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NEW YORK STATE LICENSING SYSTEM

License Issuing Agent Software Guide

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New York State Licensing System

New York State (NYS) provides many quality opportunities for recreational hunting, trapping, and fishing. As a license issuing agent, you provide a valuable service to outdoor enthusiasts. Thank you for serving as a license issuing agent for the New York State Department of Environmental Conservation (NYSDEC).

This training course has been developed to provide assistance to license issuing agents. It provides information regarding issuing licenses, permits, and tags.

Clerk Course Objectives

IMPORTANT

Your course does not have to be completed in one sitting. You may log out and pick up where you left off at your convenience.

You can navigate through the course material from the Course Contents page.

*After you have completed the course, you can refer to it at any time. Click the **Menu icon** (the icon with three horizontal lines or hamburger icon), and select **Training Course**.*

By end of the course, you will be able to:

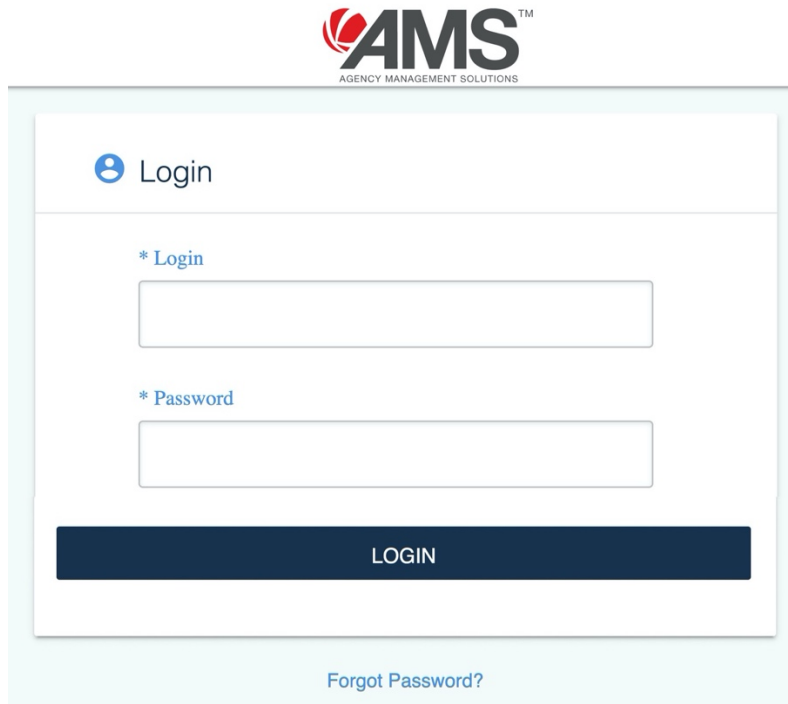
- Access the licensing application.
- Search for a customer record.
- Create a new customer record, if needed.
- Make a license sales transaction.
- Understand how to handle error messages related to eligibility and prerequisites.
- Understand troubleshooting/problem resolution procedures, system error messages, help features, and inquiry functions.
- Void a product from an order.
- Return voided products to Revenue.

- Find and download reports, and understand what is included on the reports.
- Access support materials when needed.
- Perform basic printer maintenance.

Logging In as a License Issuing Agent

Open the licensing application on the point-of-sale (POS) terminal. On the Login screen, enter your username (login) and password.

If you have forgotten your password, click **Forgot Password?** To reset your password, you must have a valid email address on your user profile, and you must have access to that email account. If you do not have access to your email account, a store manager or an agency customer support agent can reset your password.



AMSTM
AGENCY MANAGEMENT SOLUTIONS

Login

* Login

* Password

LOGIN

[Forgot Password?](#)

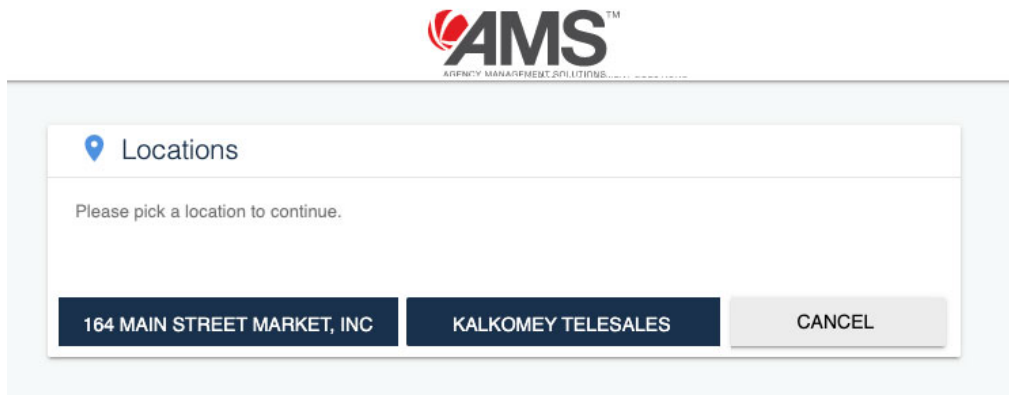
USER'S TIP

After a period of inactivity, the POS terminal will return to the Login screen.

Selecting Your Location

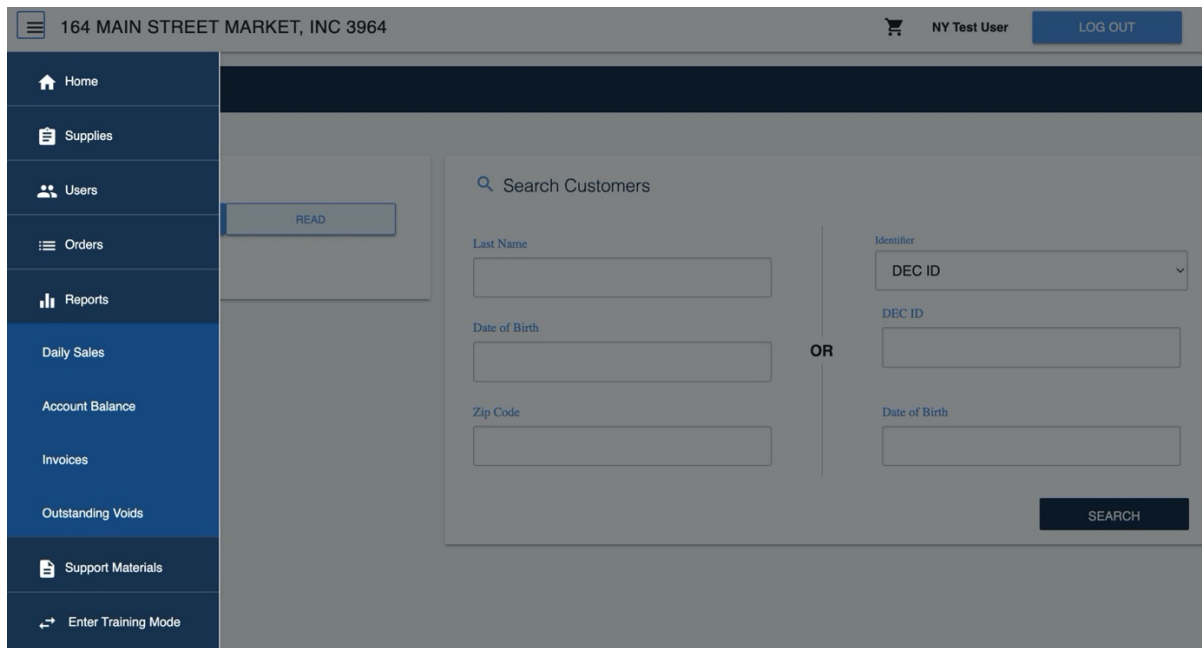
If you work at more than one location, select the appropriate location.

If you do not work at multiple locations, this step will not apply to you. You will see the Home screen of your location.



