# NEW YORK STATE LICENSING SYSTEM

License Issuing Agent Software Guide

# Table of Contents

# 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:

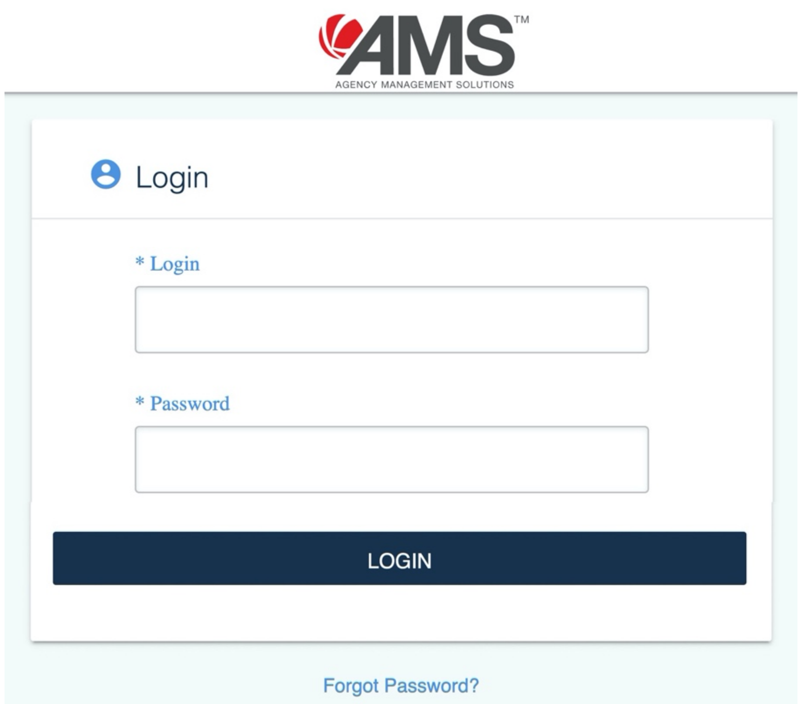
- Access the licensing application.
- Search for a customer record.
- Create a new customer record, if needed.
- Make a license sales transaction.
- Understand how to handle error messages related to eligibility and prerequisites.
- Understand troubleshooting/problem resolution procedures, system error 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.



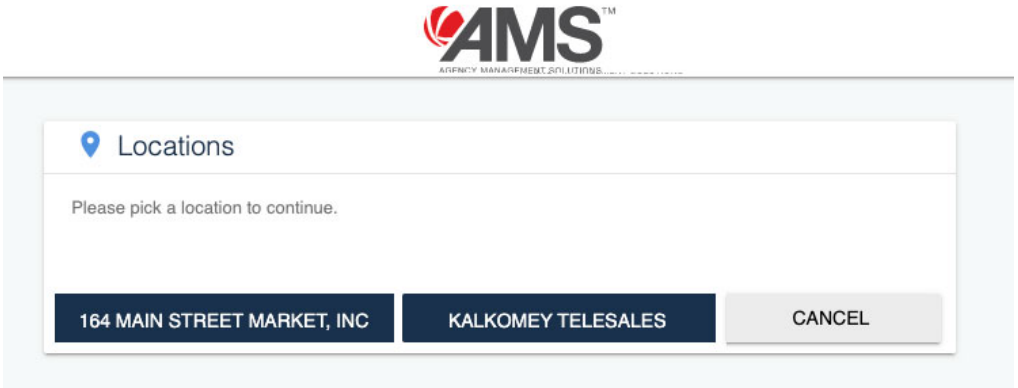

***User's Tip***

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

# Selecting Your Location

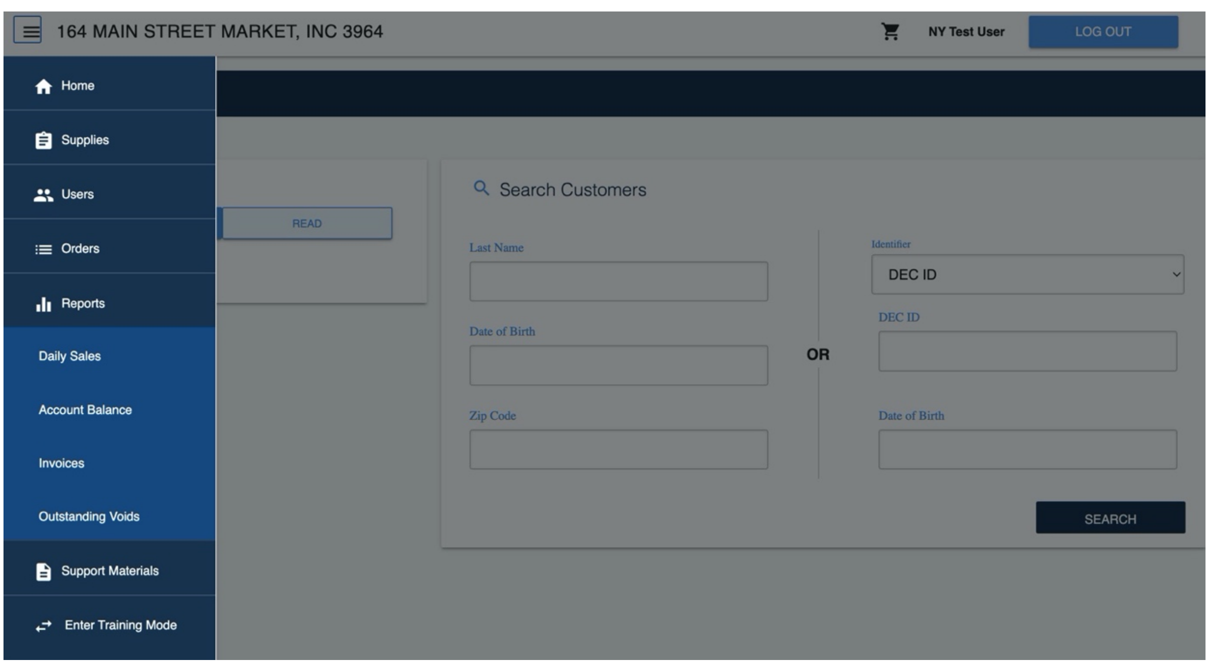
If you work at more than one location, select the appropriate location.

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



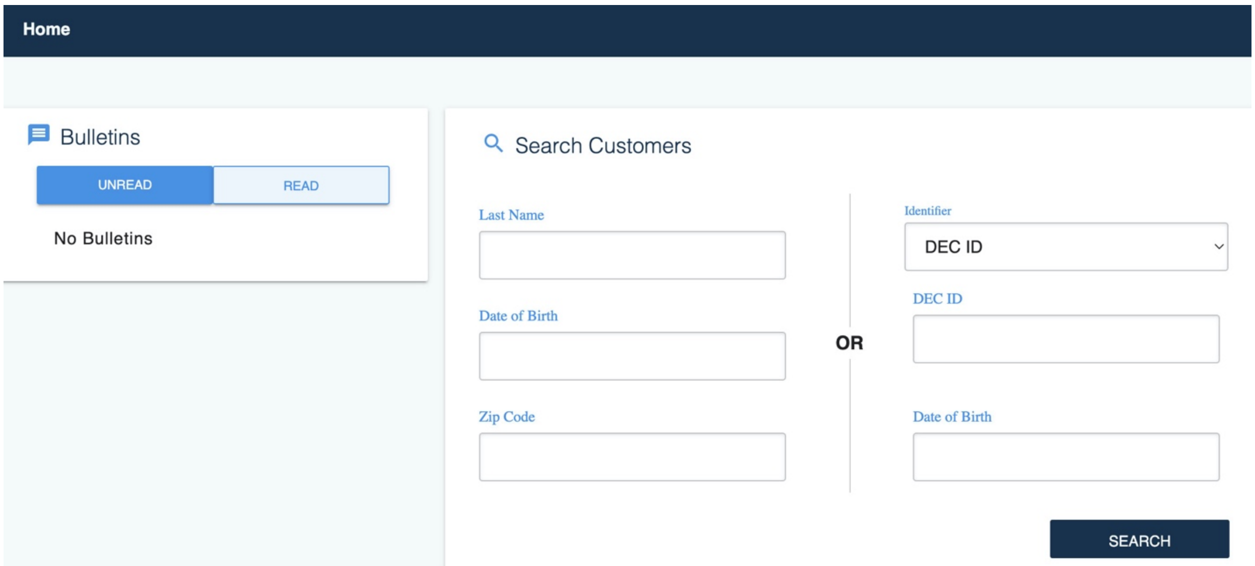

# Navigating the Licensing Application

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.




***USER'S TIP***

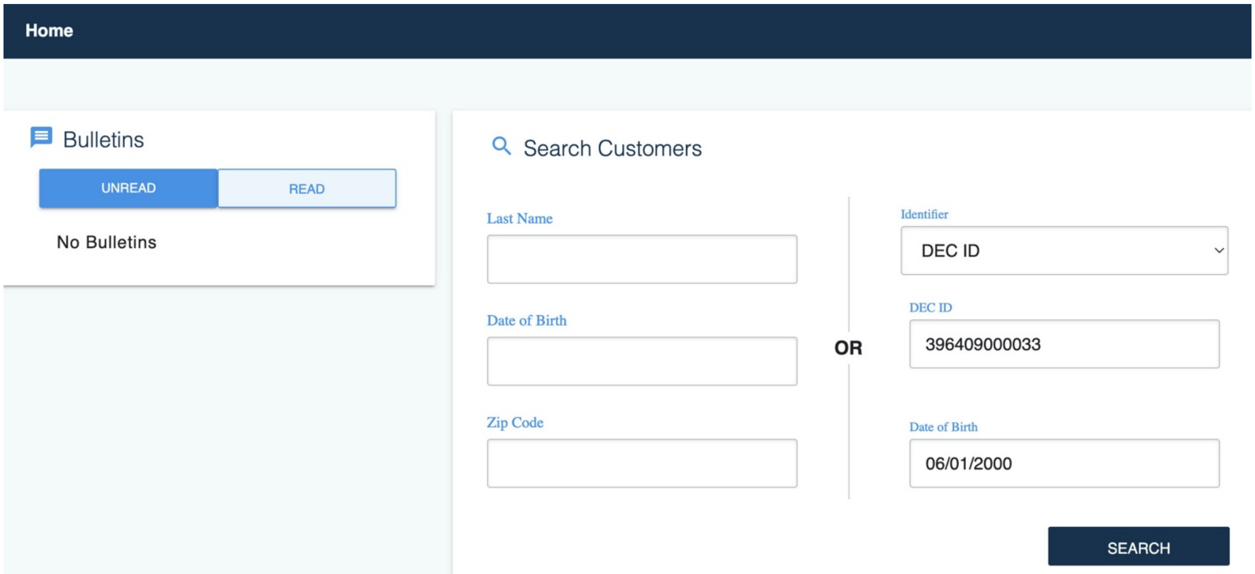
*Important information from the state agency will be posted under Bulletins.*

