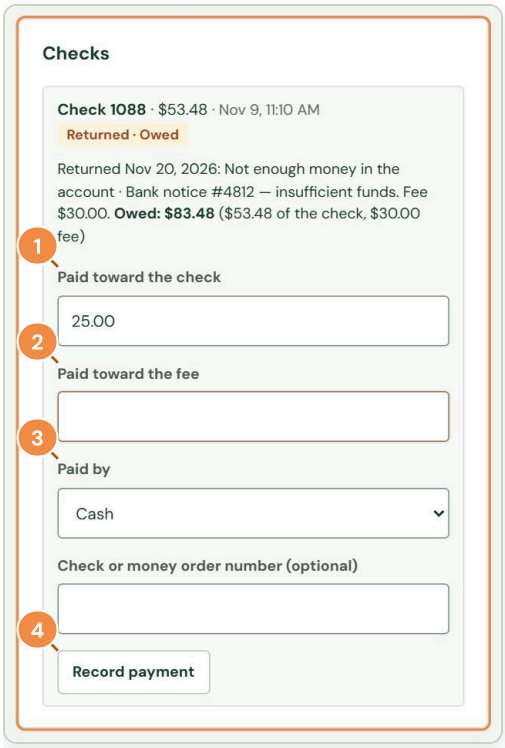
Included on every plan except Static Website and Online Store.

When the customer makes good on a returned check, record what they paid on the order's **Checks** card. They can pay all of it or part, toward the check, the fee or both. Staff can record this payment, as can Managers and the Store owner. It records money taken in. It is not a refund.



1. Owed: the checks nobody has made good yet.
2. Check: the check number and the bank's reason.
3. Fee: the store's returned-check fee on that check.
4. Owed: what the customer still owes on it.
5. All: every returned check, moved ones included.

The Returned checks list on its Owed tab.



1. Paid toward the check: starts at what is owed on it.
2. Paid toward the fee, when a fee is owed.
3. Paid by: how the customer paid.
4. Record payment saves it.

Part of a returned check paid back in cash, not yet recorded.

1. **Take the money from the customer first.**
2. **Open Returned checks and press the order number.** The order opens at its **Checks** card, which reads *Owed* with the amount.
3. **Type what was paid in Paid toward the check, and in Paid toward the fee when a fee is owed.** Each starts at what is still owed on it. Type less for a part payment.

4. **Choose Paid by:** *Cash*, *Card at the counter* or *Cashier's check or money order*. *Card at the counter* is for a card already run on the store's card terminal.
5. **Type the number in Check or money order number (optional)** for a cashier's check or money order.
6. **Record what is in hand, once.** Recording charges no card and has no undo. Press **Record payment**.

The message reads *Payment recorded: <amount>. The returned check is paid back.* or *Payment recorded: <amount>. Still owed: <amount>.* It worked when the check moves to **Paid back**, or its **Owed** figure drops, and the payment is listed under the check with how it was paid and who recorded it. A wrong entry cannot be taken back in Roadside: send the order number to Dirt Road (Send a question about Roadside, in "Ask Dirt Road for help" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/support-tickets)).

Cash paid back this way is not in Day summary's **Cash expected**, so a drawer it goes into counts over by it. Day summary lists it as **Cash collected on returned checks** (Read the register's sales, cash and checks for a day, in Chapter 3 (page 21)). A fee paid is not a sale, and it is not taxed.

- *Only <amount> of the check and <amount> of the fee are still owed.* Type no more than what is owed.
- *That looks like a card number. Roadside never keeps card numbers: enter a check or money order number, or leave it blank.* Clear the number box.

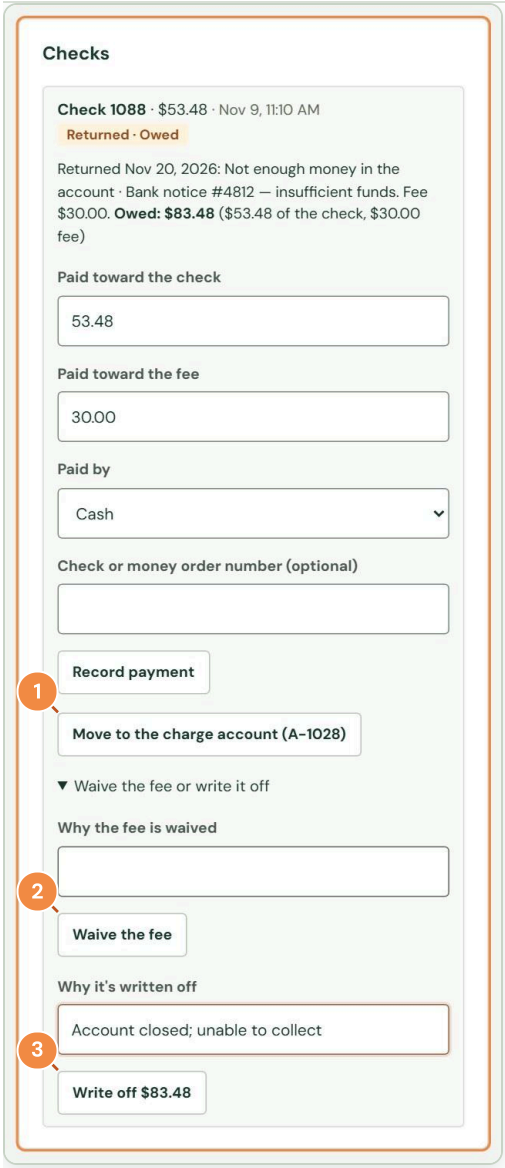
Put a returned check on the customer's charge account

WHERE TO FIND IT **Sales** ›

Returned checks → open the order → Checks → Move to the charge account Store owner, Manager

Included on every plan except Static Website and Online Store.

For a customer with a charge account that is not closed, what is owed on a returned check can move to the account and be collected with the rest of their balance. The button shows on the **Checks** card of a customer whose charge account is active or on hold. A closed account takes nothing further, so the check stays on the order. A check that paid a payment on account is not moved here: it goes back on that account as you mark it, whatever the account's status. You can also do it while marking the check, with the box **Put it on the customer's charge account** (Mark a check the bank sent back, in Chapter 8 (page 59)).



1. Move to the charge account puts what is owed on the account.
2. Waive the fee drops the fee, with a reason.
3. Write off stops expecting payment, with a reason.

The ways to settle an owed check, for a customer with a charge account.

1. **Open Returned checks and press the order number.**

2. **Move it only when the account should carry it.** A move cannot be undone in Roadside. What is owed leaves the order and joins the account's balance, owed from the date on the bank's notice, as a returned-check invoice and, when a fee is owed, a fee invoice. From then on it can draw a finance charge (Turn on a finance charge, in Chapter 21 (page 164)) or a late fee (Turn on a late fee, in Chapter 21 (page 167)) if the store uses them. While those invoices are unpaid, a refund that takes money out of this order waits, and, if the store refuses checks from a customer with an unpaid returned check, the register refuses this customer's checks. Press **Move to the charge account**, which names the account's number, and confirm *Move <amount> to charge account <number>? It's owed there from the notice's date.*

The message reads *Moved to the charge account: <amount>*. It worked when the check's status reads *On the charge account*, the **Checks** card says *Moved to the customer's charge account*, and the account shows the invoice, or both invoices when a fee is owed. To find a moved check while another check is still owed, press **All** on the **Returned checks** list. Once no check is owed, that menu line is gone: open **Orders**, press **All**, then open the order by its number or the customer's name and read its **Checks** card. Payments toward it are taken on the account (Take a payment on account, in Chapter 18 (page 137)). After a move the order's **Checks** card no longer waives the fee or writes the check off: take the fee off with a credit applied to its invoice (Give a credit or add a charge, in Chapter 18 (page 143)), or write the invoices off on the account (Write off what will not be paid, in Chapter 18 (page 145)).

Waive the fee or write the check off

WHERE TO FIND IT **Sales** › **Returned checks → open the order → Checks → Waive the fee or write it off**

Store owner, Manager

Included on every plan except Static Website and Online Store.

Drop the store's fee, or stop chasing a check that will not be paid. Both keep your reason with the check. A write-off is a record for the store's books. It tells the customer nothing.

WORDS TO KNOW

Write off
Stop expecting a payment, and record why.

Waive
Drop a fee, so the customer no longer owes it.

1. **Open Returned checks and press the order number.**
2. **Press Waive the fee or write it off under the check.** The picture in Put a returned check on the customer's charge account, in Chapter 8 (page 63) shows the choices.
3. **To drop the fee, type the reason in Why the fee is waived.** The reason takes up to 500 characters. A waived fee cannot be brought back in Roadside. Press **Waive the fee**. The message reads *Fee waived.*, and adds *The returned check is settled.* when nothing else is owed. This part shows while a fee is owed.
4. **To write off what is owed, type the reason in Why it's written off.**

5 **Write it off only when you have stopped expecting payment.** A write-off cannot be reversed in Roadside, and the order goes on showing the amount as not paid. The customer still counts as having an unpaid returned check, so the register refuses their checks while the store refuses checks from such customers. Press **Write off** with the amount, and confirm *Write off <amount>? The order keeps showing it as not paid*.

The message reads *Written off: <amount>*. It worked when the check is under **Written off** on the Returned checks list. Once no check is still owed, **Returned checks** leaves the Sales menu, and the order's **Checks** card, found on the **All** tab of **Orders**, is where to look.

- *Add a note saying why*. Both need a reason.
- *This returned check is already settled*. It was paid back, moved or written off already. The order's **Checks** card shows which.

9 Set up the screen that faces the customer

Customers can follow the sale on the screen across the counter. Choose the pictures they see between sales and the words they see when they pay.

IN THIS CHAPTER

- The welcome line and the receipt customers see on screen
- Pictures, words and dates for a slide
- Slide order and timing
- A different show for one register
- The picture between shows
- Changing or removing a slide or show

Choose what the customer display shows

WHERE TO FIND IT **Store settings** ›

Customer Displays → Slide shows and registers → Your store's display Store owner, Manager

Included on every plan except Static Website and Online Store.

WORDS TO KNOW

Customer display

The second screen at a register, turned toward the customer.

During a sale the customer sees each item and the total, with slides beside the receipt. Between customers the slides fill the screen. A Store owner or Manager chooses the content in Roadside. Staff cannot open **Customer Displays**.

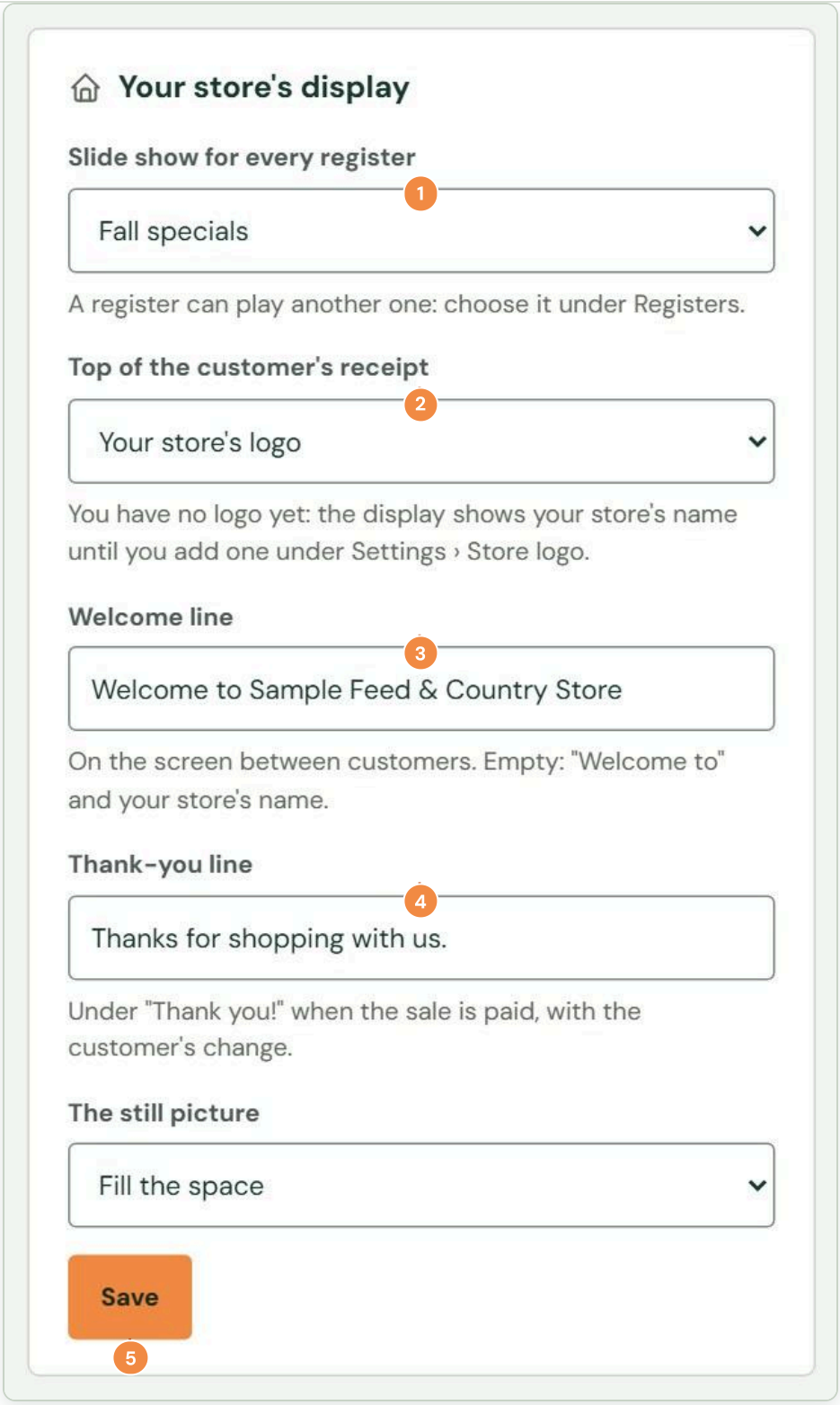
1. **Find Your store's display.** Under **Slide show for every register**, choose a show or **None: show the still picture**. If no shows are listed, start with Add a slide, in Chapter 9 (page 70), then Put slides in a slide show, in Chapter 9 (page 71).

2. **Choose what heads the receipt on screen.** Under **Top of the customer's receipt**, choose **Your store's logo** or **Your store's name**. If the store has no logo, the display uses its name. For the printed receipt, see Check an email or paper receipt before using it, in “Put the store's name and words on receipts” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/receipts).

3. **Write the two lines customers see.** The **Welcome line** appears between customers. Leave it empty for “Welcome to” followed by your store's name. The **Thank-you line** appears when the customer has paid. Each line takes up to 80 characters.

4. **Choose how the still picture fits.** Under **The still picture**, choose **Fill the space** to fill the screen or **Show the whole picture** to keep the edges.

5. **Read the words as a customer will see them.** Online registers pick up these changes within 15 minutes. Press **Save** and look for *Saved. Registers show the change within 15 minutes.* If Roadside flags a line, shorten it to 80 characters and save again.



1. Choose the show for registers that follow the store's choice.
2. Choose the logo or store name for the receipt on screen.
3. Type the greeting for the wait between sales.
4. Type the line customers see after paying.

5. Save the choices for the store.

The store's show and the words customers see at the counter.

An offline register keeps the last slides it received. The physical screen is chosen at the register, as the Crossroads POS manual shows in Set up the customer display. What the customer sees at each stage of a sale is in The customer display and What the display plays.

Add a slide

WHERE TO FIND IT **Store settings** › **Customer Displays → Slides → Add a slide** Store owner, Manager

Included on every plan except Static Website and Online Store.

WORDS TO KNOW

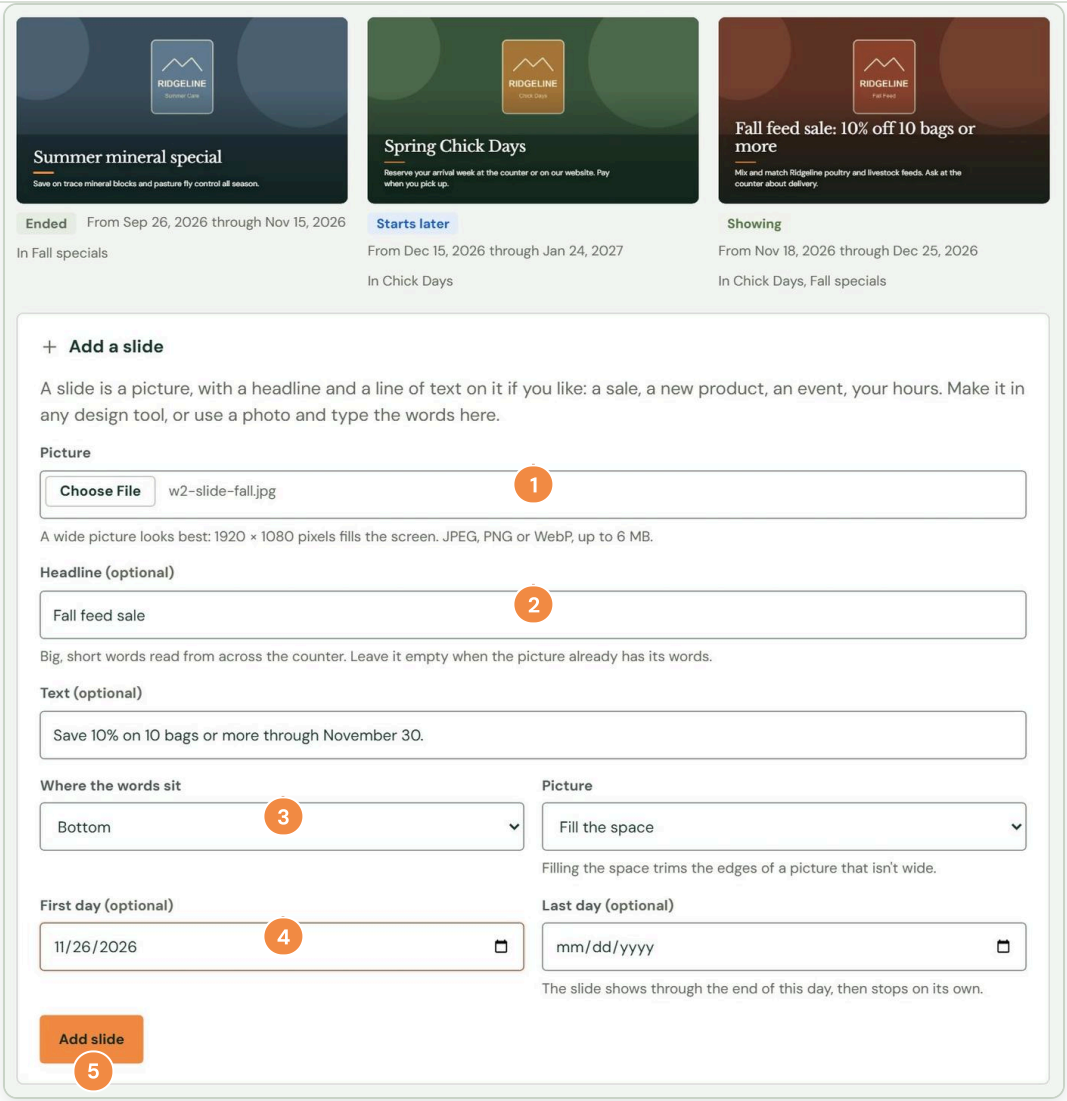
Slide

One picture for the customer display, with optional words on it.

1. **On Slides, find Add a slide.** Under **Picture**, choose a JPEG, PNG or WebP file up to 6 MB. A picture 1920 × 1080 pixels fills the screen.
2. **Add the words you want on the picture.** For a fall feed sale, put “Fall feed sale” in **Headline (optional)** and the sale dates in **Text (optional)**. The headline takes 80 characters and the text takes 200. Leave them empty if the picture already has the words.
3. **Choose where the words and picture fit. Where the words sit** offers **Bottom**, **Middle** and **Top**. Under **Picture**, **Fill the space** can trim the edges. **Show the whole picture** keeps them.
4. **Set the days the slide can play.** Use **First day (optional)** and **Last day (optional)** for a dated offer. The slide can play through the end of the last day. Press **Add slide**.

Look for *Slide added. Put it in a slide show to show it at the register.* Check the date badge on the slide. It reads *Showing*, *Starts later* or *Ended*. If it reads *Not in a slide show yet*, put it in a show and choose that show for a register (Put slides in a slide show, in Chapter 9 (page 71)).

If Roadside says *Choose a picture for the slide.*, select a file before adding it. For *The last day is before the first day.*, correct the dates. At 60 slides the form is replaced by *You have 60 slides, the most a store keeps. Delete one you no longer use to add another.* Free a place by removing a slide the store has finished using (Change or delete a slide or a slide show, in Chapter 9 (page 78)).



1. Choose the picture file.
2. Type a headline if the picture needs one.
3. Place the words where customers can read them.
4. Set the first day the slide can play.
5. Add the slide to the store's collection.

A feed sale slide with a headline and a first day.

Put slides in a slide show

WHERE TO FIND IT **Store settings** › **Customer Displays → Slide shows and registers → New slide show**

Store owner, Manager

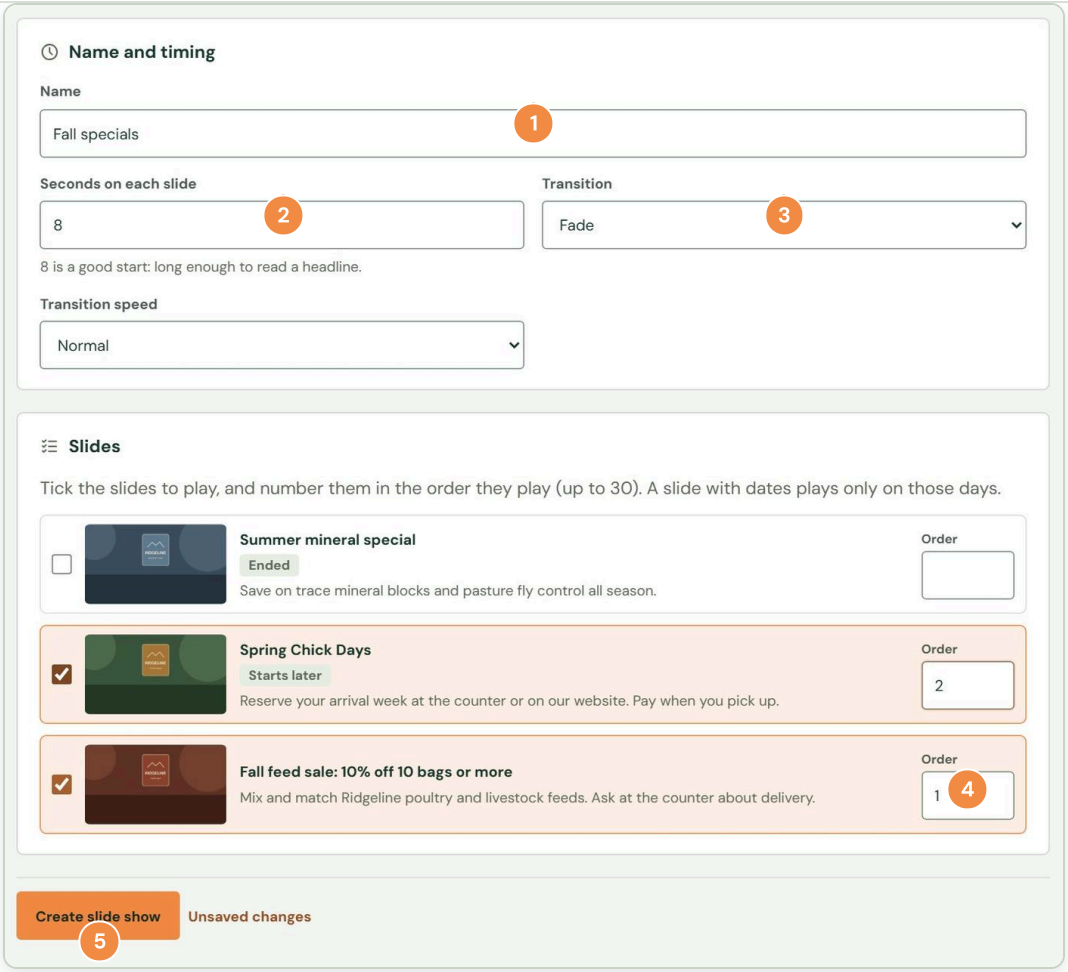
Included on every plan except Static Website and Online Store.

WORDS TO KNOW

Slide show

A named list of slides that play in order.

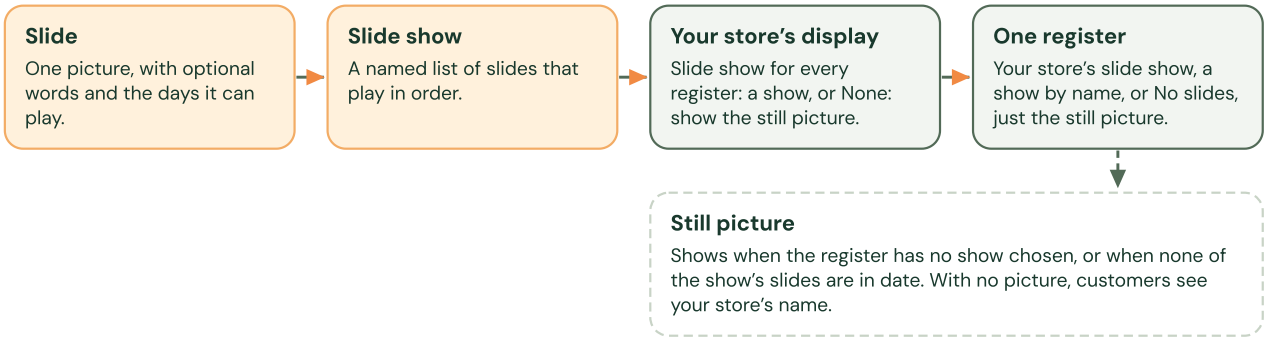
1. **Open Slide shows and registers and press New slide show.** The button appears when the store has at least one slide and fewer than 20 shows. If there are no slides, add one first (Add a slide, in Chapter 9 (page 70)).
2. **Fill in Name and timing.** Give the show its own **Name**, up to 60 characters, such as “Fall specials”. **Seconds on each slide** starts at 8. Choose from 3 to 120 seconds.
3. **Choose how one slide gives way to the next. Transition** offers **Fade**, **Slide across**, **Zoom in** and **Cut (no transition)**. For **Transition speed**, choose **Quick**, **Normal** or **Slow**.
4. **Tick up to 30 slides.** Number the ticked slides under **Order**, starting with 1. A dated slide plays only on its days. Press **Create slide show**.



1. Give the show a name you can find in the register list.
2. Set how long each slide stays up.
3. Choose how the picture changes.
4. Number the ticked slides in playing order.
5. Save the named show.

Two slides chosen and numbered for Fall specials.

Roadside says *Slide show saved. Choose it for your store or a register below.* If the name is taken, give the show its own name. Choose the saved show under **Your store's display** (Choose what the customer display shows, in Chapter 9 (page 67)) or for one register (Play a different slide show on one register, in Chapter 9 (page 74)).



How the register chooses what to play.

Play a different slide show on one register

WHERE TO FIND IT **Store settings** › **Customer Displays → Slide shows and registers → Registers**

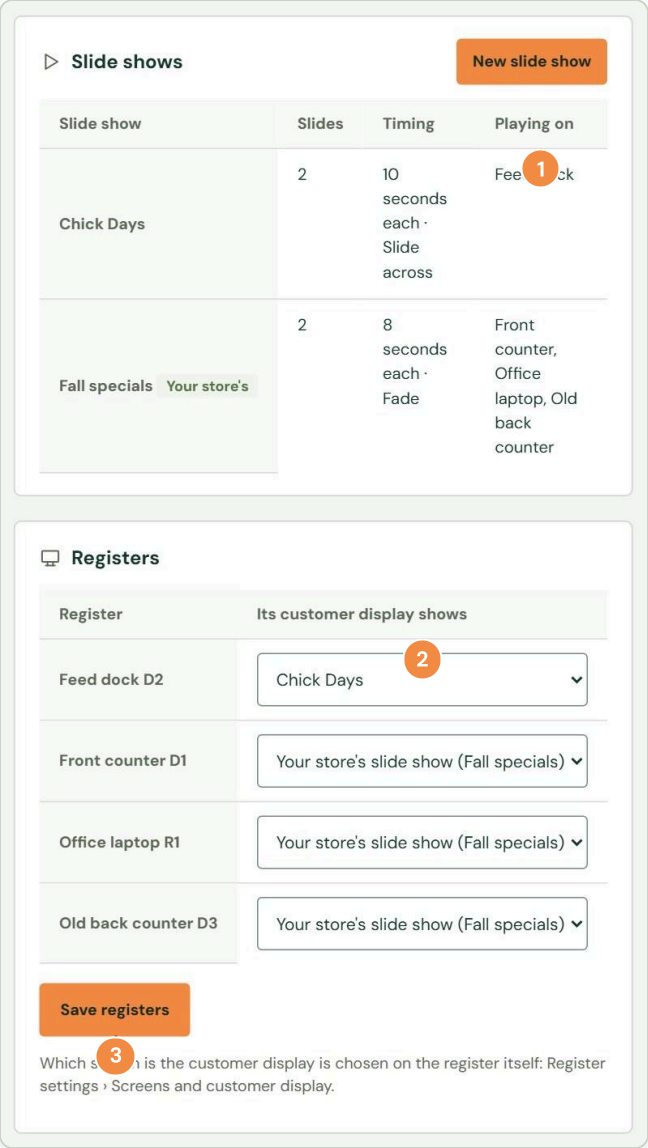
Store owner, Manager

Included on every plan except Static Website and Online Store.

To put Chick Days on the feed dock screen while the front counter plays the store's usual show, change the feed dock's row.

1. **On Slide shows and registers, find the register by name under Registers.** A counter computer appears here once it is connected and signed in. For a missing register, see Get a counter computer connected, in Chapter 1 (page 6).
2. **Choose what plays under Its customer display shows.** Choose a show by name, choose **Your store's slide show** to follow the store's choice, or choose **No slides, just the still picture**.
3. **Check the register name before saving.** Customers at that register will see your choice when it next checks in. Press **Save registers**. Roadside says *Registers saved. Each one shows its slides within 15 minutes.*

For a named show, check the **Playing on** column beside its name. If the wrong physical screen lights up or the screen is blank, use the Crossroads POS manual's The customer display is blank or on the wrong screen.



1. Check which registers are assigned to each show.
2. Choose what plays at the feed dock.
3. Save the choices in the register rows.

The feed dock register has its own Chick Days show.

Set the picture that shows when no slides play

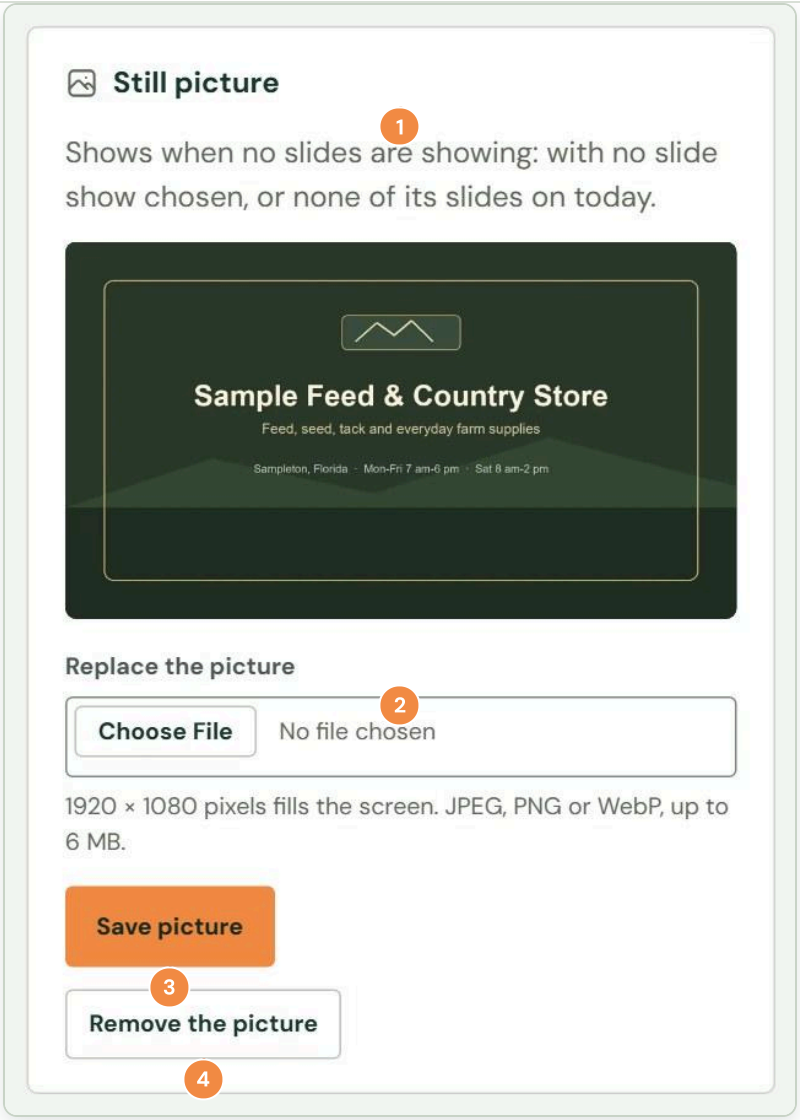
WHERE TO FIND IT **Store settings** › **Customer Displays → Slide shows and registers → Still picture**

Store owner, Manager

> Included on every plan except Static Website and Online Store.

The register uses the still picture when it has no show chosen or when none of the show's slides are in date. With no picture, customers see your store's name on Dirt Road green.

1. **Find Still picture on Slide shows and registers.** Choose **Upload a picture**, or **Replace the picture** if one is already there. Use a JPEG, PNG or WebP file up to 6 MB. A picture 1920 × 1080 pixels fills the screen.
2. **Check the file before saving.** Customers see it whenever no slides play. Press **Save picture**. Look for the picture on the card and *Picture saved. Registers show it when no slides are showing*.
3. **To go back to the store name, press Remove the picture.** Check that the card shows the store name on green. Roadside says *Picture removed. With no slides showing, the display shows your store's name*.



1. Check the picture the register falls back to.
2. Choose a different file.
3. Save the chosen picture for customers to see.
4. Return to the store name on green.

The still picture customers see when no slides play.

If the picture is saved but slides keep playing, check the show chosen for that register. To show the picture all day on one screen, use Play a different slide show on one register, in Chapter 9 (page 74).

Change or delete a slide or a slide show

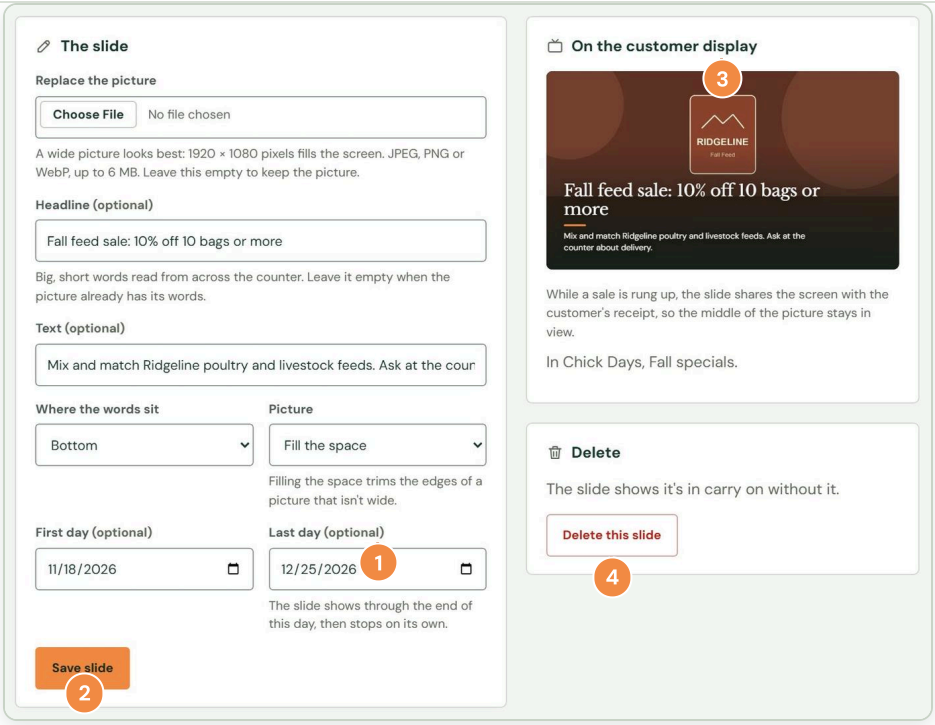
WHERE TO FIND IT **Store settings** ›

Customer Displays → Slides → open a slide; or Slide shows and registers → open a slide show

Store owner, Manager

Included on every plan except Static Website and Online Store.

1. **To change a slide, open its picture on Slides.** On **The slide**, edit the words or dates. Leave **Replace the picture** empty to keep the picture. To end an offer and keep its slide for another season, set **Last day (optional)**.
2. **Check the shows listed under On the customer display.** Your change reaches customers in every show using that slide. Press **Save slide**. Look for *Slide saved. Registers show the change within 15 minutes*. Check the saved preview. During a sale the receipt shares the screen, so keep important details near the middle of the picture.
3. **To change a show, open its name on Slide shows and registers.** Adjust the timing, tick the slides to include and number them in order. Check which registers play the show before you press **Save slide show**. Look for *Slide show saved. Registers show the change within 15 minutes*.



1. Set the final day the slide can play.
2. Save the changed picture, words or dates.
3. Check the preview and which shows use the slide.
4. Use this only when every show can lose the slide.

The dates, preview and removal button for a fall feed sale slide.

> ⚠ **CAREFUL**
>
> Deleting a slide takes it out of every show that uses it. Deleting a show sends registers assigned to it back to the store's choice. If you delete the store's own show, registers following it use the still picture until you choose another show. Registers assigned a different show keep it. To bring back a deleted slide or show, you have to make it again.

To remove a slide, open it and press **Delete this slide**. Look for *Slide deleted. The slide shows it was in carry on without it.* To remove a show, open it and press **Delete this slide show**. Check **Playing on** and each affected register's choice. An online register checks every 15 minutes. An offline register keeps the slides it last received.

10 Let cashiers ring up an item that is not in the catalog

If a bag sells before its product is in the catalog, the cashier can record it by hand. Set the approval amount, then match the line to its product so you can account for the stock.

IN THIS CHAPTER

- Allowing items entered by hand
- Setting the amount that needs a manager
- Finding the cashier and approver on a sale
- Linking the item to a product and checking its stock count

Decide whether cashiers may type in an item

WHERE TO FIND IT **Store settings** › **Registers → Manual items** Store owner

Included on every plan except Static Website and Online Store.

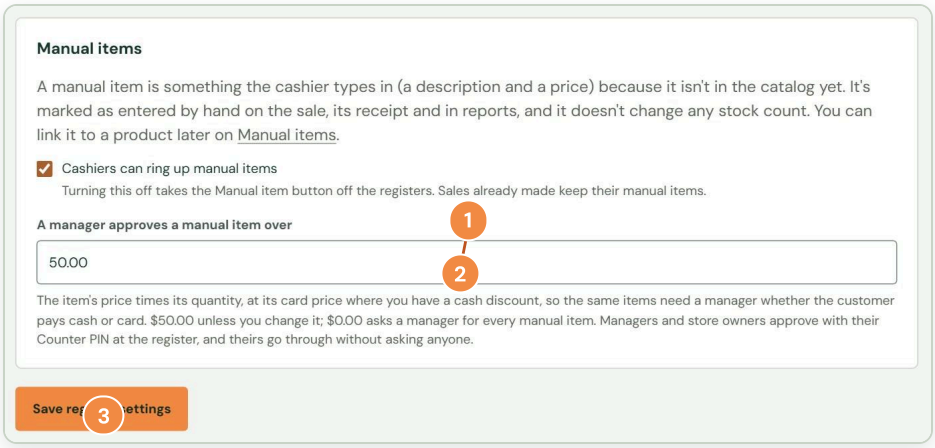
WORDS TO KNOW

Manual item
A line a cashier types by hand because the product is not in Roadside yet.

The cashier supplies the description and price. The line is marked as entered by hand on the sale, the receipt and reports. Ringing it up leaves stock alone because the line has no catalog product. The Store owner sets this rule for every register.

1. **On Registers, find the Manual items card. Cashiers can ring up manual items** starts ticked. To take the **Manual item** button off the registers, untick the box. Earlier sales keep their manual items.
2. **Set A manager approves a manual item over.** Roadside checks the item's price times its quantity. The amount starts at $50.00. Enter $0.00 to ask for approval on every manual item a cashier enters, or an amount up to $100,000.00. Use digits and a decimal point in the box, such as `50.00`.

3. **Check the amount before you press Save register settings.** Above that line amount the register asks for a Manager's or Store owner's Counter PIN. Their own manual items go through without asking someone else. Each sets their own PIN as in Set your own Counter PIN, in Chapter 2 (page 15).



1. Tick the box to allow entries by hand.
2. Set the amount above which a cashier needs approval.
3. Save the rule for every register.

The store allows manual items and sets the approval amount for one line.

Look for *Register settings saved. Registers use them from their next sale.* If the amount is refused, enter a number within the range even when you turn manual items off. If a Manager sees **Registers** for license or feed document dates, the manual-item settings still require the Store owner.

Find the items cashiers typed in

WHERE TO FIND IT **Sales** › **Manual items** Store owner

Included on every plan except Static Website and Online Store.

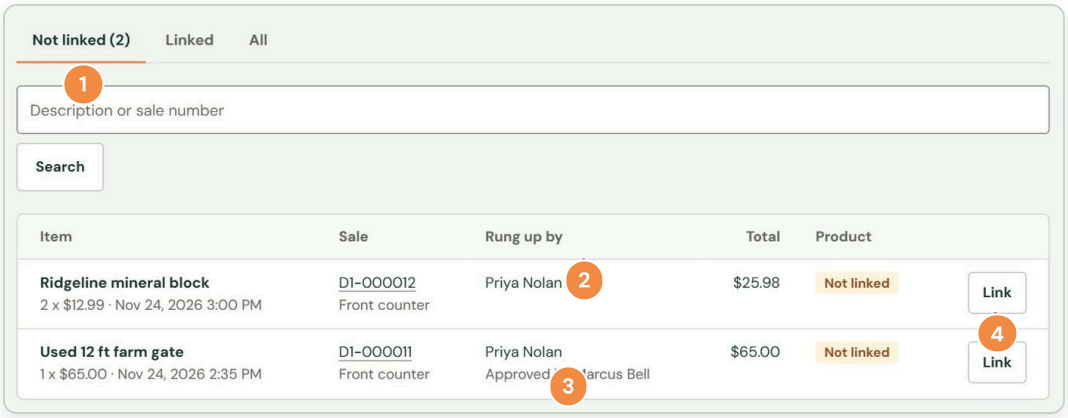
When a product has been set up after a sale, the Store owner can look up the line the cashier entered. Managers and Staff cannot open this list with their usual roles, even if they rang up or approved the item.

1. **Open Manual items under Sales. Not linked** shows how many lines still need a product. Choose **Linked** for finished links or **All** to look across both.

2. **Search for the line you want.** Type the wording the cashier used or the sale number in **Description or sale number**, then press **Search**. The list shows up to 200 lines. Narrow the search or change tabs if you cannot find yours.

3. **Match Item, Sale and Total before opening the line. Rung up by** names the cashier. If someone else approved the line, **Approved by** gives their name underneath. **Product** shows whether the line is linked.

4. **Press Link to review an unlinked item.** Press **Change** to review one already linked. Check the description and sale number on the page that opens.



