01 / GET READY

Your first day, made simple.

Set up your location once. Then follow the same clear routine each day: open, transact, reconcile and close.

YOUR WORKSPACE

app.countermark-pos.com

1 Sign in

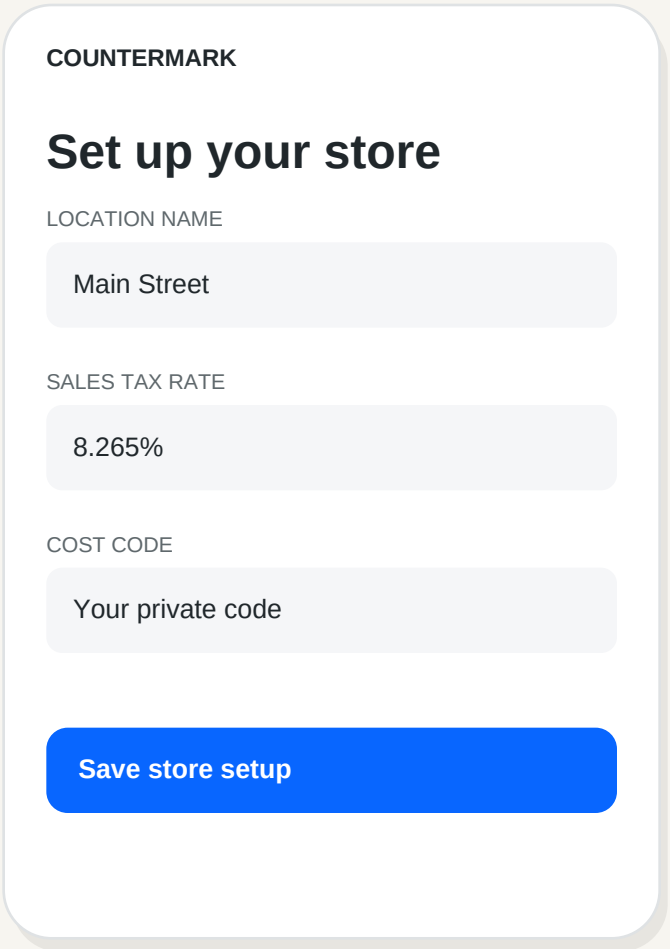
Use your assigned email and password. Complete authenticator setup if prompted, then choose your location.

2 Finish store setup

Confirm the business name, location name, time zone, tax rate and private cost code. Enter a tax rate of 0 only when appropriate.

3 Set your preferences

In Settings, review categories, holding periods, receipt wording and payment options. Give each employee their own account and permissions.



ILLUSTRATIVE SCREEN / FICTIONAL DATA

Start with practice

Use your demo location and fictional information first. Check the selected location before entering real business transactions.

02 / OPEN & BUY

Ready for the counter.

Open the store, open your own till, then start buying. Customer information follows the shared customer card.

Open store
Count total store cash

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Open your till
Count your starting cash

>

Start trading
Buy or sell

1 Find the customer

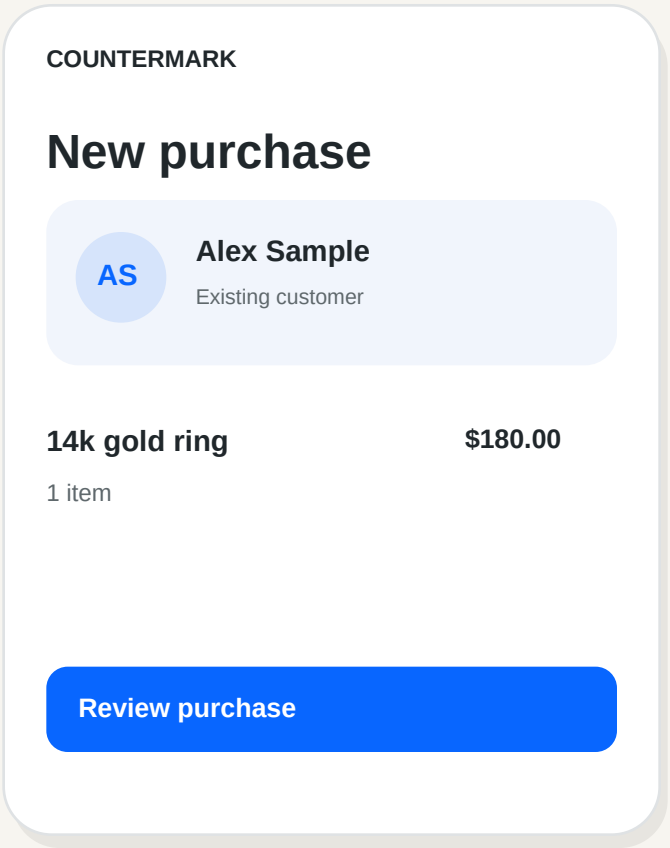
Search the existing customer list or scan an ID. Confirm their details and current front ID photo.

2 Add the items

Enter descriptions, quantities, categories and purchase amounts. Add required photos for reportable items.

3 Review and pay

Choose payment or split payment. Confirm the details, collect the seller's signature, finish the purchase and print the receipt.