## 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.




## *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 |
|---|---|---|---|---|---|
| ☐ | Van Dellen | Chester | 1000000000044 | 1980-12-29 | 230 MARTIN ST |
| ☐ | Van Dellen | Joe | 1000000000482 | 1980-12-29 | 123 Any Street |
| ☐ | Van Dellen | Chester | 999901426943 | 1980-12-29 | 230 Martin Street |

# Confirming Customer Information

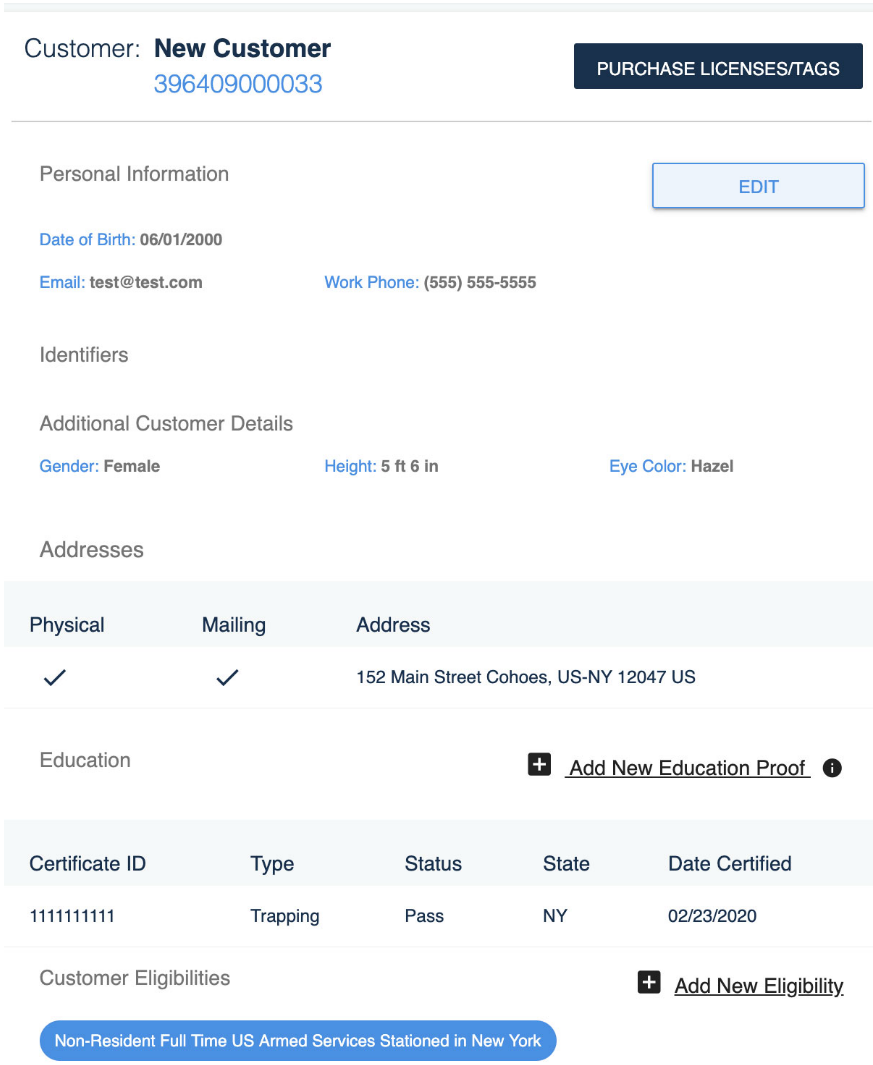
The customer record will appear. Go through the information, and ask the customer to confirm if it is correct (e.g., spelling of the name, date of birth, email address, and physical and mailing addresses). Click **Edit** to update the customer's information if needed, or click **Purchase Licenses/Tags**.

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.)




### *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*

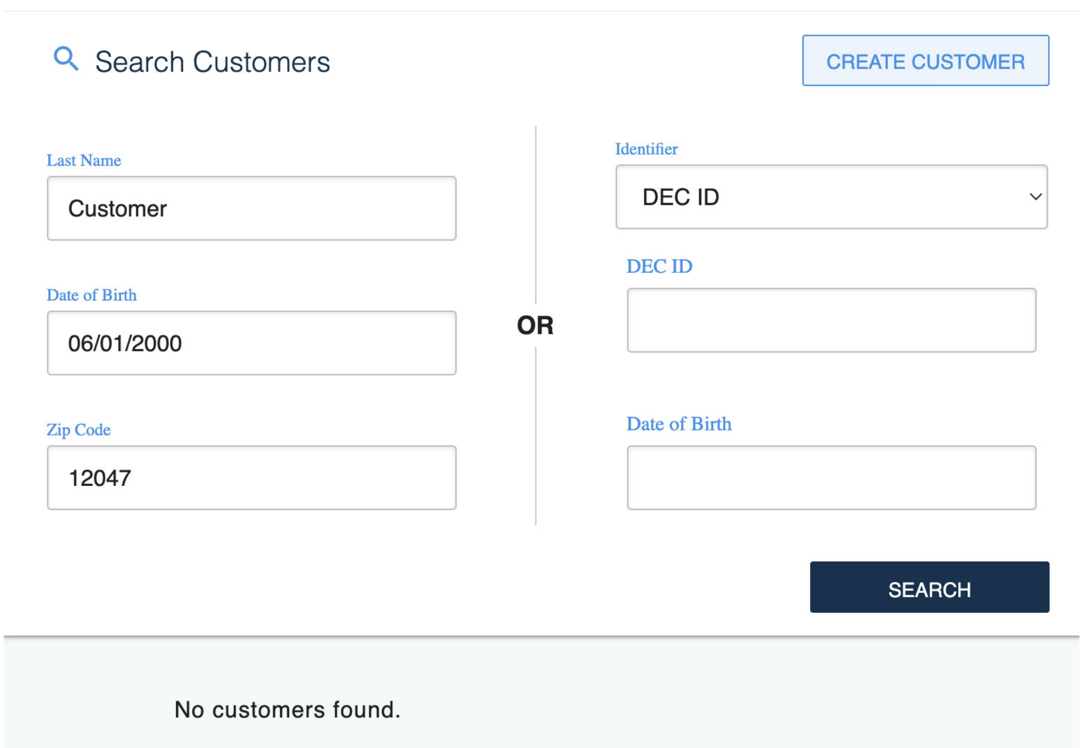
*Before you can create a new customer, you must perform multiple customer searches to ensure that there is no existing record:*

*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***

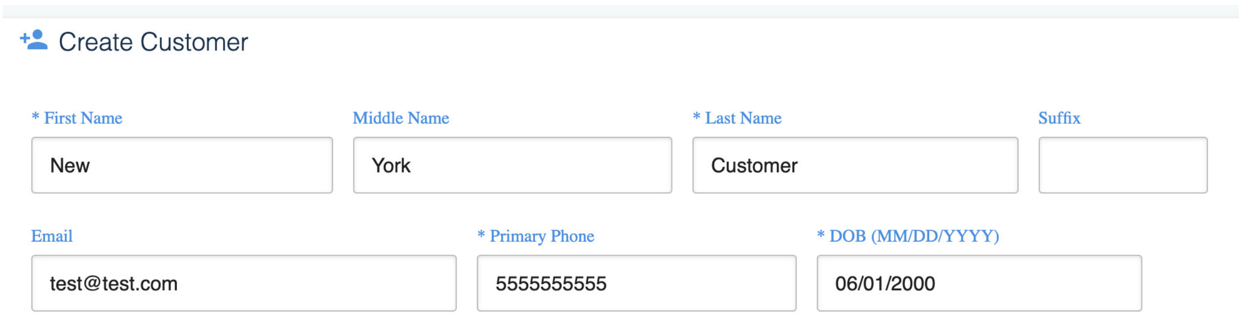
*For each search, make sure that you have entered the information correctly in each field.*

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



# 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 (*).

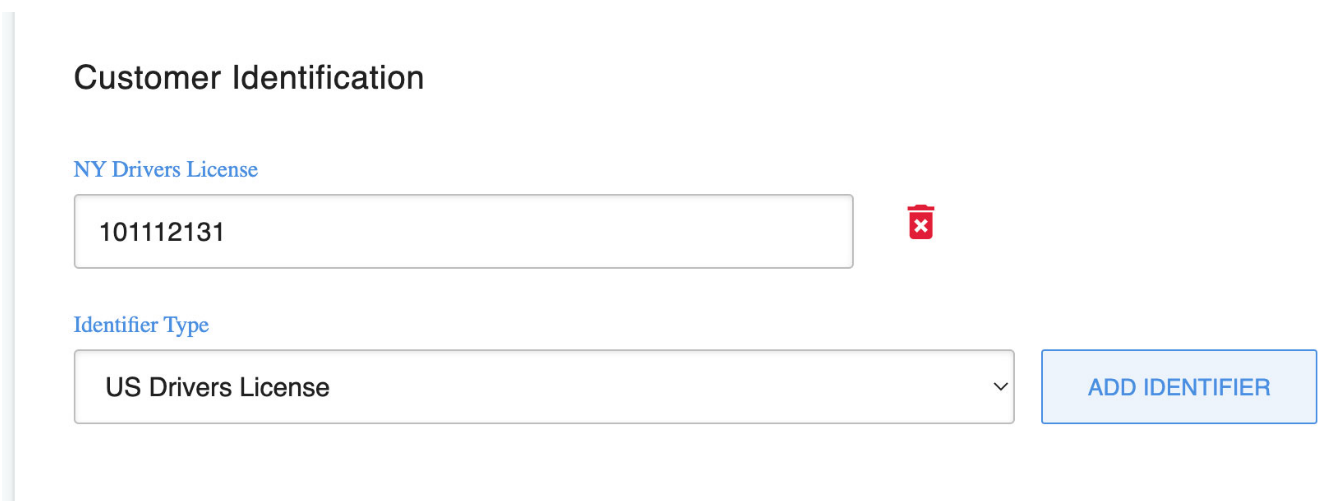



# Entering Customer Identifiers

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.