1. Check how many manual items still need a product.
2. Look here for the cashier who entered the line.
3. Read the second name when someone else approved it.
4. Open the item to check it against a product.

Unlinked items with the cashier and approval recorded at the sale.

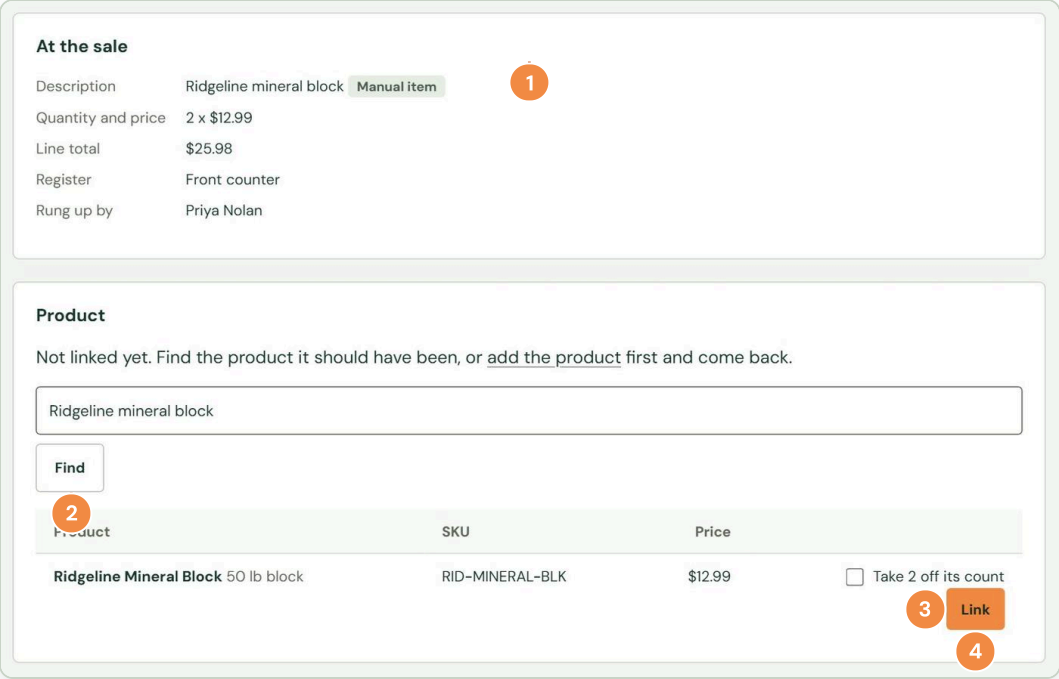
The **Not linked** count drops as you link items. If the tab reads *Nothing to link* while a search is filled in, clear the search and press **Search** before treating the list as finished. For the stock decision, see Link a manual item to its product, in Chapter 10 (page 82).

Link a manual item to its product

WHERE TO FIND IT **Sales** › **Manual items → open an item** Store owner

Included on every plan except Static Website and Online Store.

Link the cashier's description to the product and size that went out the door. The price charged, sales tax and receipt keep the original sale details. You decide separately whether the sold quantity should come off the stock count.



1. Check what the cashier sold and how many.
2. Search the catalog for the product and size.
3. Tick this only if the two sold blocks still need to come off stock.
4. Attach the line to the size on this row.

A manual line for two mineral blocks alongside a matching catalog size.

1. **Open Manual items and press Link on the line.** Under **At the sale**, match the description, quantity, price and register to the sale. Under **Product**, type a name, SKU (the store's code for that size) or barcode in **Product name, SKU or barcode** and press **Find**.

2. **Match the product and size in the results.** Compare the SKU and price. If nothing matches, try fewer words or search by barcode. If the product is missing, use **add the product**, then return to the manual item (Start a product without putting it on sale, in “Add, publish or put away a product” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/add-a-product)).

3. **Decide whether the count needs changing.** For a size with tracked stock, the tick box gives the quantity sold. For two mineral blocks it reads **Take 2 off its count**. Ticking it subtracts two from that size at the sale's location when you link. Leave it unticked if the count already allows for the sale.

4. **Press Link beside the right size.** Check the product on the **Product** card and the line that says how many came off its count or *Its count wasn't changed*. The item is on **Linked**. If you took stock off, check the movement in Record a delivery, shelf count or damaged bag, in “Count the shelf and record deliveries” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/stock).

To correct a link, open the item from **Linked** with **Change**. If linking lowered stock, removing the link puts that quantity back. Press **Unlink and put the stock back**. If linking left stock alone, the button reads **Unlink**. The card reads *Not linked yet*. and the item returns to **Not linked**. You can then find the right size and decide whether its count needs changing.

11 Decide who may give a discount at the register

Choose who can give the employee discount or mark down a torn bag. Roadside keeps the cashier's name with the sale and records who approved the discount when approval was needed.

IN THIS CHAPTER

- Which roles can give a named discount
- When a cashier needs a manager's approval
- What the cashier should check or record
- Finding the cashier, approver and sale in the report

Choose who may give a counter discount

WHERE TO FIND IT **Products** › **Discounts → New discount → Counter discount → At the register**

Store owner, Manager

Included on every plan except Static Website and Online Store.

WORDS TO KNOW

Counter discount

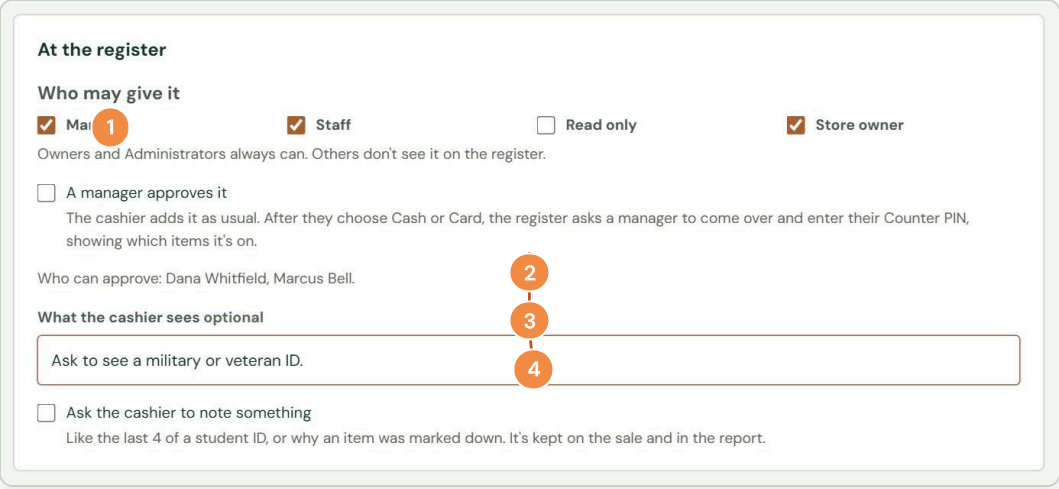
A discount a person gives by name at the register, with no code.

With Discounts set up for the store, a Manager or Store owner chooses who can give each discount. If **Discounts** is missing under **Products**, the Store owner can check setup in Turn on Discounts for the store, in “Run a sale or give out a coupon code” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/discounts).

1. **Open Discounts, press New discount and choose Counter discount.** Type a **Name** of up to 120 characters, such as “Military”. Cashiers pick it by this name and customers see it on the receipt.
2. **Set What it gives.** Choose **Percent off** or **Amount off** and type the figure, or choose **Cashier enters it** for a discount that varies. Under **Goes on**, choose **The whole sale**, **Chosen items** or **Either**. With **Either**, the cashier chooses each time.

3. **Under At the register, check Who may give it.** Staff, Manager and Store owner start ticked. Leave the roles that should see the discount ticked, Store owner included: a Store owner whose role is unticked cannot give the discount at the register. Ticking Staff lets them use this discount at the register. They still cannot open Discounts in Roadside. Read only can view discounts in Roadside.

4. **Check the amount, roles and approval before turning it on.** Once active and within its dates, this discount lets those cashiers reduce what a customer owes on the next eligible sale. For a PIN requirement, see Have a manager approve a counter discount, in Chapter 11 (page 87). Leave **Turn it on now** ticked to use it, or untick it to keep it paused. Press **Create discount**.



1. Tick the roles that can offer this discount.
2. Tick this if the cashier needs a manager each time.
3. Check which Managers and Store owners have a Counter PIN.
4. Type what the cashier should check before giving it.

The register rules for the Military discount.

Look for *Discount saved*. If paused, the message adds *It's paused until you turn it on*. On the **Counter discounts** tab, look for *Running*. If the discount is missing at the counter, check its dates and the cashier's role. See Check where a discount shows and which one a customer gets, in "Run a sale or give out a coupon code" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/discounts) for the other conditions that affect a sale.

At the register the cashier finds an active discount their role can give under **Choose a counter discount**, as shown in the Crossroads POS manual's Apply a discount.

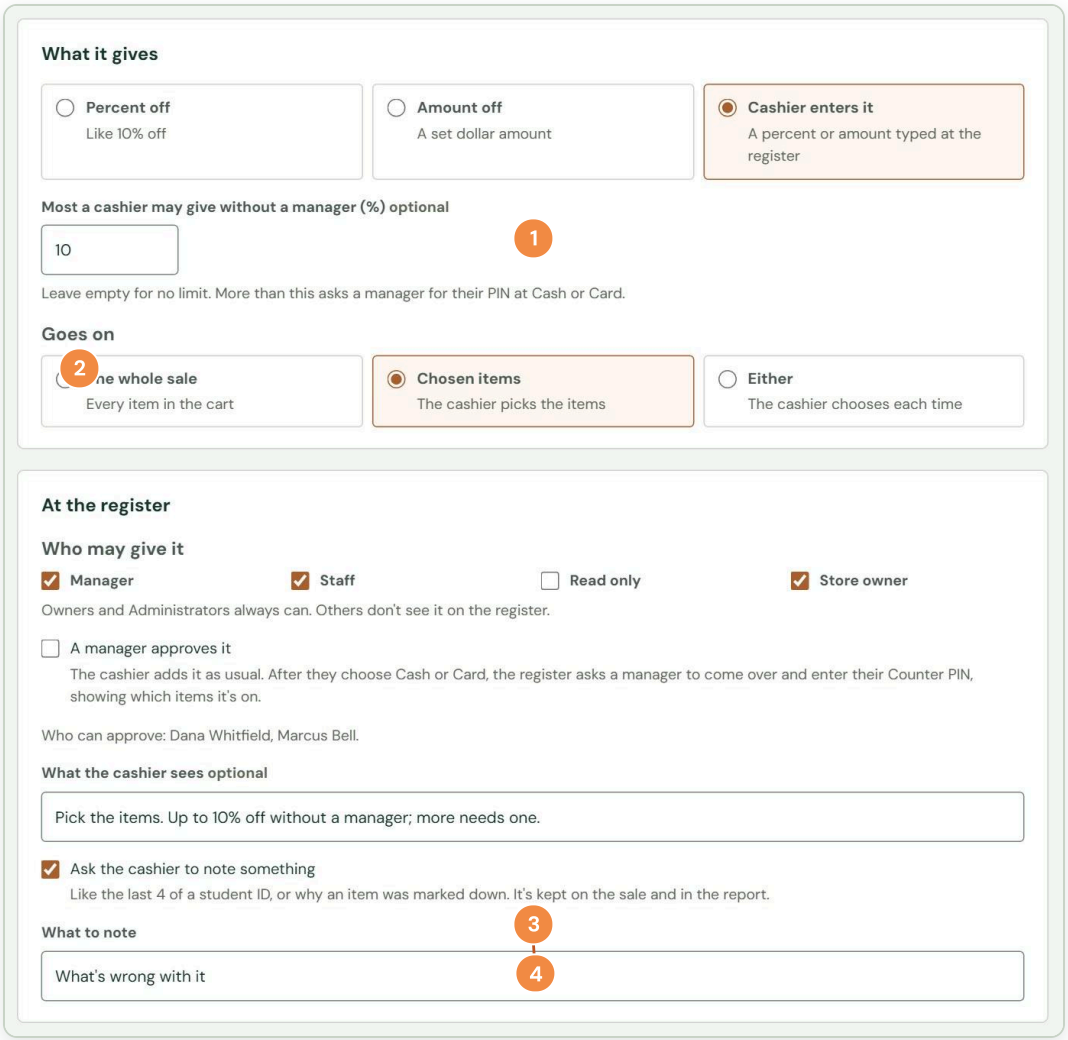
Have a manager approve a counter discount

WHERE TO FIND IT **Products** ›

Discounts → open a counter discount → Edit → What it gives and At the register Store owner, Manager

Included on every plan except Static Website and Online Store.

With Discounts set up, you can require approval for one discount and let cashiers give another on their own. Set the rule on the discount you mean to change.



1. Set the percentage a cashier can give on their own.
2. Choose whether the discount can cover one item or the whole sale.
3. Tick this to require a note on the sale.
4. Name the detail you want the cashier to record.

The cashier-entered Damaged item discount with an approval limit and a required note.

1. **Open the counter discount, press Edit and find At the register.** Read **Who can approve**. If nobody is listed, a Manager or Store owner must set their own Counter PIN under **My account** (Set your own Counter PIN, in Chapter 2 (page 15)). Reopen the form and check for their name.
2. **Choose when a cashier needs approval.** For approval every time, tick **A manager approves it**. For approval only above a percentage, leave it unticked, choose **Cashier enters it** under **What it gives** and fill in **Most a cashier may give without a manager (%)**. A cashier can give up to and including that percentage. Always type a number: the hint under the field says an empty field means no limit, but Roadside saves an empty field as 0, and then every discount a cashier enters asks for a manager.
3. **Check that someone can approve before saving a rule that requires a PIN.** If no Manager or Store owner has a Counter PIN, a cashier cannot finish a sale with a discount that needs approval. Press **Save discount**, look for *Discount saved.* and reopen **Edit** to check the rule and the names.

The register asks for a manager after the cashier chooses Cash or Card, and shows which items the discount is on. The approver chooses their name and enters their own Counter PIN, as shown in the Crossroads POS manual's Apply a discount and A discount needs a Manager.

Approval covers one sale and one cashier for 15 minutes. Taking more off, changing the items covered or changing the note asks for approval again. Five wrong PIN entries at one register hold that person's PIN there. For help, see Help a team member whose PIN does not work, in Chapter 2 (page 18).

Tell the cashier what to check and what to write down

WHERE TO FIND IT **Products** › **Discounts → open a counter discount → Edit → At the register**

Store owner, Manager

Included on every plan except Static Website and Online Store.

With Discounts set up, you can give the cashier a reminder for one discount. If you also need a record of why a bag was marked down, ask for a note on that discount.

1. **Open the counter discount and press Edit.** Under **At the register**, type the instruction in **What the cashier sees (optional)**, up to 200 characters. For example, “Ask to see a military or veteran ID.”

2. **To require an answer, tick Ask the cashier to note something.** Under **What to note**, describe what to enter in up to 60 characters. For a damaged bag, “Reason for markdown” is enough. The cashier's answer stays on the sale and in the report. Never ask for a whole ID number, card number or date of birth.

3. **Press Save discount and look for *Discount saved.*** Reopen the form to check the instruction and note label. If the cashier sees an instruction but no place to answer, check that **Ask the cashier to note something** is ticked.

After the discount is used, a Manager or Store owner can find the cashier's answer under **Note** in See who gave and who approved each discount, in Chapter 11 (page 89).

See who gave and who approved each discount

WHERE TO FIND IT **Products** › **Discounts → Report**

Store owner, Manager, Read only (Read only does not see the notes)

Included on every plan except Static Website and Online Store.

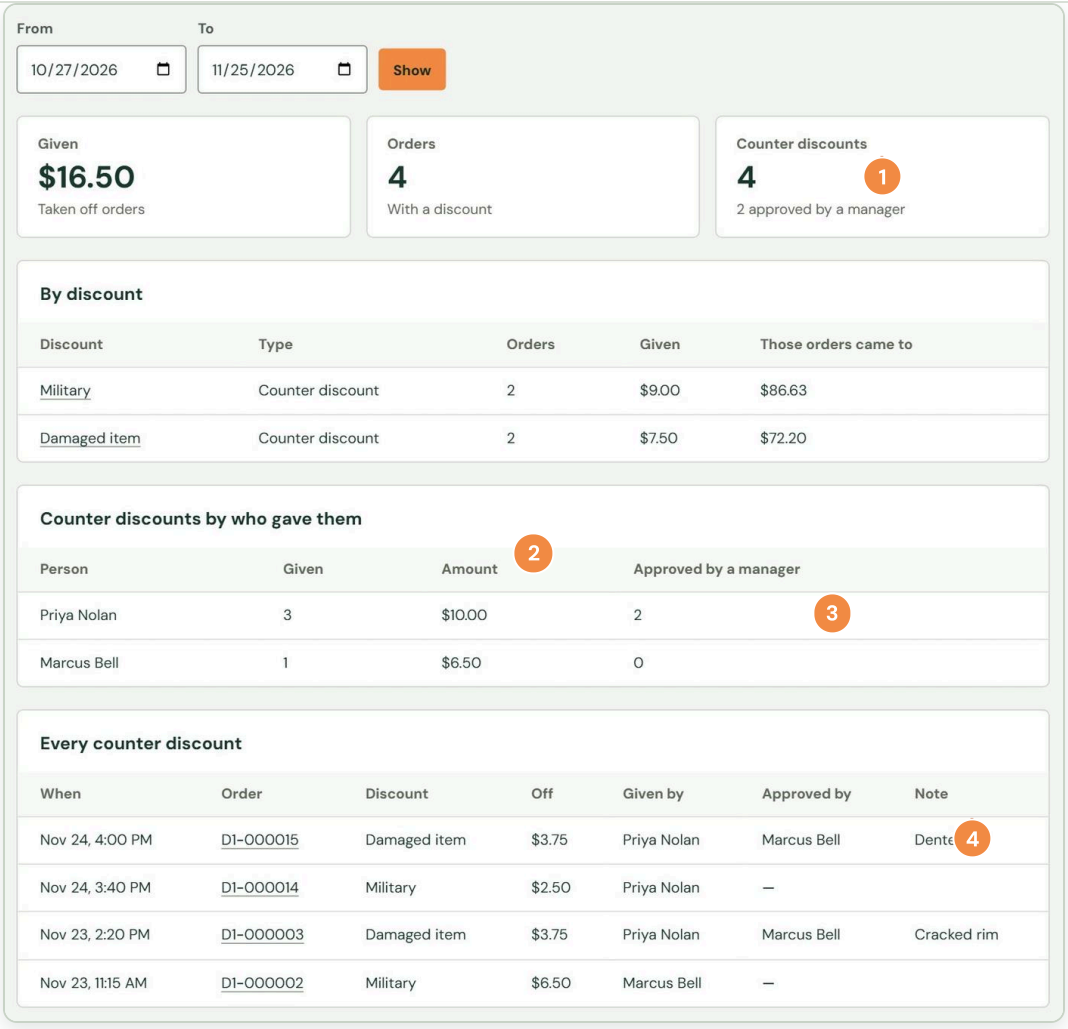
With Discounts set up, the **Discounts report** lets you trace an amount taken off at the counter back to the person and the sale. A Read only teammate can open the report and the order. Only a Store owner or Manager sees the cashier's note.

1. **Open Discounts and press Report.** It opens on today and the previous 29 days. Set **From** and **To**, then press **Show**. Cancelled orders are left out. If you see *No discounts given in these days*, check the sale date and run the report again.

2. **Read the figures at the top. Given** is the money taken off across all discounts. **Orders** counts orders with a discount. **Counter discounts** counts the counter entries listed and shows how many a manager approved. **By discount** groups the figures by discount name. For sale prices and coupons, see See which discounts were used on orders, in “Run a sale or give out a coupon code” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/discounts).

3. **Find the cashier in Counter discounts by who gave them. Given** here counts uses. **Amount** is the money taken off, and **Approved by a manager** counts approvals. The largest amount is first.

4. **Match the person's entry to an order under Every counter discount.** Check **When**, **Discount** and **Off**, then read **Given by**, **Approved by** and, if your role shows it, **Note**. Press the number under **Order** and check the discount against the sale.



1. Check how many counter discounts and approvals are listed.
2. Find the cashier and read their amount.
3. Check how many of that cashier's discounts needed approval.
4. Read the cashier's answer alongside the sale.

Counter discounts for the selected days, grouped by person and listed by sale.

The counter list holds the most recent 500 entries in the period. The counter count and per-person totals use those same entries. If you reach 500, use shorter date ranges before totaling a cashier's discounts. Changing the dates only changes the report you see. There is no download.

12 Check your team's hours on the time clock

People clock in and out at the register with their Counter PIN. In Roadside a manager checks the punches, fixes the ones that went wrong, approves the pay period and exports the hours.

IN THIS CHAPTER

- Who is on the clock, and the punches Roadside asks you to check
- Fixing a shift, and adding one somebody forgot to clock
- Approving a pay period and downloading the hours for payroll

See who is on the clock and check a punch

WHERE TO FIND IT **Store settings** › **Time clock** Store owner, Manager

Included on every plan except Static Website and Online Store.

The **Time clock** page shows who is working, what needs a manager's eye, and each person's hours for the pay period. Its heading says: *Who's working, and everyone's hours for payroll. Hours are decimal: 3.25 is 3 hours 15 minutes.* Staff and Read only people do not have the menu line.

WORDS TO KNOW

Punch

One clock-in, clock-out, or start or end of a break, made at the register with a Counter PIN.

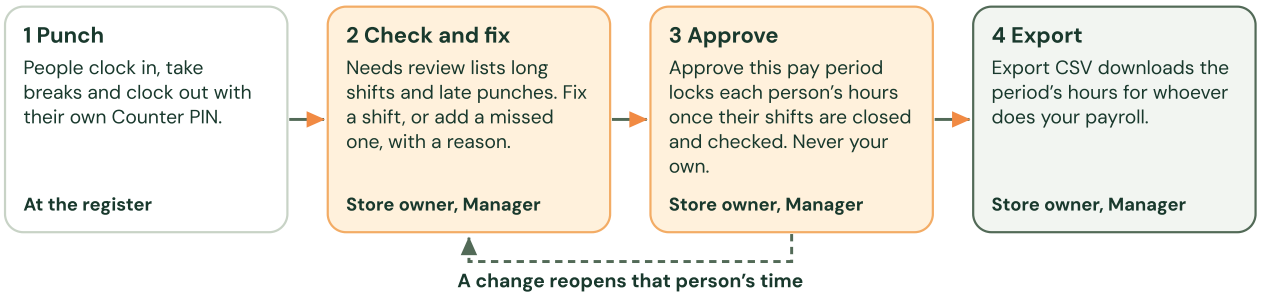
Shift

A clock-in and its clock-out, with any breaks between them. On Day summary a register shift is something else: a drawer's day.

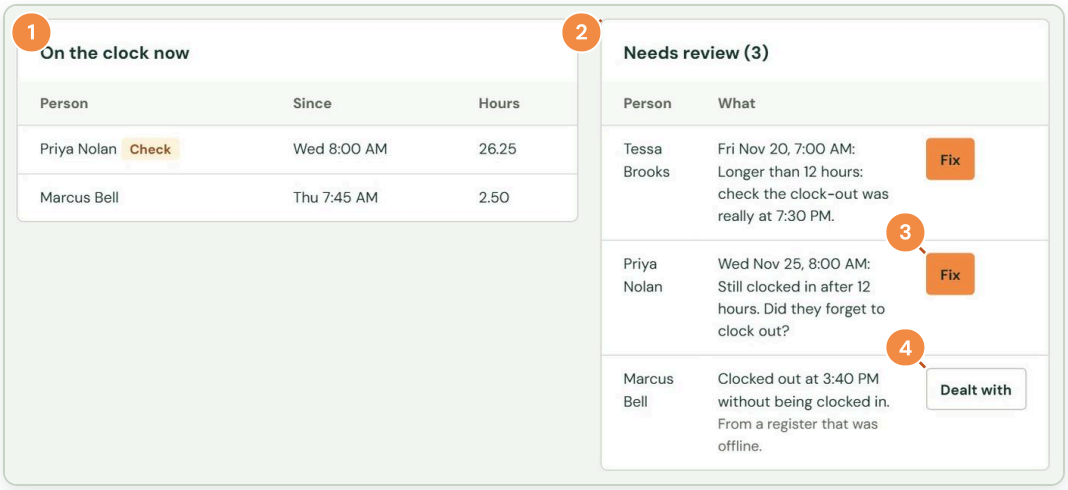
Decimal hours

Hours written with a decimal point, so 3.25 is 3 hours 15 minutes and 7.5 is 7 hours 30 minutes.

People clock in, clock out and take breaks at the register, from its sign-in screen or its lock screen, each with their own Counter PIN: see Use the time clock in the Crossroads POS manual. Each punch Roadside accepts shows here, including one a register sends after the internet was back. A punch Roadside refuses, such as one for someone who is not on the time clock, is not recorded: the register says so, on its lock screen for one it made while offline.



A pay period on the time clock: punches at the register, checks and fixes in Roadside, then approval and the file for payroll.



1. On the clock now: who is clocked in, since when, and their hours so far.
2. Needs review: each shift or punch a manager should look at.
3. Fix opens the shift, to give it the right times.
4. Dealt with clears a late punch you have checked.

On the clock now and Needs review, with two shifts to fix and one punch sent late.

On the clock now lists each person clocked in, with **Since** and **Hours**. *On break* marks someone on a break, and *Check* marks a shift that has run longer than the store's limit for review. With nobody in, it reads *Nobody is clocked in.*

Needs review gives the count in brackets and holds two kinds of row.

- **A shift to check**, with **Fix**. The usual one reads *Still clocked in after 12 hours. Did they forget to clock out?*, with the store's own limit in place of 12. A shift is also listed when it ran past that limit or starts inside another shift. Roadside never closes a shift by guessing. Press **Fix** and save the right times (Fix a shift or add one that was missed, in Chapter 12 (page 93)), and the row goes.
- **A punch from a register that was offline**, with **Dealt with**. It is a punch that did not fit, such as a clock-out with no clock-in, and it adds no hours. If the person worked hours that are missing, add the shift first. **Dealt with** cannot be undone: the row does not come back. Then press it. The message reads *Marked as dealt with. It stays in the person's history.*

It worked when **Needs review** reads *Nothing to check.*

Below, **Timesheet** totals each person's hours for one pay period: **Regular**, **Overtime**, **Total**, **Breaks** and **Shifts**, with a row for **Everyone**. Press another person's name to see their shifts, each with an **Edit** button, and *edited* beside one a manager changed. Your own page has no Edit buttons. Today has an **Hours this week** card for Store owners and Managers, with **Open the time clock →**.

Fix a shift or add one that was missed

WHERE TO FIND IT **Store settings** › **Time clock → a person's name → Edit, or Add a missed shift**

Store owner, Manager

Included on every plan except Static Website and Online Store.

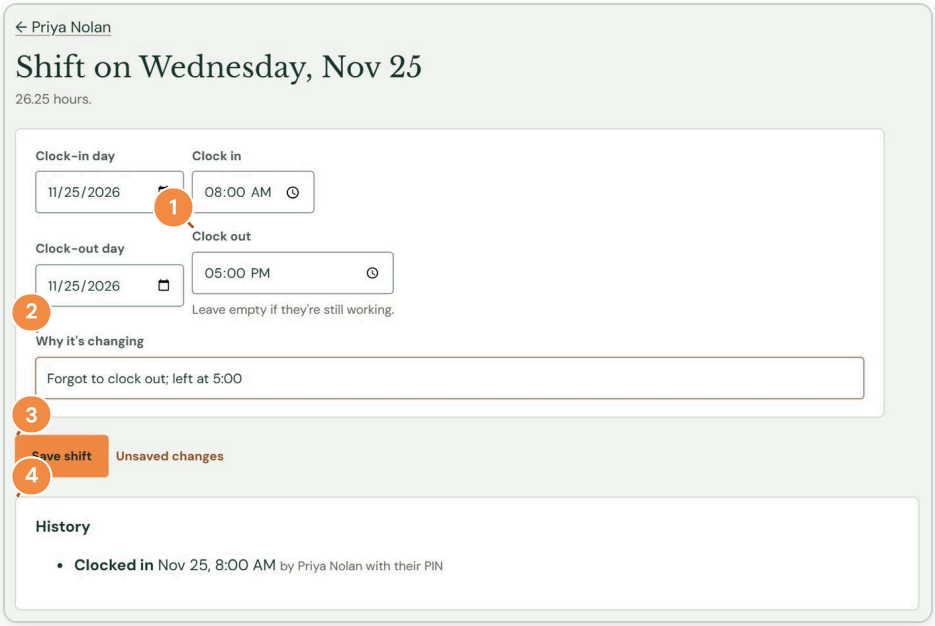
Correct a shift when someone forgot to clock out or punched at the wrong time, and add one when someone worked without clocking in. The old times and your reason stay in the shift's history. Nobody changes their own time, the Store owner included: another Manager or the Store owner does it, and on your own page the buttons are gone with the line *You can't change your own time. Ask another manager.*

CAREFUL

A change to a shift inside an approved pay period reopens that person's time for the period. Approve it again once the change is saved (Approve a pay period and export the hours, in Chapter 12 (page 96)).

Change a shift

1. **Open the shift.** Press **Fix** beside it under **Needs review**, or press the person's name under **Timesheet**, then **Edit** on the shift's row. The page is headed **Shift on** and the day, such as *Shift on Wednesday, Nov 25*.
2. **Correct the times.** Change **Clock-in day**, **Clock in**, **Clock-out day** or **Clock out**. In the screen's words, leave **Clock out** empty *if they're still working*.
3. **Type Why it's changing.** It is required and takes up to 300 characters, such as *Forgot to clock out; left at 5:00*.
4. **Check the breaks, then press Save shift.** When the shift has breaks, saving removes a break that falls wholly outside the new times and shortens one that crosses them. The message reads *Shift saved.* and the person's page opens at that day.



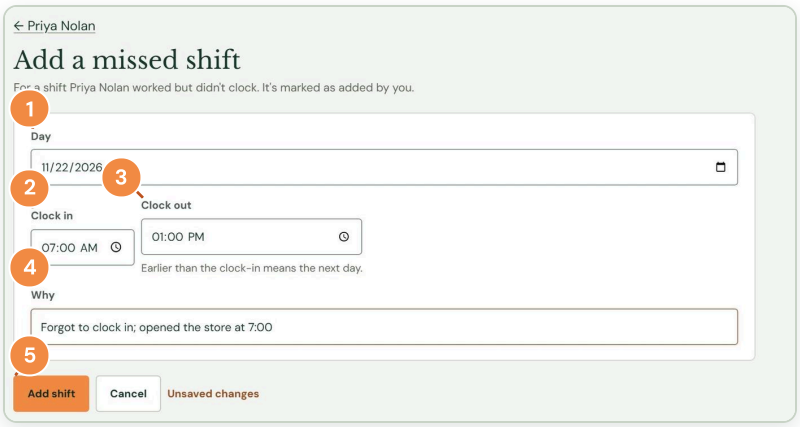
1. Clock out: type the time the person left.
2. Why it's changing: say what happened, for the history.
3. Save shift keeps the change.
4. History: every punch and change, who made it and why.

A shift with its clock-out and reason typed in, not yet saved.

History lists each punch and change: *Clocked in*, *Clocked out*, *Started a break*, *Ended a break*, *Changed* or *Added*, with the time and who did it. A punch made at the register adds *with their PIN*, and one sent late adds *(the register was offline)*. A change shows the times it replaced, beginning *Was*, and the reason.

Add a missed shift

1. **Open the person's page from their name under Timesheet, and press Add a missed shift.** The page says: *For a shift Priya Nolan worked but didn't clock. It's marked as added by you.*
2. **Choose the Day,** which starts at today, **and type Clock in and Clock out.** A clock-out at or before the clock-in counts as the next day, for a shift past midnight.
3. **Type Why,** up to 300 characters, such as *Forgot to clock in; opened the store at 7:00*.
4. **Check the day and the times, then press Add shift.** An added shift cannot be deleted, only changed, and adding one inside an approved pay period reopens that person's time. The message reads *Shift added*. **Cancel** goes back without adding it.



1. Day: the day the person worked.
2. Clock in: when they started.
3. Clock out: when they left.
4. Why: the reason, kept with the shift.
5. Add shift saves it.

Add a missed shift, filled in for one day.

ROADSIDE SAYS	WHAT TO DO
Give the clock-out time too.	A missed shift needs both times.
The clock-out must be after the clock-in.	Check the two days and times on the shift.
A shift can't be longer than 24 hours. Split it into two shifts.	Save one shift, then add the rest as a missed shift.
***That overlaps another shift*, with its times**	Change the other shift first.

Someone changed this shift while you were editing it. means another manager saved first: reload the shift and make your change again. It worked when the shift's **History** shows your change and reason, and the person's own page reads *changed by a manager* beside it (Check your own hours, in Chapter 13 (page 103)).

Approve a pay period and export the hours

WHERE TO FIND IT **Store settings** › **Time clock → Timesheet** Store owner, Manager

Included on every plan except Static Website and Online Store.

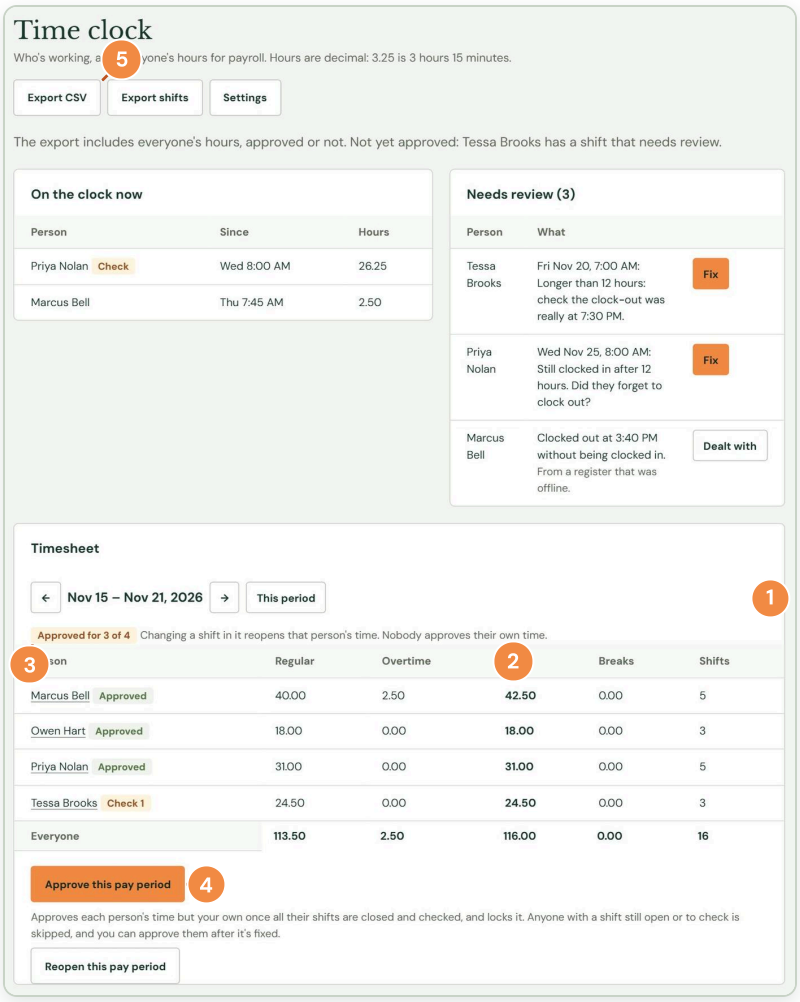
Approving says a pay period's hours are right and locks them. The export downloads them as a file for whoever does your payroll. Roadside does not run payroll or work out anyone's pay.

CAREFUL

Approving locks each approved person's hours for the period. The export includes everyone's hours, approved or not, so approve first and export after. Nobody approves their own time: a Manager approves the Store owner's, and the Store owner a Manager's. Some pay periods, such as twice a month, do not start on the first day of a work week. There, a change to a shift early in a work week can change the overtime of that week's later shifts in the next pay period, which stays approved. Check that period before you export it.

1. **Choose the pay period.** Under **Timesheet**, the arrows step back and forward a period, and **This period** returns to the current one. Opened from **Hours this week**, the page shows a week, which has no approve button when your pay period is longer: press **This period**.
2. **Clear what is open.** A name marked *On the clock* or *Check* cannot be approved yet. Fix those shifts first (Fix a shift or add one that was missed, in Chapter 12 (page 93)). Rows with **Dealt with** under **Needs review** add no hours and do not stop approval: read them, and add any missing shift before you approve.
3. **Press Approve this pay period.** The screen explains: *Approves each person's time but your own once all their shifts are closed and checked, and locks it. Anyone with a shift still open or to check is skipped, and you can approve them after it's fixed.*
4. **Read the message.** For example: *Approved 3 people's time. It's locked; changing a shift reopens it.* It names anyone skipped and why, and adds *Your own time needs another manager to approve it.* when your own hours are in the period.

5 **Press Export CSV** at the top of the page for one row a person, **or Export shifts** for one row a shift.



1. The pay period shown. Use the arrows to step to another.
2. Overtime: hours past the store's overtime limit.
3. Approved for 3 of 4: who is approved so far.
4. Approve this pay period locks the hours that are ready.
5. Export CSV downloads the period's hours for payroll.

The Time clock page for last week's pay period, approved for three of the four people.

It worked when the period reads *Approved*, or *Approved for* and how many. If nobody can be approved, the message starts *Nobody can be approved yet.* and says what to fix. A period holding only your own hours gives *Only your own time is in this period. Another manager approves it.*

Reopen this pay period takes the approval off everyone in the period, so managers can change its shifts again. A punch that lands in an approved period reopens that person's time on its own, whether it is made at that moment or sent late by a register that was offline.

FILE	COLUMNS, IN ORDER
Export CSV, named `time-clock-<start>-to-<end>.csv`	First name, Last name, Email, Period start, Period end, Regular hours, Overtime hours, Total hours, Break hours, Shifts
Export shifts, named the same with `-shifts` **on the end**	First name, Last name, Email, Date, Clock in, Clock out, Regular hours, Overtime hours, Total hours, Break hours, Edited, Status

Dates read like *2026-10-13* and hours are decimal numbers with no units. In the shifts file, **Edited** reads *yes* for a shift a manager changed, and **Status** reads *open* for a shift still on the clock. While anyone is not approved, the page says above the timesheet: *The export includes everyone's hours, approved or not. Not yet approved:* and their names.

13 Set up the time clock

The Store owner sets the time clock's rules and chooses who clocks in here, and each person reads their own hours under My time.

IN THIS CHAPTER

- The pay period, overtime, breaks and rounding
- The register's idle lock and the reminder to clock in
- Taking salaried people off the time clock
- Where each person reads their own hours

Set the pay period, overtime and breaks

WHERE TO FIND IT **Store settings** › **Time clock → Settings** Store owner

Included on every plan except Static Website and Online Store.

These settings decide how the timesheet adds up hours: the days a pay period covers, when overtime starts, and whether breaks count. Only the Store owner has the **Settings** button. A Manager sees the Time clock page without it. Times use the store's time zone, which the page names at the top.

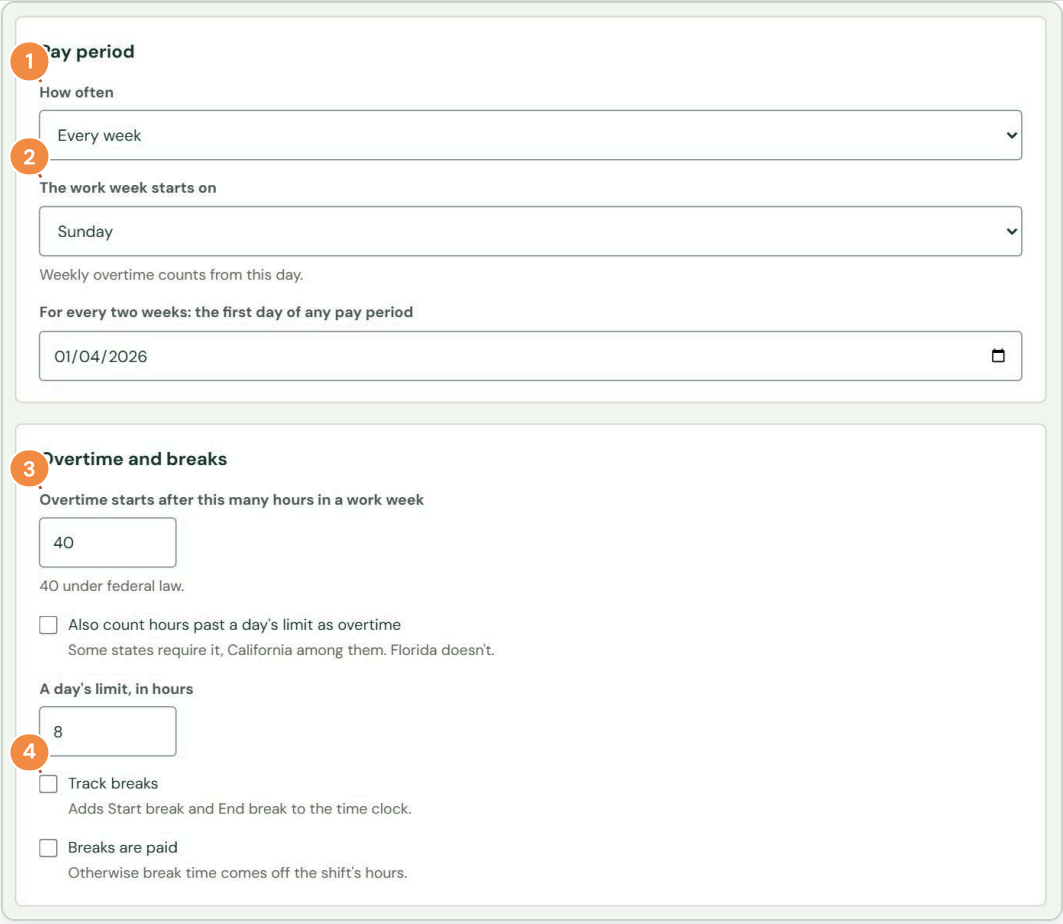
WORDS TO KNOW

Pay period
The days one paycheck covers, such as one week or the 1st to the 15th.

Overtime
On the time clock, hours past the weekly limit, or past a day's limit, that the Store owner sets.

CAREFUL

Your store decides which overtime and break rules apply to it. The screen's hints say *40 under federal law.* and, for daily overtime, *Some states require it, California among them. Florida doesn't.* This manual gives no legal advice: check your own state's rules before you save.



1. How often: choose every week, every two weeks or twice a month.
2. The work week starts on: the day weekly overtime counts from.
3. Type the hours in a work week after which overtime starts.
4. Tick Track breaks to add Start break and End break at the register.

Pay period and Overtime and breaks, at their starting values.

> ⚠ CAREFUL
> Roadside works out the hours from these settings each time the timesheet or an export is opened. Changing overtime, breaks or rounding changes the hours shown for past pay periods too, approved ones included, and they keep their *Approved* badge. Export a period before you change the rules, or check it and export it again after.