Navigating the Licensing Application

To navigate the licensing application, you can click the **Menu icon** (the icon with three horizontal lines or hamburger icon). From the Menu, you can access Training Mode, Support Materials, and Reports.



Searching for a Customer

After you choose the location (if applicable), the Home screen will appear. From this screen, you can search for customers.

The screenshot shows the 'Home' screen of an application. At the top is a dark blue header with the word 'Home' in white. Below the header, the screen is divided into two main sections. On the left is a 'Bulletins' section with a blue icon of a document with lines. It contains two buttons: 'UNREAD' (blue) and 'READ' (light blue). Below these buttons, it says 'No Bulletins'. On the right is the 'Search Customers' section. It has a magnifying glass icon and the text 'Search Customers'. Below this, there are three input fields: 'Last Name', 'Date of Birth', and 'Zip Code'. To the right of these fields is a vertical line with the word 'OR' in the middle. To the right of the 'OR' line are two input fields: 'Identifier' (a dropdown menu showing 'DEC ID') and 'DEC ID' (a text field). Below the 'DEC ID' field is another input field labeled 'Date of Birth'. At the bottom right of the 'Search Customers' section is a dark blue button with the word 'SEARCH' in white.

USER'S TIP

Important information from the state agency will be posted under Bulletins.

Entering Customer Information for a Search

In the Search Customers section, select the **Identifier** that the customer has provided from the drop-down menu. Complete the fields for **ID** and **Date of Birth** (MM/DD/YYYY).

If the search yields no results, perform a search using the fields for **Last Name**, **Date of Birth** (MM/DD/YYYY), and **Zip Code**.

Note: When you are performing a customer search, make sure that you have entered the information correctly in each field.

Home

Bulletins

UNREADREAD

No Bulletins

Search Customers

Last Name

Date of Birth

Zip Code

OR

Identifier

DEC ID

DEC ID

396409000033

Date of Birth

06/01/2000

SEARCH

Glossary

Identifier

Information that is used to identify someone in a unique way, e.g., a customer's DEC ID or a driver's license

Selecting the Correct Customer Result

Once you have entered the customer's information, click **Search**. If there are multiple results, click the checkbox next to the correct customer.

	Last Name	First Name	Customer Number	Date of Birth	Address
<input type="checkbox"/>	Van Dellen	Chester	1000000000044	1980-12-29	230 MARTIN ST
<input type="checkbox"/>	Van Dellen	Joe	10000000000482	1980-12-29	123 Any Street
<input type="checkbox"/>	Van Dellen	Chester	999901426943	1980-12-29	230 Martin Street

Confirming Customer Information

The customer record will appear. Go through the information, and ask the customer to confirm if it is correct (e.g., spelling of the name, date of birth, email address, and physical and mailing addresses). Click **Edit** to update the customer's information if needed, or click **Purchase Licenses/Tags**.

Ask the customer to provide his or her proof of NYS residency. This will assist in verifying the information on the screen and confirming that the information is correct with the customer.

Proof of Residency

NYS residents will need one of the following documents as proof of residency when purchasing a license:

- NYS driver license from DMV showing a valid NYS address
- NYS non-driver identification from DMV showing a valid NYS address
- Current NYS vehicle registration showing a valid NYS address
- IT-201 OR W-2 income tax form from the previous year
- Current voter registration card
- Current student ID card from a New York State College or University
- Military Leave and Earnings Statement (LES) OR military orders
- Current pay stub OR note on letterhead from a current employer (Either must verify your legal NYS address.)

Customer: **New Customer**
396409000033

[PURCHASE LICENSES/TAGS](#)

Personal Information

[EDIT](#)

Date of Birth: 06/01/2000

Email: test@test.com

Work Phone: (555) 555-5555

Identifiers

Additional Customer Details

Gender: Female

Height: 5 ft 6 in

Eye Color: Hazel

Addresses

Physical	Mailing	Address
✓	✓	152 Main Street Cohoes, US-NY 12047 US

Education

[+ Add New Education Proof](#) [i](#)

Certificate ID	Type	Status	State	Date Certified
111111111	Trapping	Pass	NY	02/23/2020

Customer Eligibilities

[+ Add New Eligibility](#)

Non-Resident Full Time US Armed Services Stationed in New York

IMPORTANT

The customer does not receive a printed copy of the receipt. Therefore, if the email address is not correct, he or she will not be able to receive an electronic receipt after the sales transaction.

Inform the customer that NYSDEC does not share customer email information. The email information is collected and used for NYSDEC purposes only.

Searching for the Customer

Important


Before you can create a new customer, you must perform multiple customer searches to ensure that there is no existing record:

*The search using **Identifier, ID, and Date of Birth** (MM/DD/YYYY)*

*The search using **Last Name, Date of Birth** (MM/DD/YYYY), and **Zip Code***

For each search, make sure that you have entered the information correctly in each field.

If you cannot find a customer record, click **Create Customer** to create a new one.

 Search Customers

CREATE CUSTOMER

Last Name

Customer

Date of Birth

06/01/2000

Zip Code

12047

OR

Identifier

DEC ID

DEC ID

Date of Birth

SEARCH

No customers found.

Creating a Customer Record

The Create Customer screen will appear. Enter the customer's information into each required field that is marked with an asterisk (*).

+ Create Customer

* First Name	Middle Name	* Last Name	Suffix
<input type="text" value="New"/>	<input type="text" value="York"/>	<input type="text" value="Customer"/>	<input type="text"/>
Email	* Primary Phone	* DOB (MM/DD/YYYY)	
<input type="text" value="test@test.com"/>	<input type="text" value="5555555555"/>	<input type="text" value="06/01/2000"/>	

Entering Customer Identifiers

Complete the Customer Identification section. From the drop-down menu, select the **Identifier Type** that the customer has provided. Then, click **Add Identifier**, and complete the field.

A customer may add multiple identifiers. This will help with locating the customer's record in the future.

If the customer cannot provide any identifier, select **No Identifier Provided** from the drop-down menu.

Customer Identification

NY Drivers License



Identifier Type



ADD IDENTIFIER

USER'S TIP

If the customer has a valid NYS driver's license or non-driver ID on record, the residency status will automatically be verified through the NYS Department of Motor Vehicles (DMV).

IMPORTANT

If the NYS DMV cannot verify a NYS resident's driver's license or non-driver ID, the customer must provide a different proof of residency. If the customer cannot provide another proof of residency, the customer will be presented non-resident products from the catalog.

Entering Customer Addresses

Collect and validate the customer's address or addresses. The customer must provide both a physical address and a mailing address. The same address can be used for both. Use the checkboxes to indicate the type of address that is entered.

For each U.S. address that is entered, click **Validate** to check the accuracy of the address. The address is validated by the United State Postal Service database. This will help check for mistakes in manual data entry.

Validating the address will automatically add the county (which is not collected). It will also complete any fields with missing information and correct any errors.

Addresses

☒ Physical Address

☒ Mailing Address



* Address1

Address2

* City

152 Main Street

Cohoes

* State

* ZIP

* Country

New York

12047

United States

VALIDATE

NOT VALIDATED

ADD ANOTHER ADDRESS

Address that has not been validated.

Addresses

☒ Physical Address

☒ Mailing Address



* Address1

Address2

* City

152 Main Street

Cohoes

* State

* ZIP

* Country

New York

12047

United States

VALIDATE

VALIDATED

ADD ANOTHER ADDRESS

Address that has been validated

USER'S TIP

A PO Box can be entered only as a mailing address. It is not a valid physical address. If the customer provides a PO Box, collect a physical address as well.

Entering Additional Customer Details, Education, and Eligibilities

Collect state-required information and any education and eligibility information.