***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***

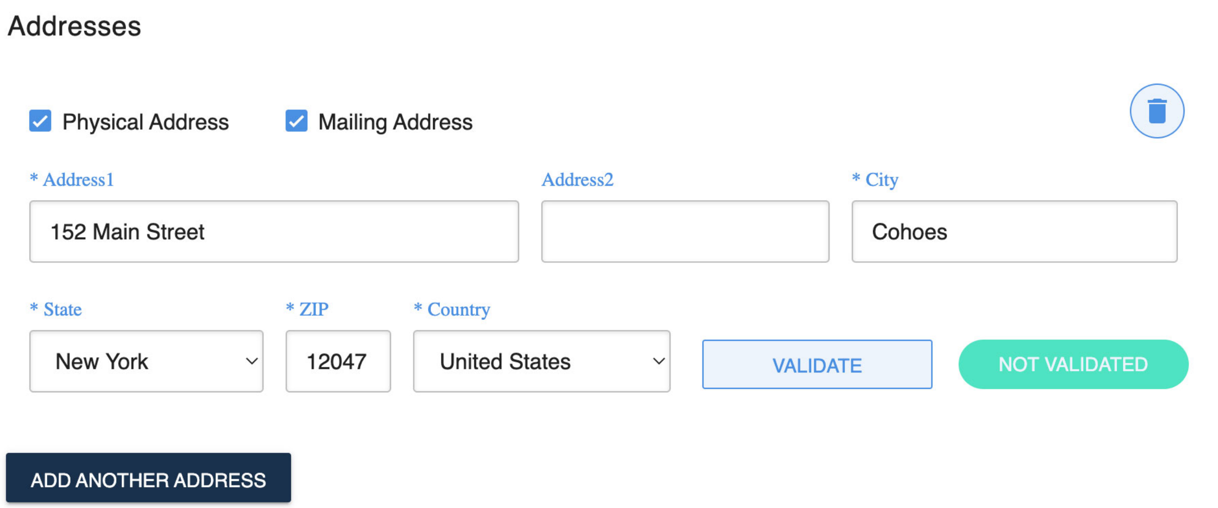
*If the NYS DMV cannot verify a NYS resident's driver's license or non-driver ID, the customer must provide a different proof of residency. If the customer cannot provide another proof of residency, the customer will be presented non-resident products from the catalog.*

# Entering Customer Addresses

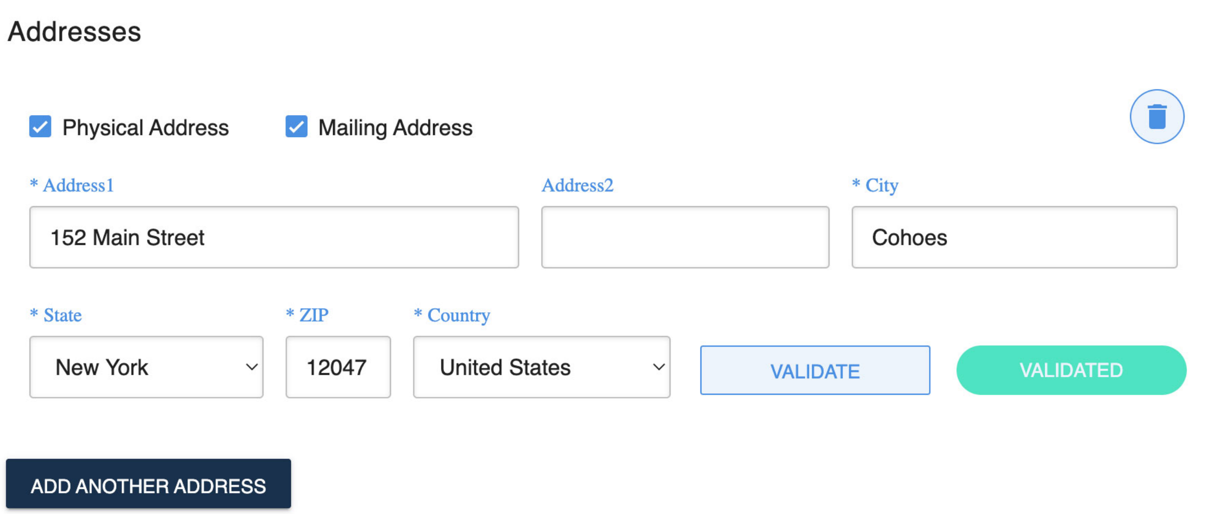
Collect and validate the customer's address or addresses. The customer must provide both a physical address and a mailing address. The same address can be used for both. Use the checkboxes to indicate the type of address that is entered.

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.




*Address that has not been validated.*




*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.*

---

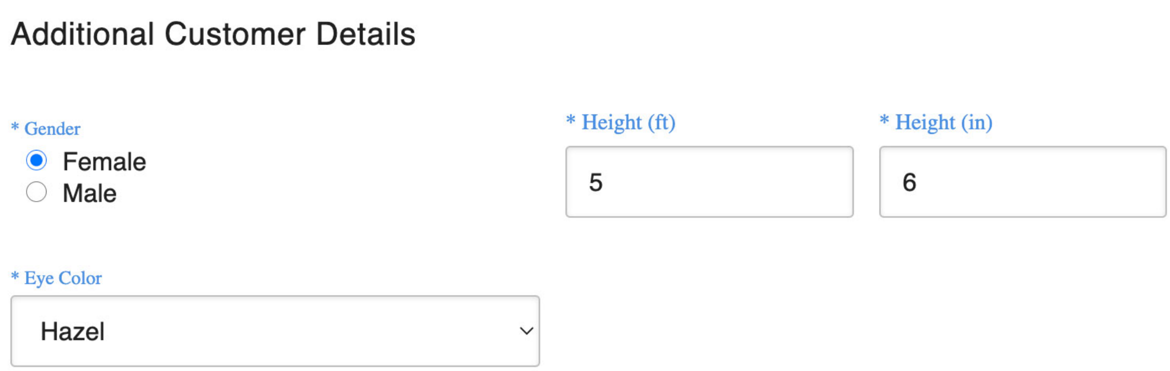
# Entering Additional Customer Details, Education, and Eligibilities

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




## 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.

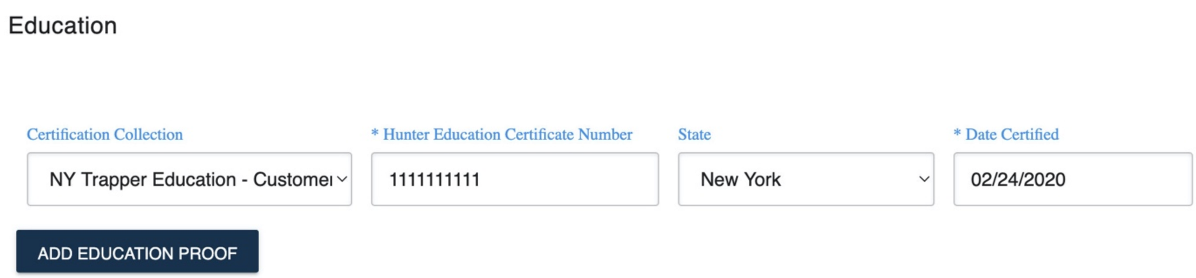
The following are acceptable customer-provided forms of documentation:

- 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.