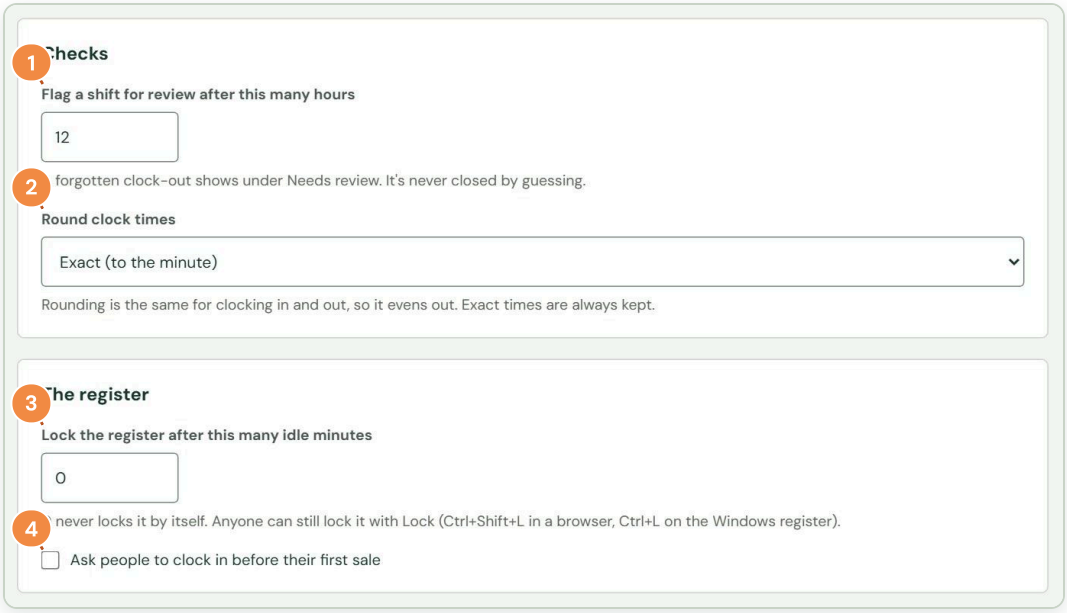
1. **Open Time clock and press Settings.** The page is headed **Time clock settings**.
2. **Under Pay period, choose How often:** *Every week*, *Every two weeks* or *Twice a month (1st to 15th, 16th to the end)*. Choose **The work week starts on**. For every two weeks, give **For every two weeks: the first day of any pay period**, so Roadside knows which weeks pair up.

3. **Under Overtime and breaks, type Overtime starts after this many hours in a work week.** To count hours past a day's limit as overtime too, tick **Also count hours past a day's limit as overtime** and type **A day's limit, in hours**.

4. **Tick Track breaks if people clock out for breaks.** The hint says it *Adds Start break and End break to the time clock.* Tick **Breaks are paid** to keep break time in the hours. *Otherwise break time comes off the shift's hours.*

5. **Under Checks and The register, set the four rules in the table below.**

6. **Press Save time clock settings.** The message reads *Time clock settings saved.*



1. Type the hours after which a shift waits under Needs review.
2. Round clock times: exact, or to the nearest 5 or 15 minutes.
3. Type how many idle minutes lock the register, or 0.
4. Tick to remind each person to clock in before their first sale.

Checks and The register, below the pay period settings.

SETTING	WHAT IT DOES	TO START WITH
Flag a shift for review after this many hours	A shift open longer goes under Needs review. *It's never closed by guessing*. From 4 to 24.	12
Round clock times	*Rounding is the same for clocking in and out, so it evens out. Exact times are always kept.*	Exact (to the minute)
Lock the register after this many idle minutes	From 2 to 60. The screen says *0 never locks it by itself*. At 0 the store sets no time, and each counter computer locks after its own idle setting, which starts at 5 minutes. Anyone can still lock the register with Lock.	0
Ask people to clock in before their first sale	The register asks a person who is not clocked in to clock in before their first sale, when it can reach Roadside. They can press Not now.	Not ticked

The pay period starts as every week from Sunday, with overtime after 40 hours, the day's limit unticked, and breaks not tracked. A shift counts whole on the day and in the work week it started, even when it runs past midnight or past the end of a pay period. An hour past both the day's limit and the weekly limit counts as overtime once. At the register, see Lock the register when you step away in the Crossroads POS manual for the lock screen and its **Time clock** button.

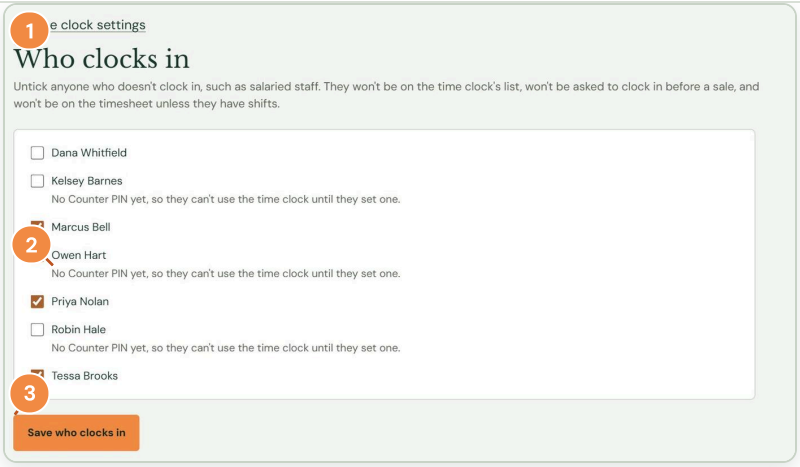
A number outside its range is refused with the range, such as *Overtime starts after 1 to 80 hours in a work week (40 under federal law)*. Every two weeks needs its first day, or Roadside asks: *Give the first day of any pay period, like 2026-10-04, so Roadside knows which weeks pair up.*

Choose who clocks in

WHERE TO FIND IT **Store settings** › **Time clock → Settings → Who clocks in** Store owner

> Included on every plan except Static Website and Online Store.

Everyone whose role clocks in is on the time clock until the Store owner takes them off. Staff, Managers and Store owners clock in, and Read only people do not. Take off anyone who is not paid by the hour. The page says: *Untick anyone who doesn't clock in, such as salaried staff. They won't be on the time clock's list, won't be asked to clock in before a sale, and won't be on the timesheet unless they have shifts.*



1. Untick each person who does not clock in.
2. No Counter PIN yet: this person cannot clock in until they set one.
3. Save who clocks in keeps the list.

Who clocks in, with the Store owner unticked and three people still without a Counter PIN.

1. **Open Time clock, press Settings, then Who clocks in.**
2. **Untick each person who does not clock in.** Tick someone to put them back.
3. **Press Save who clocks in.** The message names each change, such as *Saved. Dana Whitfield doesn't clock in.*, or reads *Nothing changed.*

Someone who is clocked in cannot be taken off. Roadside says *is on the clock. Clock them out first (Time clock › their name › Edit), then take them off the time clock.* Fix their shift (Fix a shift or add one that was missed, in Chapter 12 (page 93)), then save the list again.

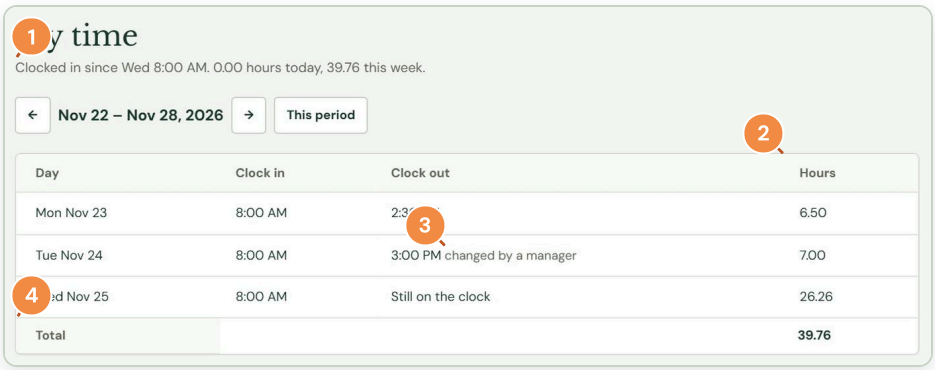
A name marked *No Counter PIN yet, so they can't use the time clock until they set one.* belongs to someone who has not set a PIN. Each person sets their own (Set your own Counter PIN, in Chapter 2 (page 15)). This list is not the register's **Who's working?** sign-in list. To turn the time clock off on one counter computer, ask Dirt Road (What a connected computer may do, in Chapter 1 (page 9)).

Check your own hours

WHERE TO FIND IT **My account** › **My time** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

Everyone who clocks in can read their own shifts under **My time** in their account menu. It is the one time clock page Staff can open, and nothing on it can be changed.



1. Whether you are clocked in, since when, and your hours today and this week.
2. Hours: each shift's hours.
3. changed by a manager marks a shift a manager corrected.
4. Total: your hours for the pay period shown.

My time for a Staff member, with one shift changed by a manager.

1. **Open your account menu and press My time.**
2. **Read the line under the heading.** It says *Clocked in*, *On a break* or *Not clocked in*, since when, and your hours today and this week.
3. **Check the shifts.** Each row gives the **Day**, **Clock in**, **Clock out** and **Hours**, and **Total** adds the period. A shift you are still working reads *Still on the clock*. The arrows step to another pay period.

It worked when your latest shift is in the list, or reads *Still on the clock* while you work. When a shift is wrong, the page says what to do: *Something wrong? Tell a manager; they can fix it, and the change shows here.* A period with no shifts reads *No shifts in this period.* Someone the Store owner took off the time clock reads *You don't clock in at this store. Any time recorded for you before is below.*

14 Take orders ahead for things that arrive later

Spring chicks and plant starts sell before they arrive. Preorders lets a customer reserve a spot in a delivery, at the counter, by phone or on the website, and pay when they pick up.

IN THIS CHAPTER

- Setting up a pre-order product and reading the Preorders list
- Adding, changing or removing an arrival batch
- Taking a reservation at the counter or by phone
- Putting a customer on the waiting list for a full batch
- Marking a batch arrived, printing the pickup list and tracking pickups
- How customers reserve, confirm and cancel on the website
- Closing one batch or ending reservations for the season

Set up a product customers reserve ahead

WHERE TO FIND IT **Sales** › **Preorders → New pre-order product**

Store owner, Manager (the Store owner sets Preorders up once from Store account > All of Roadside)

Included on every plan except Static Website and Online Store.

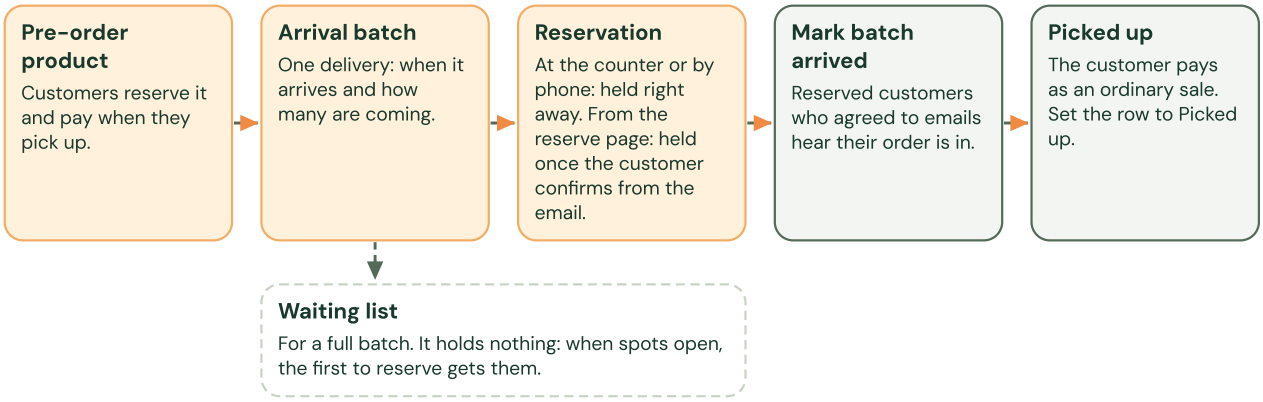
The Store owner sets Preorders up once from **Store account > All of Roadside** (Set up a tool the store already has, in "Find what your store has and set it up" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside)). On that setup sheet the tool is called **Bookings**; once set up, the menu and screens call it **Preorders**. Preorders reserves spots in a future delivery and takes no money: customers pay when they pick up.

WORDS TO KNOW

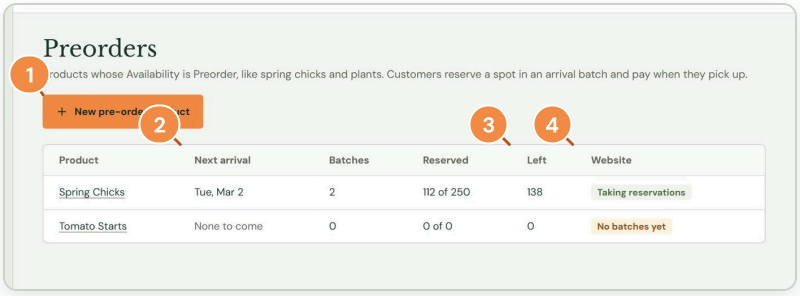
Preorder
An item a customer reserves before it arrives and pays for at pickup.

Arrival batch
One delivery of a pre-order product, with its arrival date and how many are coming.

The Preorders list explains what belongs here: *Products whose Availability is Preorder, like spring chicks and plants. Customers reserve a spot in an arrival batch and pay when they pick up.*



A preorder from the product to the pickup, with the waiting list beside a full batch.

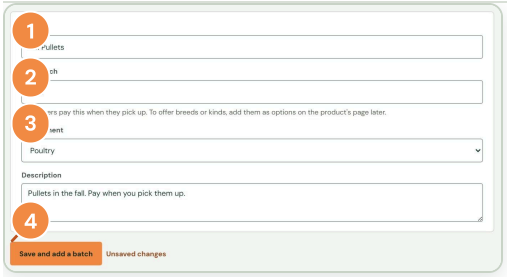


1. New pre-order product starts a draft pre-order product.
2. Next arrival shows the earliest upcoming date, or None to come.
3. Left counts open spots across the product's batches.
4. Website shows the product's online status badge.

The Preorders list with two products.

The list shows **Product**, **Next arrival**, **Batches**, **Reserved**, **Left** and **Website**. Press a product's name to open its Preorders page. The **Website** badge reads *No batches yet* when no batch exists, *Draft* while the product is still a draft in Products, or *Not on the website* when it is hidden or set to In the store only. An active online product with a batch reads *Taking reservations*, and a stopped one reads *Not a pre-order now*.

Setting a product as a pre-order prevents it from being bought online as an ordinary item: the website offers a reservation instead. Both Store owners and Managers can set up pre-order products; someone without product editing permission sees *Changing a product needs permission to edit products. Ask a manager.*



1. Name, up to 200 characters.
2. Price each, paid at pickup.
3. Department, or None.
4. Save and add a batch saves the draft and opens the first batch form.

New pre-order product filled out before saving.

1. **Open Sales > Preorders and press New pre-order product.**
2. **Type Name** (placeholder *Spring Chicks*) and **Price each**. The screen notes: *Customers pay this when they pick up. To offer breeds or kinds, add them as options on the product's page later.*
3. **Choose a Department** (or *None*) and add a **Description** (up to 4,000 characters) if wanted.
4. **Press Save and add a batch.** Roadside saves the draft and opens the batch form, confirming: *<name> is saved as a draft pre-order. Add its first arrival batch, then put it on the website from its page in Products.*

For a product already in **Products**, open it in **Products** and press **Take reservations for this product** on its **Preorders** card (or open an earlier pre-order in **Preorders** and press **Take reservations**). It appears in the Preorders list with *No batches yet* until you add one. Add breeds or kinds in **Products** (Build the list of choices customers pick, in “Set up choices such as size and color” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/product-options)) and publish the product when ready (Put a finished product on the website, in “Add, publish or put away a product” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/add-a-product)). For regular online checkout rules, see Choose what goes in the cart and order form, in “Choose how the website takes orders” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/store-settings).

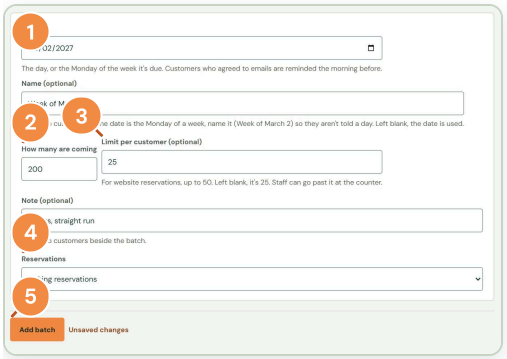
Add an arrival batch

WHERE TO FIND IT **Sales** › **Preorders → open a product → Add a batch** Store owner, Manager

Included on every plan except Static Website and Online Store.

Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

Each arrival batch is one delivery: when it arrives, how many are coming and how many one website shopper may claim. As the screen states: *A batch is one arrival: the day or week it comes in and how many. Customers reserve spots in it until it's full.*



1. Arrives sets the delivery day, or Monday of the arrival week.
2. How many are coming sets total spots.
3. Limit per customer (optional) caps online orders, 1 to 50.
4. Reservations sets Taking reservations or Not taking reservations.
5. Add batch saves the batch card.

Add a batch filled out for Spring Chicks.

1. **Open the product under Sales > Preorders and press Add a batch.**
2. **Set Arrives.** The hint says: *The day, or the Monday of the week it's due. Customers who agreed to emails are reminded the morning before.*
3. **Type Name (optional)** (up to 80 characters, placeholder *Week of March 2*). Name a Monday-of-week arrival so customers do not expect a single day; left blank, Roadside prints the date.
4. **Choose For** when the product has pre-order options: pick *Any* or one choice (such as a breed), and add a batch for each choice coming in.
5. **Type How many are coming** (up to 100,000) and **Limit per customer (optional)**. The screen notes: *For website reservations, up to 50. Left blank, it's 25. Staff can go past it at the counter.*
6. **Add a Note (optional)** (up to 200 characters, placeholder *Pullets, straight run*), leave **Reservations** on *Taking reservations* and press **Add batch**.

Roadside confirms *Batch added.* and shows the batch card on the product's Preorders page.

> ⚠ CAREFUL
>
> Before changing **Arrives** on a batch that has reservations, check the screen's warning: *Changing it emails the new date to the reserved customers who agreed to emails, and lists the rest to call.* After saving, the banner reads *Its new date is <date>. Emailed N customers the new date. Call …* When no customer could be emailed, it says *Nobody was emailed.* in place of the count.

Press **Edit** on any batch card to update it and press **Save batch** (*Batch saved.*). **How many are coming** cannot go below the number already reserved, **For** is locked once reservations exist, and an arrived batch keeps its date (*It has arrived, so its date stays.*). If nobody holds a spot in a batch, **Edit batch**

offers **Remove this batch** (*Only a batch nobody has reserved in can be removed.*), which confirms *Batch removed.* A batch that has ever had a reservation, even a cancelled one, is refused with *This batch has reservations, so it stays. Set it to Not taking reservations instead.*

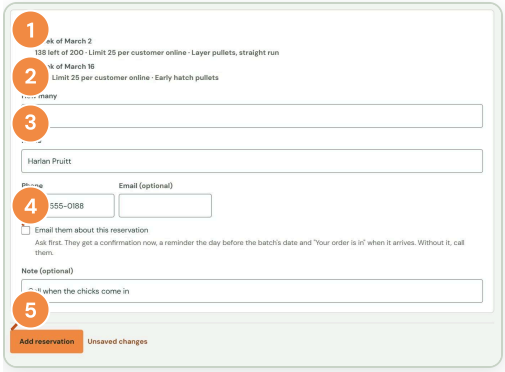
Take a reservation at the counter or by phone

WHERE TO FIND IT **Sales** › **Preorders → open a product → Add a reservation** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

Record phone-in and walk-in preorders in Roadside. As the screen states: *For a customer at the counter or on the phone. They pay when they pick up.* No money is taken here, and counter reservations hold their spots right away.



1. Batch lists each upcoming arrival; full or closed batches are dimmed.
2. How many sets the quantity, 1 to 1,000.
3. Name records who the reservation is under.
4. Email them about this reservation sends emails when ticked.
5. Add reservation holds the spots in the batch.

Add a reservation filled out for a phone-in customer.

CAREFUL

Ask the customer before ticking **Email them about this reservation**. With it ticked and an email entered, pressing **Add reservation** sends a confirmation email right away.

1. **Open the product under Sales > Preorders and press Add a reservation** at the top or on the batch card.
2. **Choose the Batch.** Full, closed or arrived batches cannot be picked; leaving it blank gives *Pick the batch the reservation is for.*
3. **Type How many** (1 to 1,000). Staff can go past the batch's online limit, up to the spots left.

4. **Type Name** (required, up to 160 characters), **Phone** (up to 40) and **Email (optional)** (up to 254), with at least a phone number or email.
5. **Tick Email them about this reservation only if they agree.** The screen warns: *Ask first. They get a confirmation now, a reminder the day before the batch's date and "Your order is in" when it arrives. Without it, call them.*
6. **Add a Note (optional)** (up to 500 characters) if needed and press **Add reservation**.

Roadside returns to the batch card with *Reserved <n> for <name>. They'll get a confirmation email.* (when emailed). The batch's **n of m reserved** total goes up, and the row shows source *At the counter*. This job stays in Roadside; at pickup, ring up the payment as an ordinary sale.

Put a customer on the waiting list

WHERE TO FIND IT **Sales** › **Preorders → open a product → Add to waiting list (on a full batch)**

Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

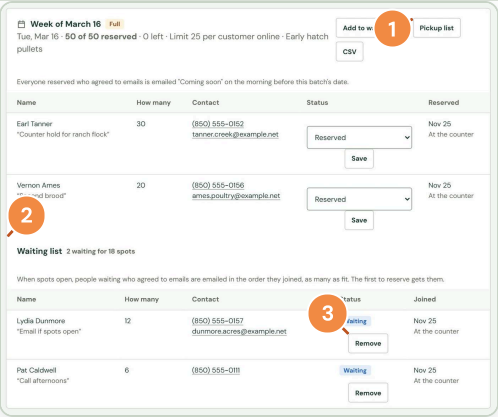
Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

When a batch is full, or has fewer spots left than a customer wants, add them to its waiting list. The waiting list holds nothing: when spots open, the first to reserve gets them. The **Add to waiting list** button is on a full batch's card only. For a batch that still has some spots, open the form from a full batch of the same product and choose the batch you mean under **Batch**. If the product has no full batch, reserve the spots that are left.

WORDS TO KNOW

Waiting list

People who want spots in a full batch. Joining holds nothing for them.



1. Add to waiting list adds a customer to this batch's line.
2. Shows how many people wait and for how many spots, or Nobody waiting.
3. Remove takes someone off the waiting list.

The waiting list under a full batch.

1. **Open the product under Sales > Preorders and press Add to waiting list** on the full batch card.
2. **Confirm the Batch and type How many** (1 to 1,000), **Name**, **Phone**, **Email (optional)** and any **Note (optional)**. Roadside needs a phone number or an email, one of the two at least.
3. **Ask before ticking Email them about the waiting list.** The hint notes: *Ask first. They're emailed when they join and if spots open up. Without it, call them.*
4. **Press Add to the waiting list.** Roadside confirms *Added <name> to the waiting list for <n>. They'll be emailed if spots open up.* (or *Call them if spots open up.*).

The customer appears under **Waiting list** with **Name**, **How many**, **Contact**, **Status** and **Joined** (one active place per person per batch). Spots can open on an open batch while your website is taking reservations for that product. Roadside then emails waiting people who agreed to emails, in the order they joined (status *Emailed that spots opened*). It passes over anyone who wants more spots than are still open to offer. The batch card lists anyone without email approval in a call prompt. While the website is not taking reservations, nobody is emailed: call the people on the list. Press **Remove** beside a row to take someone off (*<name> is off the waiting list.*); customers who joined online can also leave on their own (*Left the list*).

Mark a batch arrived and hand it out

WHERE TO FIND IT **Sales** › **Preorders → open a product → Mark batch arrived; Pickup list**

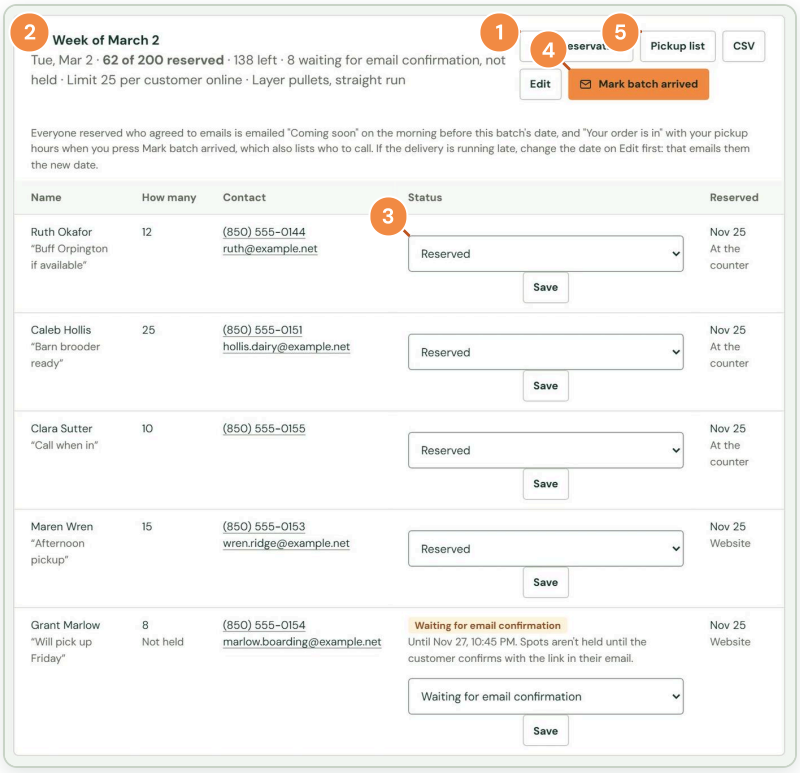
Store owner, Manager (to mark arrived); Store owner, Manager, Staff (to change a reservation's status and export); all four roles (to print the pickup list)

Included on every plan except Static Website and Online Store.

Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

When the delivery reaches the store, a Store owner or Manager marks the batch arrived so reserved customers hear their order is in. Anyone on the team can print the pickup sheet, and Staff, Managers and Store owners update statuses as customers collect.

> ⚠ CAREFUL
>
> Press **Mark batch arrived** only when the shipment is physically in the store. It emails every reserved customer who agreed to emails that their order is in (with your pickup hours from Store info), locks the batch as *Arrived*, and cannot be unsent.



1. Add a reservation adds a counter or phone-in reservation.
2. Shows n of m reserved and how many spots are left.
3. Status changes a row's state when saved with Save.
4. Mark batch arrived marks the delivery in and emails reserved customers.
5. Pickup list opens the printable check-off sheet.

A product's Preorders page showing a batch card and its reservations.

1. **Open the product under Sales > Preorders, verify the shipment, and press Mark batch arrived** (Store owner or Manager). The batch shows *Arrived* with *Marked arrived …*, reserved rows move to *Arrived, told*, and Roadside reports: *Emailed n customers that their order is in. Call <names>: they don't get emails about their reservation.* When no customer could be emailed, it says *Nobody was emailed.* in place of the count.
2. **Call the customers listed in that message** (or rows showing *(no emails)* under **Contact**).
3. **Press Pickup list** on the batch card (or at the top of the page for all batches) and print from the tab that opens.
4. **At pickup, take payment as an ordinary sale,** tick the customer off the sheet, choose *Picked up* in their row's **Status** list and press **Save** (Roadside confirms *<name>: Picked up.*).



1. To pick up totals units still waiting to be collected.
2. Qty shows each customer's reserved count.
3. Checked by gives a signature line for handover.

The printable pickup list for one batch.

The pickup list prints ✓, **Qty**, **Name**, **Phone**, **Email**, **Note** and *Checked by:* _____. Its note states: *Reserved and arrived customers only. Website reservations not confirmed by email hold nothing and are left off, as are cancelled, no-show and picked up ones.*

Staff, Managers and Store owners choose from five statuses on each row and press **Save**: *Reserved*, *Arrived, told* and *Picked up* hold spots in the batch; *Cancelled* and *No-show* return the spots to the batch. Changing one of those back to a status that holds spots is refused when the batch has no room left. Website reservations not confirmed by email read *Waiting for email confirmation* or *Not confirmed in time*, hold nothing and cannot be picked by staff.

Press **Export CSV** (all batches) or **CSV** (one batch) to download every status in a spreadsheet. Its columns are **Product**, **Batch**, **Arrives**, **Choice**, **Name**, **Phone**, **Email**, **Quantity**, **Status**, **Source**, **Customer note**, **Staff note**, **Reserved at** and **Picked up at**.

See what the customer does on the website

WHERE TO FIND IT **Website (shopper) → the pre-order product → Reserve**

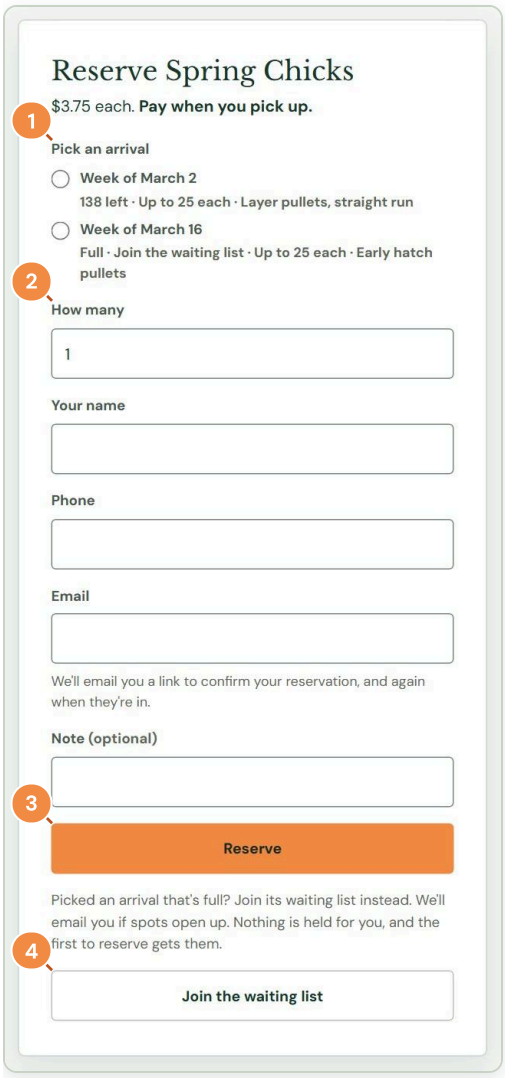
Store owner, Manager, Staff, Read only (to understand); the customer acts

Included on Counter + Online Store and Whole Store plans.

Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

> On the Counter and Counter + Stock plans: Reservations are taken at the counter and by phone only. Online reservations require the online store with online ordering switched on.

When online ordering is open (Open checkout or let customers browse only, in "Choose how the website takes orders" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/store-settings)) and the pre-order product is published with an open batch, its Preorders page reads *Taking reservations on the website and at the counter.* The foot of that page gives a reserve-page address you can share in a post or text.



1. Pick an arrival lists open and full batches with caps.
2. How many accepts a quantity up to the online limit.
3. Reserve emails the customer a confirmation link.
4. Join the waiting list puts them in line for a full batch.

The Reserve page a customer sees for Spring Chicks.

1. **The customer opens Reserve <product>,** chooses **Pick an arrival**, enters **How many**, **Your name**, **Phone** and **Email**, and any **Note (optional)**. The page requires the phone number and the email. The customer then presses **Reserve** (or **Join the waiting list** on a full batch). A customer with no email address cannot reserve on the website: take the reservation at the counter or by phone (Take a reservation at the counter or by phone, in Chapter 14 (page 109)).
2. **Roadside emails a confirmation link.** The page states: *Check your email to confirm your reservation* and *Open it and choose Confirm my reservation within 48 hours. Your spots aren't held until you do.* Until confirmed, Roadside shows *waiting for email confirmation, not held* and leaves the row off the pickup list.
3. **The customer presses Confirm my reservation from the email.** While room remains within their limit, their spots are held, the row appears with source *Website*, **n of m reserved** increases, and your store's order email gets a notice.
4. **To cancel, the customer opens that email link and presses Cancel my reservation,** freeing their spots and emailing your store. Cancelling a request that was never confirmed sends your store nothing, because it held no spots.

If a customer reports *This link doesn't work. It may have been copied incompletely.*, have them open the link straight from the email, or handle it from the batch card. After 48 hours without confirmation, the row reads *Not confirmed in time* and holds nothing. On the reserve page whose address you share, every customer confirms from the email. On your website's own product page, a signed-in shopper reserving under their verified account email holds spots straight away. The online limit counts everything held in that batch under the same email or phone number.

Stop taking reservations for a product

WHERE TO FIND IT **Sales** › **Preorders → open a product → Stop taking reservations**

Store owner, Manager

Included on every plan except Static Website and Online Store.

Preorders must be set up for your store first (Set up a product customers reserve ahead, in Chapter 14 (page 105)).

Close a single batch on its own, or stop reservations for the whole product at the end of the season. Existing reservations stay on file either way.

> ⚠ CAREFUL
> As the screen warns: *Stop taking reservations sets the product's Availability back to "In stock while there are some". Reservations already made stay. Each choice's Availability is also in the product's Options in Products.* After you press it, the product sells as an ordinary item wherever it is published for sale. If its stock is counted, check its stock on hand in Products (Record a delivery, shelf count or damaged bag, in “Count the shelf and record deliveries” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/stock)) first. A product made with **New pre-order product** is not counted, so it shows as in stock from then on.

1. **To close one batch:** open the product under **Sales > Preorders**, press **Edit** on that batch, choose *Not taking reservations* under **Reservations** and press **Save batch**. Other batches stay open, and you can reopen it until it is marked arrived.
2. **To end reservations for the product:** press **Stop taking reservations** on the product's Preorders page.

Roadside confirms *<name> isn't a pre-order any more, so it takes no new reservations. The ones it has stay.*, and the Preorders list shows *Not a pre-order now*. You can still print the pickup list, export the CSV and update remaining pickups. Next season, press **Take reservations** on the product's Preorders page to start again.



PART 2

Charge accounts

Open charge accounts, take payments, send statements and keep store credit straight.

15 Open a charge account and set its limit

A charge account lets a trusted customer buy now and pay on terms you set. Open it from the customer's own account, give it a limit and terms, and change them when the customer's needs change.

IN THIS CHAPTER

- Reading who buys on account and what each one owes
- Opening an account with a limit and terms
- Changing a limit, the terms or where statements go

See who buys on account and what they owe

WHERE TO FIND IT **Customers** › **Charge accounts** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

One page lists every customer who buys on account, with the terms, the limit, what is owed and how much room is left. Charge accounts is in the menu once the Store owner has set it up, with **Set it up** beside Charge accounts on All of Roadside: Set up a tool the store already has, in “Find what your store has and set it up” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside). Switching it off again is in Switch off a tool the store set up, in “Find what your store has and set it up” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside).

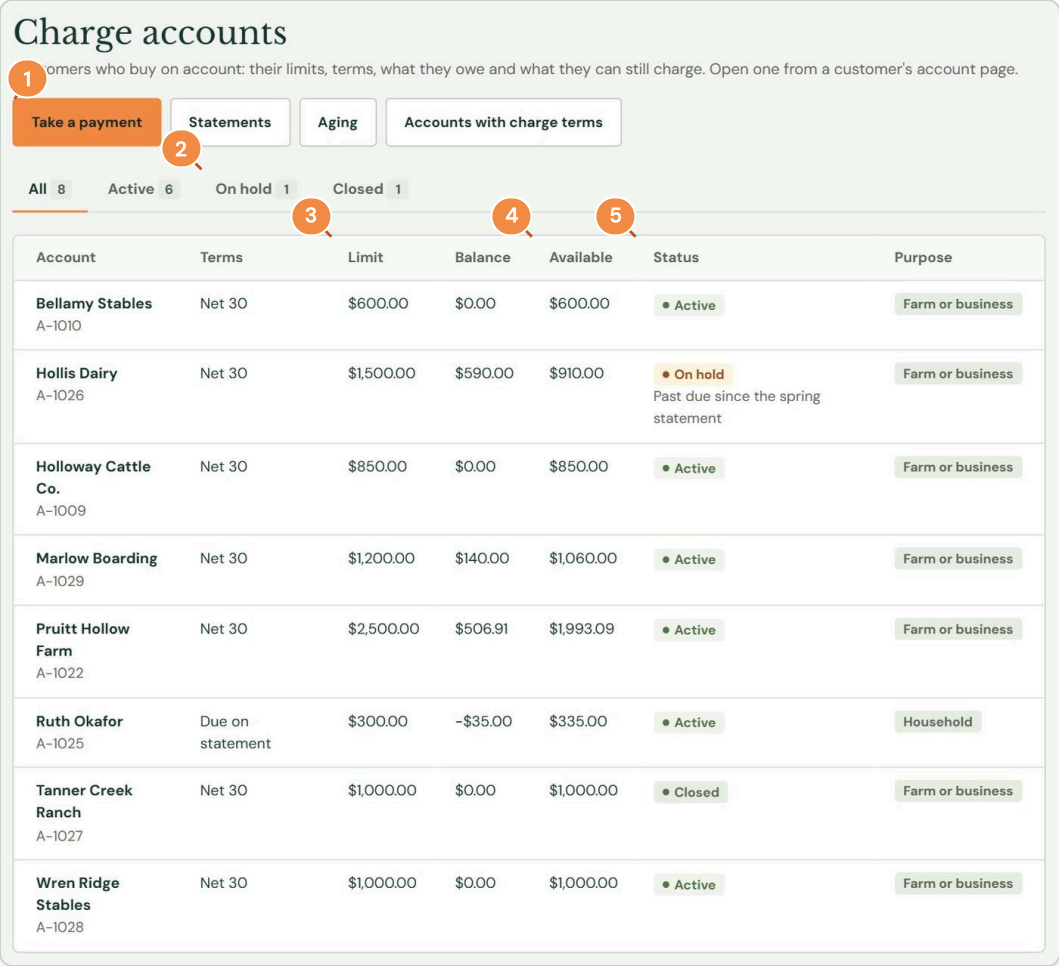
WORDS TO KNOW

Charge account

An account a customer buys on and pays later, on terms the store sets. Stores also call it a house account, a tab or A/R.

Available

What a charge account can still take: its credit limit, less its balance, less website orders charged to it that are waiting for pickup.



1. Take a payment records money a customer pays toward their account.
2. On hold lists only the accounts that are stopped.
3. Limit is the most the account may owe.
4. Available is what the account can still charge.
5. Status reads Active, On hold or Closed. A hold shows its reason.

The Charge accounts list, with one account on hold and one closed.

1. **Go to Customers, then Charge accounts.** The accounts are in name order, 50 to a page. The tabs **All**, **Active**, **On hold** and **Closed** shorten the list, and a tab with accounts in it carries a count.

2. **Read across the row. Terms** reads *Net 30*, *Due on statement* or *Seasonal* with its due date. **Limit** and **Available** read *No limit* on an account that has none. **Balance** is what the customer owes, and a balance with a minus sign is a credit: the store owes the customer. **Purpose** reads *Needs review* until someone chooses what the customer buys for.

3. **Press the account's name.** The customer's account opens at its **Charge account** card, with the open invoices and the latest activity.

The list has no button for opening an account. An account is opened from the customer (Open a charge account with a limit and terms, in Chapter 15 (page 120)), or from **Accounts with charge terms** for a customer whose old records said they buy on account (Open accounts for customers whose old fields said they buy on account, in Chapter 17 (page 132)). Once you have opened one, that customer is in this list as *Active*. Read only people see the list, **Statements** and **Aging**, and do not see **Take a payment**.

Open a charge account with a limit and terms

WHERE TO FIND IT **Customers** ›

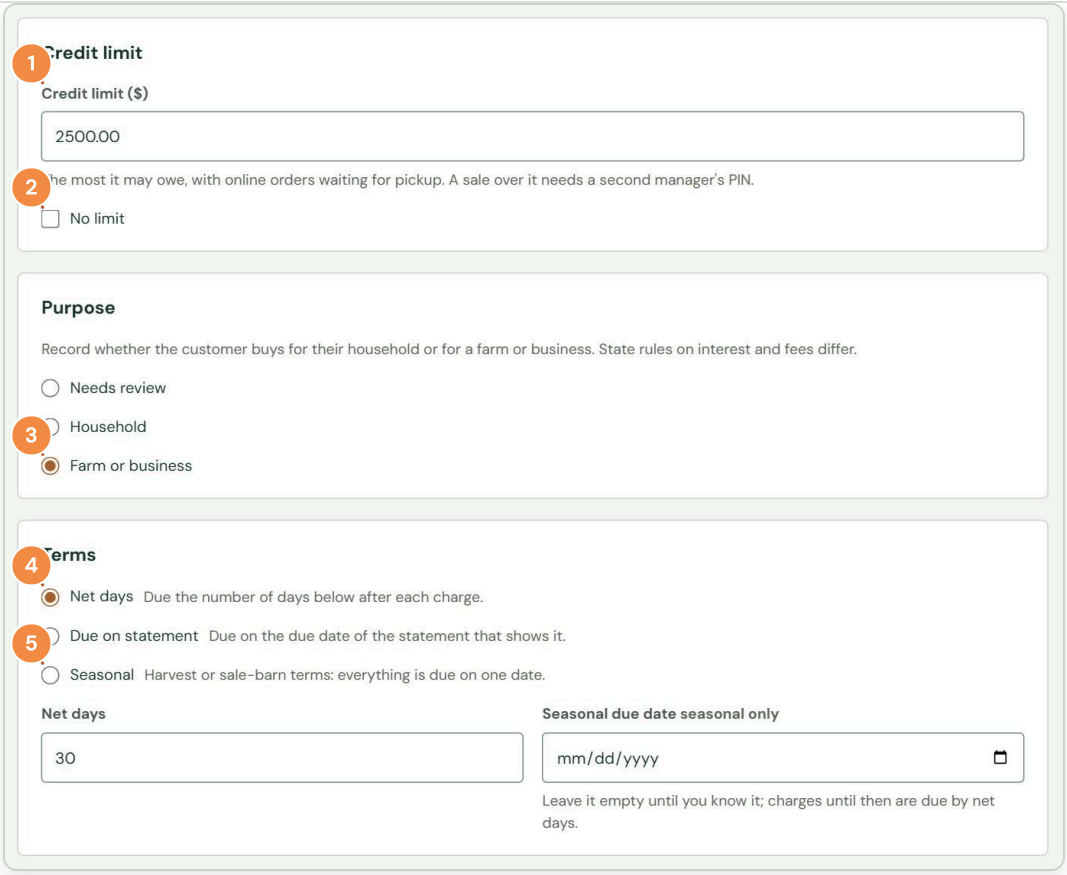
Accounts → open the customer → Charge account → Open charge account Store owner, Manager

Included on every plan except Static Website and Online Store.

A charge account belongs to one customer's account in Roadside, so the customer needs an account first (Add or correct a customer's account, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers)). You give it the most it may owe, say when charges fall due, and choose how its statements go out. Staff can read a charge account and cannot open or change one.

CAREFUL

From the next sale, the account's owner and its authorized buyers can take goods without paying, up to the limit. Check the limit and the people before you open the account: Check who may charge to an account, in Chapter 16 (page 125).



1. Credit limit ($): type the most the account may owe.
2. No limit: tick it to let the account owe any amount.
3. Farm or business: choose it for a customer who buys for a farm or a business.
4. Net days: each charge is due this many days after it is made.
5. Seasonal: choose it when everything is due on one date.

Open a charge account: the Credit limit, Purpose and Terms cards.

1. **Go to Customers, then Accounts, open the customer and press Open charge account** on the **Charge account** card. The card reads *No charge account.* until one is opened.

2. **Type the Credit limit ($),** in dollars and cents. The screen explains it: *The most it may owe, with online orders waiting for pickup. A sale over it needs a second manager's PIN.* A Manager or the Store owner can tick **No limit** instead.