ILLUSTRATIVE SCREEN / FICTIONAL DATA

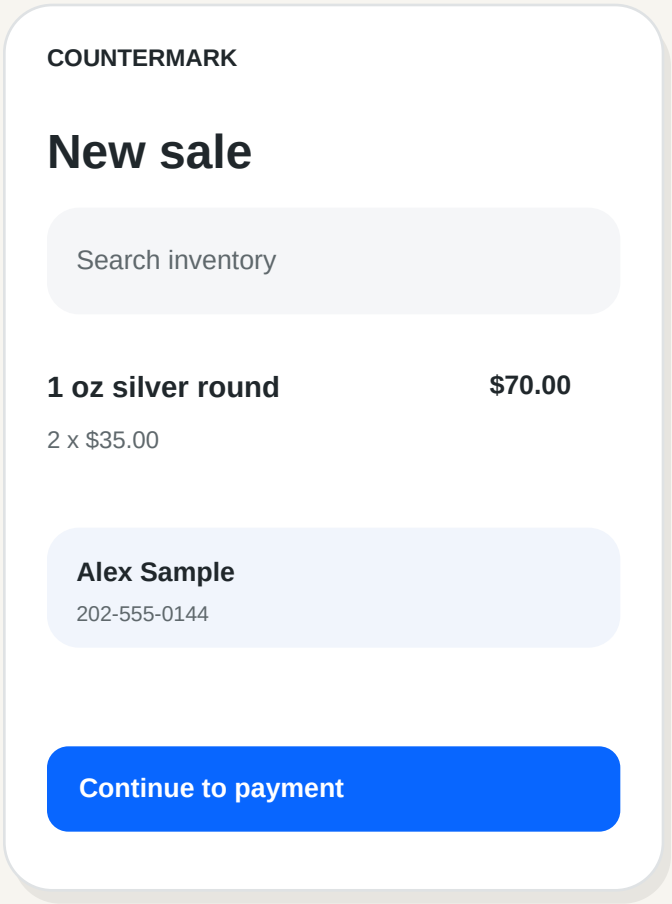
Before you buy

Expired IDs and customers under 18 are blocked. Purchased items stay separate from retail inventory until you choose their disposition.

03 / SELL & FULFILL

Items first. Payment next.

Build the cart, add the customer, then choose payment. Keep customer notes and order notes separate.



ILLUSTRATIVE SCREEN / FICTIONAL DATA

1 **Build the cart**

Search inventory or add a custom item. Enter quantity and selling price; check tax treatment.

2 **Add a customer**

Reuse a buy customer or save a new card with contact information. Customer notes stay with the card.

3 **Take payment**

Add order notes for this sale. Choose payment; for cash, enter the amount received to calculate change. Finish and print.

BACKORDERS & CUSTOMER PICKUP

Collect full payment upfront. A SKU is optional for custom orders.

In **Paid orders**, matching SKU stock allocates automatically. For a custom order, choose **Receive items** and record quantity and cost.

When eligible for release, confirm the items, capture the customer signature and complete pickup. Check holds still apply.

04 / CLOSE & CHECK

End the day with confidence.

Each employee counts their own drawer. Reconcile the store, review the day's activity and prepare reporting.

1. **Close each till**

   Count actual cash and enter the closing balance. Explain any difference from the expected amount.

2. **Close the store**

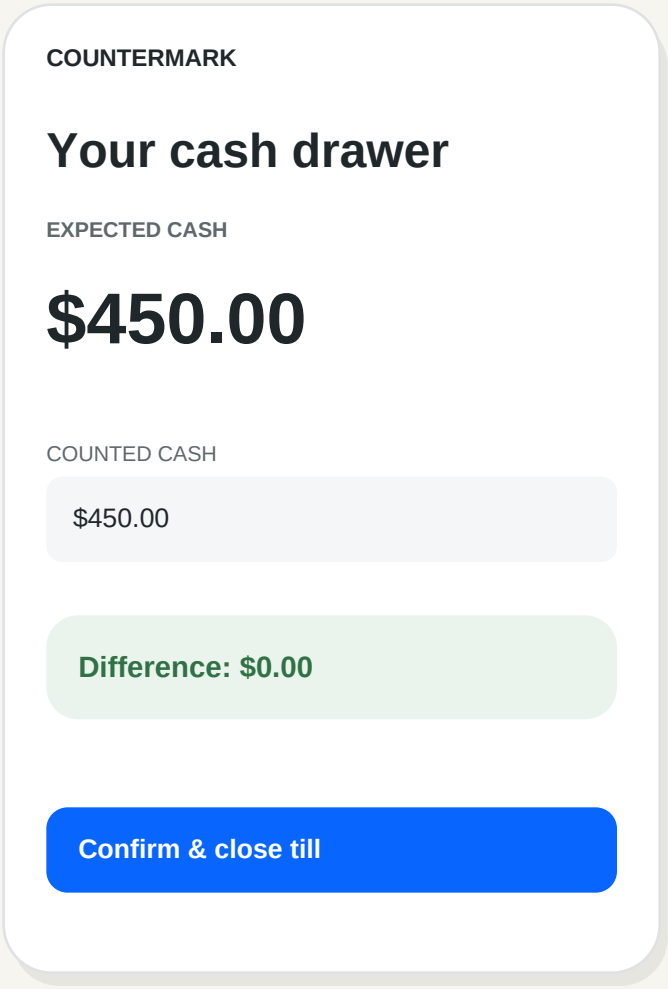
   Count remaining store cash and complete store close. Keep reserve cash separate from employee tills.

3. **Print the daily report**

   Review purchases, sales, payment totals, tax, costs and profit. Investigate missing costs or cash differences.

4. **Prepare LeadsOnline**

   Download the XML from the export queue and upload it manually. Check Transaction Monitor for processing results.



ILLUSTRATIVE SCREEN / FICTIONAL DATA

Before you leave

Automatic LeadsOnline uploading must be configured and enabled separately. A downloaded file is not confirmation that LeadsOnline processed it.