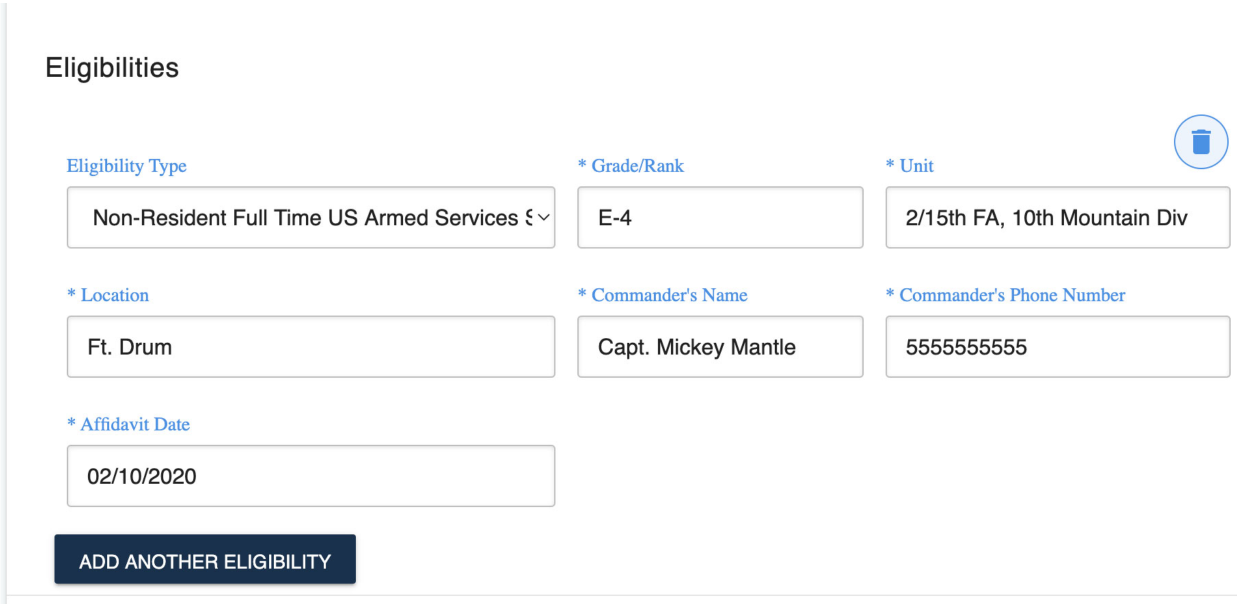



# Eligibilities

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

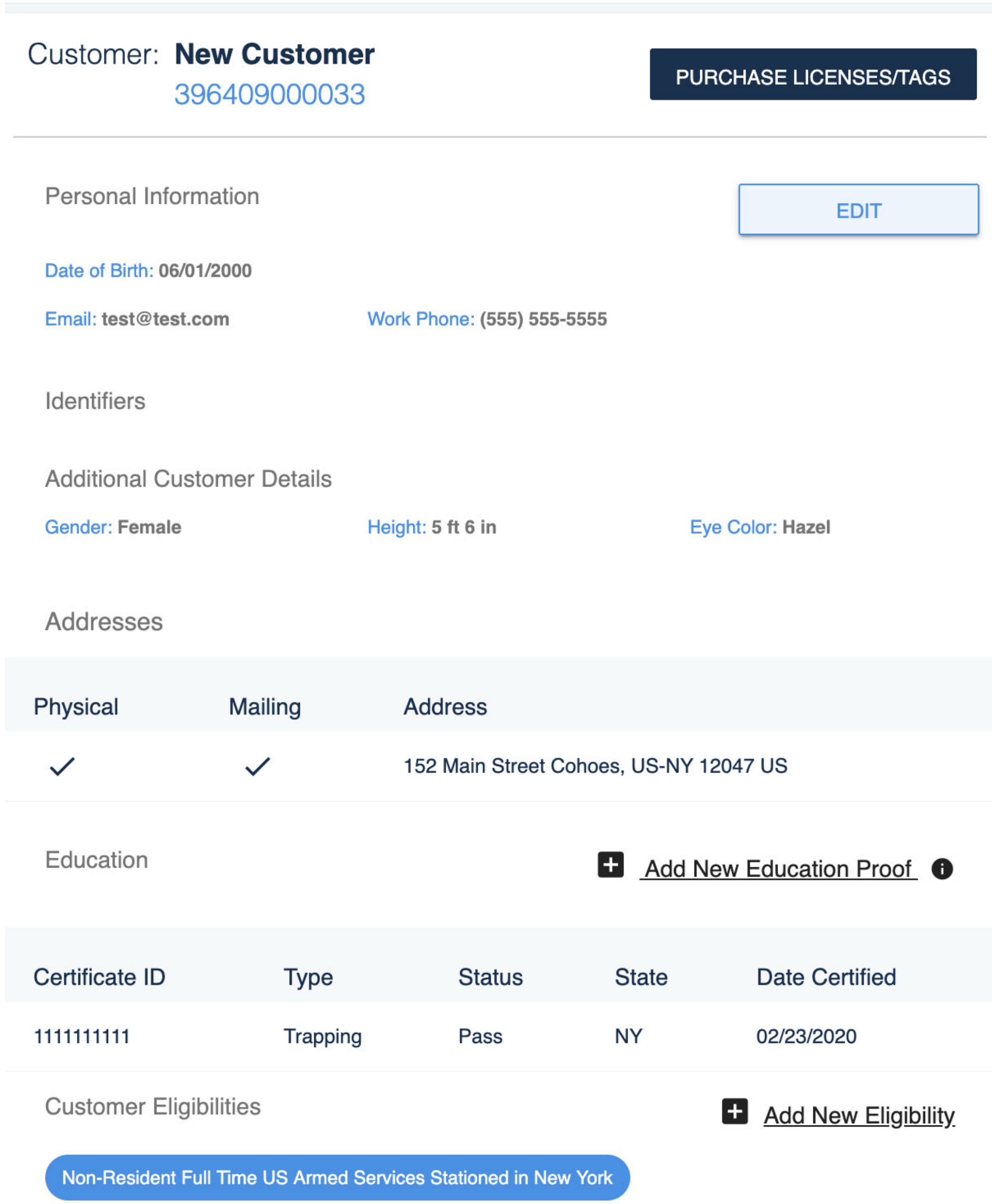



When you have collected all the information, click Save Changes or Create Customer and Start Purchase. You have now created a customer record.

# 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**.




***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

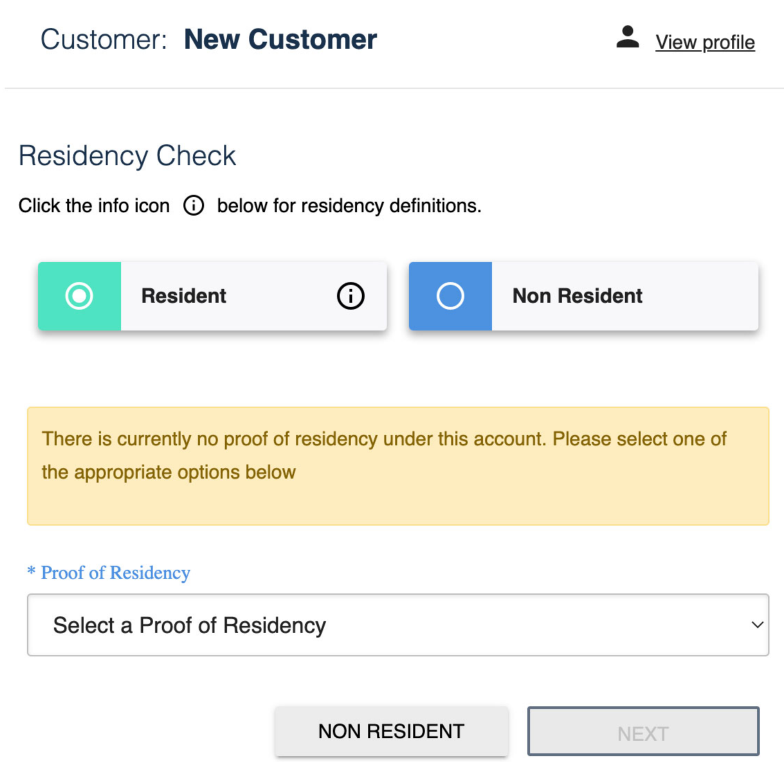
Select **Resident** if the following applies:

- 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.



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.

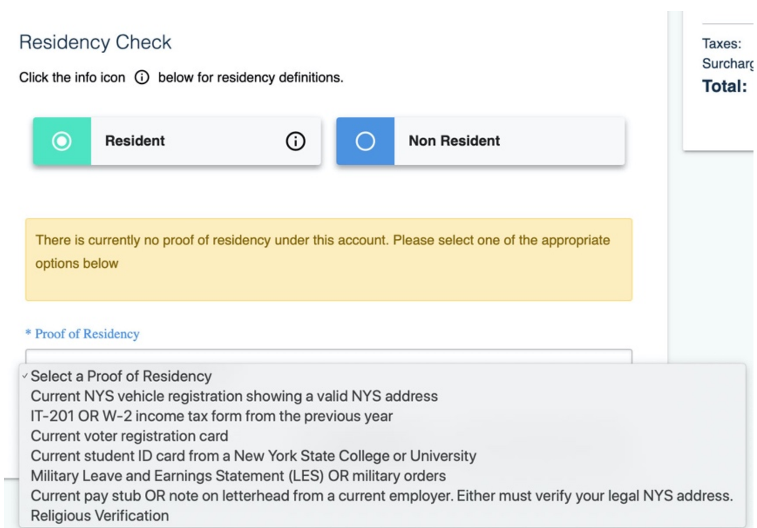
If the driver's license validation fails, the system will prompt you to collect an alternate state-approved proof of residency. You should first attempt to edit the NYS driver's license or non-driver ID to correct any possible errors before collecting alternate proof.

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.




*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

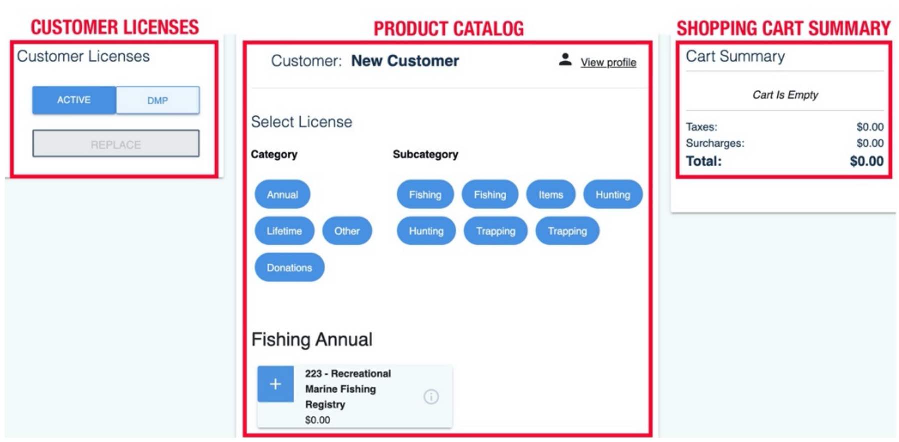
The Customer Licenses section shows the customers active holdings, such as licenses, back tags, and carcass tags. To see a customer's Deer Management Permit (DMP) History for the past **three** years, click **DMP History**. In the DMP History section, you can also sell a replacement license. You will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



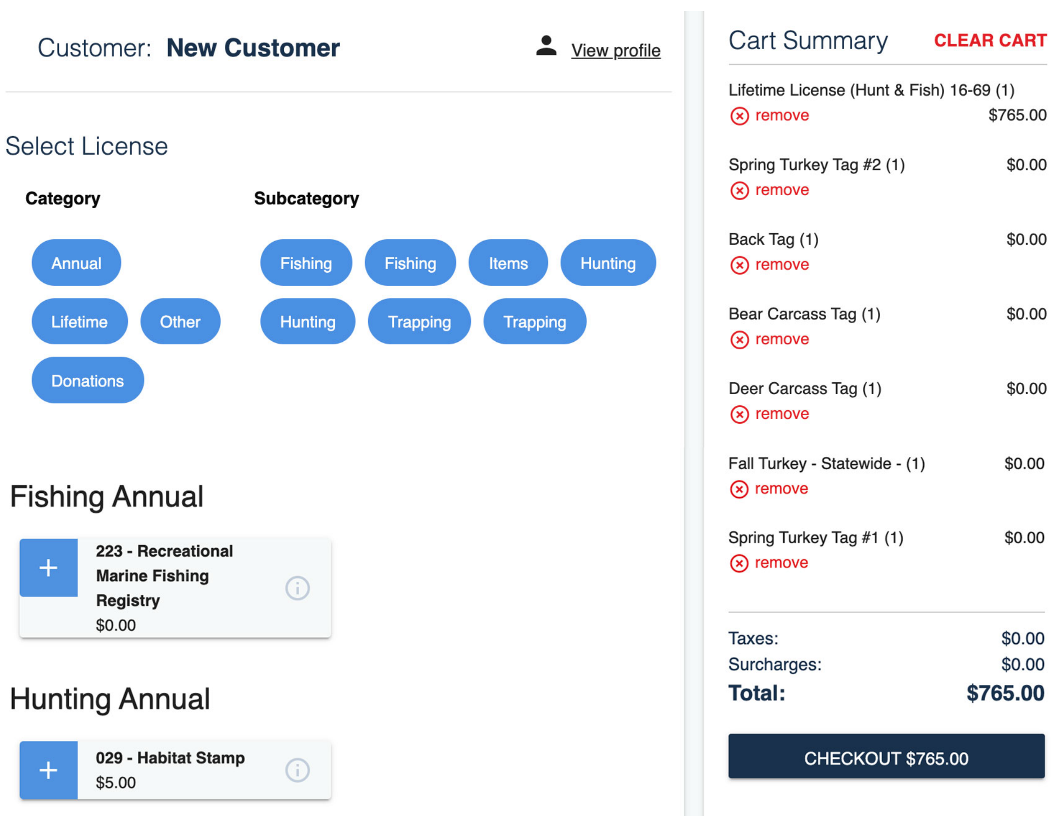
*USER'S TIP*

*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.