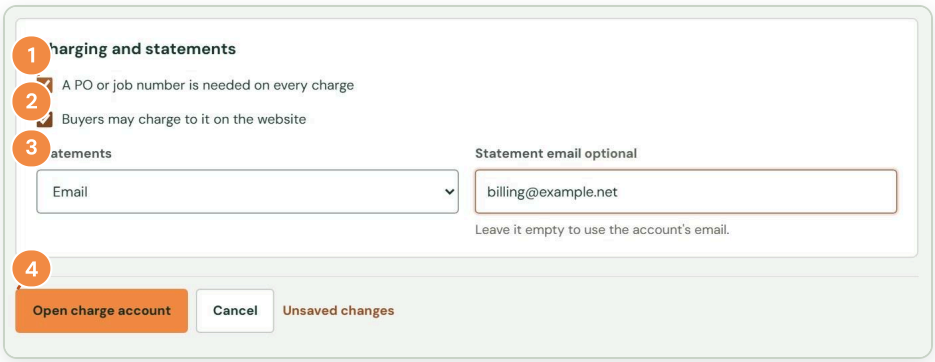
3. **Choose the Purpose:** *Household* or *Farm or business*. It starts on *Needs review*. The card gives the reason: *State rules on interest and fees differ.*

4. **Choose the Terms.** The form opens on *Net days*, with 30 in the box. The table below gives the three choices.

5. **Fill in Charging and statements.** Tick **A PO or job number is needed on every charge** for a customer who wants one on every invoice. Under **Statements**, choose *Email*, *Print* or *Email and print*. Statements go to the account's own email unless you type another in **Statement email**.

6. **Press Open charge account.** Roadside says *Charge account opened.* and the card shows *Active* with the limit and the terms.

TERMS	WHEN A CHARGE IS DUE
Net days	The number of days in **Net days** after each charge. The box takes 0 to 3,650.
Due on statement	On the due date of the statement that shows the charge.
Seasonal	On one date, typed in **Seasonal due date**. You may leave the date empty until you know it. Charges made before then are due by net days.



1. Tick this to require a PO or job number on every charge.
2. Tick this to let the account's buyers charge website orders.
3. Statements: choose Email, Print or Email and print.
4. Open charge account saves the form and opens the account.

The Charging and statements card at the foot of the same form.

Two messages stop the form most often. *Enter the credit limit, like 500.00. A manager can choose No limit instead.* means the limit box is empty. *Statements by email need an address: add one here or on the account, or send them by print.* means neither the form nor the customer's account has an email. An archived customer must be restored before the account can be opened.

A sale is charged to the account at the register, and its receipt prints the account's balance: Print a receipt or the store's copy, in Chapter 5 (page 39). A sale that would take the account over its limit goes through only when a second manager, someone other than the cashier, approves it at the register with their own Counter PIN. A register that is offline can still charge the account, within fixed amounts (Know what a register may put on a charge account while offline, in Chapter 7 (page 52)).

WORDS TO KNOW

Credit limit
The most a charge account may owe.

Net days
Terms under which each charge is due a set number of days after it is made. Net 30 means 30 days.

Seasonal terms
Terms under which everything on the account is due on one date, such as after harvest.

Purpose
Whether a charge-account customer buys for a household or for a farm or business.

A customer's account may also carry older **Payment terms** and **Credit limit ($)** fields. Those are notes. Only the Charge account card sets a limit the register obeys.

Bringing in what a customer already owed, and letting buyers charge website orders to the account, are in Chapter 17, Bring in what customers owed and let buyers charge online (page 131). Checking who may charge to an account, putting it on hold and closing it are in Chapter 16, Check who may charge, and put an account on hold (page 125).

Change a limit, the terms or how statements go

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Charge account → Change**

Store owner, Manager

Included on every plan except Static Website and Online Store.

Raise a limit before seed season, move a customer to seasonal terms, start asking for a PO, or send statements to the bookkeeper. All of it is on the form that opened the account.

1. **Open the customer and press Change** on the **Charge account** card. The form is headed **Change the charge account** and has the same four cards.
2. **Change what you need.** The top of the form says what a change of terms does: *New terms apply to new charges. Invoices already made keep their due dates.*
3. **Press Save charge account.** Roadside says *Charge account saved.* Read the card to see that the change took. It carries a *PO required* badge while the PO box is ticked, and *Charges online* while the website box is ticked.

Lowering a limit below what the customer owes asks nobody for payment. It stops further charges, unless a second manager approves one at the register. To stop every charge, close the account: Put an account on hold, or close it, in Chapter 16 (page 128). A hold still lets a second manager approve one sale at a register that is online.

If two people change the same account at once, the second sees *This charge account was changed by someone else. Check it and try again.* Nothing of theirs was saved. Open the account again and make the change once more.

16 Check who may charge, and put an account on hold

Once a charge account is open, check who is allowed to charge to it before goods leave the store. Put the account on hold while a bill is sorted out, and close it when it is finished.

IN THIS CHAPTER

- Checking who may charge to an account
- Putting an account on hold and releasing it
- Closing an account and reopening it

Check who may charge to an account

WHERE TO FIND IT **Customers** ›

Accounts → open the customer → Charge account → Who may charge

Store owner, Manager, Staff, Read only (to read); the people are changed on the customer's Contacts card

Included on every plan except Static Website and Online Store.

A charge account takes purchases from the account's owner and from the people the owner has authorized. The card names them, so anyone at the store can check before a hired hand puts a pallet of feed on the farm's account. Opening the account and setting its limit are in Open a charge account with a limit and terms, in Chapter 15 (page 120).

WORDS TO KNOW

Account owner

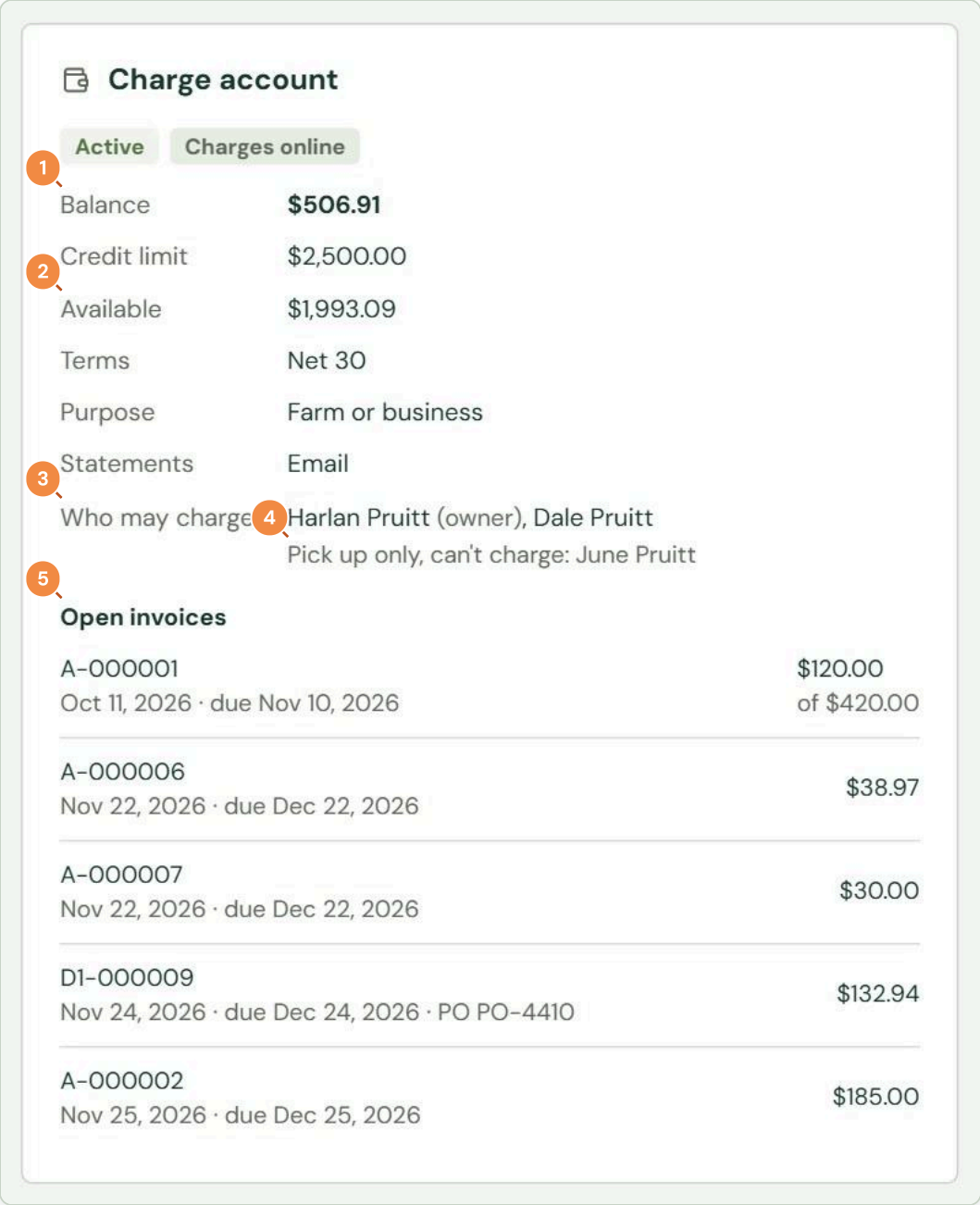
The primary contact of a customer's account. The owner may always buy on the account and pick up its orders.

Authorized buyer

A contact the store has marked as allowed to charge purchases to the account.

	Account owner The primary contact of the customer's account.	**Authorized buyer** A contact the store has marked as allowed to charge.	**Pick up only** A contact who may collect the account's orders.
At the counter	Charges to the account and picks up its orders.	Charges to the account.	Collects orders. Cannot charge.
On the website	Signed in, charges an order to the account, when the store and the account allow it.	Signed in, charges an order to the account, when the store and the account allow it.	Cannot charge.
In the customer portal (Whole Store)	Reads the statements and invoices and sees the balance.	No financial access.	No financial access.

What the account owner, an authorized buyer and a pick-up person may each do.



1. Balance is what the customer owes today.
2. Available is what the account can still charge.
3. Who may charge names the owner first, then each authorized buyer.
4. Pick up only, can't charge names people who may collect orders and nothing more.
5. Open invoices lists what is unpaid, with each due date.

The Charge account card on a customer's account.

1. **Open the customer and read Who may charge** on the **Charge account** card. The owner comes first, marked *(owner)*, then every authorized buyer.

2. **Read the line under it.** *Pick up only, can't charge* lists the contacts who may collect the account's orders. They cannot put a purchase on the account.

3. **To add or remove a buyer, go to the Contacts card on the same page.** Tick or untick **Authorized to buy on this account** for the person: Set who may buy and who may pick up, in "Find a customer and the people on their account" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers).

> ⚠ CAREFUL
> Ticking **Authorized to buy on this account** lets that person charge to the business from the next sale. Tick it only when the account's owner has said so.

An account with no primary contact reads *Nobody yet*, with the note *Add the account's owner (its main contact) before it can be charged to*. The change worked when the person's name is on the **Who may charge** line. At the register the cashier names the buyer on a charged sale, and the receipt prints the name beside **Bought by**: Print a receipt or the store's copy, in Chapter 5 (page 39).

Put an account on hold, or close it

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Charge account → Put on hold**

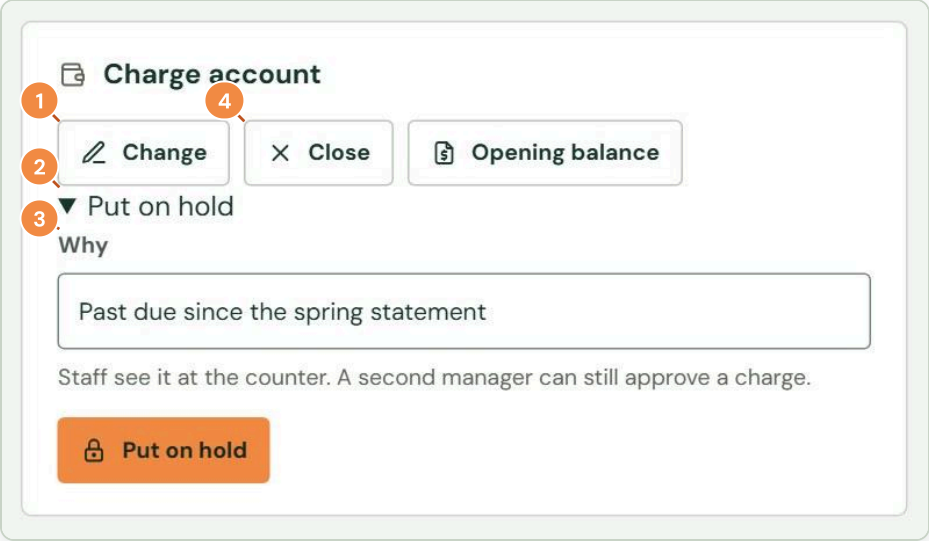
Store owner, Manager

Included on every plan except Static Website and Online Store.

A hold stops a customer charging while a bill is sorted out. Closing is for an account that is finished. Neither one changes what the customer already owes.

> WORDS TO KNOW
> ### Hold (on a charge account)
> A stop on further charges to the account. A second manager can still approve one sale at a register that is online.

> ⚠ CAREFUL
> The cashier sees the reason you type, at the counter, with the customer standing there. Write it so it can be read aloud.



1. Change opens the form for the limit, terms and statements.
2. Put on hold opens the box for the reason.
3. Why: type the reason the counter will read.
4. Close ends the account for further charges.

The buttons on a Charge account card, with Put on hold open.

1. **Open the customer and press Put on hold** at the foot of the **Charge account** card. It shows on an account that is *Active*.
2. **Type the reason in Why,** up to 300 characters, such as the screen's example, *Past due since the spring statement*.
3. **Press Put on hold.** Roadside says *On hold. Charges to it are refused unless a second manager approves one*. The card reads *On hold:* and your reason.
4. **To lift it, press Release hold.** Roadside says *Released. The account can be charged again*.

At the register a charge to a held account is refused with the reason, unless a second manager, someone other than the cashier, approves that one sale with their own Counter PIN. That approval needs the register to be online. A register that is offline refuses a held account outright, and no manager can approve the sale there (Know what a register may put on a charge account while offline, in Chapter 7 (page 52)).

Close an account, and reopen it

Press **Close** on the card. Roadside asks *Close this charge account? It takes no new charges. Payments still go on it, and you can reopen it.* A closed account takes no charge at the register, and no manager's approval changes that. What is owed stays owed.

The list of accounts on **Take a payment** leaves closed accounts out, so take the customer's last payment before you close, or reopen the account to take one. On a closed account the button reads **Reopen**, and the account comes back *Active* with the limit and terms it had.

Either change worked when the account is under **On hold** or **Closed** on the Charge accounts list.

17 Bring in what customers owed and let buyers charge online

When your store starts keeping charge accounts in Roadside, bring in what each customer already owed and open accounts for the customers whose old records say they buy on account. Then decide whether buyers may put website orders on their account.

IN THIS CHAPTER

- Bringing in what a customer owed before
- Opening accounts from the older terms fields
- Letting buyers charge website orders to their account

Bring in what a customer already owed

WHERE TO FIND IT **Customers** ›

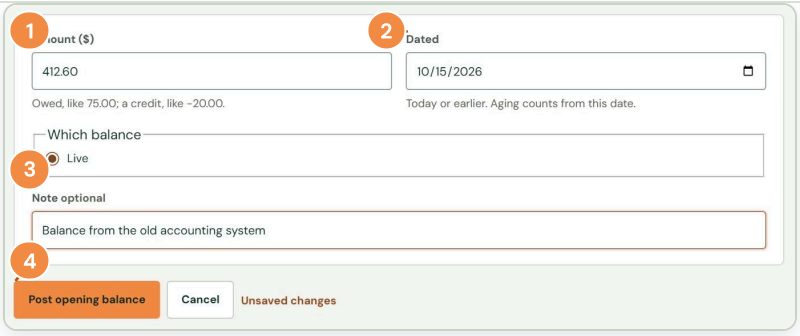
Accounts → open the customer → Charge account → Opening balance Store owner, Manager

Included on every plan except Static Website and Online Store.

A customer who owed the store money before you kept charge accounts in Roadside starts with that amount, not with zero. The opening balance is one entry for what they owed, or were owed, dated the day it was owed from. The customer needs a charge account first (Open a charge account with a limit and terms, in Chapter 15 (page 120)).

⚠ CAREFUL

An account gets one opening balance, and it cannot be edited or deleted. Check the amount and the date against your old records before you post it.



1. Amount ($): what the customer owed. Type a minus sign for a credit.
2. Dated: the day the amount was owed from.
3. Note: where the figure came from.
4. Post opening balance puts the amount on the account.

Opening balance, filled in and not yet posted.

1. **Open the customer and press Opening balance** on the **Charge account** card.
2. **Type the Amount ($).** The note under the box reads *Owed, like 75.00; a credit, like -20.00.*
3. **Choose the date in Dated.** It must be today or earlier, and Aging counts the age of the amount from it.
4. **Under Which balance, choose Live.** The form does not post until one is chosen.
5. **Add a Note if it helps, then press Post opening balance.** Roadside says *Opening balance posted.*

An amount owed becomes one invoice, dated the day you chose and due by the account's terms. A credit is applied to whatever is open on the account. It worked when **Balance** matches your old records and, for an amount owed, **Open invoices** on the card lists the invoice.

A second opening balance is refused: *This account already has an opening balance. Correct it with a credit or a charge instead.* A wrong figure is put right with a credit or a charge for the difference: Give a credit or add a charge, in Chapter 18 (page 143). The **Opening balance** button can stay on the card after you post. Opened again, the form marks *Live* with *(has one)*.

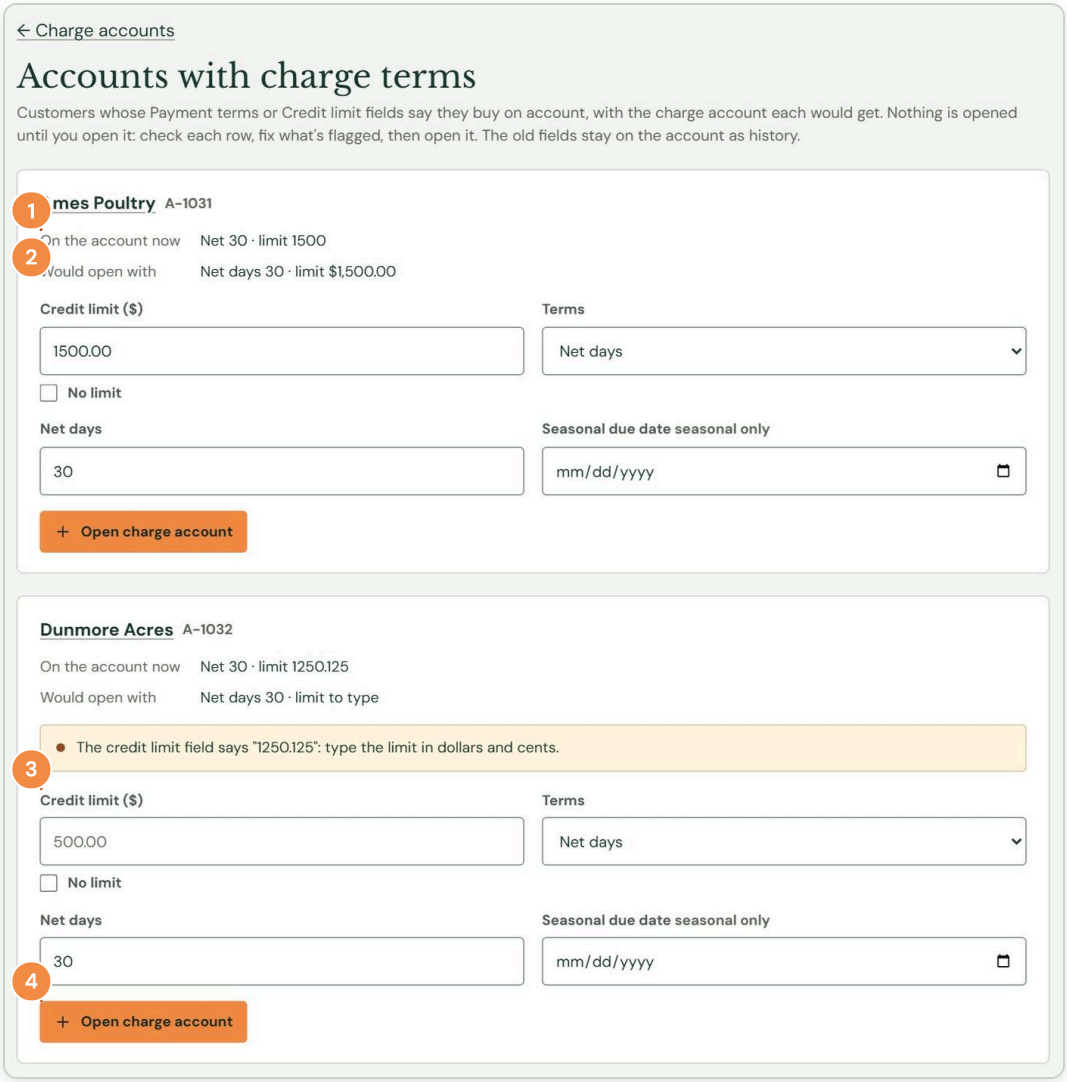
Open accounts for customers whose old fields said they buy on account

WHERE TO FIND IT **Customers** › **Charge accounts → Accounts with charge terms** Store owner, Manager

> Included on every plan except Static Website and Online Store.

A store that uses the Feed & Seed pack may have typed charge terms into the **Payment terms** and **Credit limit ($)** fields of its customers before it had charge accounts. When Charge accounts is set up, Roadside lists those customers once, each with the charge account it would get. Nothing is opened until you open it.

The **Accounts with charge terms** button is on the Charge accounts list only while a customer on that list still waits. A customer given terms later is not added to it, and is opened from their own account.



1. On the account now: what the old fields say.
2. Would open with: the terms and limit Roadside proposes.
3. Credit limit ($): check the figure, or type one where it is missing.
4. Open charge account opens this one customer's account.

Accounts with charge terms: customers waiting, one of them flagged.

1. **Go to Customers, Charge accounts and press Accounts with charge terms.**
2. **Read a customer's card. On the account now** gives the old terms and limit. **Would open with** gives what the charge account would start with.
3. **Fix what is flagged.** A note on the card says what needs you, such as *No credit limit on file: type one, or a manager chooses No limit.* or *Seasonal terms: add the date it's due*. Correct the limit, the terms or the dates on the card.
4. **Press Open charge account on that card.** Roadside says *Charge account opened for* and the customer's name. The card leaves the list.

Accounts are opened one at a time, and each lets the customer charge from the next sale, so check the people on it as you go. The old fields stay on the customer as history. Set the purpose, the PO rule and how statements go afterwards with **Change**.

Nothing on this page brings over a balance. Post what each customer owed as an opening balance: Bring in what a customer already owed, in Chapter 17 (page 131). When the last one is done the page reads *Nothing left to bring over*, and each customer is on the Charge accounts list.

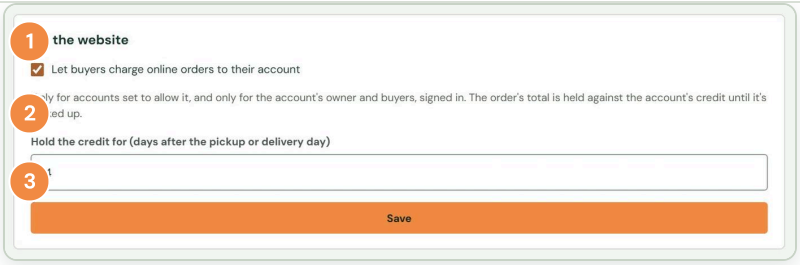
Let buyers charge website orders to their account

WHERE TO FIND IT **Customers** › **Charge accounts → On the website** Store owner

Included on Counter + Online Store and Whole Store plans.

A farm that orders feed on your website for Friday pickup can put the order on its account, as it would at the counter. Two things must both be on: this setting for the whole store, and the website box on each account you choose.

> ⚠ CAREFUL
> With this on, a signed-in buyer can place a website order with no card and no cash. The amount is added to the account's balance when the order is handed over.



1. Tick this to offer charging at website checkout.
2. Hold the credit for: how many days an order's amount is set aside.
3. Save keeps both choices.

The On the website card at the foot of the Charge accounts list.

1. **Go to Customers, then Charge accounts, and scroll to the On the website card** under the list. It is not on the Charge account settings screen, and a Manager does not see it.
2. **Tick Let buyers charge online orders to their account.** The card says who it reaches: *Only for accounts set to allow it, and only for the account's owner and buyers, signed in.*
3. **Set Hold the credit for (days after the pickup or delivery day).** It starts at 14 and takes a whole number from 1 to 90. Any other number is refused with *Hold days is a whole number of days, 1 to 90*. Nothing is saved.
4. **Press Save.** Roadside says *Buyers can charge online orders to accounts set to allow it*. With the box unticked it says *Charging to an account is off on the website*.
5. **Tick Buyers may charge to it on the website on each account that should have it.** A Manager or the Store owner does this with **Change**: Change a limit, the terms or how statements go, in Chapter 15 (page 123).

At checkout the buyer sees **Charge to my account** when they are signed in and shopping for the account, the account is *Active*, and it has credit left. It is offered for orders picked up or delivered, not for orders you ship. Nobody can approve a website order over the limit: the shopper is told to pay another way or call the store. Help a customer choose pickup, delivery or shipping, in “See how a customer orders” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/how-ordering-works) covers the rest of checkout.

While the order waits, its total counts against the account's credit, and the card shows it on the **Available** line as an amount *waiting for pickup*. If the days you set pass after the pickup or delivery day and the order is still waiting, the amount stops counting, and the charge is checked against the account's credit again at pickup. An order with no pickup or delivery day counts from the day it was

placed. The Sales tax report lists these orders under **Charge account holds, not posted yet**: Check and download sales tax for a filing period, in “Set the store's sales tax and check the report” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/sales-tax).

The setting worked when an account you ticked shows the *Charges online* badge on its card and, after its first website order, an amount *waiting for pickup*.

18 Take a payment on account and correct a balance

When a check comes in the mail or a customer pays at the desk, record it against their account. A manager can also give a credit, add a charge, write off an invoice or hand back a credit balance.

IN THIS CHAPTER

- Recording a check, cash or a card payment toward an account
- Choosing which invoices a payment pays
- Reading a payment's receipt, and finding it again
- Giving a credit, or adding a charge with no sale behind it
- Writing off an invoice that will not be paid
- Handing back a credit balance in cash or by store check

Take a payment on account

WHERE TO FIND IT **Customers** › **Charge accounts → Take a payment** Store owner, Manager, Staff

Included on every plan except Static Website and Online Store.

A check arrives in the mail, a customer hands cash across the desk, or someone reads a card over the phone and you run it on the counter card terminal. Take a payment records that money against the customer's charge account. Staff can take a payment on account. Read only people cannot.

⚠ CAREFUL

Take the payment records money you already hold. It charges no card: *Card at the counter terminal* means the card was already run on the store's card terminal. No button undoes a payment. One recorded by mistake is put right by a Manager or the Store owner, who adds a charge for the same amount: Give a credit or add a charge, in Chapter 18 (page 143).

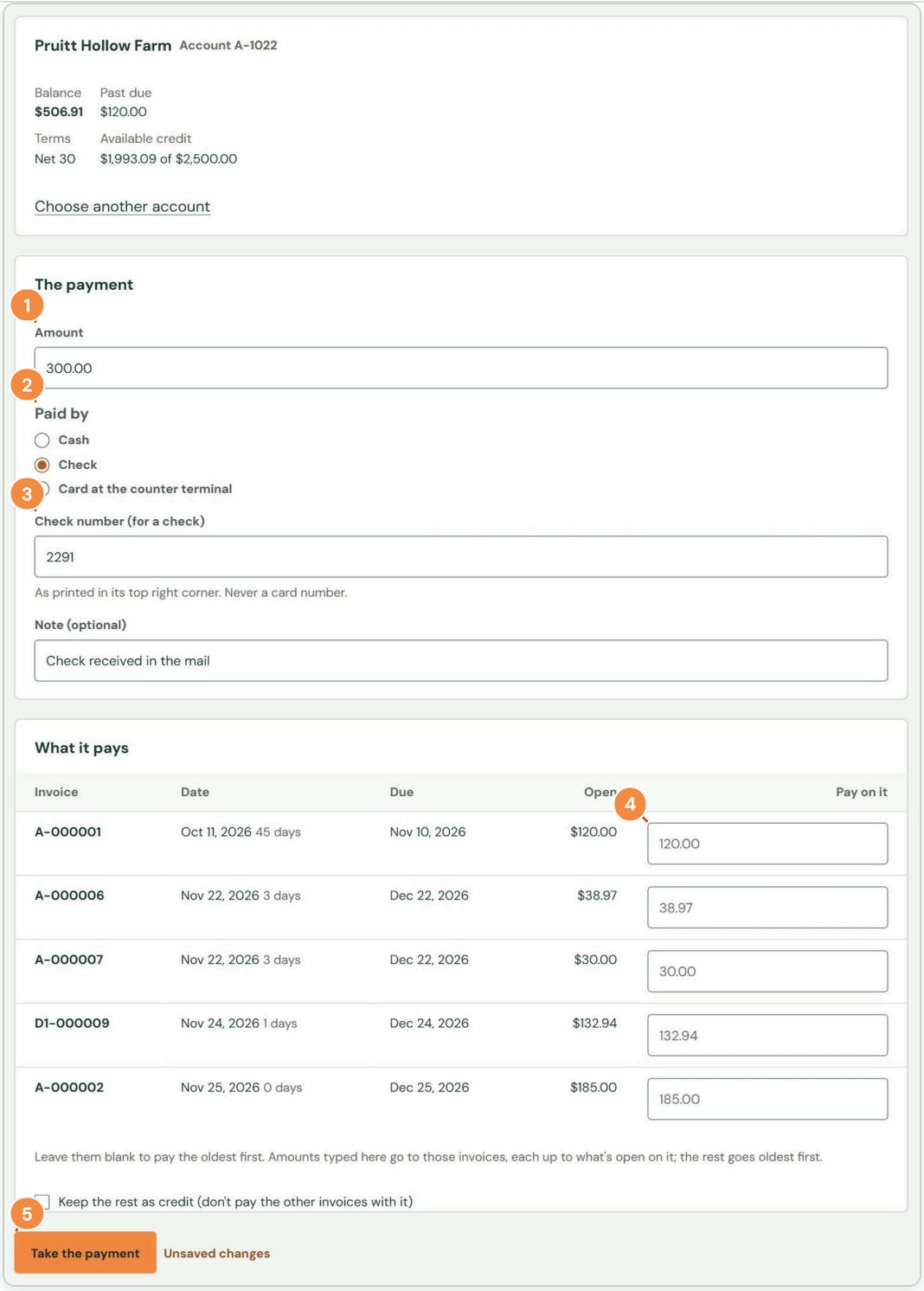
WORDS TO KNOW

Payment on account

Money a customer pays toward what they owe on their charge account. It is not payment for a sale made today.

Office payment

A payment on account recorded in Roadside, away from the register. Its money is in no register's drawer.

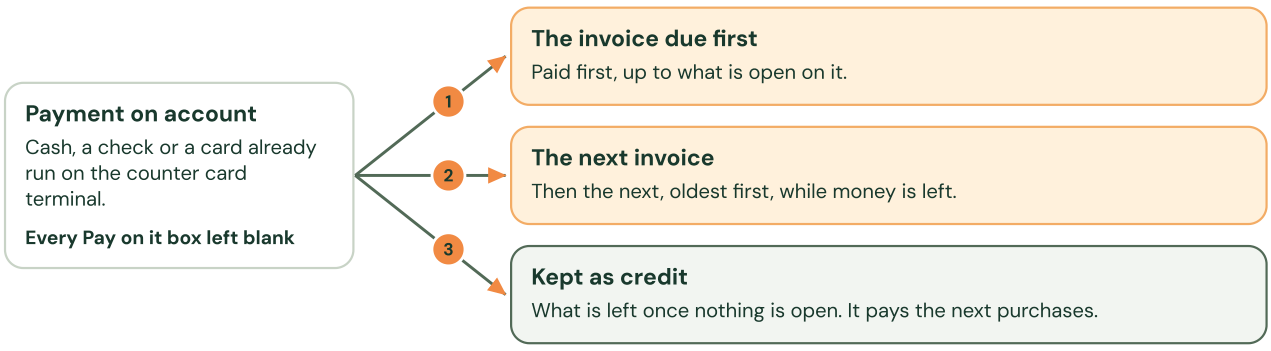


1. Amount: what the customer paid.
2. Paid by: Cash, Check or Card at the counter terminal.
3. Check number: the number printed on the check.
4. Pay on it: type an amount here to send it to that invoice.
5. Take the payment records the money on the account.

Take a payment on account, with a check typed in and not yet taken.

1. **Go to Customers, then Charge accounts, and press Take a payment.**
2. **Choose the customer under Which account? and press Next.** An account on hold is in the list, marked *on hold*. A closed account is not. The account's card shows its **Balance** (**Credit balance** when the store owes the customer), **Past due** and **Terms**, and **Available credit** when the account has a limit. If it is the wrong customer, press **Choose another account**.
3. **Type the Amount,** in dollars and cents.
4. **Choose Paid by.** *Check* is chosen to start with. The others are *Cash* and *Card at the counter terminal*.
5. **For a check, type its number in Check number (for a check).** The note under the box reads *As printed in its top right corner. Never a card number.* It takes 1 to 10 digits. **Note (optional)** takes up to 500 characters.
6. **Decide what the payment pays, under What it pays.** Leave every **Pay on it** box blank and the payment goes to the invoice due first, then the next. To pay particular invoices, type an amount beside each one.
7. **Press Take the payment.** Roadside says *Payment of*, the amount, and *taken on account*. The payment's receipt opens.

The screen states the rule for the boxes: *Leave them blank to pay the oldest first. Amounts typed here go to those invoices, each up to what's open on it; the rest goes oldest first.*



Where a payment on account goes when the Pay on it boxes are left blank.

Tick **Keep the rest as credit (don't pay the other invoices with it)** when the customer wants the payment to cover only the invoices you chose. What is left stays on the account as credit. A payment larger than everything owed leaves credit too. On an account with nothing open the card reads *Nothing is open on this account. The payment is kept as credit and pays the next purchases.*

A refusal takes nothing and brings the form back empty with the reason. *A payment on account is more than $0.00.* means the amount is missing or zero. *Enter the check's number as printed in its top right corner: 1 to 10 digits.* means the check number is missing or has letters in it. An amount beside an invoice can be no more than what is open on it.

Where the money shows afterwards

The payment is on the customer's **Charge account** card under **Recent activity**, and on the customer's timeline. On Day summary for the whole store it is in **Received on account**, and a check is on the **Office checks to deposit** list for the bank: Take the checks and cash to the bank, in Chapter 4 (page 33).

A payment on account can also be taken at the register. Cash is in the register's drawer count, a check is on the day's checks to deposit and a card is in the register's card total. The receipt in Roadside reads *taken at the counter*.

If the bank sends back a check that paid on account, mark it returned on the payment's order. The amount goes back on the charge account: Put a returned check on the customer's charge account, in Chapter 8 (page 63).

Check what a payment paid

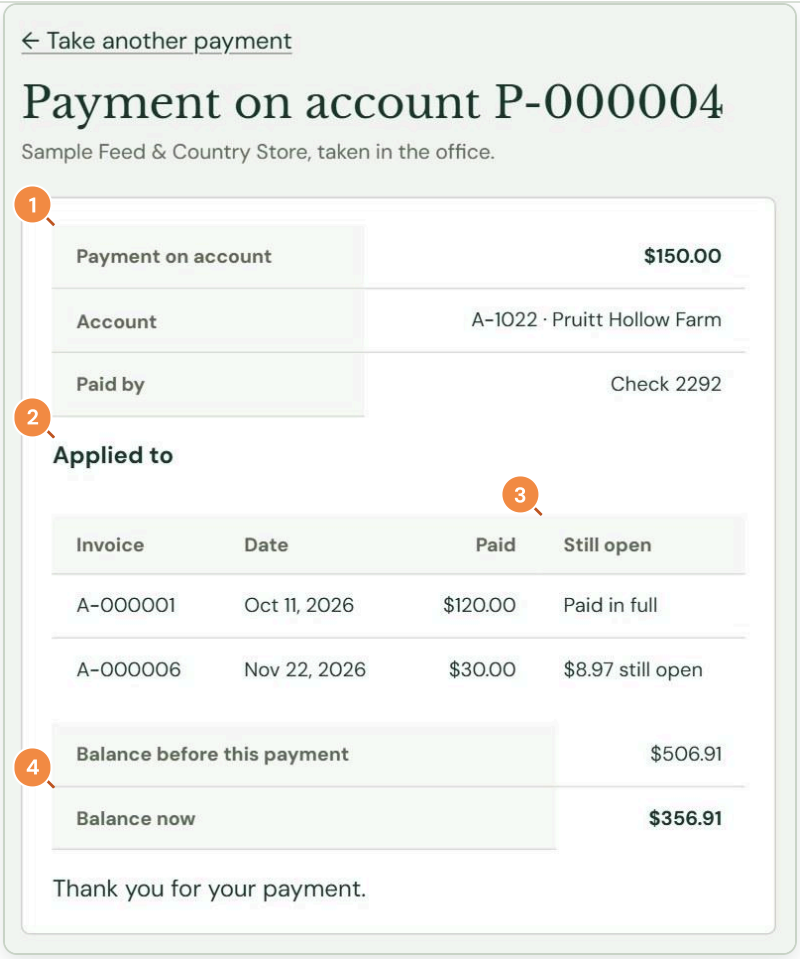
WHERE TO FIND IT **Customers** ›

Charge accounts → Take a payment → the receipt that opens; later from Sales ›

Orders → All → search for the payment's number Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

Every payment on account has a receipt that says which invoices it went to and what the account owed before and after. It opens when you take a payment.



1. Payment on account: the amount taken, with the account and how it was paid.
2. Applied to: each invoice the payment went to.
3. Still open reads Paid in full, or what is left on that invoice.
4. Balance now: what the account owes after the payment.

The receipt of a check that paid one invoice in full and part of another.

1. **Read the heading.** It gives the payment's number, such as P-000001. The line under it names your store and reads *taken in the office* or *taken at the counter*.
2. **Read Applied to.** Each row is an invoice, with its date, the amount **Paid** on it and **Still open**, which reads *Paid in full* or the amount left.
3. **Check the last rows. Balance before this payment** less the payment gives **Balance now**. Money that went to no invoice is on its own row, **Kept as credit on your account** or **Credit on your account**.

The payment is right when **Balance now** is the old balance less what the customer paid. When the payment was more than the customer owed, the last row reads **Credit balance** and the page adds *It will pay your next purchases.*

The receipt is worded for the customer and ends *Thank you for your payment.*, so you can print the page from your browser and hand it over. Roadside emails nothing from it. **← Take another payment** at the top opens the form again for the same customer.

Find a payment again

The customer's **Charge account** card lists each payment under **Recent activity** as *Payment*, with its date, its note, the amount and the balance after it. That line is not a link. To open the payment itself, go to **Sales**, then **Orders**, press the **All** tab and search for the payment's number or the customer's name. Its row begins *Payment on account*, and its page has a **Receipt (PDF)** button. Payments on account are left out of the **To do** tab.

Give a credit or add a charge

WHERE TO FIND IT **Customers** ›

Accounts → open the customer → Charge account → Give a credit, or Add a charge Store owner, Manager

Included on every plan except Static Website and Online Store.

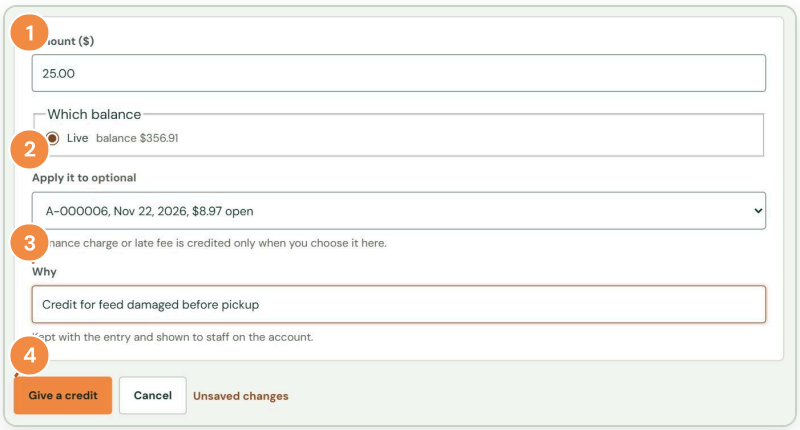
Give a credit and **Add a charge** correct what a customer owes when no sale or payment explains it. **Give a credit** takes an amount off, for a bag that split or a price you agreed to honor. **Add a charge** puts an amount on, for a delivery fee that was not rung up or a payment recorded by mistake. Both show to a Manager or the Store owner only.

WORDS TO KNOW

Credit (on a charge account)
An amount taken off what a customer owes on their charge account. No goods come back and no money changes hands.

Credit balance
A charge-account balance below zero. The store owes the customer.

> ⚠ **CAREFUL**
> Each one changes what the customer owes and shows on their next statement. Neither can be deleted. A wrong credit is corrected with a charge for the same amount, and a wrong charge with a credit.



1. Amount ($): how much to take off.
2. Apply it to: choose the oldest open invoices, or one invoice.
3. Why: the reason, kept with the entry.
4. Give a credit posts it to the account.

Give a credit, applied to one overdue invoice.

1. **Open the customer and press Give a credit** on the **Charge account** card.
2. **Type the Amount ($).**
3. **Under Which balance, choose Live.** The form does not post until one is chosen.
4. **Choose where it goes in Apply it to.** The list shows on an account with open invoices. It starts on *The oldest open invoices*, or you can pick one invoice. The note under it says *A finance charge or late fee is credited only when you choose it here.*
5. **Type the reason in Why,** up to 500 characters. It is *Kept with the entry and shown to staff on the account.*
6. **Press Give a credit.** Roadside says *Credit given.*

The screen says where a credit goes: *It goes to the invoice you choose, then the oldest open ones; with nothing open it stays as credit for the next charges.* Find a charge on a statement and take one off, in Chapter 21 (page 169) shows how to find a finance charge or late fee to take off.

Add a charge

Press **Add a charge** on the card. The form asks for the **Amount ($)**, **Which balance** and **Why**, and its button reads **Add a charge**. Roadside says *Charge added*. The screen describes the result: an invoice with no sale behind it, *dated today and due by the account's terms*, and *It changes no stock and no sales*. A closed account has no Add a charge button.

Either one worked when the entry is in **Recent activity** on the card, as *Credit* or *Charge*, and the **Balance** has moved by the amount.

A credit is not a return and it is not store credit. When goods come back, the cashier refunds the sale at the register, so the stock count and the sales tax follow: Crossroads POS manual, Refund a sale.

Write off what will not be paid

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Charge account → Write off**

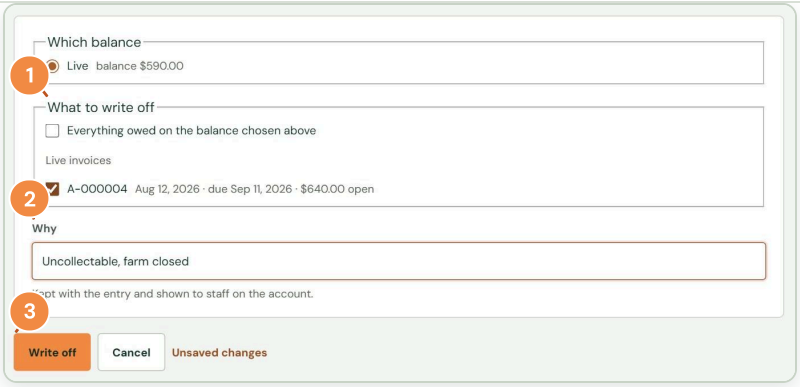
Store owner, Manager

Included on every plan except Static Website and Online Store.