Additional Customer Details

In the Additional Customer Details section, collect any additional information required by the state:

- Gender
- Height
- Eye color

Additional Customer Details

* Gender

- ☒ Female
☐ Male

* Height (ft)

5

* Height (in)

6

* Eye Color

Hazel

Education/Previous License Information

In the Education/Previous License Information section, add any education certificates for hunting, trapping, or bowhunting that the customer may have. The customer may also provide information about previous licenses.

The following are acceptable customer-provided forms of documentation:

- NY Hunter Education
- NY Bowhunter Education
- NY Trapper Education
- NY Waterfowl Education
- Out-of-State Hunter Certification

- Out-of-State Bowhunter Certification
- Out-of-State Trapper Certification
- Previous License Number for Hunt
- Previous License Number for Bow
- Previous License Number for Trapping

Select the type of Education or Previous License from the drop-down menu:

- If Education type is selected, enter the appropriate information such as certificate number, certification date, and NY for state when entering a NYS hunter, bowhunter, trapper, or waterfowl certificate.
- If Previous License type is selected, enter license number, license date, and state the license is from for previous hunt, bow, or trapping licenses.

Education

Certification Collection	* Hunter Education Certificate Number	State	* Date Certified
NY Trapper Education - Customer ▾	1111111111	New York ▾	02/24/2020

[ADD EDUCATION PROOF](#)

Eligibilities

In the Eligibilities section, add any eligibilities that the customer may have. The customer may add such eligibilities as being an active-duty military member or a person with a military disability. The customer must provide proof for any eligibility.

The following are accepted eligibilities:

- Patriot Plan Affidavit
- Non-Resident Full-Time US Armed Services Stationed in New York
- Annual Military Disability
- Permanent Military Disability
- Blind Disability
- Native American

Eligibilities

Eligibility Type

Non-Resident Full Time US Armed Services ξ

* Grade/Rank

E-4

* Unit

2/15th FA, 10th Mountain Div



* Location

Ft. Drum

* Commander's Name

Capt. Mickey Mantle

* Commander's Phone Number

5555555555

* Affidavit Date

02/10/2020

ADD ANOTHER ELIGIBILITY

When you have collected all the information, click Save Changes or Create Customer and Start Purchase. You have now created a customer record.

Searching for and Confirming the Customer Record

On the Home screen, perform a customer search. If you cannot find a customer record, create a new one.

When reviewing the customer record, ask the customer to confirm that the information is correct. Once confirmed, click **Purchase Licenses/Tags**.

Customer: **New Customer**
396409000033

[PURCHASE LICENSES/TAGS](#)

Personal Information

[EDIT](#)

Date of Birth: 06/01/2000

Email: test@test.com

Work Phone: (555) 555-5555

Identifiers

Additional Customer Details

Gender: Female

Height: 5 ft 6 in

Eye Color: Hazel

Addresses

Physical	Mailing	Address
✓	✓	152 Main Street Cohoes, US-NY 12047 US

Education

[+ Add New Education Proof](#) [i](#)

Certificate ID	Type	Status	State	Date Certified
111111111	Trapping	Pass	NY	02/23/2020

Customer Eligibilities

[+ Add New Eligibility](#)

Non-Resident Full Time US Armed Services Stationed in New York

IMPORTANT

Make sure that the following customer information is correct: spelling of the name, date of birth, email address, and physical and mailing addresses.

Checking Residency

Collect the NYS customer's proof of residency. Click the **information icon** to learn the definition of residency for the state.

Resident

Select **Resident** if the following applies:


- The customer does not have a NYS driver's license but is considered a state resident.
- The NYS driver's license validation fails.

From the drop-down menu, indicate the proof of residency that the customer has provided. The customer must present one of the state-approved forms, and you must visually verify the form.

Non-Resident

Select **Non-Resident** if the residency definition does not apply to the customer.

Customer: **New Customer**

 [View profile](#)

Residency Check

Click the info icon ⓘ below for residency definitions.

☒ Resident ⓘ

☐ Non Resident

There is currently no proof of residency under this account. Please select one of the appropriate options below

* [Proof of Residency](#)

Select a Proof of Residency ▾

NON RESIDENT

NEXT

If the customer has a valid NYS driver's license or non-driver ID on record, the residency status will automatically be verified through the NYS DMV.

If the driver's license validation fails, the system will prompt you to collect an alternate state-approved proof of residency. You should first attempt to edit the NYS driver's license or non-driver ID to correct any possible errors before collecting alternate proof.

The following are alternate state-approved proofs of residency:

- NYS driver license from DMV showing a valid NYS address
- NYS non-driver identification from DMV showing a valid NYS address
- Current NYS vehicle registration showing a valid NYS address
- IT-201 OR W-2 income tax form from the previous year
- Current voter registration card
- Current student ID card from a New York State College or University
- Military Leave and Earnings Statement (LES) OR military orders
- Current pay stub OR note on letterhead from a current employer (Either must verify your legal NYS address.)

If a **NYS resident** is unable to prove his or her residency, that resident will need to choose from the **Non-Resident** catalog.

Residency status must be verified on each transaction.

The screenshot shows a web interface for a 'Residency Check'. At the top, it says 'Residency Check' and 'Click the info icon ⓘ below for residency definitions.' Below this are two buttons: 'Resident' (with a green circle icon) and 'Non Resident' (with a blue circle icon). A yellow message box states: 'There is currently no proof of residency under this account. Please select one of the appropriate options below'. Below the message is a section titled '* Proof of Residency' which contains a list of acceptable proofs: 'Select a Proof of Residency', 'Current NYS vehicle registration showing a valid NYS address', 'IT-201 OR W-2 income tax form from the previous year', 'Current voter registration card', 'Current student ID card from a New York State College or University', 'Military Leave and Earnings Statement (LES) OR military orders', 'Current pay stub OR note on letterhead from a current employer. Either must verify your legal NYS address.', and 'Religious Verification'. On the right side of the interface, there is a vertical sidebar with the text 'Taxes:', 'Surchar', and 'Total:'.

IMPORTANT

Residency status will affect what products appear in the Product Catalog.

Beginning a Sales Transaction

On the Purchase Licenses/Tags screen, three sections are shown.

Customer Licenses

The Customer Licenses section shows the customer's active holdings, such as licenses, back tags, and carcass tags. To see a customer's Deer Management Permit (DMP) History for the past **three** years, click **DMP History**. In the DMP History section, you can also sell a replacement license. You will learn more about this process later in the course.

Product Catalog

The Product Catalog shows the eligible products that the customer can purchase based on the information he or she has provided. (The Product Catalog products shown will be affected by date of birth, residency, education or previous licenses on file, and eligibilities.) Click the **information icon** to learn more about each product.

Shopping Cart Summary

The Shopping Cart Summary shows the items that the customer intends to purchase.

The screenshot displays a web interface with three main sections, each highlighted with a red border:

- CUSTOMER LICENSES:** Contains the text "Customer Licenses" and two buttons: "ACTIVE" and "DMP". Below these is a "REPLACE" button.
- PRODUCT CATALOG:** Shows "Customer: New Customer" with a "View profile" link. It includes a "Select License" section with "Category" and "Subcategory" filters. The "Category" filter has buttons for "Annual", "Lifetime", "Other", and "Donations". The "Subcategory" filter has buttons for "Fishing", "Fishing", "Items", "Hunting", "Hunting", "Trapping", and "Trapping". Below this, a "Fishing Annual" product is listed with a "+" icon, a description "223 - Recreational Marine Fishing Registry", and a price of "\$0.00".
- SHOPPING CART SUMMARY:** Displays "Cart Summary" and "Cart Is Empty". It shows a breakdown of costs: "Taxes: \$0.00", "Surcharges: \$0.00", and "Total: \$0.00".


USER'S TIP

If a product has a prerequisite, a message will appear on the screen to notify you after you click on the plus sign (+). The customer will need to provide any required information before the transaction can be completed.