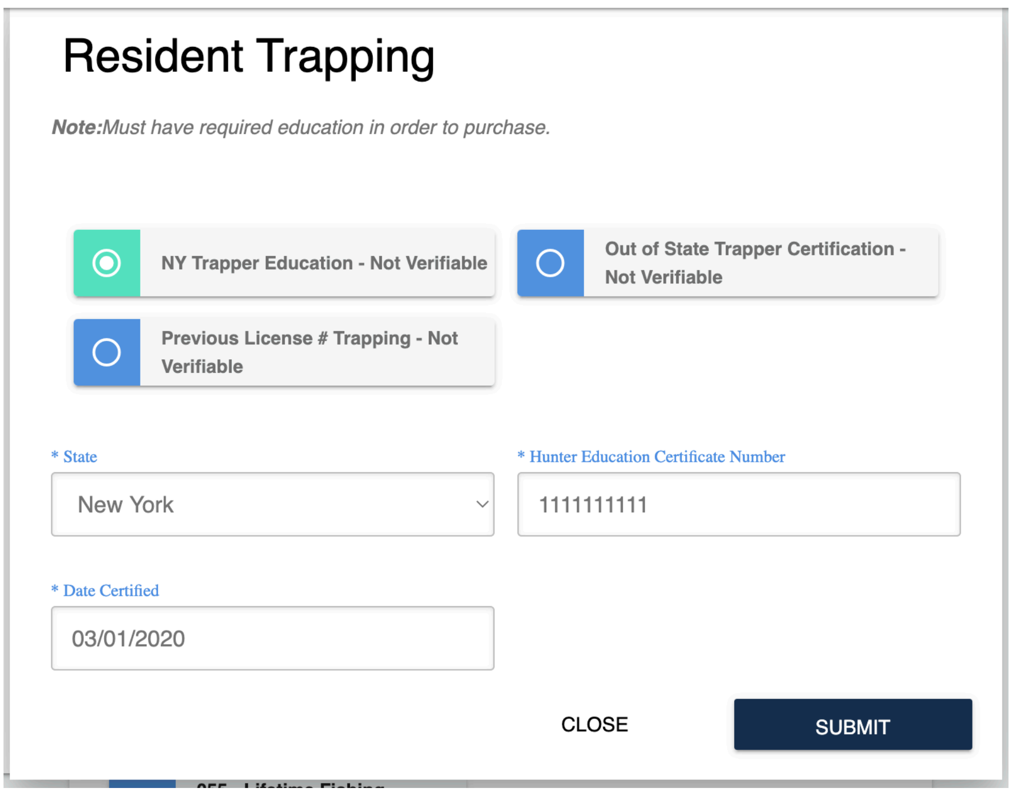


*User's Tip*

*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.




*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.

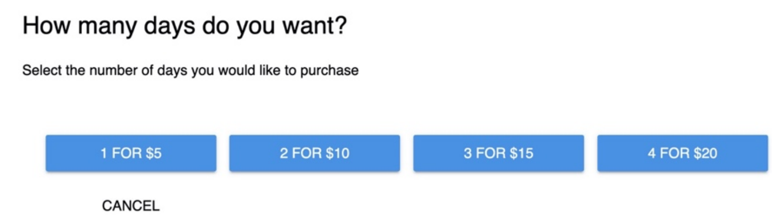
For consecutive days, do the following:

- 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.

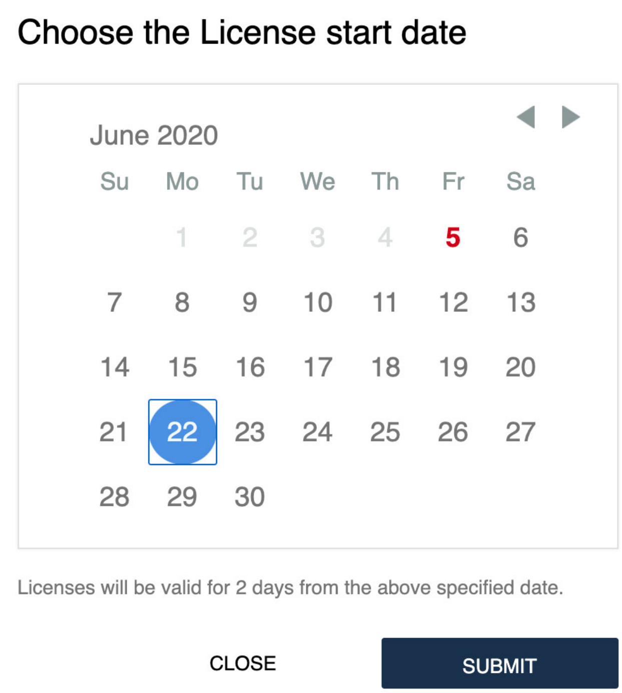
For non-consecutive days, do the following:

- 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.*




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

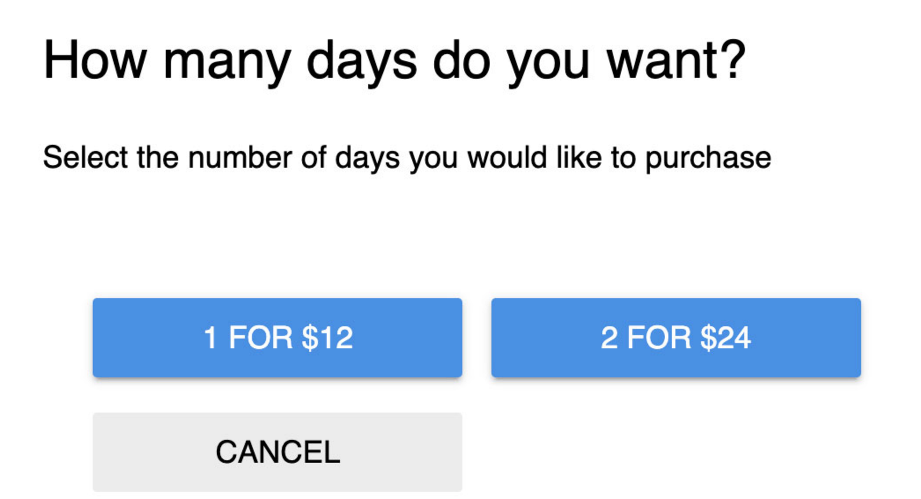



*Calendar to indicate the start date of the fishing license*

## 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**.

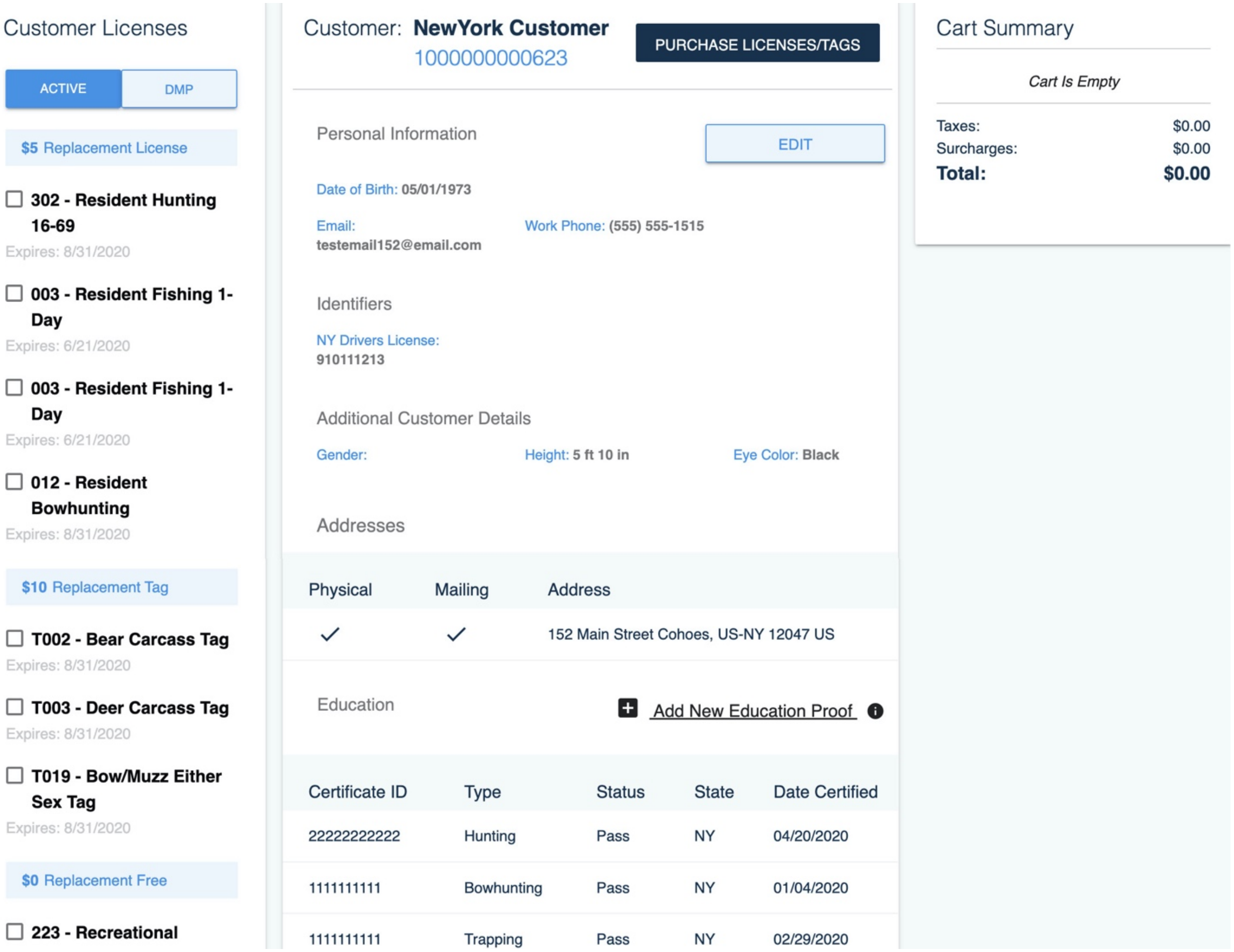



*7-day fishing license options for NYS residents: 1 for $12 and 2 for $24*

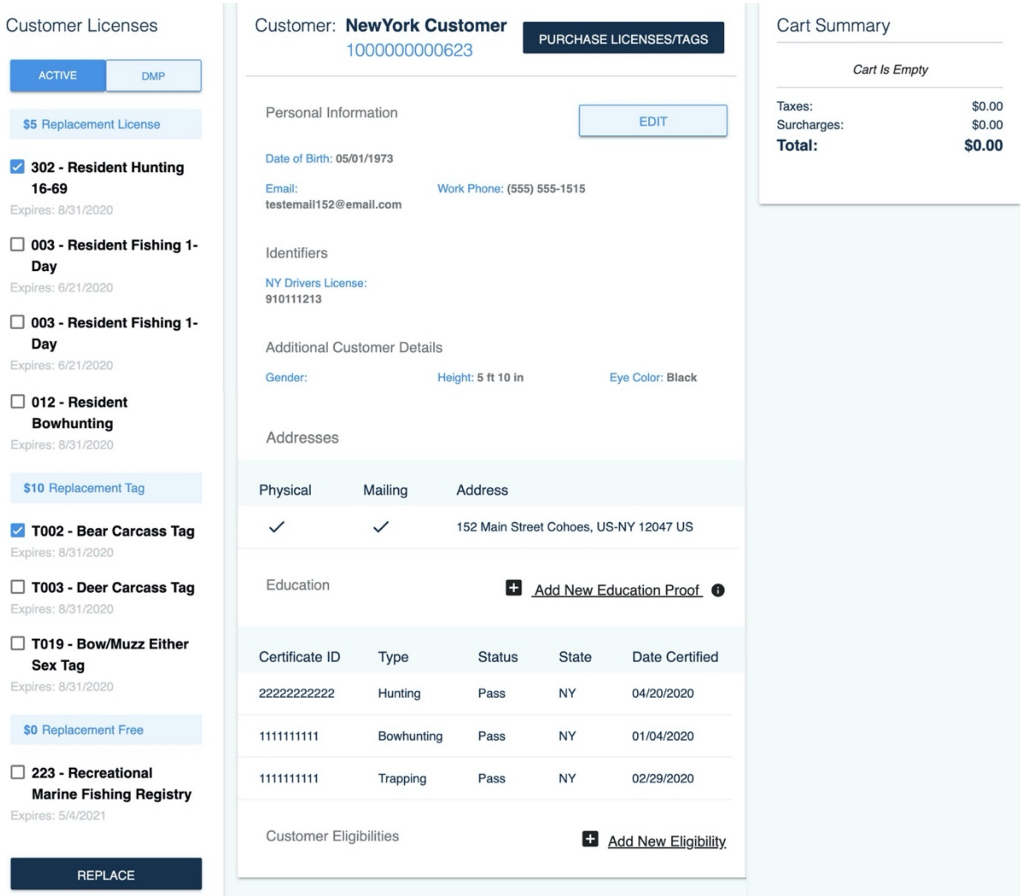
# Replacing Licenses, Carcass Tags, and Other Items

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

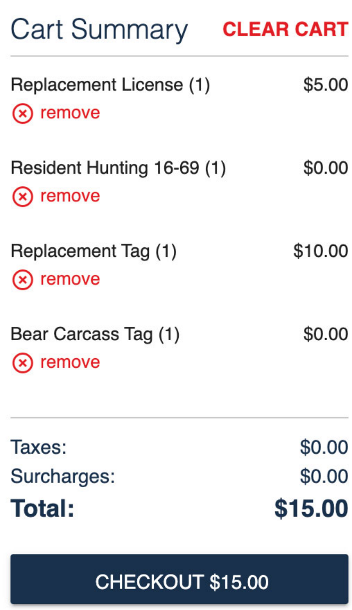
- Search for the current customer. Current active licenses will appear on the left side of the customer screen.
- Select licenses, carcass tags, or other items that need to be replaced.
- Select **Replace Licenses**. Replacement items will be added to the cart.
- Select **Checkout**.
- Complete purchase.




*Customer record with the active licenses listed on the left side*




*Selected items that customer would like to replace*




*Shopping cart summary with replacement license added*

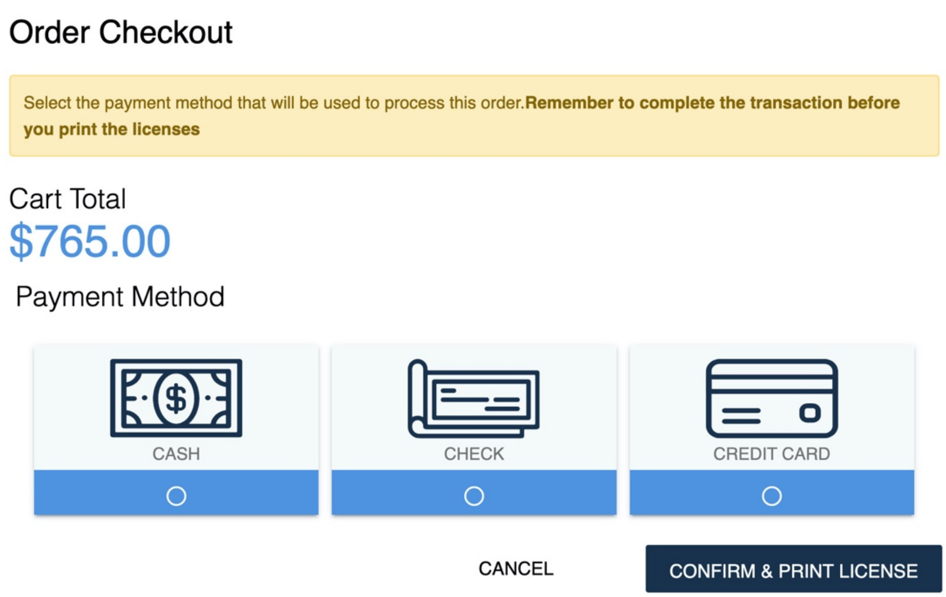
# Completing the Sales Transaction

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.




***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

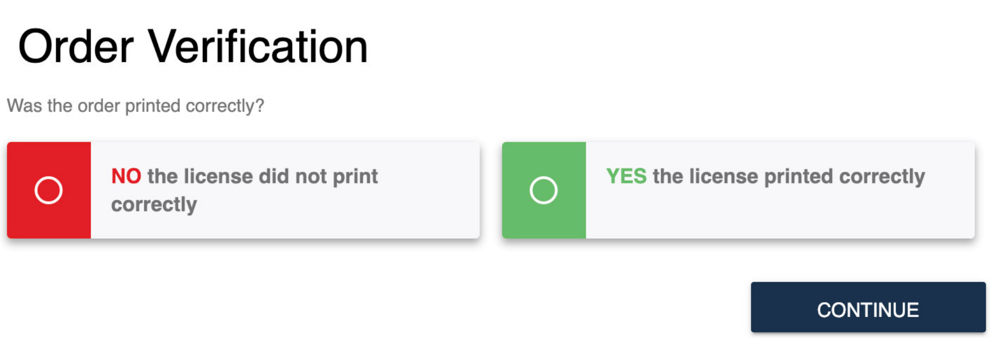
If no product is printed or if the product is not correct, select **No, the license did not print correctly**. This will take you to the Orders screen. On this screen, you can click the **Reprint icon** to reprint the product or the **Edit icon** to void the order.

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.

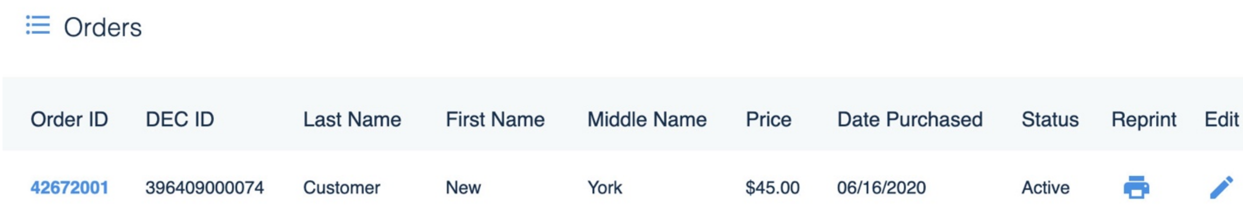
---

> ***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.*

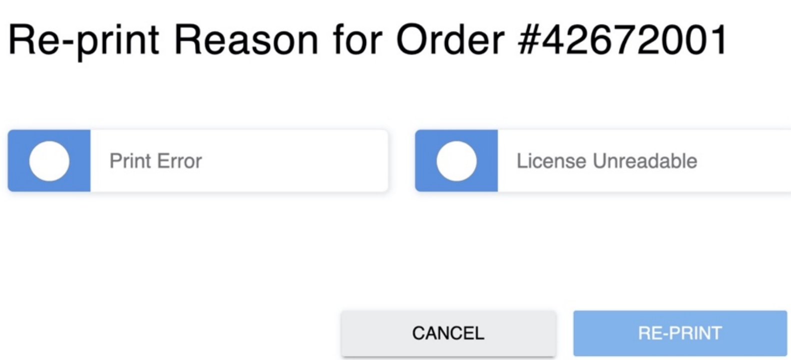
---



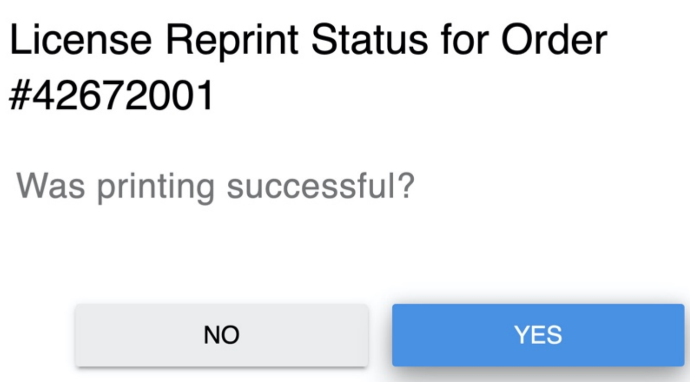

*On the Order Verification scree, click No, the license did no print correctly or Yes, the license printed correctly.*



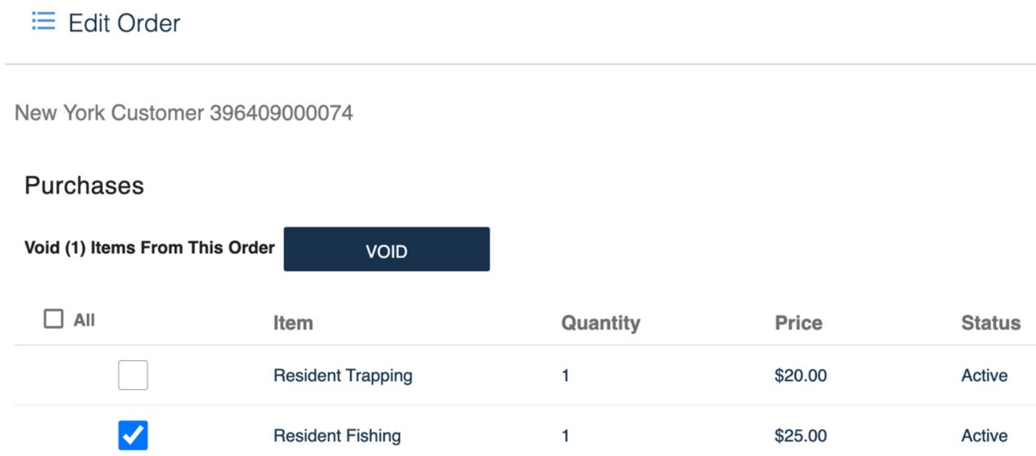

*If you select No, the license did not print correctly, you will be taken to the Orders screen. Choose the Reprint icon to reprint the product or the Edit icon to void the order.*




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




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




*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.*

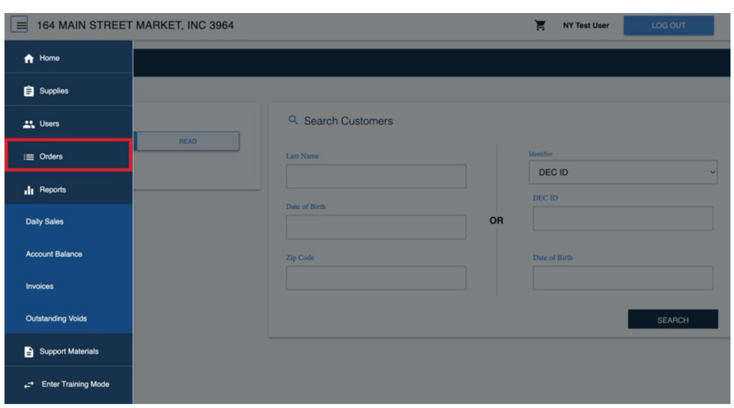
# Locating an Order to Void

Here are the guidelines for voids.