When a farm has closed or a debt is past collecting, a write-off clears the open amount from the account and keeps your reason with it. The screen puts it this way: *Clears what's still open on the invoices you choose. The sales stay sales; the statement shows the amount as written off.*

⚠ CAREFUL

A write-off cannot be reversed in Roadside, and the customer's next statement shows it. It does not stop the customer charging again. To do that as well, close the account: Put an account on hold, or close it, in Chapter 16 (page 128). A hold still lets a second manager approve one charge at a register that is online.



1. What to write off: tick everything owed, or single invoices.
2. Why: the reason, kept with the entry.
3. Write off clears what is open on the invoices you ticked.

Write off, with one old invoice ticked.

1. **Open the customer and press Write off** on the **Charge account** card. The button shows only while the account has something open.
2. **Under Which balance, choose Live.**
3. **Choose What to write off.** Tick **Everything owed on the balance chosen above**, or tick single invoices. Each invoice is listed with its date, its due date and what is open on it. An invoice is written off for all that is open on it. There is no box for part of one.
4. **Type the reason in Why,** up to 500 characters.
5. **Press Write off.** Roadside says *Written off*.

It worked when the invoices have left **Open invoices** on the card and **Recent activity** has a *Written off* entry. With nothing ticked, Roadside answers *Choose the invoices to write off, or everything owed.*

A write-off does not change the sale or the sales tax collected on it. How to treat the loss in your books is a question for your accountant.

Pay out a credit balance

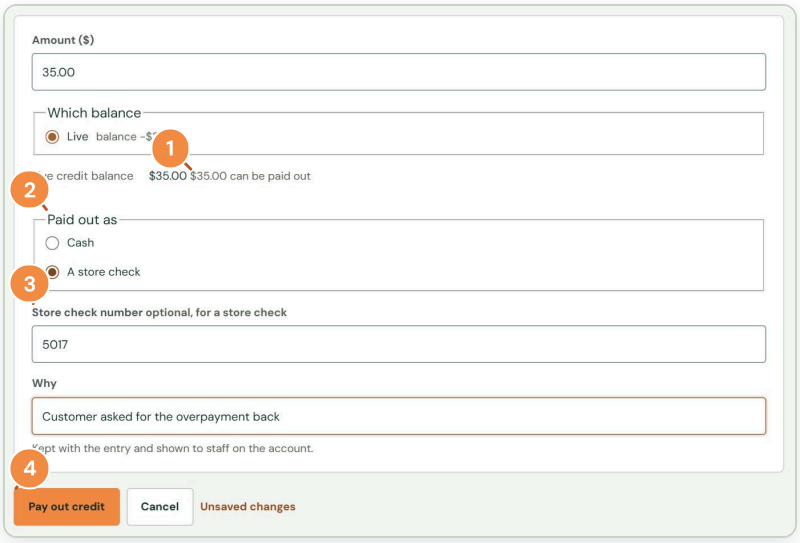
WHERE TO FIND IT **Customers** › **Accounts → open the customer → Charge account → Pay out credit**

Store owner, Manager

Included on every plan except Static Website and Online Store.

A customer who paid twice, or paid more than they owed, has a credit balance. Most leave it to pay their next charges. For one who wants the money back, a Manager or the Store owner hands it over and records it here. A pay-out counts as a refund, so it also takes the right to refund orders, which both roles have.

> ⚠ CAREFUL
> This records that money leaves the store, and it cannot be undone. Hand over the cash or write the check, then record it once.



1. Can be paid out: the part of the credit Roadside lets you hand back.
2. Paid out as: Cash or A store check.
3. Store check number: the number of the check you wrote.
4. Pay out credit records the money as handed back.

Pay out credit, by store check.

1. **Open the customer and press Pay out credit** on the **Charge account** card. The button shows only while the account has a credit balance.
2. **Read the credit balance and the figure beside it, can be paid out.** They are not always the same.
3. **Type the Amount ($) and, under Which balance, choose Live.**
4. **Choose Paid out as:** *Cash*, which is chosen to start with, or *A store check*. For a check you may type its number in **Store check number**, 1 to 10 digits.

5. **Type the reason in Why,** up to 500 characters.
6. **Press Pay out credit.** Roadside says *Credit paid out*.

Not every credit can be handed back. The screen gives the rule: *Only credit left by payments on account made in cash or by check can be paid out; credit from a card payment, a refund to the account or a manager's credit pays the next charges instead.* Ask for more than that and Roadside answers with the amount it allows, and says *The rest pays the next charges*.

It worked when the credit on the card is lower by the amount and **Recent activity** has a *Credit paid out* entry. If the cash came out of a register drawer, tell whoever counts that drawer.

A customer who would rather spend the credit in the store can have it as store credit instead: Move a charge-account credit to store credit, in Chapter 22 (page 173).

19 Make and send the month's statements

Once a month, make a statement for every account that owes or had activity, look them over, then email or print them.

IN THIS CHAPTER

- Making a month's statements for every charge account
- Choosing who checks are made out to
- Looking the statements over, then emailing or printing them
- Opening, downloading or emailing one customer's statement

Make the month's statements

WHERE TO FIND IT **Customers** › **Charge accounts → Statements → Make statements**

Store owner, Manager (to make them); Store owner (the payee); all four roles can read the list

Included on every plan except Static Website and Online Store.

The **Statements** button on **Charge accounts** opens the list of each month's statements, newest first.

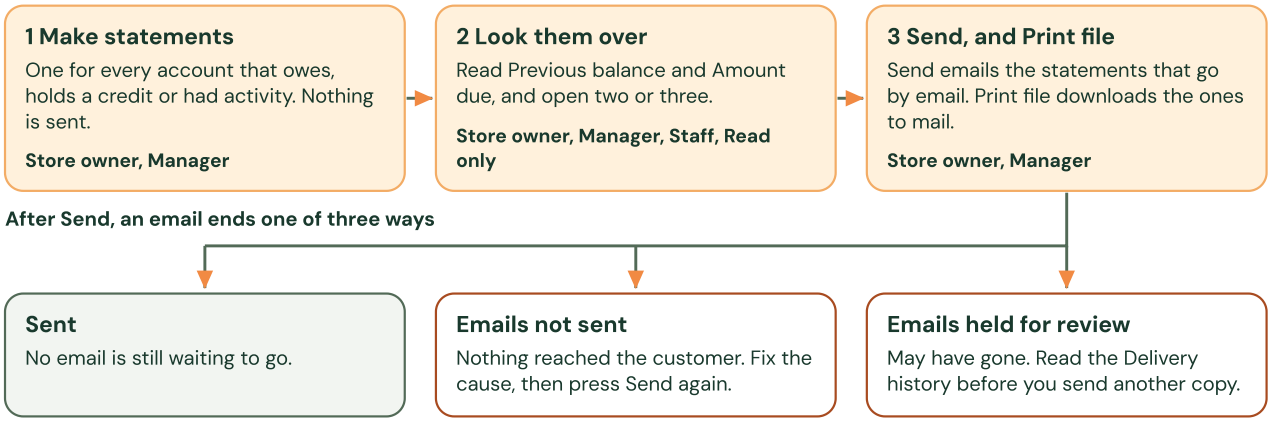
WORDS TO KNOW

Statement
One charge account's activity and amount due up to a date, sent to the customer once a month.

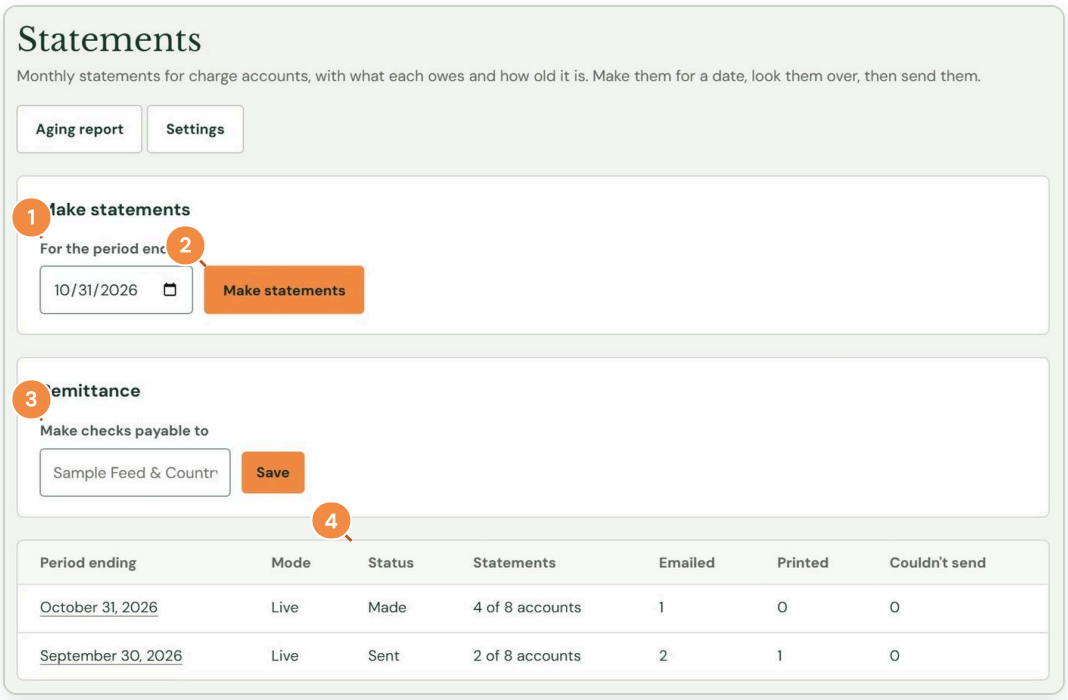
Period ending
The last day a statement covers. The next statements start the day after it.

Remittance stub
The bottom part of a statement, which the customer sends back with a check. It says who to make the check out to.

Making statements builds one for every charge account that owes something or had activity since its last statement. Only an account with a balance of exactly zero and no activity gets none, so an account holding a credit gets one every month. Making them sends nothing to customers.



The month's statements, from making them to sending them, and who does each step.



1. For the period ending: check the last day the statements cover.
2. Make statements builds them. Nothing is sent.
3. Make checks payable to: the name on every remittance stub.
4. Status: read where each month's statements stand.

Statements, with the Make statements and Remittance cards above the list of past months.

> ⚠ CAREFUL
> If the store has finance charges or late fees turned on, making the statements adds them to every account past due by more than the days the store set. They go on when the statements are made, before anything is sent, once for each statement period. Statements made for another date mid-month start a new period and are charged again (Turn on a finance charge, in Chapter 21 (page 164)).

1. **Go to Customers, then Charge accounts, and press Statements.**
2. **Check the date under For the period ending.** It starts at your store's most recent closing day, which is the last day of the month unless Dirt Road has set another day for your store. The latest date it takes is today.
3. **Press Make statements.** The message reads *Making the statements for* and the date, then *Look them over, then send them*. The month's own page opens and fills in as the statements are made.

Statements go in date order, each month starting the day after the last one ended. An earlier date is refused with *Statements already go up to* the last date and *Choose a later date*. The same date is refused with *Statements for* that date *are already made*. While the last statements are still being made, or after they stopped, Roadside asks you to wait or to make them again first (Look the statements over, then send or print them, in Chapter 19 (page 152)).

It worked when the month's row reads *Made* and the month's page has no **Couldn't be made** table. A month that missed accounts also reads *Made*, and its page names how many. The **Statements** column gives how many were made, out of the charge accounts Roadside checked. The other columns count what happened next:

STATUS	WHAT IT MEANS
Waiting	Roadside has the request and starts on it shortly.
Making	The statements are being made.
Made	Every statement that could be made is ready to look over, send and print.
Sending	Someone pressed Send and the emails are on their way.
Sent	No email is still waiting to go.
Stopped	Making them stopped partway. Open the month and press **Make again**.

A status followed by *held for review* and a number has emails that need a person to check them. **Emailed**, **Printed** and **Couldn't send** count the statements emailed, put in the print file, and not sent.

Who checks are made out to

The **Remittance** card is the Store owner's. Type the name in **Make checks payable to**, up to 120 characters, and press **Save**. Left empty, the stub uses the store's name. Statements made after you save carry it. Statements already made keep the name they were made with.

To find the customer behind an account, start from the customer's own account (Find a customer by name, phone or contact, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers)).

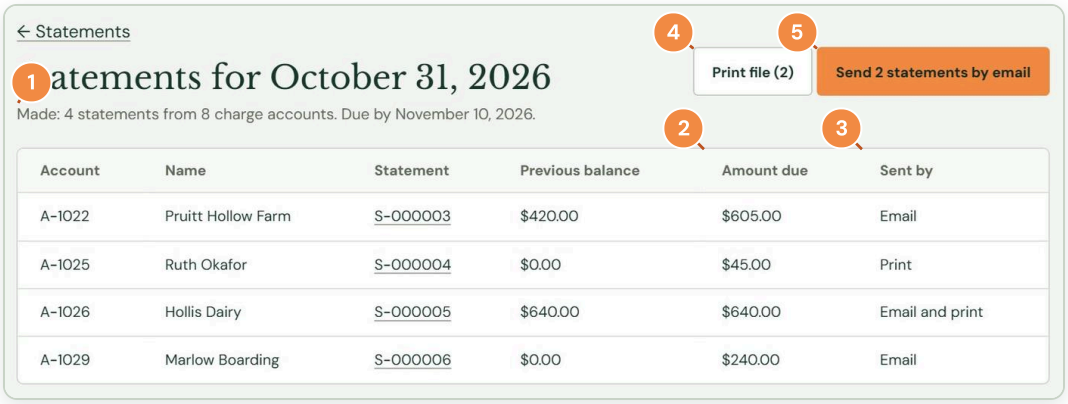
Look the statements over, then send or print them

WHERE TO FIND IT **Customers** › **Charge accounts → Statements → open a period**

Store owner, Manager (to send and print); all four roles can read

Included on every plan except Static Website and Online Store.

Press a date under **Period ending** on Statements to open that month. The page is headed **Statements for** and the date. The line under it gives the status, how many statements were made from how many charge accounts, and **Due by**, the date every statement on it is due.



1. Due by: the date printed on every statement in this month.
2. Amount due: check each account's total before anything goes out.
3. Sent by: how each account takes its statement.
4. Print file downloads one PDF of the statements that go by print.
5. Send emails every statement that goes by email.

One month's statements, made and ready to send.

Each statement goes the way its charge account says, shown under **Sent by**: *Email*, *Print* or *Email and print*. That choice belongs to the charge account (Change a limit, the terms or how statements go, in Chapter 15 (page 123)). An email goes to the account's address for statements, or to the customer account's email when that is empty.

> ⚠ CAREFUL
> **Send** emails every statement on the page whose account takes statements by email and has an address for them, each with its statement attached as a PDF, under the subject *Statement for* the month *from* your store's name. An email cannot be called back. An account set to email with no address is not counted on the button and gets nothing: add the address on its charge account first (Change a limit, the terms or how statements go, in Chapter 15 (page 123)).

1. **Read down Previous balance and Amount due.** Open two or three statements and check them (Open, preview or email one statement, in Chapter 19 (page 154)).
2. **If a table headed Couldn't be made shows, read its Why column.** Fix what it names, then press **Make again**. The message reads *Making the missing statements again*.
3. **Press Print file.** The number on the button is how many statements go by print. Roadside downloads one PDF, named `Statements-` and the period's date, with those statements in account-number order, and counts each as printed. Print it and mail them.
4. **Press Send, the button that names how many statements go by email,** once you are happy with them. The message reads *Sending*, the number, and *statements by email*.

The buttons show once the statements are made. **Send** shows while any email statement with an address is left to send, and **Print file** while any account takes its statement by print. It worked when the status reads *Sending*, then *Sent*, and **Emailed** on Statements counts the emails. Pressing Send again sends only what is not on its way already, and when nothing is left it says *Nothing new to send*.

Emails that did not go

A table headed with a number and **emails not sent** lists emails that stopped before they left, so nothing reached the customer. Its **Why** column gives the cause. Fix it, then press **Send** again.

A table headed with a number and **emails held for review** lists emails that may have gone. Roadside never sends one of these again on its own. Open the statement from the table, read its **Delivery history**, and check with the customer before you send another copy from the statement's page.

When Make again is refused

Make again shows when making stopped, or when some statements could not be made. While an email from the month is still going out, the page shows *These statements are still being sent. Try again when sending has finished.* in its place. Once a later month's statements exist, the button does not

show, and the missed activity appears on that account's next statement.

Open, preview or email one statement

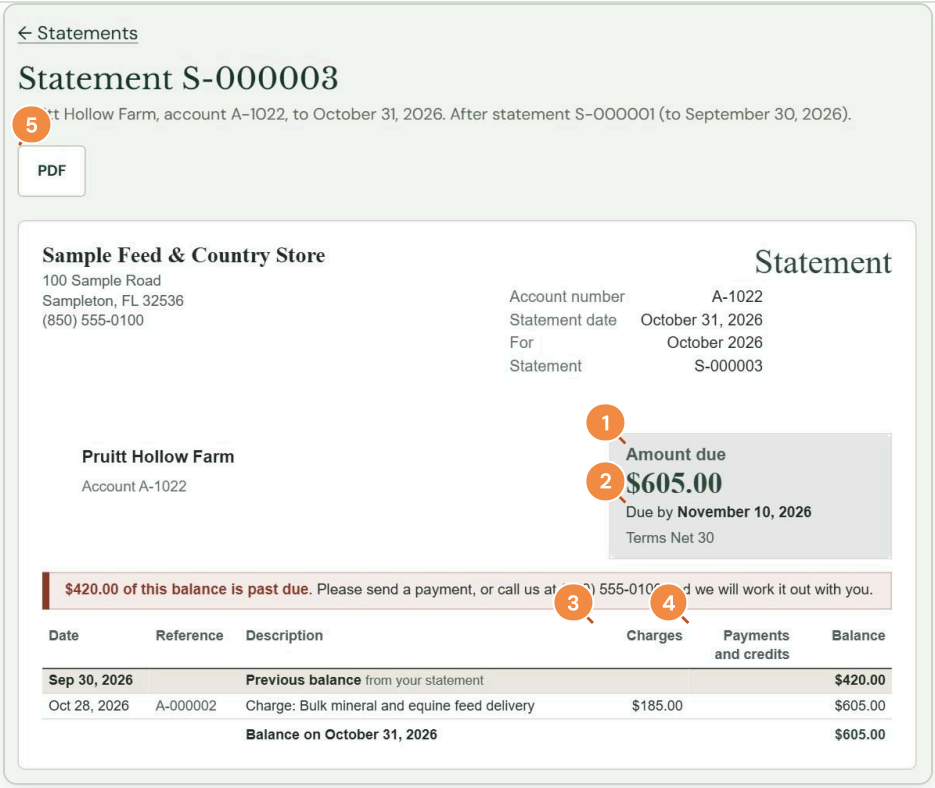
WHERE TO FIND IT **Customers** ›

Charge accounts → Statements → open a period → open a statement; or Aging → an account number (a preview)

Store owner, Manager (to email); all four roles can read and download

Included on every plan except Static Website and Online Store.

Press a statement's number in the **Statement** column of a month's page. The page is headed **Statement** and its number, and the line under it names the customer, the account and the dates it covers. **PDF** downloads it.

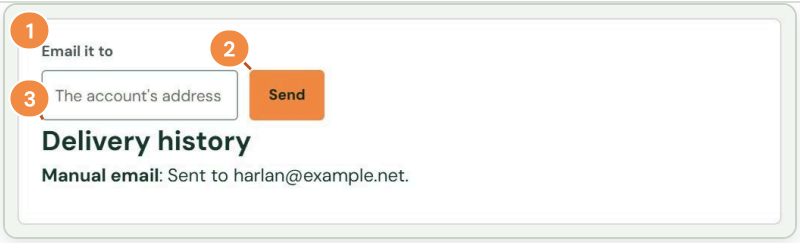


1. Amount due: what the customer owes on the statement date.
2. Due by: the date the amount is due.
3. Charges: each purchase or fee added in the period.
4. Payments and credits: what came off the balance.
5. PDF downloads the statement as the customer gets it.

The top half of one customer's statement.

The statement carries your store's details, **Account number**, **Statement date**, **Amount due** (or **Credit balance** when the store owes the customer), **Due by** and the account's terms. The activity table has **Date**, **Reference**, **Description**, **Charges**, **Payments and credits** and **Balance**. Under it, the balance is split by how old it is, and the stub at the foot reads *Please return this part with your payment.* A customer with store credit sees *Store credit*, the amount, and *is yours to spend. It is not part of the amount due.*

A statement keeps what it showed on the day it was made. Changing the account afterwards, its address or its terms, changes the next statement, not this one.



1. Email it to: type an address, or leave it empty for the account's own.
2. Send emails this statement.
3. Delivery history: check whether each copy went.

The card for emailing one statement, with its delivery history.

1. **Type an address in Email it to, or leave it empty.** Empty sends it to the account's address for statements.
2. **Press Send.** The statement goes by email with its PDF attached, to the address you typed or the account's own, so check the address first. The message reads *Sending the statement.* With no address to use, it reads *The account has no email address for statements.* and nothing is sent.
3. **Read Delivery history.** Each email has its own line, such as *Manual email: Sent* and the address. A copy in the print file shows as *Printed*.

A line reading *Queued* or *Handoff underway* is still going. One reading *Handoff needs review* adds *This email may have been sent. Check the delivery history before sending another copy. It will not be resent automatically.* One reading *Failed before handoff* adds *Nothing was sent. Fix the cause, then send it again.* While a copy is still on its way, Send refuses a second one.

A preview from Aging

An account number on Aging (See who is overdue, in Chapter 20 (page 157)) opens that account's statement up to the Aging date, headed **Statement preview** with the line *Preview: not saved and not sent.* A preview saves nothing, adds no finance charge or late fee, and has no Send card. Its **PDF** button downloads it. A date earlier than the account's latest statement is refused with *This account's statements already go up to* and that date.

On Whole Store the account owner can download the statement from your website (Know what the account owner sees on the website, in Chapter 20 (page 161)).

20 See who is overdue and show customers their account online

Aging shows who is behind and by how long. On Whole Store, the customer portal lets a charge account's owner read the account's statements and invoices on your website.

IN THIS CHAPTER

- Seeing who is behind, and by how long
- Checking that account owners can read their statements online (Whole Store)
- What an account owner reads on your website (Whole Store)

See who is overdue

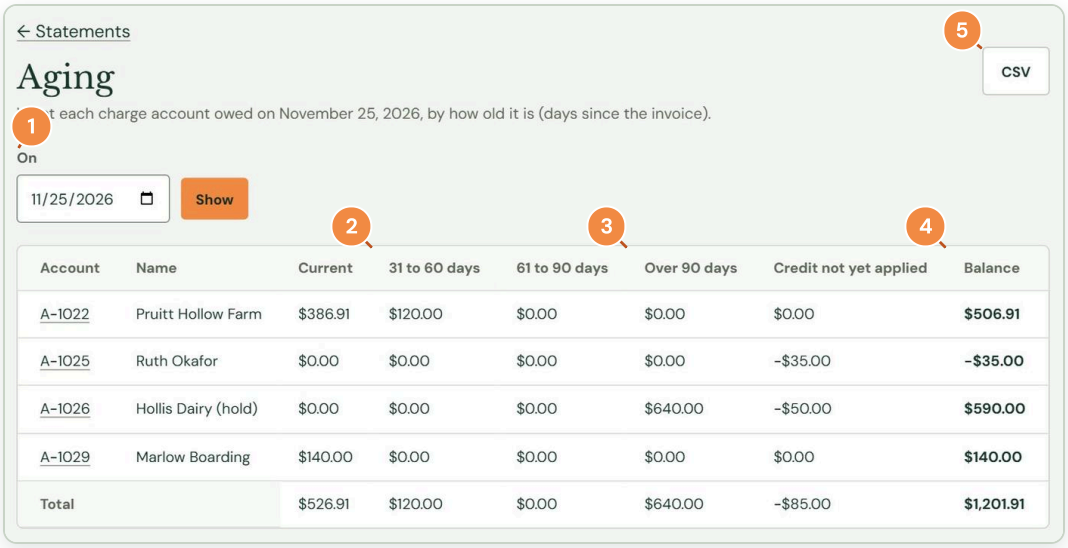
WHERE TO FIND IT **Customers** › **Charge accounts → Aging** Store owner, Manager, Staff, Read only

Included on every plan except Static Website and Online Store.

Aging lists what each charge account owed on a date, split by how long it has been owed. Open it with the **Aging** button on Charge accounts, or the **Aging report** button on Statements. Making and sending the statements is in Chapter 19, Make and send the month's statements (page 149).

WORDS TO KNOW

Aging
What customers owe, sorted by how long it has been owed. Store owners also call it A/R aging.



1. On: choose the date to see, today at the latest.
2. 31 to 60 days: amounts from invoices one to two months old.
3. Over 90 days: the oldest amounts, to chase first.
4. Balance: what the account owes in all.
5. CSV downloads the table for a spreadsheet.

Aging for four accounts, with a total row.

1. **Press Aging on Charge accounts, or Aging report on Statements.** The page opens on today's date.
2. **To see another day, choose it in On and press Show.** The line under the heading names the date and how the columns count.
3. **Read across each account.** The columns are **Current**, **31 to 60 days**, **61 to 90 days** and **Over 90 days**, counted from each invoice's date, then **Credit not yet applied** and **Balance**. An account that is on hold or closed shows that after its name. The **Total** row adds up every column.
4. **Press an account number** to open its statement preview for that date.
5. **Press CSV** for the same table as a file named `aging-` and the date, with each account's **Status** and **Purpose** added.

Some stores have their aging set to count from the due date, and the line under the heading then says *days past due*. The columns read **Not yet due**, **1 to 30 days past due**, **31 to 60 days past due**, **61 to 90 days past due** and **Over 90 days past due**.

It worked when an account's **Balance** for today's date matches the balance on its Charge account card. When no account has a balance or a credit, the table reads *Nothing owed on any charge account*.

GOOD TO KNOW

Read only people can download the CSV too. It holds every account's balance, so keep the file private.

Show the account owner their statements online

WHERE TO FIND IT **Website** › **Customer portal** Store owner, Manager

Included on the Whole Store plan.

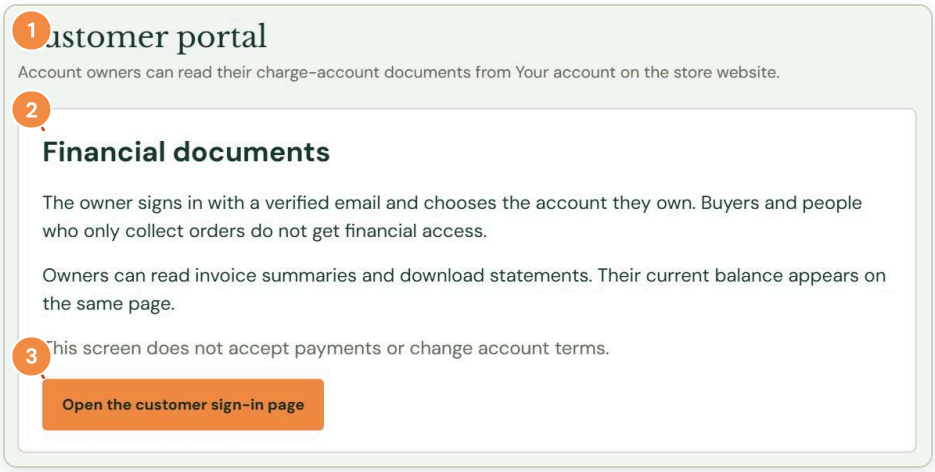
The customer portal lets the owner of a charge account sign in on your website and read the account's statements and invoices. Roadside calls it **Customer portal**. On the website the customer sees it as **Account documents and orders**, on their **Your account** page.

WORDS TO KNOW

Customer portal

The part of the store's website where a charge account's owner reads its statements and invoices.

The Store owner sets it up once, from **All of Roadside** with **Set it up** (Set up a tool the store already has, in “Find what your store has and set it up” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside)). Switching it off later works the same way as for any tool (Switch off a tool the store set up, in “Find what your store has and set it up” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside)). After that, the **Customer portal** screen under **Website** shows whether customers can read their documents. It changes nothing itself. Store owners and Managers open it. Staff and Read only do not.



1. Customer portal: the screen's name in Roadside.
2. Financial documents: read who can see the account's papers.
3. Open the customer sign-in page: see the page customers use.

Customer portal, ready for account owners.

1. **Go to Website, then Customer portal.**
2. **Check for a warning at the top.** With none, account owners can read their documents.
3. **Press Open the customer sign-in page.** Your website's account page opens in a new tab, where customers sign in.

The **Financial documents** card says who gets in: *The owner signs in with a verified email and chooses the account they own. Buyers and people who only collect orders do not get financial access.* An authorized buyer can still charge to the account but cannot read its statements. The owner reads invoice summaries, downloads statements and sees the current balance. The portal takes no payments and changes no terms, so the customer still pays at the counter or by check.

A warning that begins *Financial access is unavailable until Online ordering and Charge accounts are enabled* means one of the two is off for your store. Write to **support@dirtroadsoftware.com**.

A customer signs in on your website the same way they do to follow an order (Help a customer find or repeat an order, in “See what your customer gets after they order” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/after-the-order)).

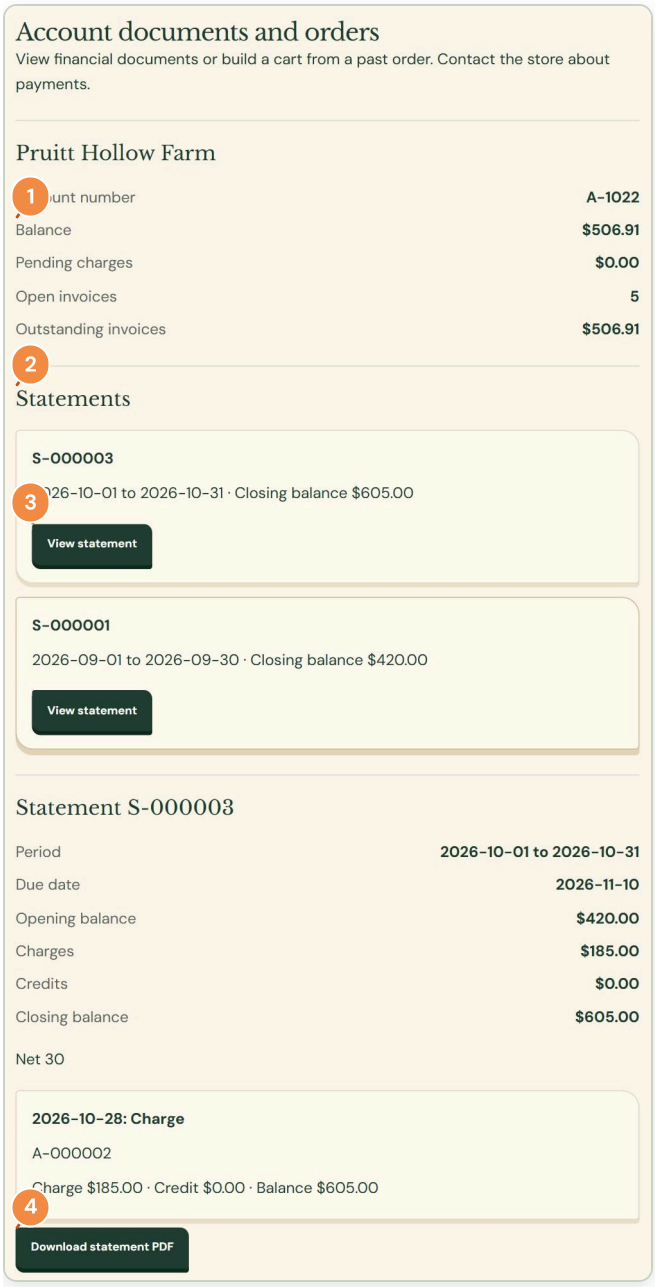
Know what the account owner sees on the website

WHERE TO FIND IT **Website (shopper) → Your account → Account documents and orders**

The account's owner, signed in on the store website

Included on the Whole Store plan.

Once the owner signs in on your website and chooses their account, the **Your account** page shows a section headed **Account documents and orders**, with the line *View financial documents or build a cart from a past order. Contact the store about payments.* These are the words on the Sample store's website. Your website's design may word the headings differently.



1. Balance: what the account owes today.
2. Statements: the account's statements, newest first.
3. View statement opens one statement on the page.
4. Download statement PDF saves the statement as a file.

What a charge account's owner sees on the store website.

At the top are **Account number**, **Balance**, **Pending charges**, **Open invoices** and **Outstanding invoices**. Below come two lists, **Statements** and **Invoices**, with **View statement** and **View invoice** on each line. A statement opens with its period, opening and closing balance and activity, and the button **Download statement PDF**. The PDF has the same amounts, dates and balances as the statement Roadside makes, with each line described in plain words such as *Charged* or *Payment* and never your staff's notes. An invoice shows **Invoice date**, **Due date**, **Amount**, **Applied**, **Remaining**, **Status** and **Purchase order**.

Under **Order again**, the owner picks a past order to see which items are available today, then presses **Add selected items to cart**. The page says *This adds a cart draft. It does not place an order.*

When a customer sees nothing

The section stays hidden for anyone on the account who is not its signed-in owner, and for an owner whose account has no charge account. If the documents fail to load for another reason, the page reads *Financial documents could not be loaded. Refresh your account to try again.*

It worked when the owner's **Balance** matches the balance on the customer's Charge account card in Roadside.

21 Add finance charges and late fees

A store can add a monthly finance charge, a flat late fee, or both to accounts that are past due. Both are off until the Store owner turns one on and confirms the terms were reviewed for the store's state.

IN THIS CHAPTER

- Charging a monthly percentage on past-due balances
- Adding a flat fee when an account runs late
- Confirming the legal review the screen asks for
- Finding a charge on a statement and crediting it back

Turn on a finance charge

WHERE TO FIND IT **Customers** › **Charge accounts → Statements → Settings → Finance charges**

Store owner

Included on every plan except Static Website and Online Store.

Finance charges and late fees are set on **Charge account settings**, behind the **Settings** button on Statements. The button shows only to the Store owner, and only the Store owner can change the settings. A person below Store owner whose role has been given the screen sees every field greyed out, with the notice *Only the Store owner or the Owner can change these.*, and no button to save.

WORDS TO KNOW

Finance charge
A monthly percentage added to the part of a balance that is past due.

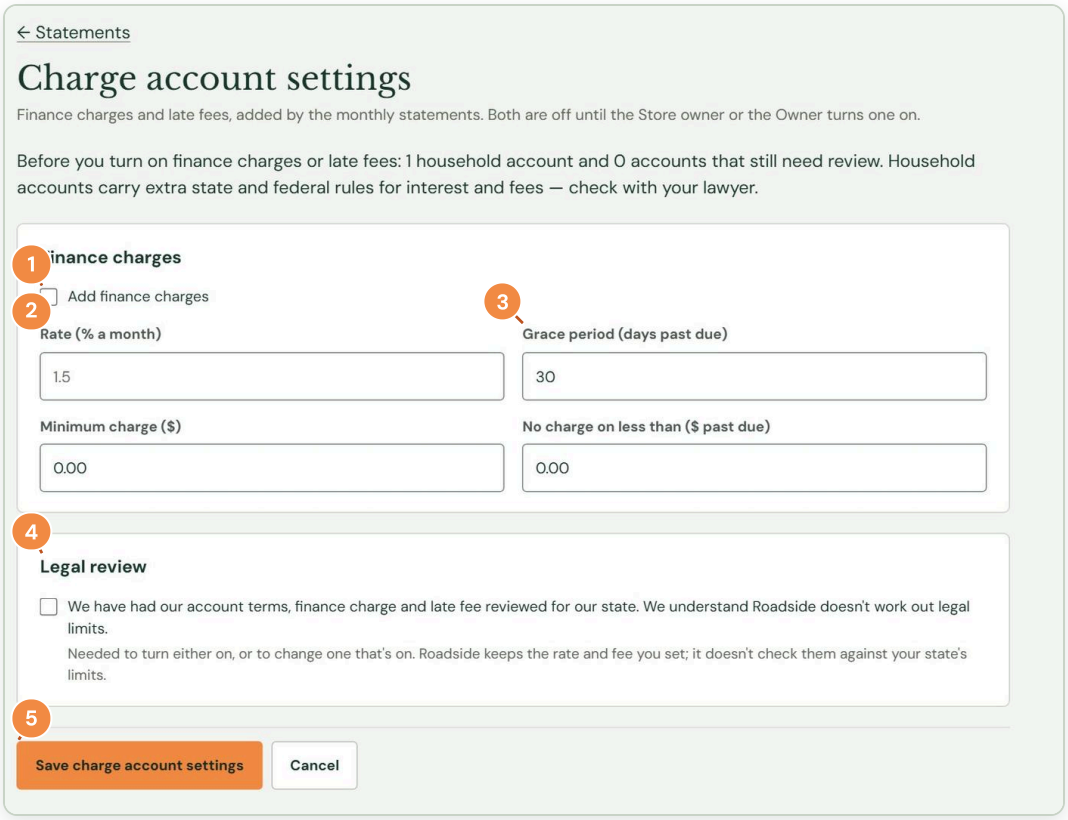
Grace period
How many days past due an amount can be before a finance charge applies to it.

Roadside adds the charge when the month's statements are made, never in between. On each account it works out what was past due by more than the grace period on the statement's last day, less any credit not yet applied, and charges the monthly rate on that, rounded half up to the cent. A payment dated after the statement's last day does not lower that month's charge.

- A finance charge is never added to an earlier finance charge or late fee, so charges do not compound.
- An account that owed nothing on the statement's last day is not charged. An account on hold or closed that still owes is.
- **No charge on less than ($ past due)** skips accounts whose past-due amount is under the figure you type.
- **Minimum charge ($)** raises a smaller charge to that figure, but never above the past-due amount itself.
- Each charge is its own invoice on the account, dated the statement's last day and due when that statement is due.
- An account is charged once per statement period. Making the same period's statements again does not charge twice, but statements for another date start a new period, which is charged again.

Set each account's purpose first

Each charge account has a **Purpose**: *Household*, *Farm or business* or *Needs review* (Open a charge account with a limit and terms, in Chapter 15 (page 120)). While any account is a household account or still needs review, the settings screen shows a notice. While both are off it begins *Before you turn on finance charges or late fees:*. It counts those accounts and says *Household accounts carry extra state and federal rules for interest and fees*, telling you to check with your lawyer. Sort those accounts out before you turn a charge on.



1. Add finance charges: tick to turn them on.
2. Rate (% a month): type the monthly rate your terms give.
3. Grace period (days past due): days before an amount is charged.
4. Legal review: tick to confirm your terms were reviewed for your state.
5. Save charge account settings keeps your choices.

The Finance charges and Legal review cards on Charge account settings.

1. **Go to Customers, Charge accounts, Statements, and press Settings.**
2. **Tick Add finance charges.**
3. **Type the monthly percentage in Rate (% a month).** The grey figure in an empty box is a placeholder, not a suggestion.
4. **Set Grace period (days past due),** from 0 to 365. It starts at 30.
5. **Fill in Minimum charge ($) and No charge on less than ($ past due) if your terms have them.** Leave them empty if not.

6. **Tick the box on the Legal review card.** It reads *We have had our account terms, finance charge and late fee reviewed for our state. We understand Roadside doesn't work out legal limits.* Under it: *Needed to turn either on, or to change one that's on. Roadside keeps the rate and fee you set; it doesn't check them against your state's limits.*

7. **Press Save charge account settings.** Roadside asks you to confirm it is you before it saves, as it does for other sensitive changes (Change a role or remove someone who left, in "Give the right people access to Roadside" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/team-roles)).

> ⚠ CAREFUL
> From the next statements made, every account past due by more than the grace period is charged, and the charge prints on statements that go to customers. If Roadside prepares the statements on a schedule, that counts too (Have Roadside prepare each month's statements, in Chapter 27 (page 202)). Roadside keeps the rate you type and does not check it against any law. Tick the legal review box only once your store has had its terms reviewed for your state, as the screen asks.

It worked when the message reads *Finance charge and late fee settings saved.* and the Legal review card shows *Last confirmed* with the date. Each statement made after that prints your rule in its terms. A save without the rate is refused with *Set the rate first.*, and one without the tick with *Tick the box to confirm your legal review first.*

Change the rate or turn it off

Changing any finance-charge figure while it is on needs the legal review tick again. To stop charging, untick **Add finance charges** and save; turning off needs no tick. No new charges are added after that. Charges already added stay on the accounts until they are paid or credited (Find a charge on a statement and take one off, in Chapter 21 (page 169)).

Turn on a late fee

WHERE TO FIND IT **Customers** › **Charge accounts → Statements → Settings → Late fees** Store owner

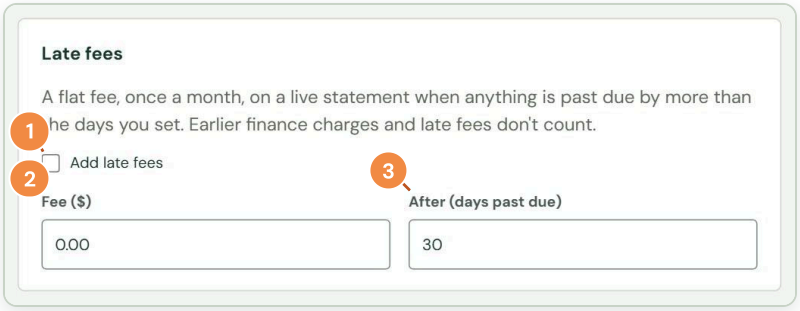
Included on every plan except Static Website and Online Store.

A late fee is one flat amount per statement period, added when the statements are made, to an account with anything past due by more than the days you set. It is on the same **Charge account settings** screen as finance charges. A store can use either one or both.

WORDS TO KNOW

Late fee

A flat amount added once per statement period while something on an account is past due.



1. Add late fees: tick to turn them on.
2. Fee ($): type the flat amount.
3. After (days past due): days before the fee applies.

The Late fees card on Charge account settings.

1. **Open Settings on Statements and tick Add late fees.**
2. **Type the amount in Fee ($).**
3. **Set After (days past due),** from 0 to 365. It starts at 30.
4. **Tick the box on the Legal review card,** as for a finance charge.
5. **Press Save charge account settings** and confirm it is you.

CAREFUL

The fee is added to customers' accounts on the next statements made, once per statement period, for every account with an amount past due by more than the days you set. Earlier finance charges and late fees do not count toward it. Roadside does not check the fee against your state's limits; the store confirms its terms were reviewed, as the screen asks.

It worked when the message reads *Finance charge and late fee settings saved.* and the next statements print the fee in their terms. A save without an amount is refused with *Set the fee first.* Unticking **Add late fees** and saving stops new fees. Fees already added stay on the accounts.

Find a charge on a statement and take one off

WHERE TO FIND IT Customers ›

Accounts → open the customer → Charge account → Give a credit → Apply it to Store owner, Manager

Included on every plan except Static Website and Online Store.

When a customer asks about a charge, show them the statement. Each finance charge or late fee is a line in the activity table, with *Finance charge* or *Late fee* under **Description** and its invoice number under **Reference**. The statement's terms print the store's rule, in one sentence made from the rate, the minimum charge when one is set, and the days saved in the settings. It begins *A finance charge of* and the rate.

The same invoice number appears under **Open invoices** on the customer's Charge account card, dated the last day of that statement.

CAREFUL

A credit takes money off what the customer owes, shows on their next statement, and stays in the account's activity once given. Roadside takes any amount: what is more than the charge goes to the oldest other open invoices, never to another finance charge or late fee, and the rest stays on the account as credit.