Adding and Removing Products

To add or remove products from the shopping cart, follow these guidelines:

- To add a product to the shopping cart, click the **plus sign (+)**. Once added, the product will be removed from the catalog.
- To remove a product from the shopping cart, click **Remove**. Once removed, the product will be returned to the catalog.
- When you remove the main product from the shopping cart, the application will automatically remove any corresponding dependent licenses or tags as well. For example, when you remove an annual hunting license, the carcass tags will automatically be removed.

Customer: **New Customer**  [View profile](#)

Select License

Category

Subcategory

Annual

Lifetime

Donations

Fishing

Hunting

Trapping

Fishing

Trapping

Trapping

Items

Trapping

Trapping

Hunting

Trapping

Trapping

Fishing Annual

+

223 - Recreational Marine Fishing Registry

\$0.00


Hunting Annual


+


029 - Habitat Stamp


\$5.00


Cart Summary **CLEAR CART**


Lifetime License (Hunt & Fish) 16-69 (1)
 remove \$765.00


Spring Turkey Tag #2 (1)
 remove \$0.00

Back Tag (1)
 remove \$0.00

Bear Carcass Tag (1)
 remove \$0.00

Deer Carcass Tag (1)
 remove \$0.00

Fall Turkey - Statewide - (1)
 remove \$0.00

Spring Turkey Tag #1 (1)
 remove \$0.00

Taxes: \$0.00

Surcharges: \$0.00

Total: \$765.00

CHECKOUT \$765.00

USER'S TIP

Customers may purchase more than one quantity of a product in such cases as short-term fishing licenses or donation products. If you add a product that a customer can purchase multiple times, a message will appear on the screen to notify you.

Adding a Product With a Prerequisite

If you add a product that has a prerequisite, such as an education requirement, you will be notified of this prerequisite. To purchase the product, the customer must meet the prerequisite requirement. Once the required information has been entered, it will appear on the customer record.

Resident Trapping

Note: Must have required education in order to purchase.

☒ NY Trapper Education - Not Verifiable

☐ Out of State Trapper Certification - Not Verifiable

☐ Previous License # Trapping - Not Verifiable

* State

New York

* Hunter Education Certificate Number

1111111111

* Date Certified

03/01/2020

CLOSE

SUBMIT

To purchase a trapping license, the customer must have a valid trapper education certificate on record.

IMPORTANT

When selling a lifetime license, the prerequisite can be bypassed by selecting Continue Without Adding Education. However, the customer will not receive carcass tags until proof of education has been added to his or her record.

If proof of education or a previous license is added after selling a lifetime license, the carcass tags will generate but will be mailed to the customer. Therefore, if the customer does have proof of education or a previous license, be sure to add it before completing the sale.

Adding a Short-Term Fishing License

There are two options for short-term fishing licenses: 1 day and 7 days.

***Note:** The prices used in the steps below are for NYS residents. The prices for non-residents will differ.*

1-Day Fishing License

For 1-day fishing licenses, the customer may purchase them to use for consecutive (back-to-back) days or non-consecutive days.

For consecutive days, do the following:

- Add the product.
- Select the number of days the customer would like to purchase.
- Select the start date for the license on the calendar.
- Click Submit.

For non-consecutive days, do the following:

- Add the product for the first non-consecutive day by selecting 1 for \$5.
- Select the start date for the license on the calendar.
- Click Submit.
- Repeat steps 1 to 3 until all days have been added.

***Note:** Each license used for a non-consecutive day should appear as a separate line item in the shopping cart. The options of **2 for \$10**, **3 for \$15**, etc., cannot be used for non-consecutive days.*

How many days do you want?

Select the number of days you would like to purchase

1 FOR \$5

2 FOR \$10

3 FOR \$15

4 FOR \$20

CANCEL

1-day fishing license options for NYS residents: 1 for \$5, 2 for \$10, 3 for \$15 and 4 for \$20

Choose the License start date

June 2020

◀

▶

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Licenses will be valid for 2 days from the above specified date.

CLOSE

SUBMIT

Calendar to indicate the start date of the fishing license

7-Day Fishing License

For a 7-day fishing license, do the following:

- Add the product.
- Select the start date for the license on the calendar.
- Click **Submit**.

How many days do you want?

Select the number of days you would like to purchase

1 FOR \$12

2 FOR \$24

CANCEL

7-day fishing license options for NYS residents: 1 for \$12 and 2 for \$24

Replacing Licenses, Carcass Tags, and Other Items

To add a replacement license, carcass tag, or other item, follow these steps:

- Search for the current customer. Current active licenses will appear on the left side of the customer screen.
- Select licenses, carcass tags, or other items that need to be replaced.
- Select **Replace Licenses**. Replacement items will be added to the cart.
- Select **Checkout**.
- Complete purchase.

Customer Licenses

ACTIVE DMP

\$5 Replacement License

☐ **302 - Resident Hunting 16-69**
Expires: 8/31/2020

☐ **003 - Resident Fishing 1-Day**
Expires: 6/21/2020

☐ **003 - Resident Fishing 1-Day**
Expires: 6/21/2020

☐ **012 - Resident Bowhunting**
Expires: 8/31/2020

\$10 Replacement Tag

☐ **T002 - Bear Carcass Tag**
Expires: 8/31/2020

☐ **T003 - Deer Carcass Tag**
Expires: 8/31/2020

☐ **T019 - Bow/Muzz Either Sex Tag**
Expires: 8/31/2020

\$0 Replacement Free

☐ **223 - Recreational**

Customer: **NewYork Customer**
1000000000623

PURCHASE LICENSES/TAGS

Personal Information

EDIT

Date of Birth: 05/01/1973

Email: testemail152@email.com

Work Phone: (555) 555-1515

Identifiers

NY Drivers License:
910111213

Additional Customer Details

Gender:

Height: 5 ft 10 in

Eye Color: Black

Addresses

Physical	Mailing	Address
✓	✓	152 Main Street Cohoes, US-NY 12047 US

Education

+ Add New Education Proof ⓘ

Certificate ID	Type	Status	State	Date Certified
22222222222	Hunting	Pass	NY	04/20/2020
111111111	Bowhunting	Pass	NY	01/04/2020
111111111	Trapping	Pass	NY	02/29/2020

Cart Summary

Cart Is Empty

Taxes:	\$0.00
Surcharges:	\$0.00
Total:	\$0.00

Customer record with the active licenses listed on the left side

Customer Licenses

ACTIVE

DMP

\$5 Replacement License

☒ **302 - Resident Hunting 16-69**
Expires: 8/31/2020

☐ **003 - Resident Fishing 1-Day**
Expires: 6/21/2020

☐ **003 - Resident Fishing 1-Day**
Expires: 6/21/2020

☐ **012 - Resident Bowhunting**
Expires: 8/31/2020

\$10 Replacement Tag

☒ **T002 - Bear Carcass Tag**
Expires: 8/31/2020

☐ **T003 - Deer Carcass Tag**
Expires: 8/31/2020

☐ **T019 - Bow/Muzz Either Sex Tag**
Expires: 8/31/2020

\$0 Replacement Free

☐ **223 - Recreational Marine Fishing Registry**
Expires: 5/4/2021

REPLACE

Customer: **NewYork Customer**
1000000000623

PURCHASE LICENSES/TAGS

Personal Information

EDIT

Date of Birth: 05/01/1973
Email: testemail152@email.com
Work Phone: (555) 555-1515

Identifiers

NY Drivers License: 910111213

Additional Customer Details

Gender: Height: 5 ft 10 in Eye Color: Black

Addresses

Physical	Mailing	Address
✓	✓	152 Main Street Cohoes, US-NY 12047 US

Education

+ Add New Education Proof ⓘ

Certificate ID	Type	Status	State	Date Certified
2222222222	Hunting	Pass	NY	04/20/2020
1111111111	Bowhunting	Pass	NY	01/04/2020
1111111111	Trapping	Pass	NY	02/29/2020

Customer Eligibilities

+ Add New Eligibility

Cart Summary

Cart Is Empty

Taxes:	\$0.00
Surcharges:	\$0.00
Total:	\$0.00

Selected items that customer would like to replace

Cart Summary CLEAR CART

Replacement License (1) \$5.00
⊗ remove

Resident Hunting 16-69 (1) \$0.00
⊗ remove

Replacement Tag (1) \$10.00
⊗ remove

Bear Carcass Tag (1) \$0.00
⊗ remove

Taxes: \$0.00
Surcharges: \$0.00
Total: \$15.00

CHECKOUT \$15.00

Shopping cart summary with replacement license added

Completing the Sales Transaction

Once you have added all the products to the shopping cart, the customer is ready to make payment. Click Checkout.