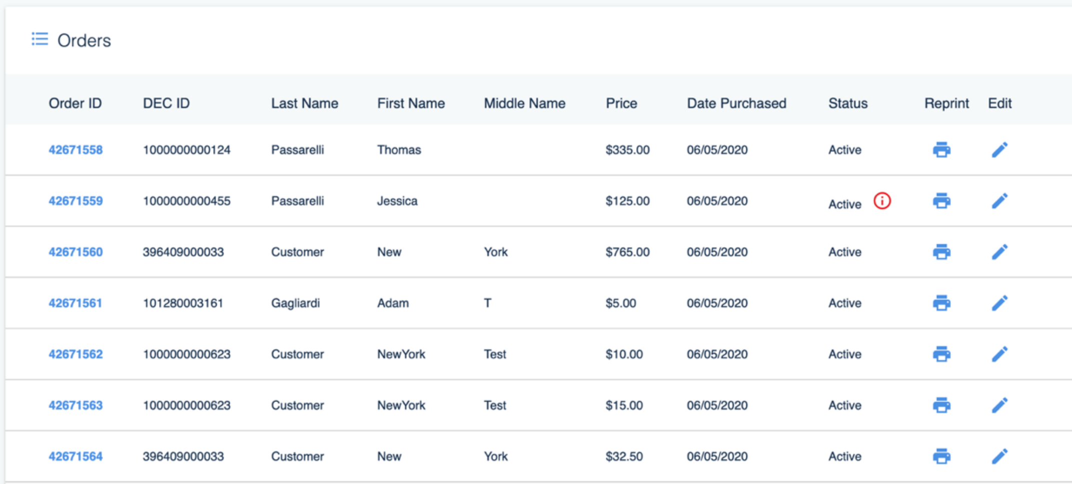
- You can void items only within 4 hours of the completion of the sale.
- You can void items sold only at your agent location within that 4-hour window.
- You cannot void the following items:
    - Lifetime Licenses
    - Deer Management Permits (DMPs)
    - Donations (Habitat Stamp, Venison Donation, 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

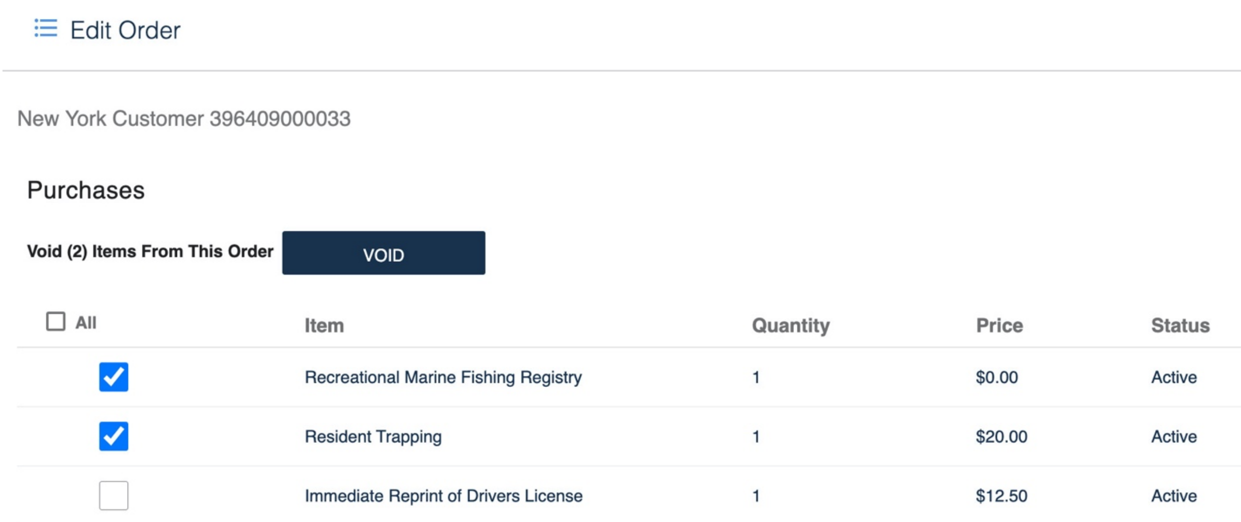
During the void process, you can void individual products or all the products from a single order.

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

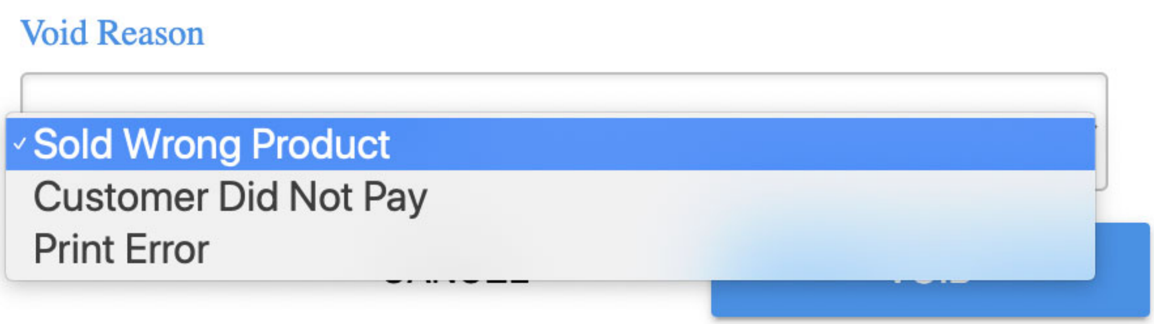
- If you need to void all products, click the **All** checkbox.

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

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




*Edit Order screen showing all the products from an order*




*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

| All | Item | Quantity | Price | Status |
|---|---|---|---|---|
| | Recreational Marine Fishing Registry | 1 | $0.00 | Voided |
| | Resident Trapping | 1 | $20.00 | Voided |
| | 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

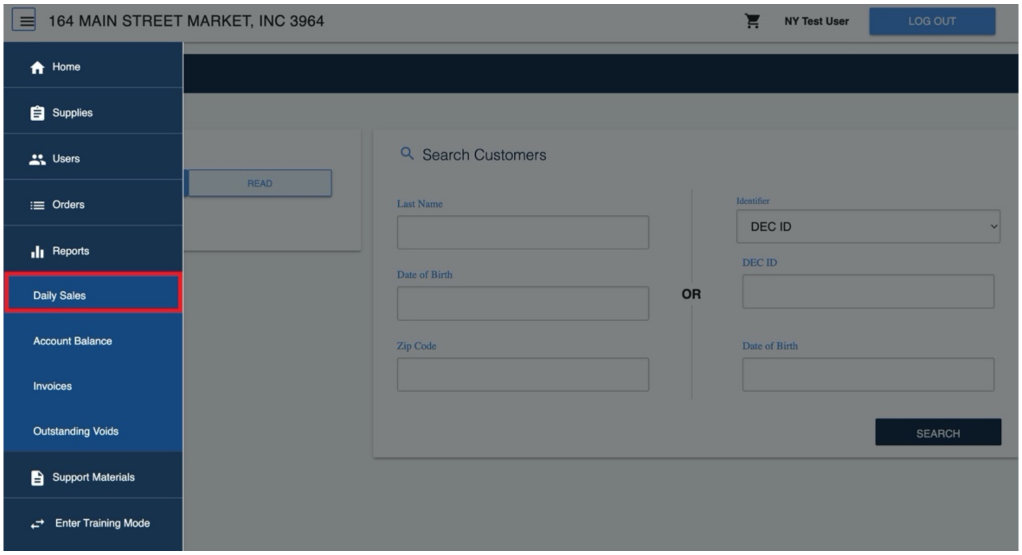
The Outstanding Voids Report lists all the outstanding voids that need to be resolved at your location. You can monitor the status of these voids through this report.

# 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**.

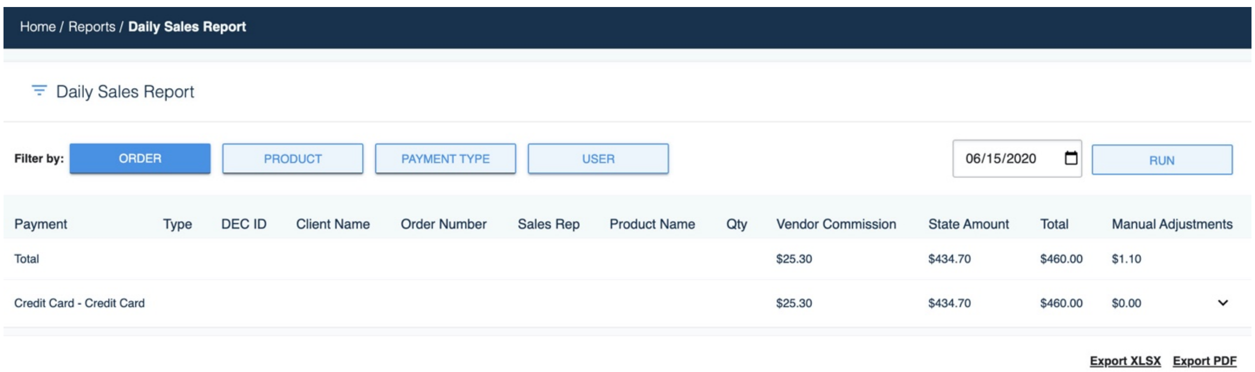
The Order view includes the following information.