1. **Open the customer under Customers, Accounts, and press Give a credit on the Charge account card.**
2. **Type the amount in Amount ($).** To take off that charge alone, type the amount open on it.
3. **Under Apply it to, choose the charge's invoice number.** Each line gives the number, its date and the amount open. The hint reads *A finance charge or late fee is credited only when you choose it here.*
4. **Say why in Why,** up to 500 characters. Staff see the note on the account.
5. **Press Give a credit.** The message reads *Credit given.*

It worked when the charge's invoice leaves **Open invoices** on the Charge account card, or shows a smaller amount open. Left at *The oldest open invoices*, a credit pays the customer's purchases and leaves the fee owing, because Roadside never puts a credit on a finance charge or late fee by itself. Give a credit or add a charge, in Chapter 18 (page 143) covers the rest of the Give a credit screen.

22 Give store credit and see where it went

Store credit is money the store owes a customer, to spend at the counter. It is kept on the customer's account, with or without a charge account.

IN THIS CHAPTER

- Reading a customer's store credit balance and what moved it
- Giving store credit by hand, with the reason kept
- Turning a charge-account credit into store credit
- Where store credit from the register shows up in Roadside

Check a customer's store credit

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Store credit**

Store owner, Manager, Staff, Read only

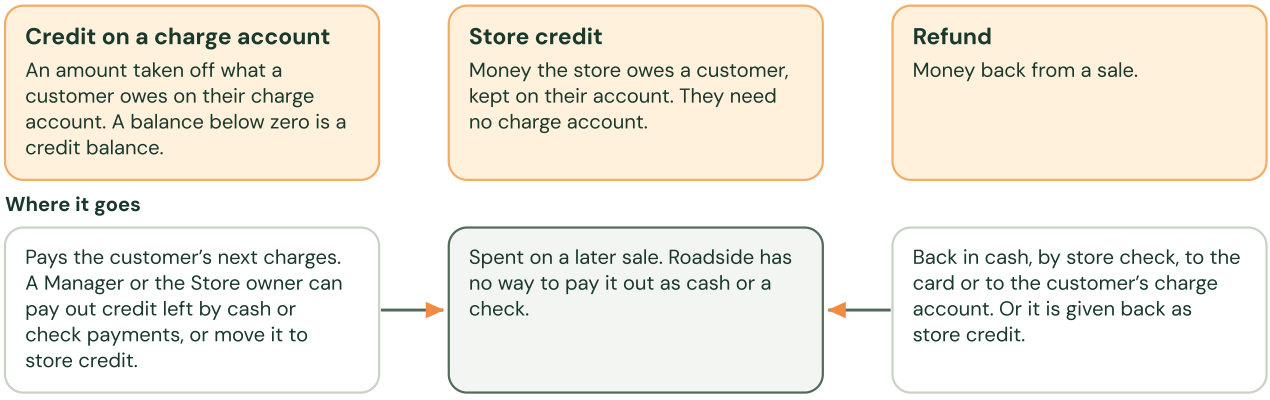
Included on every plan except Static Website and Online Store.

A customer asks how much credit they have left, or says the credit from last month's return never showed up. The **Store credit** card on their account gives the balance and what last changed it. A customer does not need a charge account to have store credit.

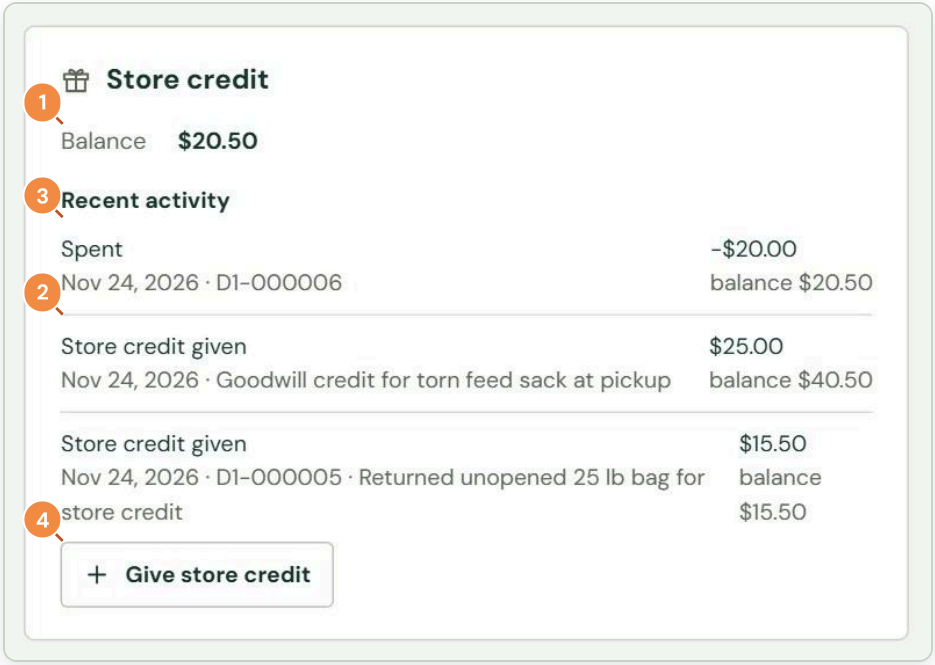
WORDS TO KNOW

Store credit

Money your store owes a customer, kept on their account for them to spend on a later purchase. It is separate from what they owe on a charge account.



A credit on a charge account, store credit and a refund are three different things.



1. Balance: what the customer has left to spend.
2. Store credit given: credit that was added, with its date and reason.
3. Spent: credit that paid for a sale.
4. Give store credit adds credit by hand.

The Store credit card on a customer's account.

1. **Go to Customers, then Accounts, and open the customer.**
2. **Find the Store credit card and read Balance.**
3. **Read Recent activity.** It lists the latest 10 entries, the newest first. Each has a date, the sale's number or the reason someone typed, the amount, and the balance after it.

THE ENTRY READS	WHAT HAPPENED
Store credit given	Credit was added: by hand, from a charge-account credit, or as a refund given back as store credit.
Spent	The customer paid for a sale with store credit.
Given back to store credit	A sale that was paid with store credit was refunded, and that part went back to the customer's store credit.

You have found it when the latest entry matches the refund or the sale you were looking for. The card shows 10 entries and there is no fuller list, so for an older one open the sale itself in **Sales**, **Orders**.

A customer with none has a card that reads *No store credit. It's added when a refund is given back as store credit, or by hand.* Staff and Read only people do not see the card at all for a customer who has no store credit.

The balance prints in two other places. A receipt for a sale paid with store credit has a **Store credit left** line. A charge-account statement tells the customer the amount is theirs to spend and adds *It is not part of the amount due.* Refunds in Roadside are covered in Give money back for an order, in "Resolve payments and give money back" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/payments-refunds).

Store credit is spent on a sale. Roadside has no way to pay it out as cash or a check.

Store credit is not a gift card. It belongs to one customer's account. For gift cards, write to **support@dirtroadsoftware.com**.

Give store credit by hand

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Store credit → Give store credit**

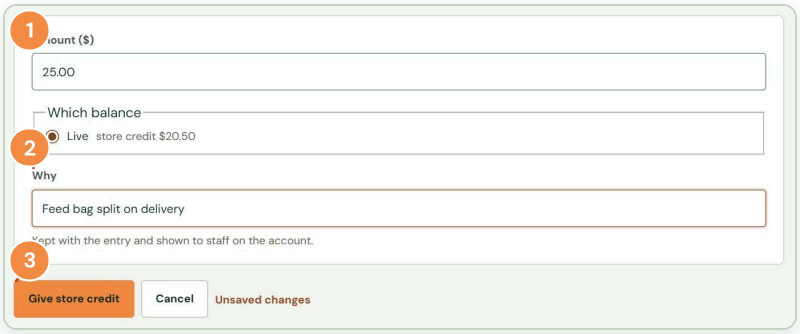
Store owner, Manager

Included on every plan except Static Website and Online Store.

A bag split on delivery, or you want to make something right without a refund. A Manager or the Store owner adds store credit to the customer's account and types why. Staff cannot give store credit by hand.

⚠ CAREFUL

The customer can spend it at the register from their next visit. Store credit given by hand cannot be taken back in Roadside, so check the amount before you press.



1. Amount ($): how much credit to add.
2. Why: the reason, kept with the entry.
3. Give store credit adds it to the customer's balance.

Give store credit, filled in and not yet given.

1. **Open the customer and press Give store credit** on the **Store credit** card. A Manager or the Store owner sees the card and its button on every customer.
2. **Type the Amount ($),** in dollars and cents.
3. **Under Which balance, choose Live.** The form does not post until one is chosen.
4. **Type the reason in Why,** up to 500 characters. The screen's own example is *Feed bag split on delivery*. The reason is *Kept with the entry and shown to staff on the account.*
5. **Press Give store credit.** Roadside says *Store credit given.*

The form says what this is and is not: *It isn't a sale and changes no stock. To give back money from a sale as store credit, refund the sale instead.* A zero amount is refused with *The store credit is more than $0.00, like 10.00.*

It worked when the card shows the higher **Balance** and a *Store credit given* entry with your reason. Day summary for the whole store counts it in **Store credit given**, as given by hand.

Move a charge-account credit to store credit

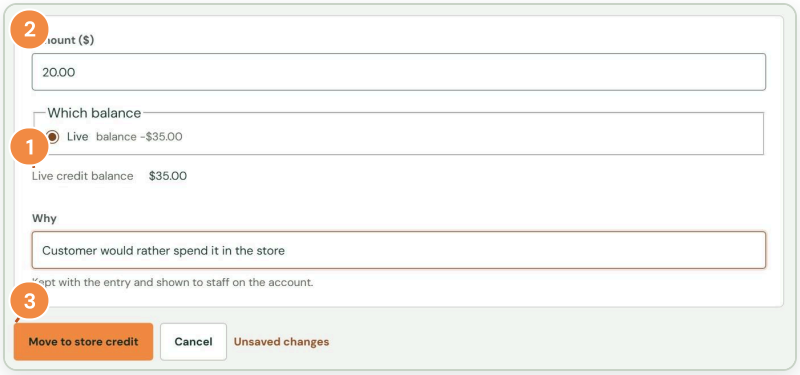
WHERE TO FIND IT **Customers** ›

Accounts → open the customer → Charge account → Move to store credit Store owner, Manager

Included on every plan except Static Website and Online Store.

A customer who overpaid their charge account has a credit balance there. Left alone, it pays their next charges. If they would rather spend it on anything in the store, including on a day they pay at the counter, move it to store credit.

> ⚠ CAREFUL
> After the move, the amount does not pay the customer's next charges on account. It cannot be moved back.



1. Live credit balance: the most you can move.
2. Amount ($): how much of it to move.
3. Move to store credit takes it off the account and adds it to store credit.

Move to store credit, for a customer with a credit balance.

1. **Open the customer and press Move to store credit** on the **Charge account** card. The button shows only while the account has a credit balance.
2. **Read Live credit balance,** then type the **Amount ($)**. It can be all of the credit or part of it.
3. **Under Which balance, choose Live.**
4. **Type the reason in Why,** up to 500 characters.
5. **Press Move to store credit.** Roadside says *Moved to store credit*.

The screen describes the move: *It comes off the credit on the account, so it no longer pays the next charges.* Ask for more than the credit balance and Roadside names the balance and says no more than that can be moved.

It worked when two cards agree. The **Charge account** card's credit is lower and has a *Moved to store credit* entry. The **Store credit** card's **Balance** is higher by the same amount, with a *Store credit given* entry.

To hand the credit back as cash or a store check instead, see Pay out a credit balance, in Chapter 18 (page 146).

Know how store credit is given back and spent at the register

WHERE TO FIND IT **The register, or Sales** ›

Orders → open an order → Record a payment or a refund; the results show on Customers ›

Accounts → Store credit and on Sales › **Day summary**

Store owner, Manager, Staff, Read only (to read the results)

Included on every plan except Static Website and Online Store.

Most store credit starts and ends at the register. A refund can go back to the customer as store credit, and store credit can pay for a sale. An order's page in Roadside does both too: **Record a payment** offers **Store credit** when the customer has some, and a refund's **Given back by** offers it to a Manager or the Store owner, for a payment taken at the counter. A sale that was charged to an account goes back to the account only. Either way, Roadside shows you the result.

AT THE REGISTER	ON THE CUSTOMER'S STORE CREDIT CARD	ON DAY SUMMARY
A refund is given back as store credit	*Store credit given*, or *Given back to store credit* when the sale had been paid with store credit	**Refunds as store credit**, and in **Store credit given**
Store credit pays for a sale	*Spent*	**Store credit spent (not money taken)**

The register follows four rules, which explain most questions from the counter.

- Store credit is kept on a customer's account, so a refund can go back as store credit only for a customer who has one.
- A customer cannot spend more store credit than they have.
- When store credit pays part of a sale, the rest is paid in cash or by check, not by card and not on the charge account.
- When a sale that was paid with store credit is refunded, that part goes back to store credit, not out as cash.

Store credit spent is not money taken, and store credit given is not money paid out. Neither is in any drawer's count, and the note under Day summary's totals says so. Read the register's sales, cash and checks for a day, in Chapter 3 (page 21) covers the rest of that screen.

You have the right entry when its date and amount match the sale or the refund. An entry from the register carries the sale's number when it has one, and you can search for that number in **Sales**, **Orders**.



PART 3

Fencepost CRM farm tools (Whole Store)

Follow-ups, customer lists, farm details, renewals and reorder reminders for Whole Store.

23 Give a promised call a due date and an owner

When you promise to call about a feed delivery, put the call on the customer's account with the day it is due. Your team can see who is due to make the call and whether it is finished.

IN THIS CHAPTER

- Give a call a due date
- Find work due today or overdue
- Change the date or pass the call to someone else
- Check one customer or the whole store

Add a follow-up for a customer

WHERE TO FIND IT **Customers** › **Accounts → open the customer → Follow-up tasks → Add follow-up**

Store owner, Manager, Staff

Included on the Whole Store plan.

A Timeline entry marked *Follow-up* stays in the customer's history. Use the **Follow-up tasks** card when someone needs to act by a particular day. For a Timeline note, see Record a call or visit so the next person can find it, in "Find a customer and the people on their account" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers).

WORDS TO KNOW

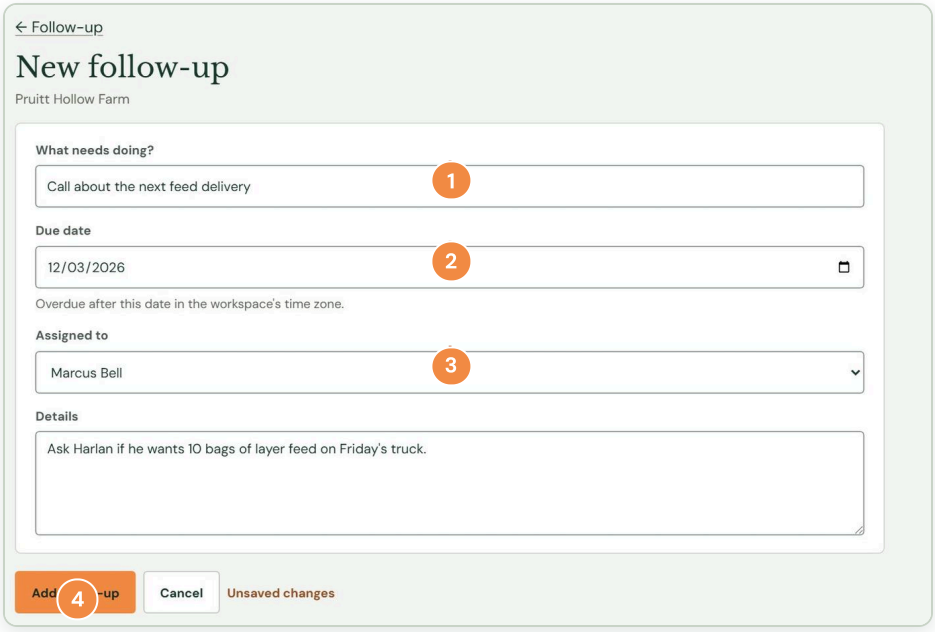
Follow-up

A job for one customer with a due date and, usually, someone assigned to it.

1. **Open the customer's account.** Press **Add follow-up** on the **Follow-up tasks** card. If you started on the store's **Follow-up** screen, press **Choose an account** first and open the customer.
2. **Write down the job and the day.** In **What needs doing?**, type a title of up to 160 characters, such as *Call about the next feed delivery*. Choose a **Due date**. The job becomes overdue after that day in the store's time zone.

3. **Choose who will do it.** Under **Assigned to**, choose an active team member who can work follow-ups, or leave **Unassigned**. Use **Details** for instructions, up to 4,000 characters.

4. **Press Add follow-up.** Look for *Follow-up saved.* The job shows on this customer's **Follow-up tasks** card, marked *Open*. Nobody gets a notice. Tell the person taking the call.



1. Type what the person making the call needs to do.
2. Choose the day the job is due.
3. Choose who takes the call.
4. Save the job on this customer's account.

A delivery call with a due date and someone assigned to it.

If the form stays open, check the title and date. If it refuses the person you chose, choose someone else or leave the job unassigned. Read only can see follow-ups. To add one, use an unarchived account and a role that can edit.

If the card is missing, the Store owner can set up **Follow-up and customer lists** under **All of Roadside**. Press **Set it up**, then **Set it up for the store**. See Set up a tool the store already has, in "Find what your store has and set it up" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside) for setup and Switch off a tool the store set up, in "Find what your store has and set it up" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside) to switch it off.

Work through today's follow-ups

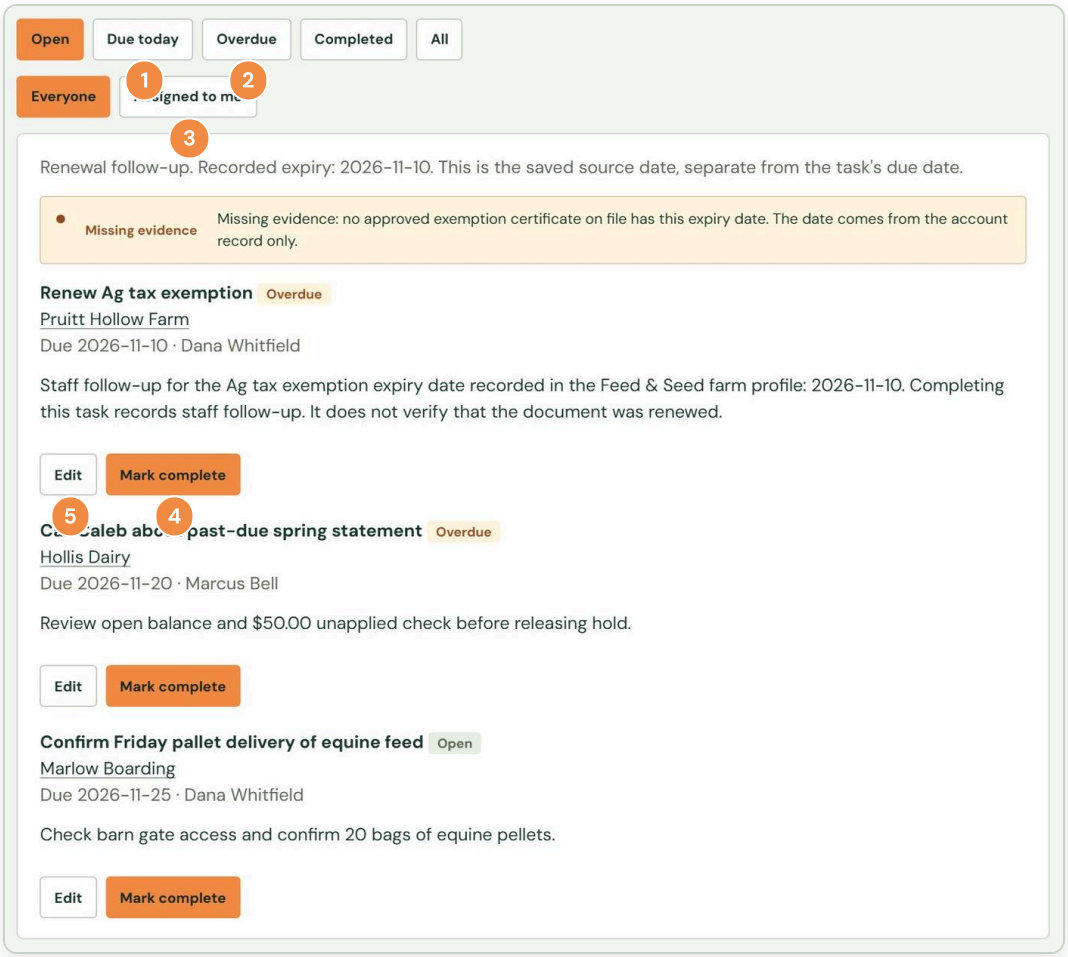
WHERE TO FIND IT **Customers** › **Follow-up**

Store owner, Manager, Staff, Read only (Read only cannot change anything)

Included on the Whole Store plan.

Open **Follow-up** under Customers to find calls and other jobs for accounts that have not been archived. Store owners, Managers and Staff can finish or reopen them. Read only can use the filters.

1. **Choose whose jobs to see. Everyone** includes unassigned jobs. **Assigned to me** shows yours. If a customer's name is above the filters, press **All accounts** to see the rest of the store.
2. **Choose the dates you need. Due today** and **Overdue** show unfinished jobs. **Open** also includes later ones. **Completed** holds finished work, and **All** includes both. Jobs are in due-date order, up to 100 per page.
3. **Find the call.** Check its title, customer, due date, person and details. If a list is empty, try **Everyone** and **Open**, or use **Next page** when there are more.
4. **After doing the job, press Mark complete.** Look for *Follow-up completed*. The job moves to **Completed**. If an overdue call is finished, it leaves the overdue count. To correct a mistake, open **Completed** and press **Reopen**. Roadside says *Follow-up reopened*.



1. Find what is due today.
2. Check which calls are late.
3. Narrow the list to your own work.
4. Record a finished job.
5. Change the date, the person or the details.

The store's open follow-ups in due-date order.

A follow-up stays in the history when you complete it. There is no delete button. A register sale finished with a restricted-use pesticide license or a Veterinary Feed Directive (VFD) to follow can put a job here too. See Let a known customer's license or VFD follow the sale, in Chapter 1 (page 13).

Change a follow-up or hand it to someone else

WHERE TO FIND IT **Customers** › **Follow-up → Edit (on the task)** Store owner, Manager, Staff

Included on the Whole Store plan.

If a customer asks you to call on a different day, change the existing follow-up so the team sees one date for that call.

1. **Find the customer's job and press Edit.** If it is missing, choose **Everyone** and **All**. Check the account name on **Edit follow-up**.
2. **Change what the team needs.** Choose the **Due date** or a person under **Assigned to**. Use **Details** for what the customer told you. If the previous person is unavailable, choose an active team member or **Unassigned**.
3. **Press Save follow-up.** Look for *Follow-up saved*. Check the date and the name beside it. Tell the person taking over or ask them to check **Assigned to me**. Roadside sends no assignment notice.

If you see *This follow-up was changed by someone else. Reload it and try again.*, copy the changes you want to keep. Press **reload the current follow-up**, read the other person's changes, then make yours and save.

See what is waiting, from Today or a customer's account

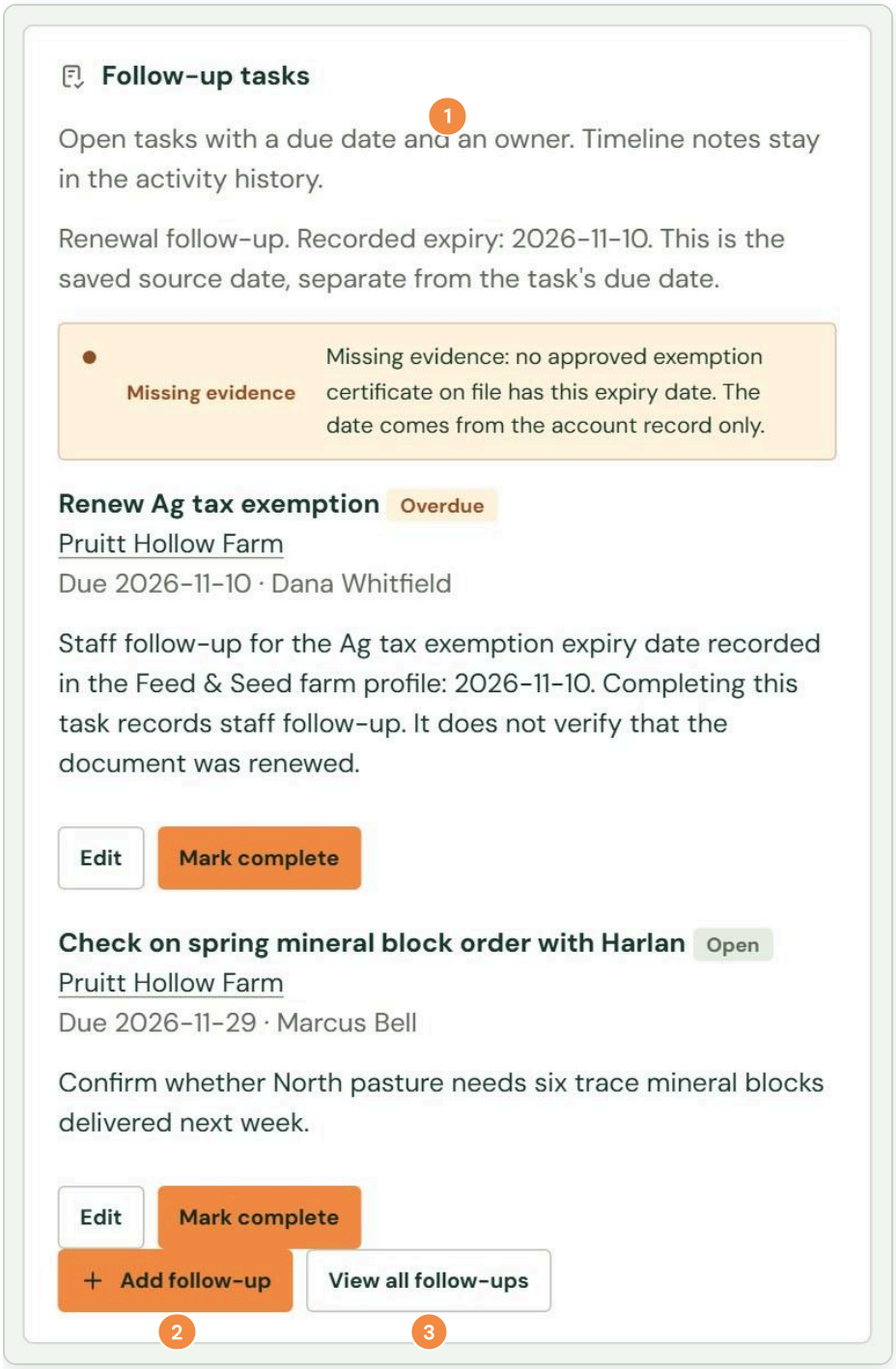
WHERE TO FIND IT **Today → Follow-up; or Customers** ›

Accounts → open the customer → Follow-up tasks Store owner, Manager, Staff, Read only

> Included on the Whole Store plan.

Before calling a customer, check what your team has already promised. To plan the day's calls for the whole store, use the dashboard count.

1. **For one customer, open their account.** The **Follow-up tasks** card shows up to five open jobs, including unassigned ones. Press **View all follow-ups** for the rest, including completed work. *No open follow-up tasks.* means there is no unfinished job for this customer.

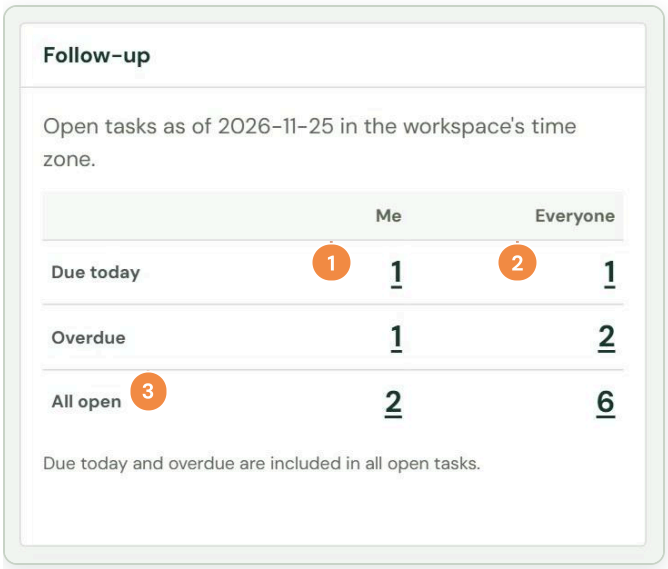


1. Read the customer's outstanding jobs.
2. Add the next call here if you can edit follow-ups.
3. Open this customer's full list, including finished work.

Open jobs on one customer's account.

1. **For the store, find Follow-up on your dashboard.** Read **Due today**, **Overdue** or **All open**. Choose **Me** for your work or **Everyone** for the team. Today's and overdue jobs are already counted in **All open**.

2 **Press a number.** The list opens with the same date and assignment filters. A zero means there are no jobs in that group. If the dashboard has no card, see Arrange a dashboard for the team, in "Check the store before opening" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/first-week).



1. Read down this column for your own jobs.
2. Use this column for everyone's jobs.
3. Press the late-job count to open those follow-ups.

The dashboard counts your follow-ups beside the store's.

24 Keep a customer list you can open again

Save the filters you use more than once, such as active horse customers tagged for spring. Each time you open the list, Roadside finds the accounts that match that day.

IN THIS CHAPTER

- Save the rules for a list
- Check which customers match
- Download subscribed addresses
- Edit the filters or remove a list

Save a customer list

WHERE TO FIND IT **Customers** › **Customer lists → New customer list** Store owner, Manager, Staff

Included on the Whole Store plan.

To find the same kind of customer next spring, save the filters you use this year. For a one-time export of customer records, see Download the store's customer accounts, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers). If the menu line is missing, ask the Store owner to set up **Follow-up and customer lists** under **All of Roadside**.

WORDS TO KNOW

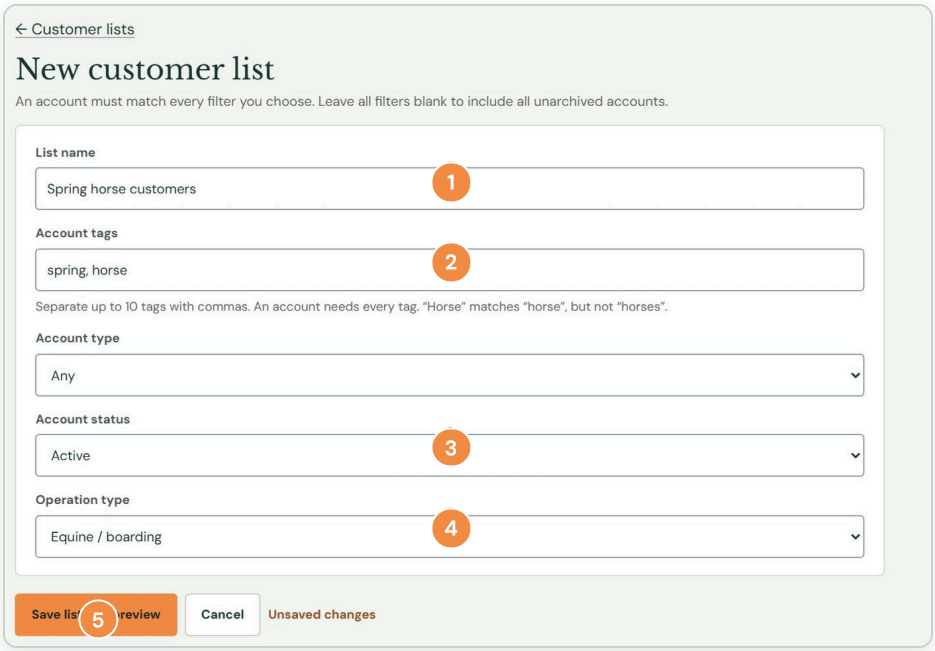
Customer list

A set of saved filters that Roadside uses to find matching accounts each time you open it.

1. **Press New customer list and type a List name.** Choose a name you will recognize, such as *Spring horse customers*. It can be up to 120 characters.
2. **Choose which tags must be on an account.** In **Account tags**, separate up to 10 tags with commas. Each tag can have up to 40 characters. With *spring, horse*, the customer needs both tags. *Horse* matches *horse*. The plural *horses* is a different tag. See Add or correct a customer's account, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers) to tag an account.

3. **Narrow the list if needed. Account type** offers **Customer**, **Prospect**, **Vendor** and **Other**. **Account status** offers **Active**, **On hold** and **Inactive**. Leave either at **Any** to include all its choices. With the Feed & Seed pack in use, you can also choose an **Operation type**, such as **Equine / boarding** or **Poultry**.

4. **Press Save list and preview.** Look for *Customer list saved*. Check the names under **Current matches**. Each account must match every filter. With no filters, the list includes every unarchived account.



1. Give the list a name you can find again.
2. Type the tags each account needs.
3. Choose which account statuses to include.
4. Choose the kind of operation to include.
5. Save the filters and check the results.

The filters for a spring list of active equine customers.

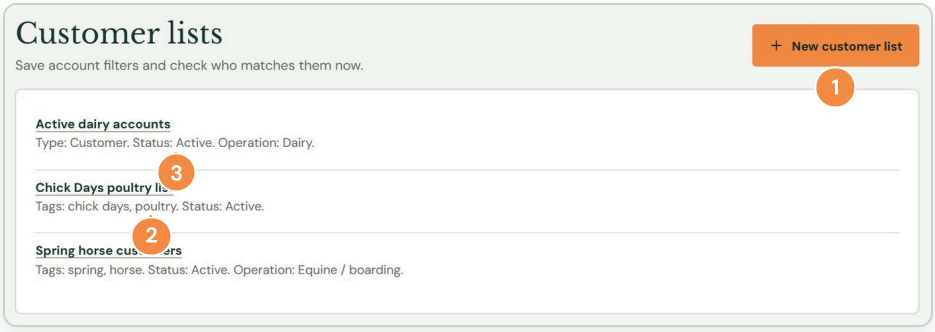
If the form refuses a tag, check for an empty entry between commas or a tag longer than 40 characters. If it says *Operation filters need the Feed & Seed pack.*, leave **Operation type** at **Any** and use the other filters.

Open a list and see who matches today

WHERE TO FIND IT **Customers** › **Customer lists → open a list** Store owner, Manager, Staff, Read only

Included on the Whole Store plan.

The names on a saved list can change between visits. For example, an account that gains the last tag it needs will be there the next time you open the list.



1. Start a list here if your role can edit.
2. Check which tags a customer needs.
3. Read the kind of farm the list includes.

Saved lists with the filters that decide who belongs on each one.

1. **Find the list by its name and filters. Tags:**, **Type:**, **Status:** and **Operation:** tell you what the list looks for. *All unarchived accounts.* means no filters were set. If the screen says *No saved customer lists.*, someone with edit access can create one.
2. **Press the list name and read Current matches.** Each row has the account name, tags if any, and an address or *No email address*. The badge says *Email included in export* or *Email excluded from export*. A customer can match the list without being subscribed.
3. **Check the remaining pages.** The counts are for this page, with up to 100 accounts per page. Press **Next accounts** when offered. If someone is missing, compare their account with every filter, including the spelling of each tag. Archived accounts stay off the list.

Download the list's subscribed email addresses

WHERE TO FIND IT **Customers** › **Customer lists → open a list → Export subscribed emails**

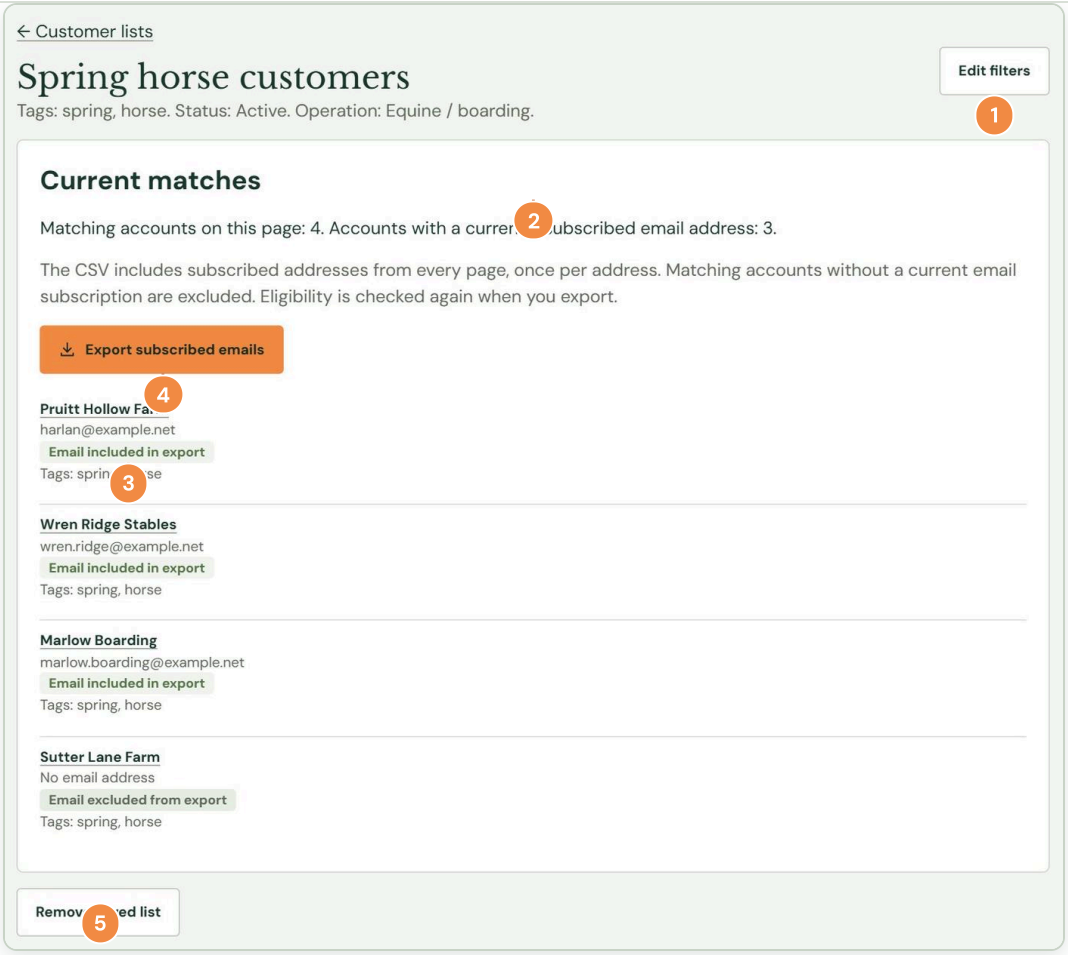
Store owner, Manager

Included on the Whole Store plan.

You can download one row for each subscribed email address on the list. Matching customers with no current subscription or no email address are left out. Roadside checks both the accounts and the subscriptions again when you press the button.

> ⚠ CAREFUL
> The file holds customer names and email addresses. Keep it private and use the addresses only for what those people agreed to receive. Someone can unsubscribe after you download a copy.

1. **Open the saved list and check its filters.** Read the subscription badges under **Current matches**. If the screen says *Export needs permission to export both customer lists and account data.*, ask a Manager or the Store owner to download it.
2. **Press Export subscribed emails.** Open the downloaded `customer-list-[id].csv`, where `[id]` is the list number. It is a spreadsheet file with columns **Name** and **Email**.
3. **Check the addresses across the whole list.** The file takes subscribed addresses from every page, once per address. Two matching accounts that share an address give you one row.



1. Open the saved filters to adjust the selection.
2. Check the matching accounts on this page.
3. Look for this badge beside a subscribed address.
4. Download subscribed addresses from all pages.
5. Use this only when you mean to retire the list.

A saved list shows which matching accounts have subscribed addresses.

The email-list tools collect and export addresses. They do not send newsletters. Use Check whether someone agreed to email, in “Keep a list of people who asked for email” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/email-list) to check consent and Export the list and keep only the people you can email, in “Keep a list of people who asked for email” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/email-list) to export the whole subscriber list. Download a fresh file before using the list again.

Change a list's filters or remove it

WHERE TO FIND IT **Customers** › **Customer lists → open a list → Edit filters, or Remove saved list**

Store owner, Manager, Staff

Included on the Whole Store plan.

Open the saved list by name. Changing or removing it affects everyone who uses that list.

1. **To rename it or change who matches, press Edit filters.** Change the **List name** or the filters, then press **Save list and preview**. Check the name, filter summary and **Current matches** after *Customer list saved*.
2. **If someone else edited it, keep both changes in view.** If Roadside says *This segment changed. Reload it before saving.*, copy the entries you need and press **reload the current list**. Read what changed before you save again.

CAREFUL

Removing the list puts away its saved filters. You cannot restore the list here. Write down the filters first if you might want to recreate it. The customers keep their accounts and their email subscriptions.

1. **To retire it, press Remove saved list and confirm.** The message reads *Customer list removed. Account records are unchanged.* Check that the name has gone from **Customer lists**.

25 Record a customer's properties and animals

A farm may take feed at the home place and hay at a leased pasture. Keep the directions for each place under its own name and record which animals are there.

IN THIS CHAPTER

- Find the farm's delivery details
- Save directions and gate notes for one place
- Record a flock or herd and its head count
- Put away a property or group the customer has stopped using

Record a property and its delivery directions

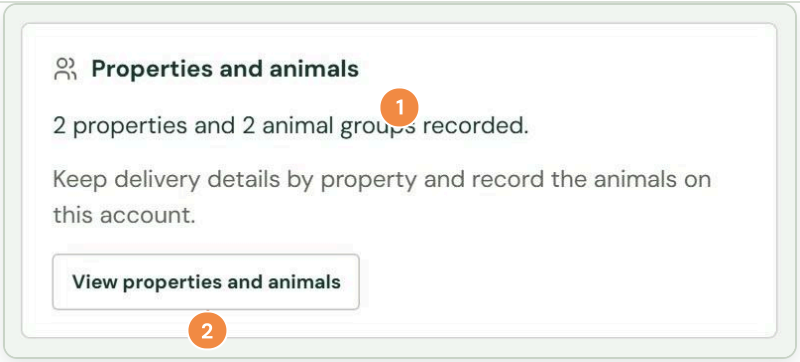
WHERE TO FIND IT Customers ›

Accounts → open the customer → Properties and animals → View properties and animals → Add property

Store owner, Manager, Staff (Read only can read)

Included on the Whole Store plan.

Open the customer's account and find **Properties and animals**. The card counts active properties and animal groups. It appears on an unarchived account with Follow-up set up and the Feed & Seed pack in use. Read only can look up the details.