Select the customer's payment method, and enter the required information.

Collect payment. (Collect cash or check. Run and get approval on credit card.)

Click Confirm & Print License.




Order Checkout

Select the payment method that will be used to process this order. **Remember to complete the transaction before you print the licenses**

Cart Total

\$765.00

Payment Method

 CASH <input type="radio"/>	 CHECK <input type="radio"/>	 CREDIT CARD <input type="radio"/>
---------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------

CANCEL

CONFIRM & PRINT LICENSE

USER'S TIP

Selecting the correct payment method will help with daily reconciliation.

IMPORTANT

If the customer has a valid email address associated with his or her customer record, the customer will be sent an electronic receipt.

Printing the Product

By clicking **Confirm & Print License**, the product will be sent to the printer. There will be no preview of the product.

Product Printed Correctly

Inspect the printed product. If the product is printed and appears correct, select **Yes, the license printed correctly**.

No Product Printed or Product Did Not Print Correctly

If no product is printed or if the product is not correct, select **No, the license did not print correctly**. This will take you to the Orders screen. On this screen, you can click the **Reprint icon** to reprint the product or the **Edit icon** to void the order.

Provide the reason for the reprinting or voiding. If an order needs to be reprinted, the product will be sent to the printer again. If an order is voided, the customer will not be charged for the sales transaction.

***Note:** If a product is printed with errors or if it is illegible, set the product aside to be returned with the returnable documents. It must be returned to Revenue.*



Order Verification

Was the order printed correctly?

<input type="radio"/>	NO the license did not print correctly	<input type="radio"/>	YES the license printed correctly
-----------------------	-----------------------------------------------	-----------------------	------------------------------------------

CONTINUE

On the Order Verification screen, click No, the license did not print correctly or Yes, the license printed correctly.

Order ID	DEC ID	Last Name	First Name	Middle Name	Price	Date Purchased	Status	Reprint	Edit
42672001	396409000074	Customer	New	York	\$45.00	06/16/2020	Active		

If you select No, the license did not print correctly, you will be taken to the Orders screen. Choose the Reprint icon to reprint the product or the Edit icon to void the order.

Re-print Reason for Order #42672001

☐ Print Error

☐ License Unreadable

CANCEL

RE-PRINT

If reprinting the product, choose the reason for reprinting: Print Error or License Unreadable.

License Reprint Status for Order #42672001

Was printing successful?

NO

YES

If reprinting the product, indicate if the reprinting was successful by clicking No or Yes.

 Edit Order

New York Customer 396409000074

Purchases

Void (1) Items From This Order

VOID

<input type="checkbox"/> All	Item	Quantity	Price	Status
<input type="checkbox"/>	Resident Trapping	1	\$20.00	Active
<input checked="" type="checkbox"/>	Resident Fishing	1	\$25.00	Active

If voiding an order, select the items that need to be voided, and click Void.

USER'S TIP

To view the details of the transaction again or other past transactions, select Orders from the Menu icon.

IMPORTANT

There will be no PDF preview of the license.

When to Void Products

After a sales transaction, you may need to void a product from that order for the following reasons:

- The wrong product was sold to the customer.
- The printed license and tags are reviewed for errors or legibility, and a problem is found on them.

Note: *If you sell a license that you cannot print, it is advised to void the license immediately.*

USER'S TIP

The voided product will be listed on the Outstanding Voids (Returnable Documents) Report until you return it to Revenue.

IMPORTANT

You have only 4 hours to void a product with the licensing application.

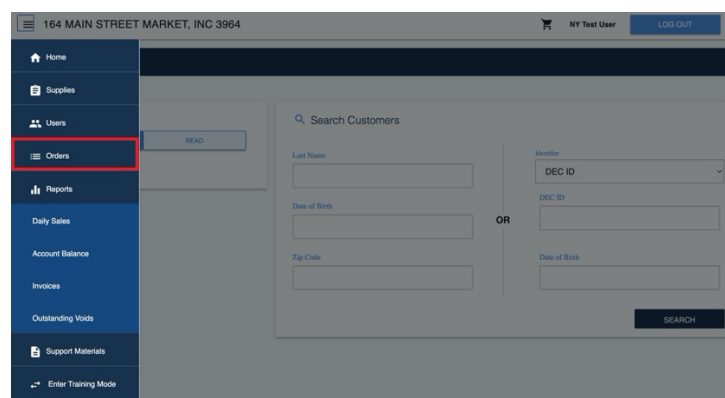
Locating an Order to Void

Here are the guidelines for voids.
















- You can void items only within 4 hours of the completion of the sale.
- You can void items sold only at your agent location within that 4-hour window.
- You cannot void the following items:
 - Lifetime Licenses
 - Deer Management Permits (DMPs)
 - Donations (Habitat Stamp, Venison Donation, Trail Supporter Patch, Conservation Fund)
 - Magazine subscriptions
 - Any item that has already been replaced

To begin the void process, click the **Menu icon**, and select **Orders**. On the Orders screen, all orders processed within the last 4 hours at your location will appear. They are listed from oldest to newest.

Locate the order that you need to void, and click the **Edit icon**.



Selecting Orders from the Menu

Orders									
Order ID	DEC ID	Last Name	First Name	Middle Name	Price	Date Purchased	Status	Reprint	Edit
42671558	1000000000124	Passarelli	Thomas		\$335.00	06/05/2020	Active		
42671559	1000000000455	Passarelli	Jessica		\$125.00	06/05/2020	Active 		
42671560	396409000033	Customer	New	York	\$765.00	06/05/2020	Active		
42671561	101280003161	Gagliardi	Adam	T	\$5.00	06/05/2020	Active		
42671562	1000000000623	Customer	NewYork	Test	\$10.00	06/05/2020	Active		
42671563	1000000000623	Customer	NewYork	Test	\$15.00	06/05/2020	Active		
42671564	396409000033	Customer	New	York	\$32.50	06/05/2020	Active		

Orders screen with sales transactions within the 4-hour window

IMPORTANT

To void a product using the licensing application, you must void it within 4 hours of the transaction. After 4 hours, you will have to contact Revenue at 1-800-962-5622 to process the void.

Selecting Products to Void

On the Edit Order screen, you will see all the products that the customer had purchased in that order. The following information is provided for each order.

- **Item:** The name of the product
- **Quantity:** The number of products purchased
- **Price:** The price of each product
- **Status:** The status of the product, such as Active or Voided

Voiding Products

During the void process, you can void individual products or all the products from a single order.

- If you need to void individual products, click the checkbox beside the product.

- If you need to void all products, click the **All** checkbox.

Verify that the correct products have been selected. Click **Void**.

Provide the reason for voiding the selected products. Click **Void**.

 Edit Order

New York Customer 396409000033

Purchases

Void (2) Items From This Order

VOID

<input type="checkbox"/> All	Item	Quantity	Price	Status
<input checked="" type="checkbox"/>	Recreational Marine Fishing Registry	1	\$0.00	Active
<input checked="" type="checkbox"/>	Resident Trapping	1	\$20.00	Active
<input type="checkbox"/>	Immediate Reprint of Drivers License	1	\$12.50	Active

Edit Order screen showing all the products from an order

Void Reason

✓ Sold Wrong Product

Customer Did Not Pay

Print Error

Two reasons for voiding products to select from: sold wrong product or print error

USER'S TIP

When you select the main product, the application will automatically select any corresponding dependent licenses or tags to be voided. For example, when selecting a hunting license, the carcass tags will automatically be selected.