1. Check how many properties and groups are recorded.
2. Open the delivery details and animals for this customer.

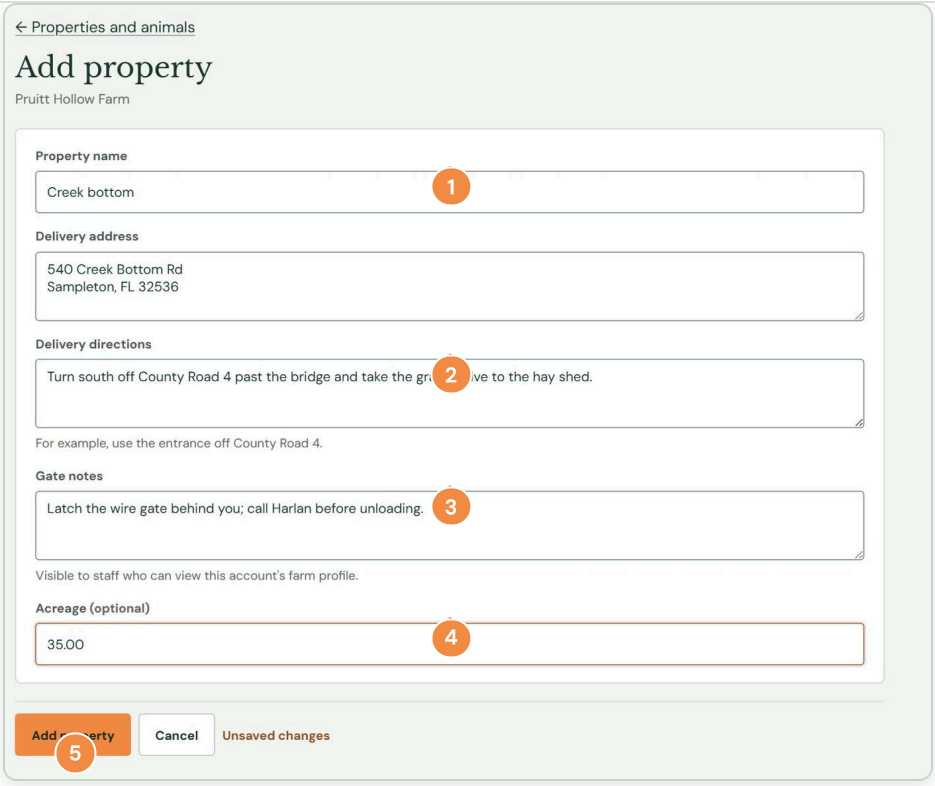
The account card counts active properties and animal groups.

WORDS TO KNOW

Property

A named place a customer uses, such as a pasture or barn, with its own delivery details.

1. **Press View properties and animals, then Add property.** If the page says *No properties recorded.*, start with one place the customer uses. Older farm-profile notes stay on the account. Copy only the directions you know belong to this place.
2. **Name the place and give the driver directions. Property name** is required and takes up to 160 characters. Put the street address in **Delivery address** (up to 1,000 characters). Use **Delivery directions** for details such as which entrance to take (up to 2,000).
3. **Check what you put in Gate notes.** Everyone on your team who can view this farm account can read these notes. Enter only what the customer agrees to share, up to 2,000 characters. Fill in **Acreage (optional)** if you have it.
4. **Press Add property.** After *Property saved.*, check the name under **Properties**. The active property count on the account goes up. To correct directions, press **Edit property**, make the change and press **Save property**.



1. Use a name the customer and driver recognize.
2. Explain which entrance or road to use.
3. Record the gate instructions the customer agrees to share.
4. Enter the acreage if you have it.
5. Save this place on the customer's account.

A named pasture with its own delivery instructions.

These details do not change an order or its delivery address. For the customer's billing and delivery addresses, see Add or correct a customer's account, in “Find a customer and the people on their account” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/customers). Farm documents and their expiry dates are kept separately in Record or correct a farm document, in “Check a customer's farm documents” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/compliance-pricing).

Record the animals a customer keeps

WHERE TO FIND IT **Customers** ›

Accounts → open the customer → Properties and animals → View properties and animals → Add animal group

Store owner, Manager, Staff

Included on the Whole Store plan.

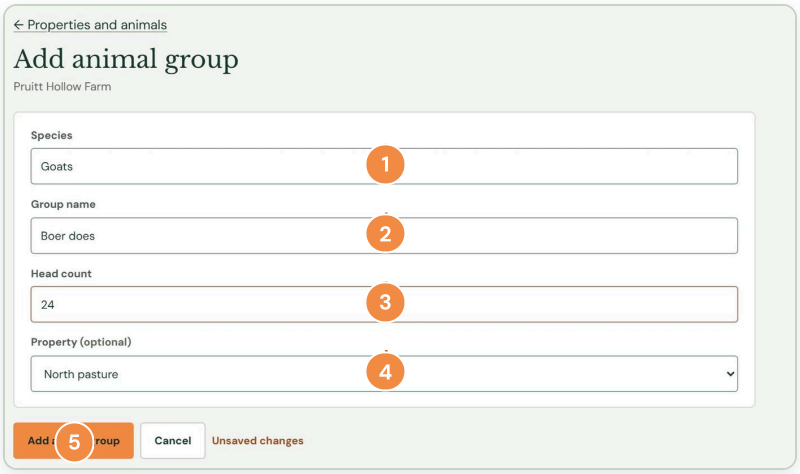
Use one group for each flock or herd you want to count separately. On the customer's account, press **View properties and animals**. If the card is missing, check that Follow-up is set up, the account is unarchived and the store uses the Feed & Seed pack.

WORDS TO KNOW

Animal group

A named group of one species with a head count, such as a herd or a flock.

1. **Under Animal groups, press Add animal group.** Type the **Species** (up to 80 characters) and a **Group name** (up to 160). Both are required. For example, use *Goats* and *Boer does*.
2. **Enter the Head count as a whole number.** Under **Property (optional)**, choose an active property on this account. If the location is undecided or there are no properties yet, leave **No property assigned**.
3. **Press Add animal group.** Look for *Animal group saved*. Find the group under **Animal groups** and check its species, head count and property. If Roadside says *Choose an active property for this account.*, choose another property or clear the assignment.



1. Enter the species.
2. Give this group a name.
3. Type the number of animals in the group.
4. Choose the property where the group lives.
5. Save the group on this account.

An animal group assigned to one of the customer's pastures.

When the count or the location changes, press **Edit animal group**, change the entry and press **Save animal group**. The count stays as your team entered it. The daily amounts for the website feed calculator are set separately in Set how much each animal eats, in Chapter 28 (page 213).

Archive a property or an animal group

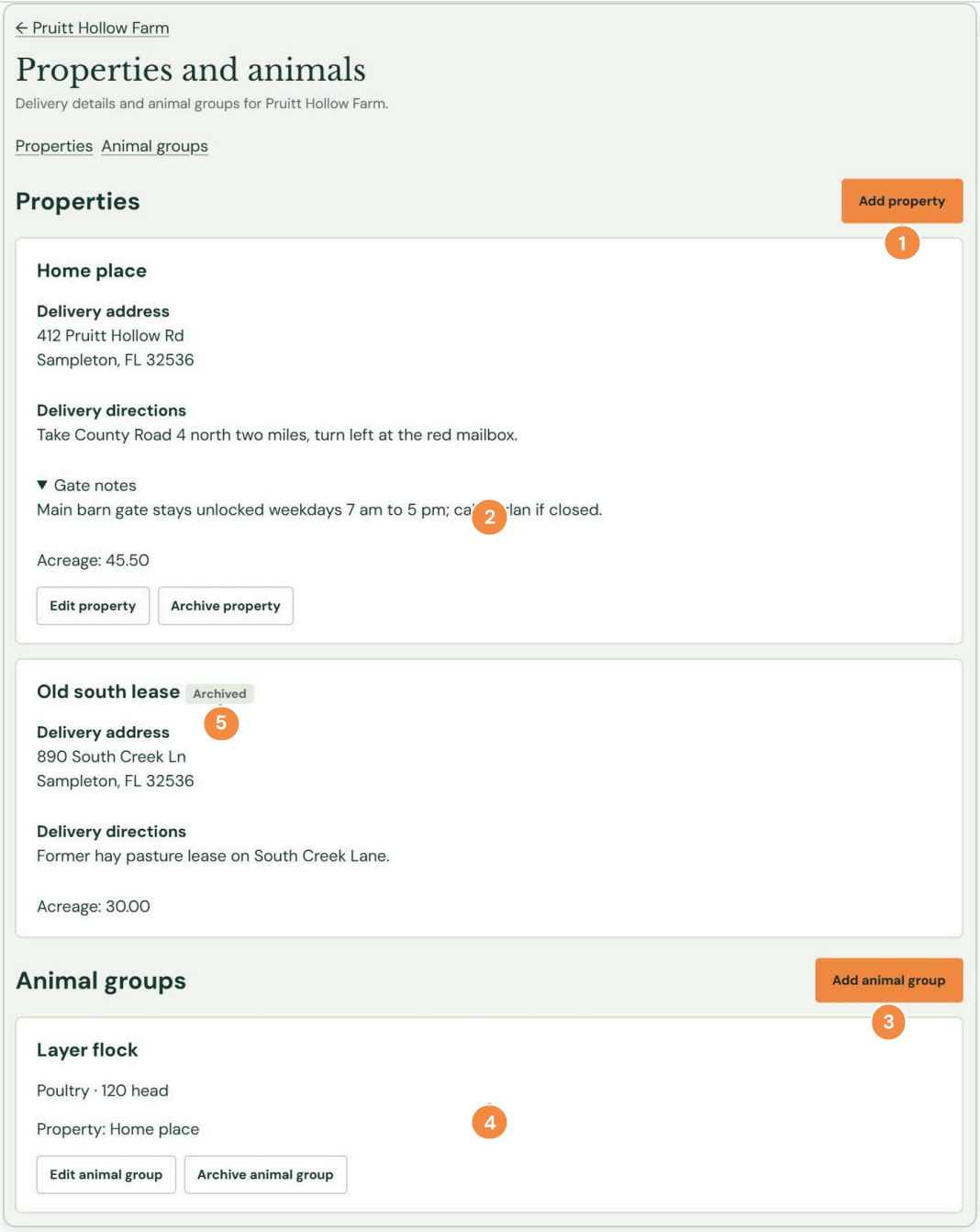
WHERE TO FIND IT **Customers** ›

Accounts → open the customer → Properties and animals → View properties and animals → Archive property, or Archive animal group

Store owner, Manager, Staff

Included on the Whole Store plan.

If a customer gives up a pasture, move the animals that are still on the account before you put the pasture away. Open **View properties and animals** on the customer's unarchived account. This screen needs Follow-up set up and the Feed & Seed pack in use.



1. Add a place for another delivery.
2. Open the gate notes for this property.
3. Record another flock or herd.
4. Check how many head are in the group.
5. Use the badge to recognize a record kept for reference.

The customer's properties and animal groups, including archived records.

> ⚠ CAREFUL
>
> Archiving leaves the details on the page for reference. You cannot edit or restore an archived record here. If the customer uses the place or group again, add it again.

1. **Check the groups at the property.** For a group the customer still keeps, press **Edit animal group**. Choose its other property or **No property assigned**, then press **Save animal group**.
2. **For a group the customer has stopped keeping, press Archive animal group and confirm.** Look for *Animal group archived*. The group carries an *Archived* badge.
3. **Once the property has no active groups, press Archive property and confirm.** Look for *Property archived*. The property shows *Archived* and drops out of the active count on the account card. If you see *Reassign or archive the animal groups at this property first.*, check the property shown on each active group.

26 Check farm documents before they expire

Find customers whose farm documents have expired or come due in the next 30 days. Give someone the call and check separately whether the store has approved a replacement tax certificate.

IN THIS CHAPTER

- Find an expiry date and give someone the call
- Check the status of a renewal follow-up
- Read the evidence for a replacement certificate

Find documents that are expired or due soon

WHERE TO FIND IT **Customers** › **Follow-up → Review renewal dates**

Store owner, Manager, Staff (to create tasks); Read only can read

Included on the Whole Store plan.

Open **Follow-up** and press **Review renewal dates**. The link appears when Follow-up is set up and the store uses the Feed & Seed pack. Staff, Managers and the Store owner can create follow-ups. Read only can check the dates.

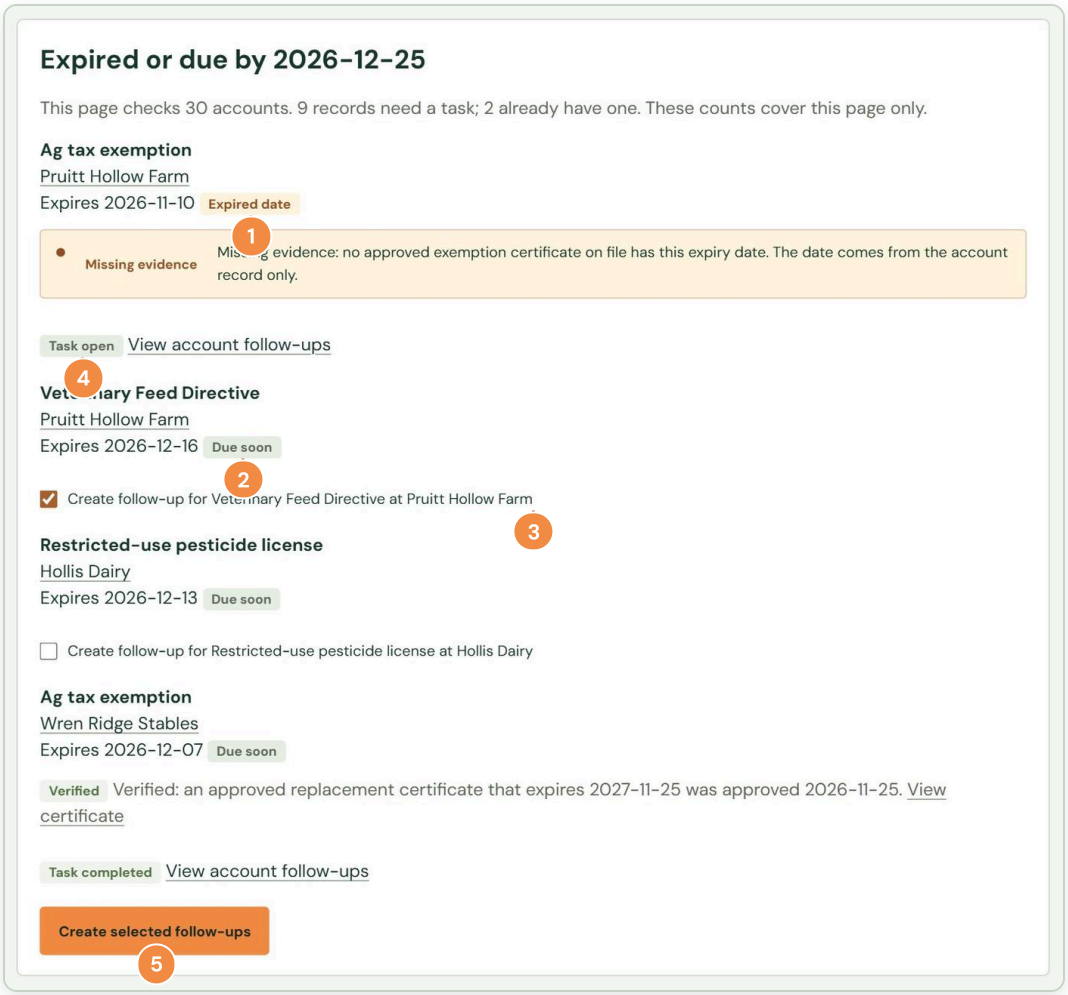
WORDS TO KNOW

Renewal follow-up
A follow-up made from a document expiry date saved on a customer's account.

1. **Read the date beside Expired or due by.** The list covers dates already past and dates through 30 days from today. Check the customer, the date and the kind of document: **Ag tax exemption**, **Veterinary Feed Directive** (VFD) or **Restricted-use pesticide license**. An *Expired date* has passed. *Due soon* includes today.
2. **Check whether someone already has the job. Task open** and **Task completed** both have a **View account follow-ups** link. For a document without a job, tick the box beside its document and customer. You can select up to 250 records at once.

3 **Give the selected calls to the team.** Creating these follow-ups records work for staff. It does not contact the customer, change their dates or approve a purchase. Press **Create selected follow-ups**. The message counts the follow-ups created and any that already existed.

4 **Check the row for Task open.** Press **View account follow-ups**. The title begins with *Renew* and the due date is the recorded expiry. The job goes to the team member assigned to the account if they can work follow-ups. Otherwise it reads *Unassigned*.



1. Check which date has already passed.
2. Read the expiry before deciding whom to call.
3. Tick the document that needs a follow-up.
4. Open the account's follow-ups to read the existing job.
5. Create jobs for the checked records.

Expired documents and documents due within the next 30 days.

The totals cover this page only. If you see *No renewal follow-ups found on this page.*, press **Next accounts** if offered. If a date was skipped or has changed, check it on the customer's account before selecting it again. See Record or correct a farm document, in “Check a customer's farm documents” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/compliance-pricing) to record dates and Find documents that need renewing, in “Check a customer's farm documents” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/compliance-pricing) for the expiry list by document.

Know what Verified means on a renewal

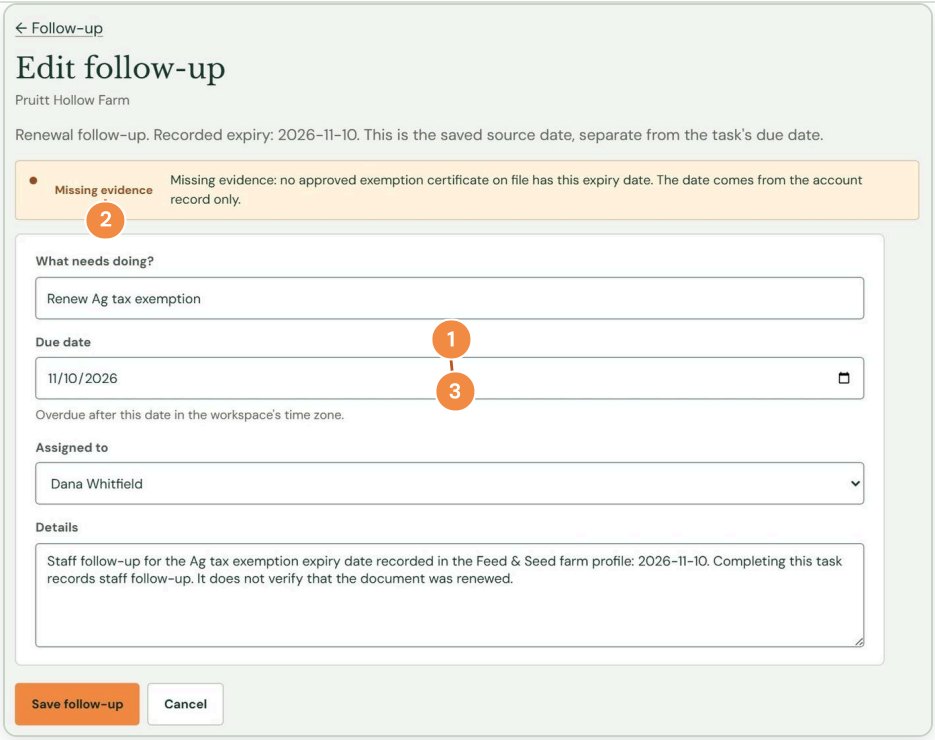
WHERE TO FIND IT **Customers** › **Follow-up → Review renewal dates; and on a renewal task**

Store owner, Manager, Staff, Read only

Included on the Whole Store plan.

A call can be finished while the store is still waiting for the replacement certificate. With Follow-up set up and the Feed & Seed pack in use, open **Review renewal dates** and find the customer and document.

1. **Read the job status. Task completed** records staff follow-up. Completing the job changes no expiry date on the account. Press **View account follow-ups** to read the job and its recorded expiry.
2. **For an ag exemption, read the certificate evidence.** A certificate named on the job identifies the record the renewal is tied to. *Missing evidence* means Roadside could not identify the supporting certificate with certainty. Read the reason beside it and check the customer's certificate record.
3. **Look for Verified on the matching ag renewal.** It takes a Manager or Store owner approving a replacement certificate for that account under **Tax exemptions**. Changing a date or marking the call complete does not verify renewal. With the Online Store, people who can review exemptions can press **View certificate** when a certificate is linked. See Approve or decline a customer's exemption card, in “Set the store's sales tax and check the report” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/sales-tax) for the approval.



1. Match the document and account to the call you are checking.
2. Read why Roadside could not establish the certificate link.
3. Compare the job's due date with the recorded expiry.

A renewal job whose ag exemption is missing certificate evidence.

Veterinary Feed Directives and restricted-use pesticide licenses are checked at the register when the sale requires them. Their renewal follow-ups do not get a *Verified* badge.

27 Prepare statements on a schedule and review late invoices

With the Fencepost CRM farm tools, Roadside can make each month's statements on the closing day and hold them for a person to review. Invoice review walks through the invoices that are past due, one customer at a time.

IN THIS CHAPTER

- Having Roadside make each month's statements on its own
- Looking over a prepared month and marking it reviewed
- Getting past a month that is blocked
- Walking through overdue invoices, customer by customer

Have Roadside prepare each month's statements

WHERE TO FIND IT **Customers** › **Follow-up → Monthly statement preparation → Preparation schedule**

Store owner, Manager (all four roles can read the page)

Included on the Whole Store plan.

With the schedule on, Roadside makes each month's statements by itself once the month closes, the same statements a person makes with **Make statements**. Then it waits for someone to look them over. It sends nothing to customers. Sending and printing stay a person's job, from the month's page (Look the statements over, then send or print them, in Chapter 19 (page 152)).

Open **Follow-up** under **Customers** and press **Monthly statement preparation**. The page is headed **Monthly statements**. Staff and Read only people see it with the line *Changing this schedule or recording a review requires permission to manage charge accounts and edit follow-ups.*

WORDS TO KNOW

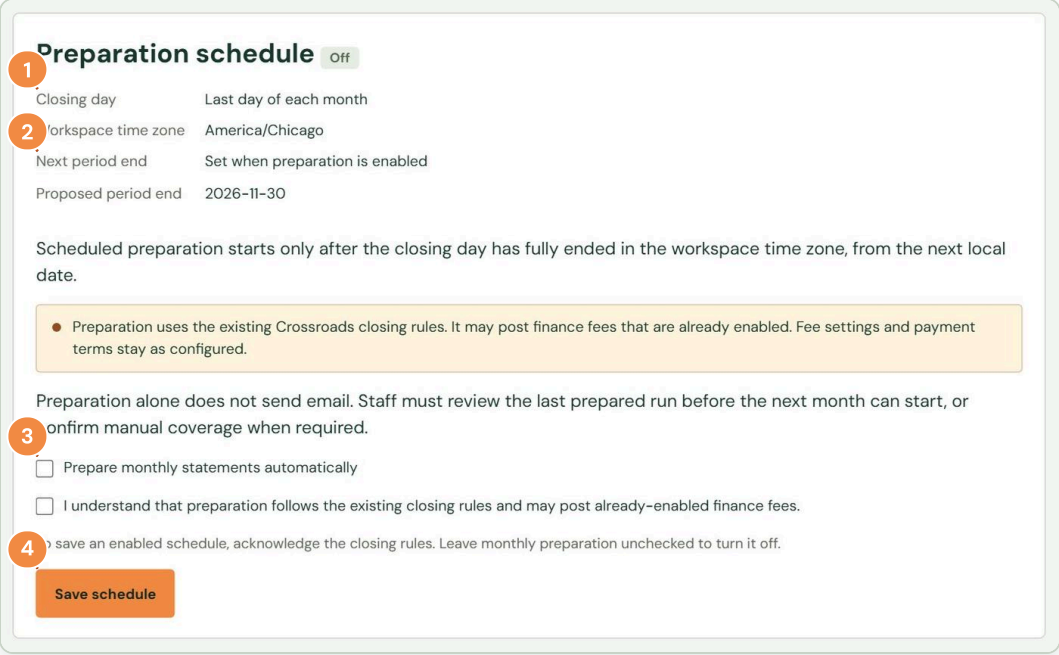
Preparation

Roadside making a month's statements on its own, for a person to review before they are sent.

Closing day

The day of the month a statement period ends.

Statements close on the last day of the month, and the **Closing day** line reads *Last day of each month*, unless Dirt Road has set another day for your store. The day is shown here and set nowhere in Roadside. To change it, write to **support@dirtroadsoftware.com**.



1. Closing day: the last day of each statement period.
2. Next period end: the month Roadside prepares next.
3. Prepare monthly statements automatically: tick to turn the schedule on.
4. Save schedule keeps your choice.

The Preparation schedule card, with the schedule off.

1. **Read the facts at the top of Preparation schedule. Closing day**, **Workspace time zone**, and, while the schedule is off, **Proposed period end**: the first month Roadside will prepare.
2. **Tick Prepare monthly statements automatically.**
3. **Tick I understand that preparation follows the existing closing rules and may post already-enabled finance fees.** Saving the schedule on needs both ticks.
4. **Press Save schedule.** The message reads *Monthly statement preparation enabled.*

> ⚠ CAREFUL
> With the schedule on, statements are made each month without anyone pressing a button. If the store has finance charges or late fees turned on, each month's preparation adds them to the accounts that are past due (Turn on a finance charge, in Chapter 21 (page 164)). Nothing goes to customers until a person sends it.

Preparation starts once the closing day has fully ended in the store's time zone, so a month that closes on the 31st is prepared from the 1st. It worked when the badge beside **Preparation schedule** reads *On*, and **Next period end** and **First scheduled period end** show dates.

To turn it off, untick **Prepare monthly statements automatically** and press **Save schedule**. The message reads *Monthly statement preparation turned off*. If a refusal asks you to reload the page, the dates moved while it was open: reload it, check the dates and save again. Where a message or reason on this page mentions Crossroads closing rules or Crossroads runs, it means your charge-account statements under **Charge accounts**, **Statements**.

Statements can still be made by hand on any day (Make the month's statements, in Chapter 19 (page 149)).

Review a prepared month, then send it

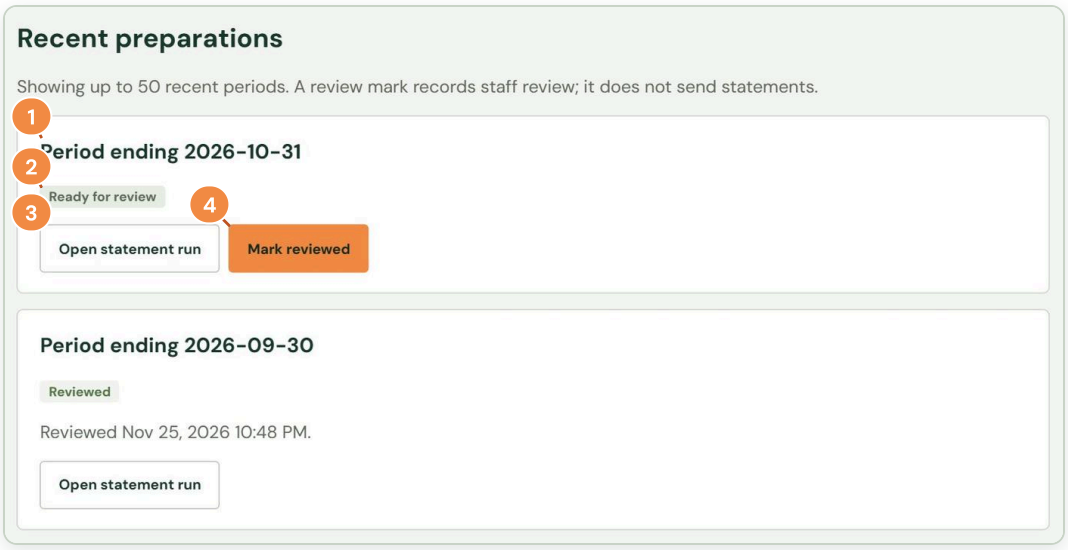
WHERE TO FIND IT **Customers** › **Follow-up → Monthly statement preparation → Recent preparations**

Store owner, Manager, Staff, Read only (to read); Store owner, Manager (to mark reviewed)

Included on the Whole Store plan.

Recent preparations, lower on the Monthly statements page, has a card for each month Roadside prepared, up to 50 of them, each headed **Period ending** and the date. Each month must be reviewed before Roadside prepares the next one.

BADGE	WHAT IT MEANS
Waiting to prepare	The month has closed and Roadside starts on it shortly.
Preparing	The statements are being made.
Ready for review	Made. Look them over, send or print them, then mark the month reviewed.
Reviewed	Someone marked it reviewed. The card gives the date and time.
Blocked	Roadside could not prepare it. The line under the badge says why.
Preparation failed	Making the statements stopped. The line under the badge says what to check.



1. Period ending: the last day the month's statements cover.
2. Ready for review: this month waits for a person.
3. Open statement run opens the month's statements to look over and send.
4. Mark reviewed records your review so next month can start.

Recent preparations, with one month reviewed and one ready.

1. **Find the card that reads *Ready for review* and press Open statement run.** The month's page opens, headed **Statements for** and the date.
2. **Look the statements over, then print and send them there** (Look the statements over, then send or print them, in Chapter 19 (page 152)).
3. **Go back to Monthly statements and press Mark reviewed.** The message reads *Staff review recorded. No statements were sent.*

> ⚠ CAREFUL
> **Mark reviewed** sends nothing. It records that a person looked, and lets next month's preparation start. Statements go to customers only when someone presses Send on the month's page. A month that is never reviewed holds back every later month.

It worked when the card reads *Reviewed* and **Next period end** at the top moves on a month. Only the latest ready month takes a review. Another is refused with *Only the current ready preparation can be acknowledged.*, and a month whose statements did not all finish with *The statements must finish successfully before review is acknowledged.*

A month that is blocked

The line under a *Blocked* badge names the cause:

- **Earlier statements still being made, or an earlier run that stopped.** Open **Statements** under Charge accounts, open that month, and press **Make again** if it stopped.
- **The person who turned the schedule on no longer has permission.** A Store owner or Manager ticks both boxes on **Preparation schedule** and presses **Save schedule** to approve it again.
- **The statement closing day changed.** Check the dates, tick the boxes and save the schedule again. If the card also shows **Review manual statement coverage**, the schedule card has no Save schedule: use the coverage review below.
- **A later month was already made by hand.** The card shows **Review manual statement coverage**, below.

When statements were made by hand

If someone made statements with **Make statements** for a later date than the month Roadside was due to prepare, the card shows **Review manual statement coverage**, with the dates the hand-made statements cover and the next period Roadside proposes. If the closing day changed as well, the schedule card has no **Save schedule** while this is waiting and, when the schedule is on, offers **Turn off schedule** instead.

1. **Press Review manual statement run** and check those statements.
2. **Tick I reviewed the manual statements and approve advancing this schedule to** and the date.
3. **Press Confirm coverage and advance schedule.** The message reads *Manual statement review recorded and schedule advanced. No statements were sent.* The hand-made statements stay as they were.

When no month has been prepared yet, the list reads *No scheduled statements have been prepared.*

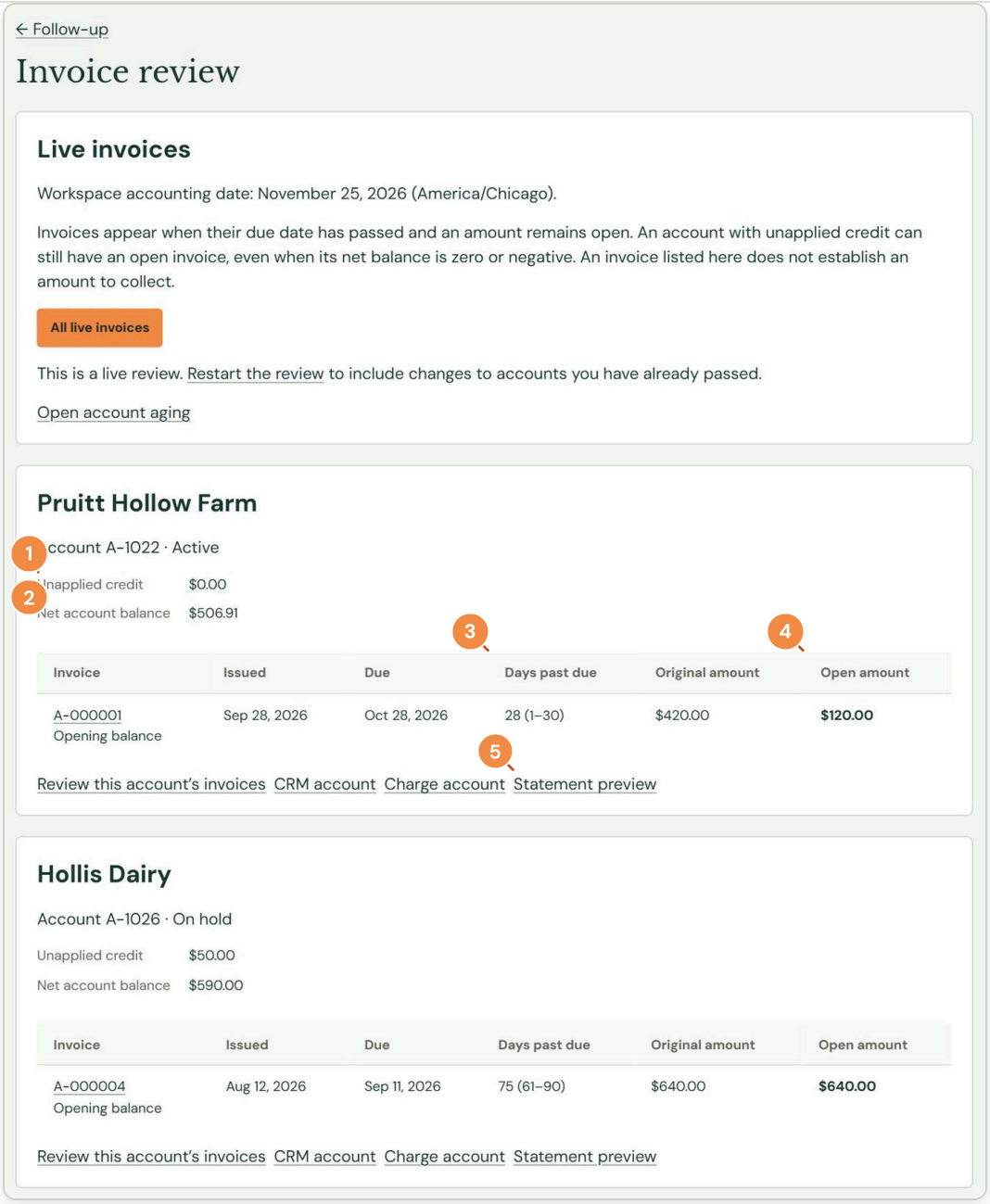
Go through the invoices that are past due

WHERE TO FIND IT **Customers** › **Follow-up → Invoice review** Store owner, Manager, Staff, Read only

Included on the Whole Store plan.

Invoice review lists every charge-account invoice whose due date has passed with money still open, grouped by customer, so you can work down it before calling people. It changes nothing and sends nothing. Open **Follow-up** under **Customers** and press **Invoice review**. All four roles can use it.

The card at the top, headed **Live invoices**, gives the date the page counts from and the store's time zone. Its note is worth keeping in mind: a customer can hold credit not yet applied and an open invoice at once, so an invoice listed here is not by itself the amount to collect.



1. Unapplied credit: money the customer has paid that is not yet on an invoice.
2. Net account balance: what the customer owes after that credit.
3. Days past due: how long each invoice has been overdue.
4. Open amount: what is still unpaid on the invoice.
5. Statement preview: open the customer's statement to today.

Invoice review, with two customers' past-due invoices.

1. **Read each customer's card.** It gives the name, **Account** with the number and *Active*, *On hold* or *Closed*, then **Unapplied credit** and **Net account balance**.

2. **Read the invoices.** The columns are **Invoice**, **Issued**, **Due**, **Days past due**, **Original amount** and **Open amount**. Under each number, a word names the kind, such as *Finance charge* or *Late fee*, and an invoice from a sale has **Open order**.
3. **Use the links under the table. Review this account's invoices** shows that customer alone. The next link opens the customer's account, **Charge account** opens its charge account, and **Statement preview** its statement to today.
4. **Press Continue review** for the next batch. Each page holds up to 50 invoices from up to 20 customers.

Days past due here count from each invoice's due date, so they can differ from the columns on Aging, which count from the invoice date unless the store's aging is set to count from the due date (See who is overdue, in Chapter 20 (page 157)). When a customer pays, take the payment on their account (Take a payment on account, in Chapter 18 (page 137)). To promise a call and keep track of it, add a follow-up (Add a follow-up for a customer, in Chapter 23 (page 178)).

It worked when **Continue review** reaches a page that reads *No open past-due invoices to display in this batch*.

When the review needs a fresh start

The review reads the accounts as you go. If an account changes while you are working through it, the page says so: *The account changed since the previous page. Restart from the first page to see the current invoices.*, or *This page link is no longer valid for the current review. Start a fresh review.* for an old link. Press the link in the message, or **Restart the review** in the top card, to begin again with every change included.

28 Remind customers to reorder before the bag runs out

Fencepost Plus lets a customer see how long a bag should last for their animals. They can ask for an email before the feed runs out and use the link in it to order more.

IN THIS CHAPTER

- Set up Fencepost Plus
- Show the calculator on feed pages
- Set daily amounts from the feed tag
- Find or stop a customer's reminder
- Help a customer change how many animals they feed

Set up Fencepost Plus

WHERE TO FIND IT **Store account** › **All of Roadside** Store owner

> Your store must have the Fencepost Plus add-on, offered on the Whole Store plan.

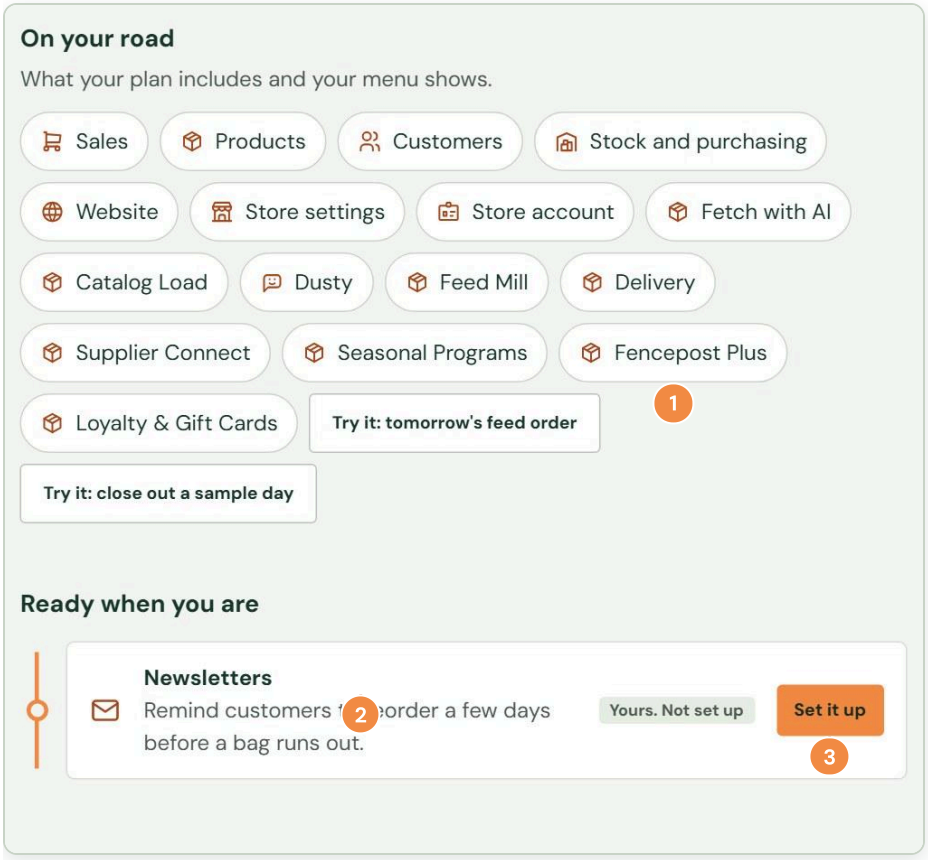
The Store owner sets up Fencepost Plus once for the store. The setup adds the settings and the reminder list. The calculator starts off, so setup alone puts nothing on a feed page. A reminder puts the customer's address on the store's email list: Check whether someone agreed to email, in “Keep a list of people who asked for email” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/email-list).

> WORDS TO KNOW
>
> **Fencepost Plus**
> The Whole Store add-on that includes the feed calculator and reorder reminders.

1. **Open All of Roadside and look under Ready when you are.** On the line named **Newsletters**, press **Set it up**.

2 **Read the setup sheet.** Press **Set it up for the store**. Look for **Reorder reminders** under **Customers** and the **Feed calculator** tab under **Checkout and delivery** in Store settings. If you see no setup line, the tool may be set up already: look for **Reorder reminders** under **Customers**. Otherwise check that you are signed in as the Store owner and that your store has Fencepost Plus. See Set up a tool the store already has, in "Find what your store has and set it up" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside).

3 **Turn on the calculator for eligible feeds.** See Show "How long will a bag last?" on feed pages, in Chapter 28 (page 212).



1. Find the add-on your store has.
2. Find the setup line about reminding customers to reorder.
3. Open the setup sheet for the store.

Fencepost Plus under On your road, and the setup line under Ready when you are.

To stop the reminder tool for everyone, open **Add-ons you set up** under Store settings. Switching it off stops reminder emails. The store keeps the records for the next time it sets up the tool. Press **Switch it off** beside **Newsletters**, review what stops, then press **Switch it off** on that page and confirm your sign-in when asked. See Switch off a tool the store set up, in "Find what your store has and set it up" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/all-of-roadside).

Show “How long will a bag last?” on feed pages

WHERE TO FIND IT **Store settings** › **Checkout and delivery → Feed calculator** Store owner, Manager

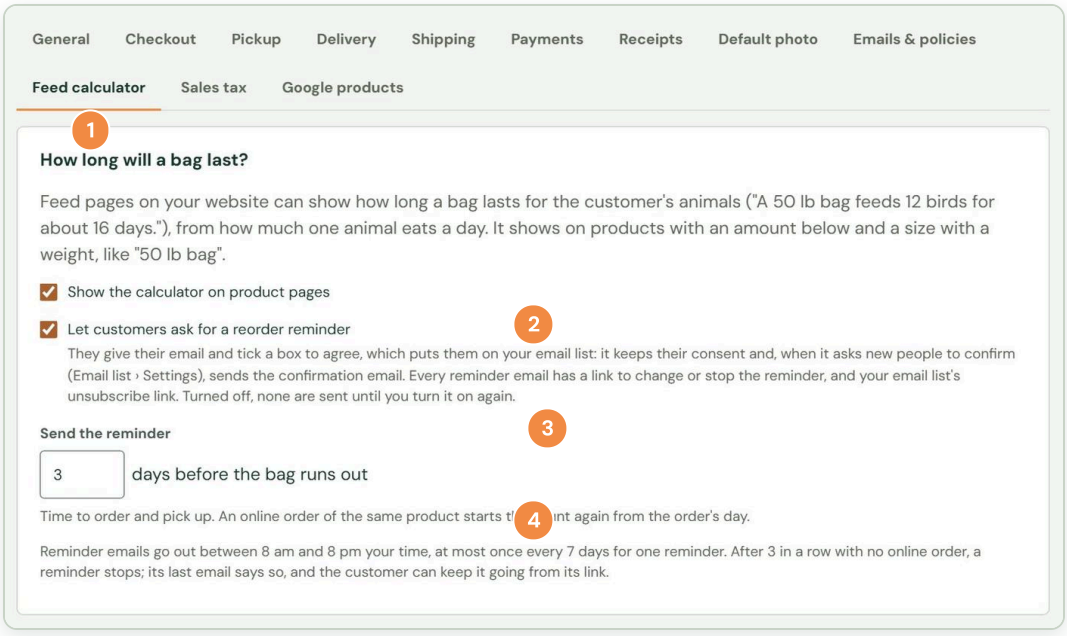
Your store must have the Fencepost Plus add-on, offered on the Whole Store plan.

Open the **Feed calculator** tab on **Checkout and delivery**. Before you save, decide what customers should see. Turning the calculator on shows an estimate on feed pages with a daily amount and a bag weight. Allowing reminders adds a form where a customer can agree to join your email list and get a reminder for that feed. A customer who asks gets an email to confirm the address when it needs confirming, then a reminder the set number of days before the bag runs out, at most once every 7 days. Roadside stops after 3 emails in a row with no online order of that feed, and each email carries a link where the customer changes or stops the reminder.

WORDS TO KNOW

Feed calculator

The part of a feed's product page that estimates how long one bag lasts for the number of animals a customer feeds.



1. Open this tab under Checkout and delivery.
2. Tick this to show estimates on eligible feed pages.
3. Tick this to let customers request emails.
4. Choose how many days ahead to remind them.

The settings for the calculator, reminder requests and days of notice.

1. **Tick Show the calculator on product pages. Let customers ask for a reorder reminder** starts ticked, but only works with the calculator on. Untick it for a calculator alone. Reminder emails pause while reminders are off.
2. **Set the lead time.** In **Send the reminder**, enter 1 to 14 days before the bag runs out. It starts at 3. Saving recalculates the next email date on active reminders and those waiting for confirmation.
3. **Press Save feed calculator settings.** Look for *Feed calculator settings saved*. Open a feed's page on your website and look for **How long will a bag last?**. If it is missing, check the feeding amount and bag weight in Set how much each animal eats, in Chapter 28 (page 213).

Reminders go out between 8 am and 8 pm store time. Each reminder email carries your store's mailing address. If the screen says emails are waiting for an address, enter it under **Hours and contact** in Store settings (Correct the phone number, address or map pin, in "Set the store's hours and contact details" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/store-info)). To check a customer's subscription, see Check whether someone agreed to email, in "Keep a list of people who asked for email" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/email-list).

Set how much each animal eats

WHERE TO FIND IT **Store settings** ›

Checkout and delivery → Feed calculator → Amounts by department; Amounts for one product

Store owner, Manager

> Your store must have the Fencepost Plus add-on, offered on the Whole Store plan.

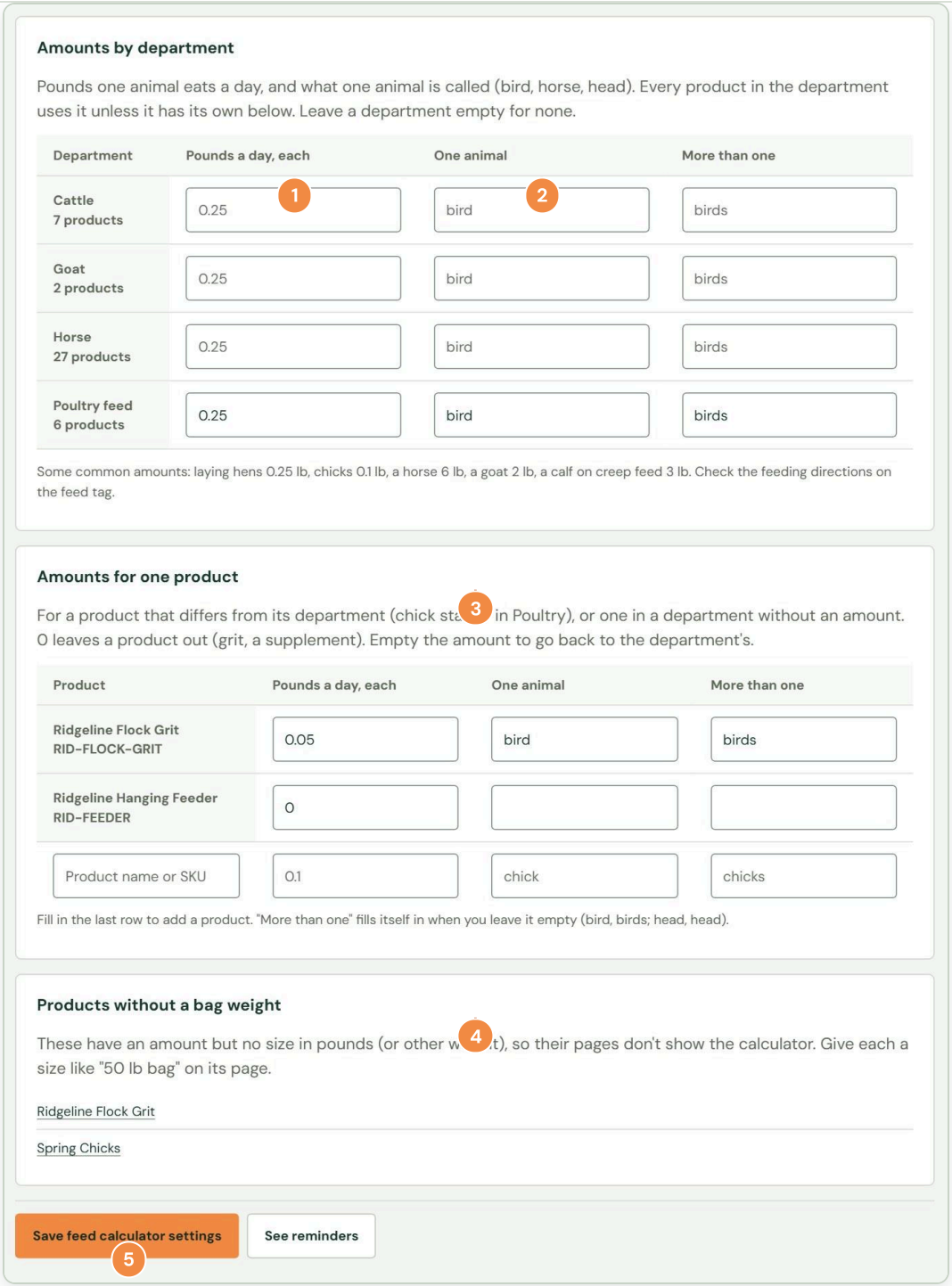
Use the feed tag for the amount one animal eats in a day. Customers see the estimate based on what you save. The example printed on the settings screen is *A 50 lb bag feeds 12 birds for about 16 days*. Use the directions for the particular feed when entering your figures (Copy the bag's feed tag onto the product, in "Write a description and check the feed tag" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/descriptions-feed-tags)).

1. **Set a department amount.** Under **Amounts by department**, enter **Pounds a day, each** as a number greater than 0 and up to 100. Under **One animal** and **More than one**, enter the words customers use, such as *bird* and *birds*. If no departments are listed, open **Categories** under Products (Put products in the right department, in "Find and organize what you sell" in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/products-at-a-glance)).

2. **Give one product a different amount if it needs one.** Under **Amounts for one product**, use the row for the product, or type its name or stock code in **Product name or SKU**. Its amount takes precedence over the department's. Enter 0 to leave a supplement or treat out. Clear a saved product amount to use the department's again.

3. **Save and check the bag weight.** Saving updates the amounts on eligible website feeds and recalculates reminder email dates using the saved days of notice. Press **Save feed calculator settings**. Check for *Feed calculator settings saved*. If the product name is refused or matches several products, use its stock code.

4. **Open the product on your website.** Enter an animal count and read the estimate. If the item is under **Products without a bag weight**, give at least one size a weight (Add a size and set how you sell it, in “Set sizes, prices and product photos” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/sizes-photos)). This card shows up to 20 products and disappears when there are none to fix.



1. Enter the daily amount from the feed tag.
2. Name the animal the amount is for.
3. Set a different amount for one feed or leave it out.
4. Look here for products that still need a weight.
5. Save the entries before checking a product page.

The department feeding amounts, product exceptions and missing bag weights.

See who gets reminders, and stop one

WHERE TO FIND IT **Customers** › **Reorder reminders**

Store owner, Manager, Staff, Read only (to read); Store owner, Manager, Staff (to stop one)

Your store must have the Fencepost Plus add-on, offered on the Whole Store plan.

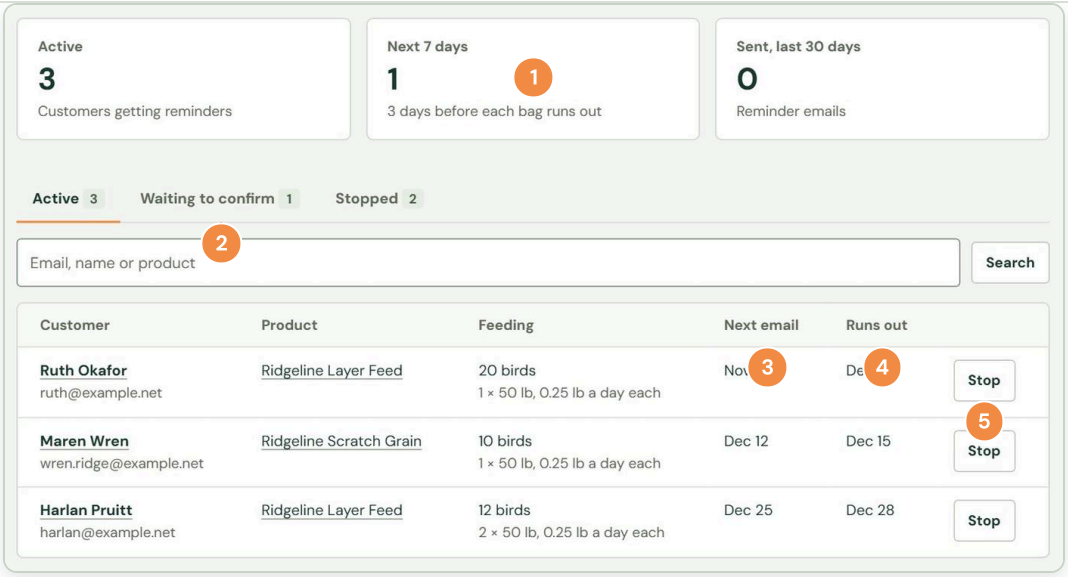
Customers request reminders on the website. The email gives them a link to order more. It places no order. If **Reorder reminders** is missing from the Customers menu, see Set up Fencepost Plus, in Chapter 28 (page 210).

WORDS TO KNOW

Reorder reminder

An email a customer asks for before their feed is due to run out.

1. **Check the totals and choose a tab. Active**, **Next 7 days** and **Sent, last 30 days** show the store's reminder activity. The tabs are **Active**, **Waiting to confirm** and **Stopped**. Enter an email, name or product and press **Search**. There are up to 50 reminders per page.
2. **Match the customer and the feed. Feeding** shows their animals and bags. **Next email** and **Runs out** are two different dates. Under **Stopped**, the row gives the reason. If the search finds nobody, try a shorter name or another tab.
3. **To stop a single reminder, check the address and product first.** Stopping ends emails for this reminder. The customer stays on the email list and keeps their other reminders. Only the customer can ask for another on the product page. Press **Stop**, then confirm the address and product in the prompt.
4. **Check Stopped.** The row reads *Stopped by staff*. Staff, Managers and the Store owner can stop one. Read only can look it up. For a request to unsubscribe from the store's email list, see Check whether someone agreed to email, in “Keep a list of people who asked for email” in the Core Roadside guide (dirtroadsoftware.com/support/roadside-manual/email-list). Unsubscribing stops all that person's reminders.



1. Check how many reminders are due in the next week.
2. Find requests that still need confirmation.
3. Read when the next email is due.
4. Check the estimated day the feed runs out.
5. Stop only the reminder for the customer and feed on this row.

The active reminders and the dates a customer can expect an email.

The reason on a stopped row tells you where to look.

- For a customer request, look for *Stopped by the customer*, *Replaced by a newer reminder* or *Unsubscribed from the email list*.
- For an email problem, the reason reads *The address bounced or reported spam* or *Emails to the address kept failing*.
- The other reasons are *The product left the website* and *Stopped after 3 emails with no order*.

Use the product page if the customer wants to request a reminder again.

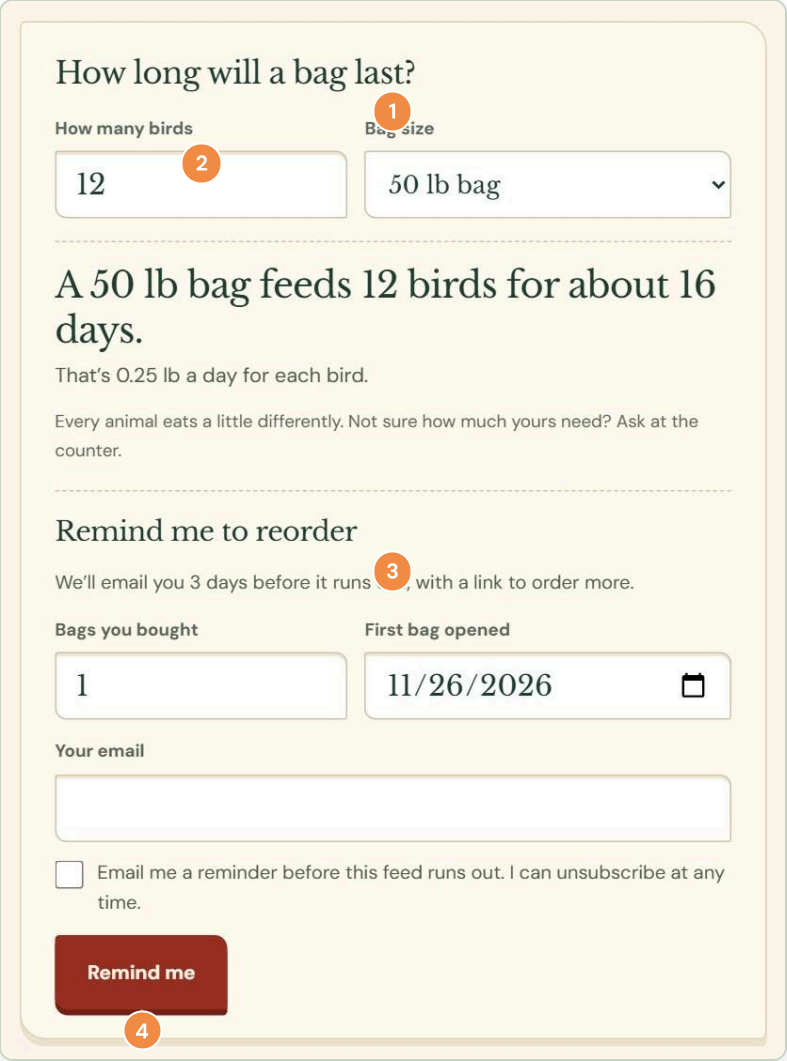
Know what the customer sees and receives

WHERE TO FIND IT **Website (shopper) → a feed's product page → How long will a bag last?**

The customer; Store owner, Manager and Staff to explain it

> Your store must have the Fencepost Plus add-on, offered on the Whole Store plan.

A customer can use the estimate without giving an email address. If they want a reminder, they ask for it themselves on the feed's page.



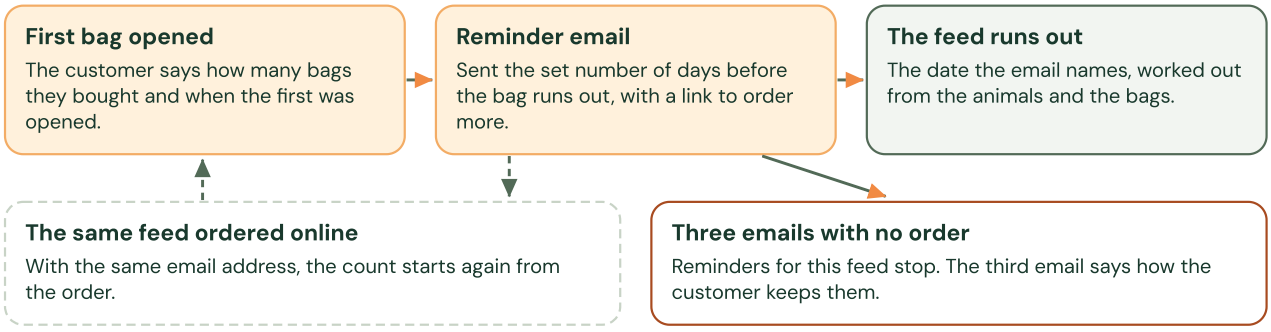
1. Find the estimate on the product page.
2. Enter how many birds will eat the feed.
3. Enter the bag and email details here.
4. Ask for the reminder after agreeing to the email.

The estimate and reminder form on a feed page.

1. **Check how long a bag lasts.** Under **How long will a bag last?**, enter the number of animals. For poultry the field reads **How many birds**. Choose a **Bag size** if more than one size has a weight. The estimate changes with the count.

2. **Ask for a reminder.** Under **Remind me to reorder**, enter **Bags you bought** (1 to 50), **First bag opened** (it starts at today's date) and **Your email**. Asking puts this address on the store's email list and may send a confirmation email. Tick **Email me a reminder before this feed runs out. I can unsubscribe at any time.** and press **Remind me**.

3. **Check for confirmation.** If the store asks for email confirmation and the address needs it, the subject is *Please confirm your reorder reminder from [business]*. Open its link and press the button on the page. The request moves from **Waiting to confirm** to **Active**. A subscribed address can start straight away. Unconfirmed requests drop off after 30 days.

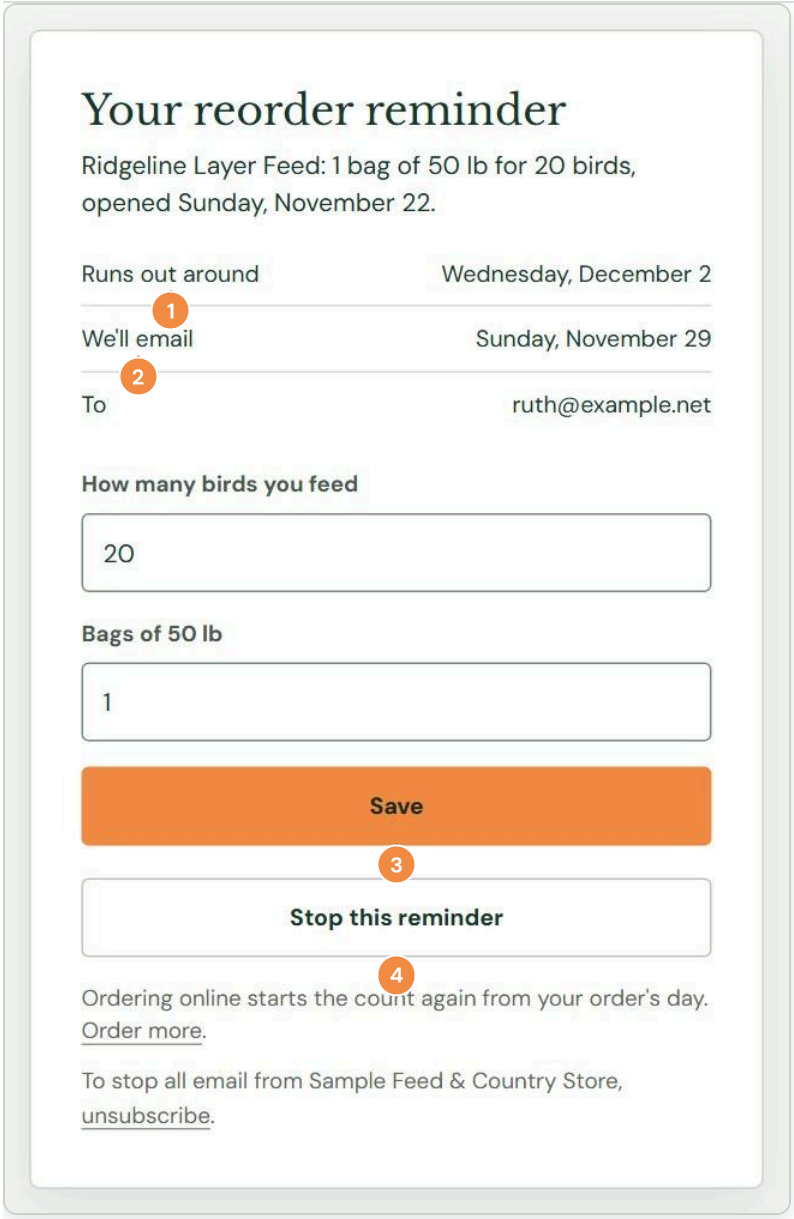


What starts the count again for an active reminder. A register sale does not restart it.

The reminder's subject is *Your [product] runs out around [Mon d]*. It has a link to order more and a link to change or stop the reminder. An online order of the same feed using the same email address starts the count again. The third email with no order tells the customer they can open the change link and press **Save** to keep getting reminders while the reminder is active.

1. **To change the count, open the change link in the reminder email.** On **Your reorder reminder**, change the number of animals or bags and press **Save**. Look for *Saved. The dates below are worked out again*. Read **Runs out around** and **We'll email** to check the result.

2. **To finish with this feed, check the product before stopping. Stop this reminder** ends emails for this feed only. Press it and look for **Reminder stopped**. To stop all reminders from the store, use the unsubscribe link in a reminder email.



1. Check the estimated day the feed runs out.
2. Read the next email date or see whether it was sent.
3. Save the animal or bag count and check the dates.
4. End the reminder for this feed.

The customer's reminder page shows the estimated runout and email dates.

If the change link does not work, open it again directly from the email. A stopped reminder needs a fresh request on the product page. One email address can have up to 20 open reminders. At that limit, stop an unwanted reminder before requesting another.

Quick answers

The questions people ask about the counter, charge accounts and the farm tools. Each one goes to the section that has the steps, who can do them and what the job needs.

Where do I close the drawer at night?

Count the cash and close a drawer, in Chapter 4 (page 28)

The drawer is short. What do I check?

Count the cash and close a drawer, in Chapter 4 (page 28)

I closed a drawer with the wrong count.

Reopen a closed drawer to count again, in Chapter 4 (page 30)

Which checks go to the bank today?

Take the checks and cash to the bank, in Chapter 4 (page 33)

How do I add another register?

For a counter computer: Get a counter computer connected, in Chapter 1 (page 6). For a phone, a tablet or an office computer: Add a register in a web browser, in Chapter 1 (page 11).

A register was stolen or is missing.

Retire a register or report it lost, in Chapter 1 (page 10)

How do I set my PIN for the register?

Set your own Counter PIN, in Chapter 2 (page 15)

A cashier's PIN stopped working.

Help a team member whose PIN does not work, in Chapter 2 (page 18)

The internet went down. Can we keep selling?

Yes, on a counter computer, once the Store owner has allowed it: for cash, for a check when your store takes checks, and on a charge account. A card is never taken offline. Let registers keep selling while offline, in Chapter 6 (page 43)

Can a customer charge to their account while the internet is down?

Yes, when offline selling is on and the account is active. An account on hold or closed cannot be charged offline. A sale past $500.00, more than $1,000.00 on one account while the register is offline, or a sale past the credit available needs a second manager's Counter PIN. Know what a register may put on a charge account while offline, in Chapter 7 (page 52)

An order shows a Check badge.

For a sale a register made offline: Check offline sales that need a look, in Chapter 6 (page 46). For a check the bank sent back: Record what the customer pays back, in Chapter 8 (page 61).

A customer's check bounced.

Mark a check the bank sent back, in Chapter 8 (page 59)

How do I change the slides on the customer screen?

Add a slide, in Chapter 9 (page 70)

A cashier rang up something that is not in the system.

Link a manual item to its product, in Chapter 10 (page 82)

Who can give the employee discount?

Choose who may give a counter discount, in Chapter 11 (page 85)

Someone forgot to clock out.

Fix a shift or add one that was missed, in Chapter 12 (page 93)

How do I get hours for payroll?

Approve a pay period and export the hours, in Chapter 12 (page 96)

How do I take chick orders ahead?

Take a reservation at the counter or by phone, in Chapter 14 (page 109). If the product is not set up for reservations yet: Set up a product customers reserve ahead, in Chapter 14 (page 105).

How do I open a charge account?

Open a charge account with a limit and terms, in Chapter 15 (page 120)

A customer is behind on their bill. How do I stop them charging?

Put an account on hold, or close it, in Chapter 16 (page 128)

How do I raise a customer's credit limit?

Change a limit, the terms or how statements go, in Chapter 15 (page 123)

A customer mailed a check for their account.

Take a payment on account, in Chapter 18 (page 137)

How do I send this month's statements?

Look the statements over, then send or print them, in Chapter 19 (page 152)

Who is past due?

See who is overdue, in Chapter 20 (page 157)

How do I give a customer store credit?

Give store credit by hand, in Chapter 22 (page 172)

Can a customer see their statement online?

Show the account owner their statements online, in Chapter 20 (page 159)

How do I remind someone to call a customer back?

Add a follow-up for a customer, in Chapter 23 (page 178)

How do I turn on the feed calculator and reorder reminders?

Set up Fencepost Plus, in Chapter 28 (page 210)

Glossary

Every word the manual stops to explain, in one list, with the chapter that explains it.

A

Account owner

The primary contact of a customer's account. The owner may always buy on the account and pick up its orders. Chapter 16 (page 125)

Acknowledgement

The file Roadside gives back after an import, so the register knows which sales arrived and can clear them. Chapter 6 (page 43)

Aging

What customers owe, sorted by how long it has been owed. Store owners also call it A/R aging. Chapter 20 (page 157)

Animal group

A named group of one species with a head count, such as a herd or a flock. Chapter 25 (page 191)

Arrival batch

One delivery of a pre-order product, with its arrival date and how many are coming. Chapter 14 (page 105)

Authorized buyer

A contact the store has marked as allowed to charge purchases to the account. Chapter 16 (page 125)

Available

What a charge account can still take: its credit limit, less its balance, less website orders charged to it that are waiting for pickup. Chapter 15 (page 118)

C

Cash expected

The cash customers handed over at a register, less the change and the cash refunds. It does not include the opening float. Chapter 3 (page 20)

Charge account

An account a customer buys on and pays later, on terms the store sets. Stores also call it a house account, a tab or A/R. Chapter 15 (page 118)

Charged to account

A sale put on a customer's charge account. No money was taken, so no drawer holds it. Chapter 3 (page 20)

Closing day

The day of the month a statement period ends. Chapter 27 (page 202)

Counter discount

A discount a person gives by name at the register, with no code. Chapter 11 (page 85)

Counter PIN

A person's own number of 6 to 8 digits for the register. It is not a Roadside password and never signs in to Roadside. Chapter 2 (page 15)

Counter sale

A sale rung up at a register, kept in Roadside as an order. Chapter 5 (page 36)

Credit (on a charge account)

An amount taken off what a customer owes on their charge account. No goods come back and no money changes hands. Chapter 18 (page 137)

Credit balance

A charge-account balance below zero. The store owes the customer. Chapter 18 (page 137)

Credit limit
The most a charge account may owe. Chapter 15 (page 118)

Customer display
The second screen at a register, turned toward the customer. Chapter 9 (page 67)

Customer list
A set of saved filters that Roadside uses to find matching accounts each time you open it. Chapter 24 (page 185)

Customer portal
The part of the store's website where a charge account's owner reads its statements and invoices. Chapter 20 (page 157)

D

Day summary
One store day of register sales, payments and refunds, with each drawer's count. Chapter 3 (page 20)

Decimal hours
Hours written with a decimal point, so 3.25 is 3 hours 15 minutes and 7.5 is 7 hours 30 minutes. Chapter 12 (page 91)

F

Feed calculator
The part of a feed's product page that estimates how long one bag lasts for the number of animals a customer feeds. Chapter 28 (page 210)

Fencepost Plus
The Whole Store add-on that includes the feed calculator and reorder reminders. Chapter 28 (page 210)

Finance charge
A monthly percentage added to the part of a balance that is past due. Chapter 21 (page 164)

Follow-up
A job for one customer with a due date and, usually, someone assigned to it. Chapter 23 (page 178)

G

Grace period
How many days past due an amount can be before a finance charge applies to it. Chapter 21 (page 164)

H

Hold (on a charge account)
A stop on further charges to the account. A second manager can still approve one sale at a register that is online. Chapter 16 (page 125)

L

Late fee
A flat amount added once per statement period while something on an account is past due. Chapter 21 (page 164)

M

Manual item
A line a cashier types by hand because the product is not in Roadside yet. Chapter 10 (page 80)

N

Net days
Terms under which each charge is due a set number of days after it is made. Net 30 means 30 days. Chapter 15 (page 118)

O

Office check
A check taken for a payment on a charge account in Roadside, not at a register. It is in no drawer. Chapter 4 (page 28)

Office payment
A payment on account recorded in Roadside, away from the register. Its money is in no register's drawer. Chapter 18 (page 137)

Offline
The register cannot reach Roadside, because the internet or the store's network is down. Chapter 6 (page 43)

Offline sale
A sale a register saves on its own computer until it can send it to Roadside. Chapter 6 (page 43)

Opening float
The cash put in the drawer before the first sale, for making change. Chapter 4 (page 28)

Over or short
The counted cash less what should be in the drawer. Over means more cash than expected, short means less. Chapter 4 (page 28)

Overtime
On the time clock, hours past the weekly limit, or past a day's limit, that the Store owner sets. Chapter 13 (page 99)

P

Pairing code
A one-time code that connects one counter computer to the store. Dirt Road makes it. The register's own screen calls it *Connection code*. Chapter 1 (page 4)

Pay period
The days one paycheck covers, such as one week or the 1st to the 15th. Chapter 13 (page 99)

Payment on account
Money a customer pays toward what they owe on their charge account. It is not payment for a sale made today. Chapter 18 (page 137)

Period ending
The last day a statement covers. The next statements start the day after it. Chapter 19 (page 149)

Preorder
An item a customer reserves before it arrives and pays for at pickup. Chapter 14 (page 105)

Preparation
Roadside making a month's statements on its own, for a person to review before they are sent. Chapter 27 (page 202)

Property
A named place a customer uses, such as a pasture or barn, with its own delivery details. Chapter 25 (page 191)

Punch
One clock-in, clock-out, or start or end of a break, made at the register with a Counter PIN. Chapter 12 (page 91)

Purpose
Whether a charge-account customer buys for a household or for a farm or business. Chapter 15 (page 118)

R

Register
A counter computer or a web browser that rings up sales. Each register numbers its sales with its own letters, such as D1. Chapter 1 (page 4)

Register ID
The eight-character code printed on a register's receipts. It stays the same when the register is renamed. Chapter 1 (page 4)

Register shift

One register's drawer for one store day. It has nothing to do with the hours a person works. Chapter 4 (page 28)

Remittance stub

The bottom part of a statement, which the customer sends back with a check. It says who to make the check out to. Chapter 19 (page 149)

Renewal follow-up

A follow-up made from a document expiry date saved on a customer's account. Chapter 26 (page 198)

Reorder reminder

An email a customer asks for before their feed is due to run out. Chapter 28 (page 210)

Retire

Stop a register's access to the store and have it clear the data it saved. Chapter 1 (page 4)

Returned check

A check the bank sent back unpaid. Store owners also call it a bounced check or an NSF check. Chapter 8 (page 56)

S

Seasonal terms

Terms under which everything on the account is due on one date, such as after harvest. Chapter 15 (page 118)

Shift

A clock-in and its clock-out, with any breaks between them. On Day summary a register shift is something else: a drawer's day. Chapter 12 (page 91)

Slide

One picture for the customer display, with optional words on it. Chapter 9 (page 67)

Slide show

A named list of slides that play in order. Chapter 9 (page 67)

Statement

One charge account's activity and amount due up to a date, sent to the customer once a month. Chapter 19 (page 149)

Store credit

Money your store owes a customer, kept on their account for them to spend on a later purchase. It is separate from what they owe on a charge account. Chapter 22 (page 170)

T

Two-step sign-in

Roadside asks for a code from your authenticator app after your password, a step the screens call *two-factor*. Chapter 2 (page 15)

V

Veterinary Feed Directive

A veterinarian's written order for medicated feed, abbreviated VFD on the account form. Chapter 1 (page 4)

W

Waiting list

People who want spots in a full batch. Joining holds nothing for them. Chapter 14 (page 105)

Waiting sales

Sales a register has taken and not yet sent to Roadside. Chapter 6 (page 43)

Waive

Drop a fee, so the customer no longer owes it. Chapter 8 (page 56)

Write off

Stop expecting a payment, and record why. Chapter 8 (page 56)

Where to find each screen

Every screen in this guide, in the order of the full menu, with the section that teaches it. Your own menu shows the screens your role and your store's plan include, once the store has set them up.

The middle column gives the group in the menu, then the screen, with › between them. An arrow means a tab, a button or a card to press once the screen is open. A store with a register reads Sales where a website plan reads Orders, so these lines say Sales.

SCREEN	WHERE TO FIND IT	SECTION
Today		
At the counter today	Today → At the counter today	Glance at the counter from Today, in Chapter 3 (page 20) See the store's registers, in Chapter 1 (page 4)
Follow-up, on Today or on a dashboard	Today → Follow-up	See what is waiting, from Today or a customer's account, in Chapter 23 (page 182)
Hours this week	Today → Hours this week	See who is on the clock and check a punch, in Chapter 12 (page 91)
Sales		
A register sale, its refund and its receipt	Sales › Orders → open the sale	Find a register sale and see how it was paid, in Chapter 5 (page 36) Print a receipt or the store's copy, in Chapter 5 (page 39)
Receipt acknowledgement	A paid counter sale's receipt → Receipt acknowledgement (optional)	Keep a customer's signature with a receipt, in Chapter 5 (page 41)

SCREEN	WHERE TO FIND IT	SECTION
The Checks card on an order: mark a check returned, record a payment, move it to the charge account or write it off	Sales › Orders → open the order → Checks. Open checks are also listed on Sales › Returned checks	Mark a check the bank sent back, in Chapter 8 (page 59) Record what the customer pays back, in Chapter 8 (page 61) Put a returned check on the customer's charge account, in Chapter 8 (page 63) Waive the fee or write the check off, in Chapter 8 (page 65)
Offline problems	Sales › Offline problems	Check offline sales that need a look, in Chapter 6 (page 46)
Day summary and the day's totals	Sales › Day summary	Read the register's sales, cash and checks for a day, in Chapter 3 (page 21)
Cash drawers and Reopen a drawer	Sales › Day summary → Cash drawers	Count the cash and close a drawer, in Chapter 4 (page 28) Reopen a closed drawer to count again, in Chapter 4 (page 30)
Checks to deposit and Office checks to deposit	Sales › Day summary → Checks to deposit	Take the checks and cash to the bank, in Chapter 4 (page 33)
Card deposit	Sales › Day summary → Card deposit (with Every register chosen)	Match the card processor's deposit, in Chapter 4 (page 34)
Log and Email the day summary	Sales › Day summary → Log	Email the day to the managers and owners, in Chapter 3 (page 26)
Past register shifts	Sales › Day summary → Past register shifts	Look back at past drawer counts, in Chapter 4 (page 31)

SCREEN	WHERE TO FIND IT	SECTION
Manual items and one manual item	Sales › Manual items	Find the items cashiers typed in, in Chapter 10 (page 81) Link a manual item to its product, in Chapter 10 (page 82)
Preorders: a product, its batches, its reservations and its waiting list	Sales › Preorders	Set up a product customers reserve ahead, in Chapter 14 (page 105) Add an arrival batch, in Chapter 14 (page 107) Take a reservation at the counter or by phone, in Chapter 14 (page 109) Put a customer on the waiting list, in Chapter 14 (page 110)
Pickup list, and marking a batch arrived	Sales › Preorders → open a product → Mark batch arrived, or Pickup list	Mark a batch arrived and hand it out, in Chapter 14 (page 111)
Stop taking reservations	Sales › Preorders → open a product → Stop taking reservations	Stop taking reservations for a product, in Chapter 14 (page 115)
Products		
Counter discount: who may give it, a manager's approval and what the cashier notes	Products › Discounts → New discount → Counter discount. For one you already have, open it → Edit → At the register	Choose who may give a counter discount, in Chapter 11 (page 85) Have a manager approve a counter discount, in Chapter 11 (page 87) Tell the cashier what to check and what to write down, in Chapter 11 (page 88)

SCREEN	WHERE TO FIND IT	SECTION
Discounts report, counter discounts by person	Products › Discounts → Report	See who gave and who approved each discount, in Chapter 11 (page 89)
Customers		
Charge account card on a customer	Customers › Accounts → open the customer → Charge account	Open a charge account with a limit and terms, in Chapter 15 (page 120) Change a limit, the terms or how statements go, in Chapter 15 (page 123) Check who may charge to an account, in Chapter 16 (page 125) Put an account on hold, or close it, in Chapter 16 (page 128)
Opening balance	Customers › Accounts → open the customer → Charge account → Opening balance	Bring in what a customer already owed, in Chapter 17 (page 131)
Give a credit, Add a charge, Write off and Pay out credit	Customers › Accounts → open the customer → Charge account	Give a credit or add a charge, in Chapter 18 (page 143) Write off what will not be paid, in Chapter 18 (page 145) Pay out a credit balance, in Chapter 18 (page 146)

SCREEN	WHERE TO FIND IT	SECTION
Store credit card, Give store credit and Move to store credit	Customers › Accounts → open the customer → Store credit. Move to store credit is on the Charge account card	Check a customer's store credit, in Chapter 22 (page 170) Give store credit by hand, in Chapter 22 (page 172) Move a charge-account credit to store credit, in Chapter 22 (page 173)
Follow-up tasks card	Customers › Accounts → open the customer → Follow-up tasks	Add a follow-up for a customer, in Chapter 23 (page 178)
Properties and animals	Customers › Accounts → open the customer → Properties and animals	Record a property and its delivery directions, in Chapter 25 (page 191) Record the animals a customer keeps, in Chapter 25 (page 193) Archive a property or an animal group, in Chapter 25 (page 195)
Follow-up	Customers › Follow-up	Work through today's follow-ups, in Chapter 23 (page 180) Change a follow-up or hand it to someone else, in Chapter 23 (page 181)
Renewal follow-ups	Customers › Follow-up → Review renewal dates	Find documents that are expired or due soon, in Chapter 26 (page 198) Know what Verified means on a renewal, in Chapter 26 (page 200)

SCREEN	WHERE TO FIND IT	SECTION
Monthly statement preparation	Customers › Follow-up → Monthly statement preparation	Have Roadside prepare each month's statements, in Chapter 27 (page 202) Review a prepared month, then send it, in Chapter 27 (page 204)
Invoice review	Customers › Follow-up → Invoice review	Go through the invoices that are past due, in Chapter 27 (page 207)
Charge accounts list, and On the website	Customers › Charge accounts	See who buys on account and what they owe, in Chapter 15 (page 118) Let buyers charge website orders to their account, in Chapter 17 (page 134)
Accounts with charge terms	Customers › Charge accounts → Accounts with charge terms	Open accounts for customers whose old fields said they buy on account, in Chapter 17 (page 132)
Take a payment on account, and its receipt	Customers › Charge accounts → Take a payment	Take a payment on account, in Chapter 18 (page 137) Check what a payment paid, in Chapter 18 (page 141)

SCREEN	WHERE TO FIND IT	SECTION
Statements, one month's statements and one statement	Customers › Charge accounts → Statements	Make the month's statements, in Chapter 19 (page 149) Look the statements over, then send or print them, in Chapter 19 (page 152) Open, preview or email one statement, in Chapter 19 (page 154)
Aging	Customers › Charge accounts → Aging. The Statements page opens it too, with Aging report	See who is overdue, in Chapter 20 (page 157)
Charge account settings: finance charges and late fees	Customers › Charge accounts → Statements → Settings	Turn on a finance charge, in Chapter 21 (page 164) Turn on a late fee, in Chapter 21 (page 167)
Customer lists and one list	Customers › Customer lists	Save a customer list, in Chapter 24 (page 185) Open a list and see who matches today, in Chapter 24 (page 186) Download the list's subscribed email addresses, in Chapter 24 (page 187) Change a list's filters or remove it, in Chapter 24 (page 190)
Reorder reminders	Customers › Reorder reminders	See who gets reminders, and stop one, in Chapter 28 (page 216)
Website		

SCREEN	WHERE TO FIND IT	SECTION
Customer portal	Website › Customer portal	Show the account owner their statements online, in Chapter 20 (page 159)
Store settings		
Feed calculator	Store settings › Checkout and delivery → Feed calculator	Show “How long will a bag last?” on feed pages, in Chapter 28 (page 212) Set how much each animal eats, in Chapter 28 (page 213)
Checks at the counter	Store settings › Payments → Checks at the counter	Set the store's rules for checks, in Chapter 8 (page 56)
Registers: Manual items, and the license and VFD dates	Store settings › Registers	Decide whether cashiers may type in an item, in Chapter 10 (page 80) Let a known customer's license or VFD follow the sale, in Chapter 1 (page 13)
Offline selling	Store settings › Registers → Offline selling settings	Let registers keep selling while offline, in Chapter 6 (page 43)

SCREEN	WHERE TO FIND IT	SECTION
Customer Displays: the store's display, slides, slide shows, registers and the still picture	Store settings › Customer Displays	Choose what the customer display shows, in Chapter 9 (page 67) Add a slide, in Chapter 9 (page 70) Put slides in a slide show, in Chapter 9 (page 71) Play a different slide show on one register, in Chapter 9 (page 74) Set the picture that shows when no slides play, in Chapter 9 (page 75) Change or delete a slide or a slide show, in Chapter 9 (page 78)
Time clock: who is on the clock, a person's shifts, a shift, Add a missed shift, approving a pay period and exporting the hours	Store settings › Time clock	See who is on the clock and check a punch, in Chapter 12 (page 91) Fix a shift or add one that was missed, in Chapter 12 (page 93) Approve a pay period and export the hours, in Chapter 12 (page 96)
Time clock settings and Who clocks in	Store settings › Time clock → Settings	Set the pay period, overtime and breaks, in Chapter 13 (page 99) Choose who clocks in, in Chapter 13 (page 102)
Store account		

SCREEN	WHERE TO FIND IT	SECTION
Setting up Charge accounts, Preorders, Follow-up, the Customer portal and Fencepost Plus	Store account › All of Roadside → Set it up. The line for Fencepost Plus is named Newsletters	See who buys on account and what they owe, in Chapter 15 (page 118) Set up a product customers reserve ahead, in Chapter 14 (page 105) Add a follow-up for a customer, in Chapter 23 (page 178) Show the account owner their statements online, in Chapter 20 (page 159) Set up Fencepost Plus, in Chapter 28 (page 210)
Retire a register	Store account › Retire a register	Retire a register or report it lost, in Chapter 1 (page 10) Stop a lost computer from uploading, in Chapter 6 (page 50)
A request to Dirt Road: connect a counter computer, change what one may do, bring in a register's waiting sales, or say which customer edits made offline were set aside	Store account › Support → New ticket	Get a counter computer connected, in Chapter 1 (page 6) What a connected computer may do, in Chapter 1 (page 9) Bring in sales from a register that cannot connect, in Chapter 6 (page 48) Check a customer edit made while offline, in Chapter 6 (page 50)
My account, and pages with no menu line		

SCREEN	WHERE TO FIND IT	SECTION
Counter PIN	My account → Sign-in & security → Counter PIN	Set your own Counter PIN, in Chapter 2 (page 15) Change or remove your Counter PIN, in Chapter 2 (page 17) Help a team member whose PIN does not work, in Chapter 2 (page 18)
My time	My account → My time	Check your own hours, in Chapter 13 (page 103)
Register locations	No menu line. Your Roadside address with `/pos/registers/locations` on the end	Move a register to another location, in Chapter 1 (page 8)
Sign in at the register	The register opens this page in a web browser	Confirm your sign-in for the register, in Chapter 1 (page 7)
Which register is this?	The browser counter → Switch register. The browser counter has no menu line: your Roadside address with `/pos` on the end	Add a register in a web browser, in Chapter 1 (page 11)
The website your customers use		
Reserve, for a pre-order product	Your website → the pre-order product → Reserve	See what the customer does on the website, in Chapter 14 (page 113)
Account documents and orders	Your website → Your account	Know what the account owner sees on the website, in Chapter 20 (page 161)
How long will a bag last?, and Your reorder reminder	Your website → a feed's page. Your reorder reminder opens from the link in a reminder email	Know what the customer sees and receives, in Chapter 28 (page 217)



ROADSIDE

BY DIRT ROAD SOFTWARE

Questions about Roadside?

Write to us and tell us which screen you were on and what you were trying to do. A picture of the screen helps.

support@dirtroadsoftware.com

The current manual, with search and the PDF:
dirtroadsoftware.com/support/roadside

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