Checking Product and Order Status

On the Edit Order screen, the status of the products will now be updated to **Voided**.

On the Orders screen, the status of the order will be updated.

Note: If you did not void all the products in the order, the status on the Orders screen will remain as **Active** but will have a red information icon beside it. If you voided all the products in the order, the status will be updated to **Voided** and will have a red information icon beside it.

 Edit Order

New York Customer 396409000033

Purchases



Void (0) Items From This Order

VOID

<input type="checkbox"/> All	Item	Quantity	Price	Status
<input type="checkbox"/>	Recreational Marine Fishing Registry	1	\$0.00	Voided
<input type="checkbox"/>	Resident Trapping	1	\$20.00	Voided
<input type="checkbox"/>	Immediate Reprint of Drivers License	1	\$12.50	Active

Edit Order screen with updated Voided status

 Orders

Order ID	DEC ID	Last Name	First Name	Middle Name	Price	Date Purchased	Status	Reprint	Edit
42671562	1000000000623	Customer	NewYork	Test	\$10.00	06/05/2020	Active		

Orders screen with the red information icon beside the status

IMPORTANT

Collect all voided products from the customer. You must send the voided products to Revenue by the date specified in the Outstanding Voids Report.

Returning Voided Products

The Outstanding Voids Report lists all the outstanding voids that need to be resolved at your location. To view the report, click the Menu icon. Expand the Reports submenu, and click Outstanding Voids. The outstanding voids are listed from newest to oldest.

Look for the order that you need to return. Review the information under the Order Number. Be sure to return the voided products by that date. Send the voided products in an envelope to Revenue.

Once Revenue has received the voided products, the entry for the order will be removed from the Outstanding Voids Report.

Home / Reports / Outstanding Voids Report				
☰ Outstanding Voids Report				
Order ID	Customer Name	Voided By	Void Date & Time	Return By Date (45 days)
42672001	New York Customer	NY Test User	06/16/2020 9:22 AM	07/31/2020
Print Document	Product Name(s)	Return Status		
NY Sporting License	Resident Fishing	Pending		
NY Sporting License	Resident Fishing	Pending		

USER'S TIP

Send the voided products to the following address:

*NYSDEC
Revenue
625 Broadway
Albany, NY 12233-4900*

Checking Status of Voided Products

To view the status of an order on the Outstanding Voids (Returnable Documents) Report, look at Return Status. The status can change from Pending to Charged.

Pending means Revenue has not yet received the voided products. The return is still within the specified return period. The return period is 45 days from the date that the void was processed.

Charged means Revenue did not receive the voided products within the specified return period. Revenue has charged your location for the unreturned, voided products. You will have 45 days to return the documents before being charged. Once Revenue has received the voided products, it will credit your location for the products.

Products that have been successfully returned will not appear on the Outstanding Voids (Returnable Documents) Report.

Home / Reports / **Outstanding Voids Report**

 Outstanding Voids Report

Order ID	Customer Name	Voided By	Void Date & Time	Return By Date (45 days)
42672001	New York Customer	NY Test User	06/16/2020 9:22 AM	07/31/2020

Print Document	Product Name(s)	Return Status
NY Sporting License	Resident Fishing	Pending
NY Sporting License	Resident Fishing	Pending

Types of Reports

You can view the following reports in the licensing application:

Daily Sales Report

The Daily Sales Report lists the transactions for any selected date at your location. You can filter the report by order, product, payment type, and user.

Account Balance Report

The Account Balance Report lists all transactions at your location. The account balance is automatically calculated with each transaction.

Invoices (Account Notice Statement) Report

The Invoices Report lists all the invoices that have been generated by the system and emailed to the your location's agent of record.

Outstanding Voids (Returnable Documents) Report

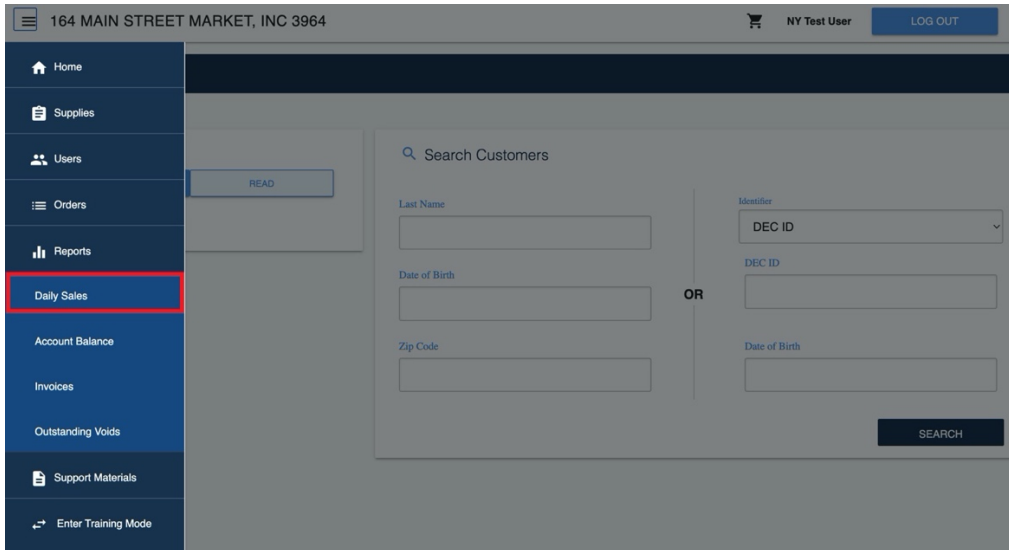
The Outstanding Voids Report lists all the outstanding voids that need to be resolved at your location. You can monitor the status of these voids through this report.

Daily Sales Report

The Daily Sales Report lists the transactions for any selected date at your location. To view the report, click the **Menu icon**. Expand the **Reports** submenu, and click **Daily Sales**.

To view the report for a specific date, enter the date (MM/DD/YYYY) that you need for the sales report. Click **Run**. If on that date any transactions were processed, the results will generate.

You can filter the Daily Sales Report by order, product, payment type, and user.



Daily Sales Report: Order View

To filter the Daily Sales Report by order, click **Order**.

The Order view includes the following information.

- **Payment:** The payment method for the transaction (e.g., cash, credit card, etc.)
- **Type:** The transaction type (e.g., sale, reversal, or void)
- **DEC ID:** The unique number to identify the customer
- **Client Name:** The person who is associated with the order
- **Order Number:** The unique number to identify and track the order
- **Sales Representative:** The user who processed the transaction
- **Product Name:** The specific product sold
- **Quantity:** The number of the products sold
- **Vendor Commission:** The amount of commission your location earned
- **State Amount:** The amount from the transaction that goes to the state
- **Total:** The total transaction amount (the sum of vendor commission and state amount)

- **Manual Adjustments:** The adjustment to the vendor account made by Revenue to correct any outstanding balance issues

You can find the overall totals for the columns on the first line. In addition, you can expand the entries to learn more about the transactions.

Note: You can export the Order view as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this view. When you export the Order view, all the information, including the entries with additional details, will expand and display in the documents.

Home / Reports / Daily Sales Report											
Daily Sales Report											
Filter by: ORDER PRODUCT PAYMENT TYPE USER 06/15/2020 RUN											
Payment	Type	DEC ID	Client Name	Order Number	Sales Rep	Product Name	Qty	Vendor Commission	State Amount	Total	Manual Adjustments
Total								\$25.30	\$434.70	\$460.00	\$1.10
Credit Card - Credit Card								\$25.30	\$434.70	\$460.00	\$0.00

[Export XLSX](#) [Export PDF](#)

Order view of the daily sales report, not expanded

Daily Sales Report											
Filter by: ORDER PRODUCT PAYMENT TYPE USER 06/08/2020 RUN											
Payment	Type	DEC ID	Client Name	Order Number	Sales Rep	Product Name	Qty	Vendor Commission	State Amount	Total	Manual Adjustments
Total								\$0.00	\$235.00	\$235.00	\$0.00
Check								\$0.00	\$235.00	\$235.00	\$0.00
	Sales							\$0.00	\$235.00	\$235.00	
	Reversals							\$0.00	\$0.00	\$0.00	
	Voids							\$0.00	\$0.00	\$0.00	

[Export XLSX](#) [Export PDF](#)

Order view of the daily sales report, with Credit Card expanded

Payment	Type	DEC ID	Client Name	Order Number	Sales Rep	Product Name	Qty	Vendor Commission	State Amount	Total	Manual Adjustments
Total								\$25.30	\$434.70	\$460.00	\$1.10
Credit Card - Credit Card								\$25.30	\$434.70	\$460.00	\$0.00
	Sales							\$25.30	\$434.70	\$460.00	
		999901259030	Cameron A Passarelli	42671991	NY Test User			\$25.30	\$434.70	\$460.00	
	Reversals							\$0.00	\$0.00	\$0.00	
	VOIDS							\$0.00	\$0.00	\$0.00	

Order view of the daily sales report, with Sales expanded

Daily Sales Report

Payment	Type	DEC ID	Client Name	Order Number	Sales Rep	Product Name	Qty	Vendor Commission	State Amount	Total	Manual Adjustments
Total								\$25.30	\$434.70	\$460.00	\$1.10
Credit Card - Credit Card								\$25.30	\$434.70	\$460.00	\$0.00
	Sales							\$25.30	\$434.70	\$460.00	
		999901259030	Cameron A Passarelli	42671991	NY Test User			\$25.30	\$434.70	\$460.00	
						Lifetime Fishing 16€	1	\$25.30	\$434.70	\$460.00	
						Lifetime Hard Card	1	\$0.00	\$0.00	\$0.00	
	Reversals							\$0.00	\$0.00	\$0.00	
	Voids							\$0.00	\$0.00	\$0.00	

Order view of the daily sales report, with an individual sale expanded

To filter the Daily Sales Report by product, click **Product**.

The Product view includes the following information.

- **Code:** The product code associated with the product
- **Product:** The specific product sold
- **Quantity:** The number of the products sold

- **Vendor Commission:** The amount of commission your location earned
- **State Amount:** The amount from the transaction that goes to the state
- **Total Amount Collected:** The total amount collected for each product (the sum of vendor commission and state amount)

You can find the overall totals for the columns on the first line.

Note: You can export the Product view as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this view. When you export the Product view, all the information will expand and display in the documents.

Home / Reports / **Daily Sales Report**

Daily Sales Report

Filter by:

ORDER

PRODUCT

PAYMENT TYPE

USER

06/15/2020

RUN

Code	Product	Quantity	Vendor Commission	State Amount	Total Amount Collected
Total		2	\$25.30	\$434.70	\$460.00
055	Lifetime Fishing 16-69	1	\$25.30	\$434.70	\$460.00
HC	Lifetime Hard Card	1	\$0.00	\$0.00	\$0.00

[Export XLSX](#)
[Export PDF](#)

Daily Sales Report: Payment Type View

To filter the Daily Sales Report by payment type, click **Payment Type**.

The Payment Type view includes the following information.

- **Payment Type:** The payment method for the transaction (e.g., cash, credit card, etc.)
- **Vendor Commission:** The amount of commission your location earned
- **State Amount:** The amount from the transaction that goes to the state
- **Total:** The total amount collected for each payment type (the sum of vendor commission and state amount)

- **Manual Adjustments:** The adjustment to the vendor account made by Revenue to correct any outstanding balance issues

You can find the overall totals for the columns on the first line.

Note: You can export the Payment Type view as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this view. When you export the Payment Type view, all the information will expand and display in the documents.

☰ Daily Sales Report

Filter by:	ORDER	PRODUCT	PAYMENT TYPE	USER	06/08/2020	RUN
Payment Type	Vendor Commission	State Amount	Total	Manual Adjustments		
Total	\$0.00	\$235.00	\$235.00	\$0.00		
Check	\$0.00	\$235.00	\$235.00	\$0.00		

[Export XLSX](#) [Export PDF](#)

Daily Sales Report: User (Clerk) View

To filter the Daily Sales Report by user, click **User**.

The User view includes the following information.

- **Staff:** The clerk who processed the transaction
- **Total Sales:** The number of the transactions processed
- **State Amount:** The amount from the transaction that goes to the state
- **Vendor Commission:** The amount of commission your location earned
- **Total:** The total amount collected by the user

You can find the overall totals for the columns on the first line. In addition, you can expand the entry for each user to learn more about the transactions.

Note: You can export the User view as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this view. When you export the User view, all the information, including the entries with additional details, will expand and display in the documents.

Home / Reports / Daily Sales Report				
Daily Sales Report				
Filter by:	ORDER	PRODUCT	PAYMENT TYPE	USER
				06/15/2020
				RUN
Staff	Total Sales	State Amount	Vendor Commission	Total
Total		\$434.70	\$25.30	\$460.00
NY Test User	1	\$434.70	\$25.30	\$460.00
Export XLSX Export PDF				

Account Balance Report

The Account Balance Report shows all the transactions at your location. The application automatically calculates the account balance. To view the report, click the **Menu icon**. Expand the **Reports** submenu, and click **Account Balance**.

The transactions are listed from oldest to newest. The report includes the following information.

- **Date:** The date of the transaction or transactions
- **Transaction Type:** The transaction type (e.g., sale, reversal, or void)
- **Amount:** The total amount sold for each date
- **Total Balance:** The calculated balance based on the total amount sold for each date

To view previous time periods, click the arrows beside the date range. To manually refresh the report for the most recent transactions, click **Latest Transaction**.

Note: You can export the Account Balance Report as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this report. When you export the Account Balance Report, all the information will expand and display in the documents.

Date	Transaction Type	Amount	Total Balance
04/10/2020	Sales	\$50.00	\$5,645.02
04/11/2020	Sales	\$150.00	\$5,845.02
04/12/2020	Sales	\$25.00	\$6,045.02
04/14/2020	Sales	\$35.00	\$6,230.02
04/15/2020	Sales	\$50.00	\$6,280.02
04/16/2020	Sales	\$142.00	\$6,422.02
04/17/2020	Sales	\$286.75	\$6,758.77
04/18/2020	Sales	\$100.00	\$6,858.77
04/19/2020	Sales	\$15.00	\$6,898.77
04/20/2020	Sales	\$1,930.29	\$8,879.06
04/21/2020	Sales	\$140.56	\$9,269.62
04/23/2020	Sales	\$106.78	\$9,476.40
04/24/2020	Sales	\$96.72	\$9,598.12

Invoices (Account Notice Statement) Report

The Invoices Report lists all the invoices that have been generated by the system and emailed to your location's agent of record. To view the report, click the **Menu icon**. Expand the **Reports** submenu, and click **Invoices**.

To search for an invoice, enter the date range into the required fields for **Begin Date** (MM/DD/YYYY) and **End Date** (MM/DD/YYYY). You can filter the results further by status: [Pending](#), [Reviewed](#), [Paid](#), and [Held](#). Uncheck the checkbox beside the status to remove it from the search results.

Once all the information has been entered, click **Search**. If any invoices were generated in that time period and meet any filter options, they will appear. The results will include the following information.

- **Status:** The status of the invoice (Pending, Reviewed, Paid, or Held)
- **Invoice Date:** The date the invoice was created
- **Sales Begin Date:** The starting date of the current invoice
- **Sweep Date:** The date on which the sweep amount will be taken out of the vendor's bank account
- **Gross Amount:** The total amount of money in the current invoice, including purchases, donations, taxes, etc.
- **Vendor Amount:** The amount of money in the current invoice (from the gross amount) that belongs to the vendor and not taken out during the sweep
- **Sweep Amount:** The amount of money in the current invoice that will be taken out by the state from the vendor's bank account

To view a complete invoice for your sales period, click the **three vertical dots** next to the entry. You can download the report as an Excel spreadsheet (XLSX file) or a PDF. The invoice will provide details about the transactions that occurred during the invoice period.

Home / Reports / **Invoices**

Invoices

* Begin Date

06/01/2020

* End Date

06/16/2020

☒ Pending ☒ Reviewed ☒ Paid ☒ Held

SEARCH

Status	Invoice Number	Sales Begin Date	Invoice Date	Sweep Date	Gross Amount	Vendor Amount	Sweep Amount
No records found for this time period or selected status(es)							

USER'S TIP

There will be no change in the sales period or sweep rotation for existing vendors.

For new vendors, Revenue will establish sales period and sweep rotation.

IMPORTANT

For NYS vendors, the Reviewed status is not applicable. Vendors are not manually invoiced. No information will appear under the Reviewed status.

GLOSSARY

Held – Status indicating that Revenue has removed the invoice from the sweep due to a discrepancy; no sweep occurs until discrepancy is resolved

Paid – Status indicating that the sweep has gone through and the vendor has paid

Pending – Status indicating that the invoice has been generated and has not been paid

Outstanding Voids (Returnable Documents) Report

IMPORTANT

The Outstanding Voids Report should be checked daily to keep track of the voided products and their statuses.

The Outstanding Voids Report collects all the outstanding voids that need to be resolved at your location. To view the report, click the **Menu icon**. Expand the **Reports** submenu, and click **Outstanding Voids**.

The outstanding voids are listed from newest to oldest. For each void, the following information is provided.

- **Order ID:** The unique number to identify and track the order

- **Customer Name:** The person who is associated with the order
- **Void By:** The user who processed the void
- **Void Date & Time:** The date and time that the void was processed
- **Return By Date:** The date when the products need to be returned to Revenue
- **Print Document:** The type of product (e.g., license)
- **Product Name(s):** The specific product sold
- **Return Status:** The status of the returned products (Pending or Charged)

Once Revenue has received the voided products, the entry for the order will be removed from the Outstanding Voids Report.

Note: You can export the Outstanding Voids Report as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this report. When you export the Outstanding Voids Report, all the information will expand and display in the documents.

Home / Reports / Outstanding Voids Report				
☰ Outstanding Voids Report				
Order ID	Customer Name	Voided By	Void Date & Time	Return By Date (45 days)
42672001	New York Customer	NY Test User	06/16/2020 9:22 AM	07/31/2020
Print Document	Product Name(s)	Return Status		
NY Sporting License	Resident Fishing	Pending		
NY Sporting License	Resident Fishing	Pending		

Glossary

Charged

Status indicating that Revenue did not receive the voided products within the specified return period; location charged for the unreturned, voided products

Pending

Status indicating that Revenue has not yet received the voided products; return still within the specified return period

Viewing Support Materials (Agent Help Link)

To view additional support documents, click the **Menu icon**, and click **Support Materials**. Available support documents will be listed on this screen. Click the **Open icon** to view a document.

For each support document, the following information is provided.

- **Title:** The title of the support document
- **Date of Upload:** The date on which the document was uploaded
- **Open:** The link to open and view the document

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 Support Materials

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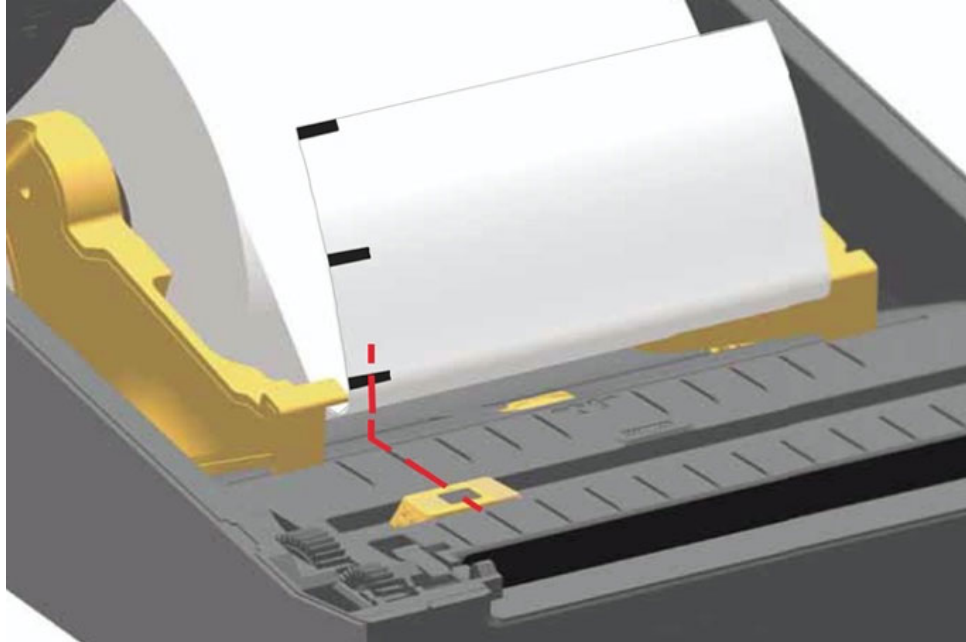
Changing Media (Paper Roll) in the Printer

In this tutorial, you will learn how to load media into the printer. The Media Status indicator will display red when media is exhausted.

1. Open the printer.
2. Remove the empty core from the roll holders.
3. Remove the outside wrap from the new media roll to prevent contamination.
4. Place the supply media in the role holders.
5. Pull the end of the media out the front of the printer.
6. Verify the media sensor is in the correct location for your media.
7. Press the media down under the media guides.
8. Close the printer.

IMPORTANT

The media roll for printing licenses has a black mark on its back side at each perforation to allow for accurate paper alignment and printing. Flip the media roll up. Align the movable media sensor to the third tick so that the sensor aligns to the center of the black mark. Do not position the sensor in the center area of the media; this will lead to unsatisfactory performance.



Cleaning the Printer

In this tutorial, you will learn how to perform routine cleaning of the printer. Before beginning, turn power off and remove all media.

1. Clean the media sensors using compressed air.
2. Use a cotton swab moistened with alcohol to clean the cartridge sensor.
3. Use a cotton swab moistened with alcohol to clean off any adhesive build up on the media guides, roll holders, and other areas.
4. Clean the roll holders and frame using a lint-free wipe and isopropyl alcohol. Wipe the areas thoroughly to remove all paper dust and accumulated adhesive.
5. For printers with a dispenser option, open the door.
 - a. Clean the peel bar.
 - b. Clean the peel roller.
 - c. Clean the liner path.
 - d. Clean the ribs and sensor.

6. The outside of the printer may be cleaned using solutions common to the healthcare industry, including isopropyl alcohol and water.

Increasing the Darkness Level on the Printer

If the printer prints out a product that is too light or faint, you can adjust the darkness setting on the printer. Locate the switch on the back of the printer. Move it toward the plus (+) sign to increase the darkness level.



In this image, the default setting is shown.

Learning More About General Printer Maintenance

Performing general maintenance on the printer will help ensure that it works properly. For additional how-to videos for the printer, visit the [Zebra website](https://www.zebra.com/us/en/support-downloads/printers/desktop/zd420c.html) (<https://www.zebra.com/us/en/support-downloads/printers/desktop/zd420c.html>).

For all of your technical support needs, please get in touch with Vendor Support at **347-227-0452**.