- **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)

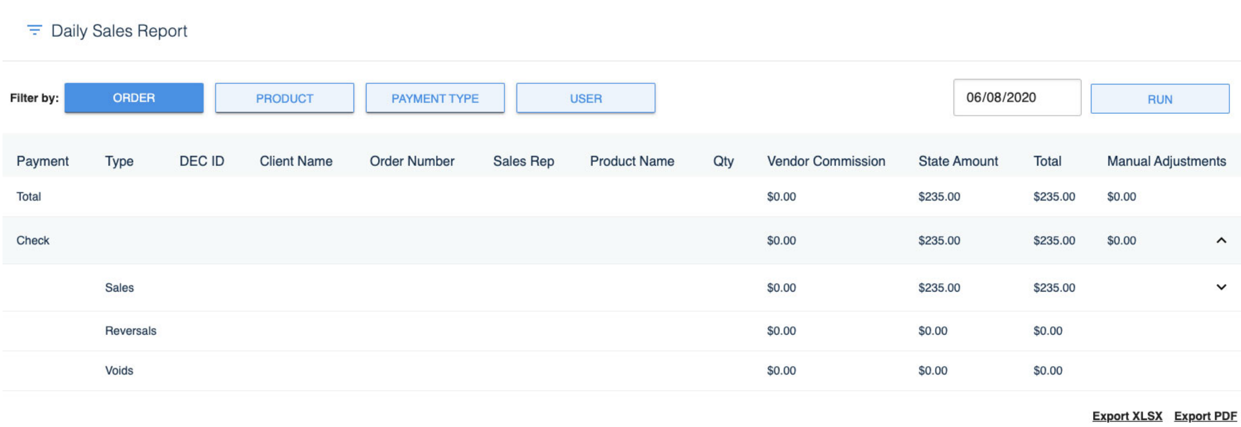
- **Manual Adjustments:** The adjustment to the vendor account made by Revenue to correct any outstanding balance issues

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.

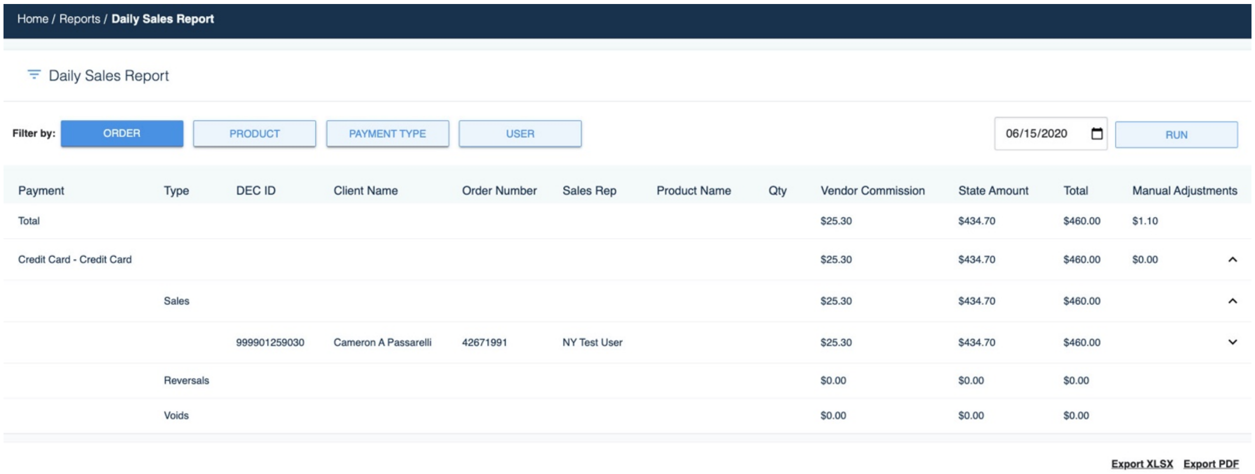
**Note:** You can export the Order view as an Excel spreadsheet (XLSX file) or a PDF to print a full report of this view. When you export the Order view, all the information, including the entries with additional details, will expand and display in the documents.



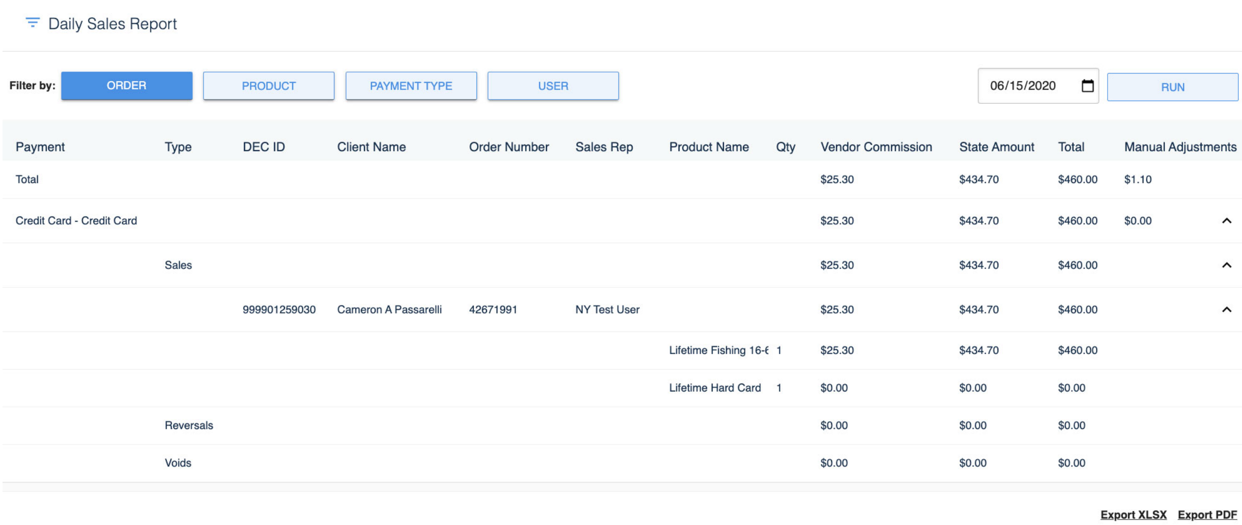

*Order view of the daily sales report, not expanded*




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




*Order view of the daily sales report, with Sales expanded*




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

# Daily Sales Report: Product View

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

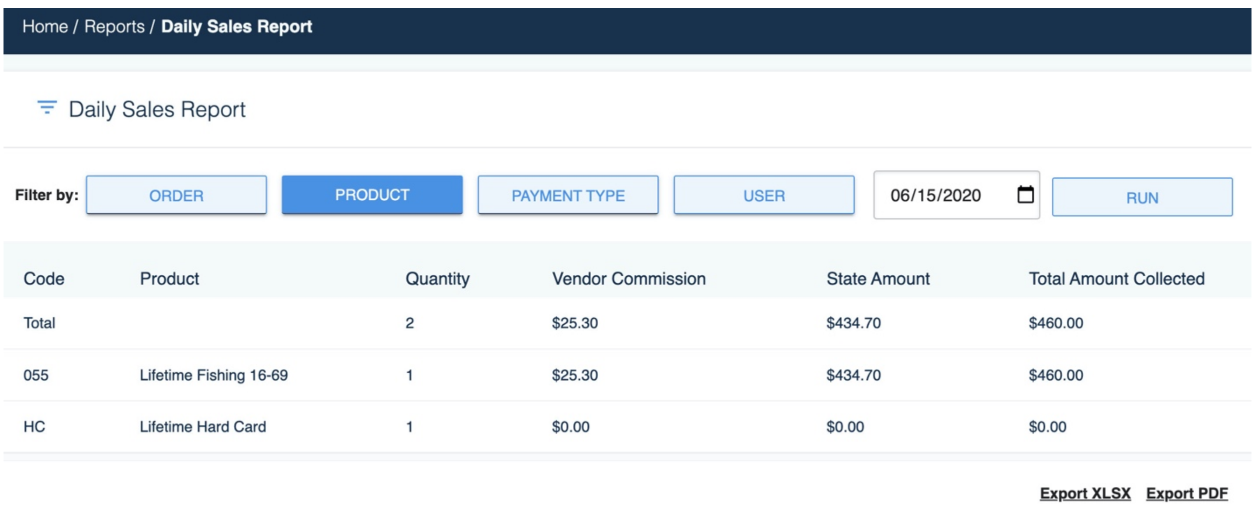
The Product view includes the following information.

- **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.




# Daily Sales Report: Payment Type View

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

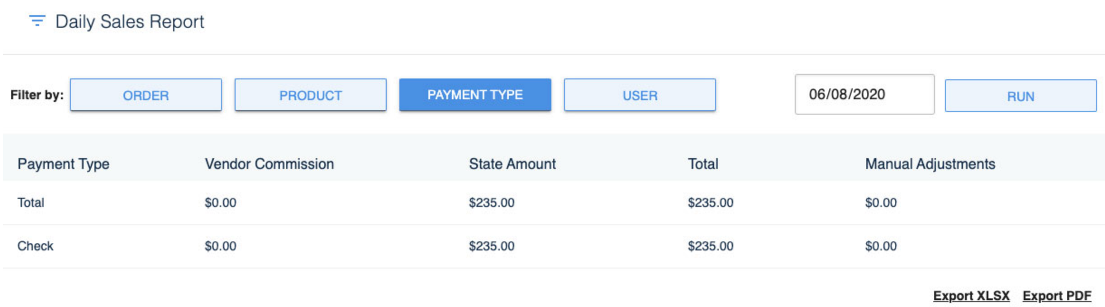
The Payment Type view includes the following information.

- **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: User (Clerk) View

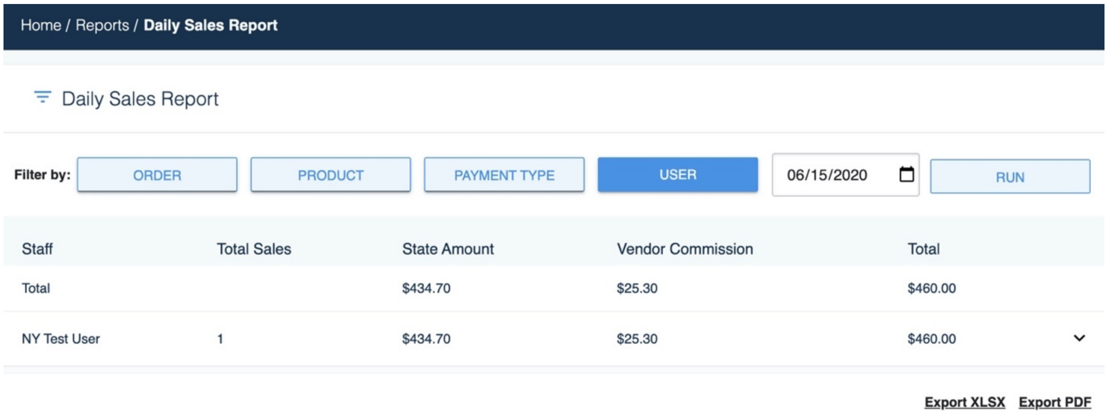
To filter the Daily Sales Report by user, click **User**.

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.




# 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.

Account Balance Report 04/09/2020 - 06/08/2020 < > LATEST TRANSACTION

| 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

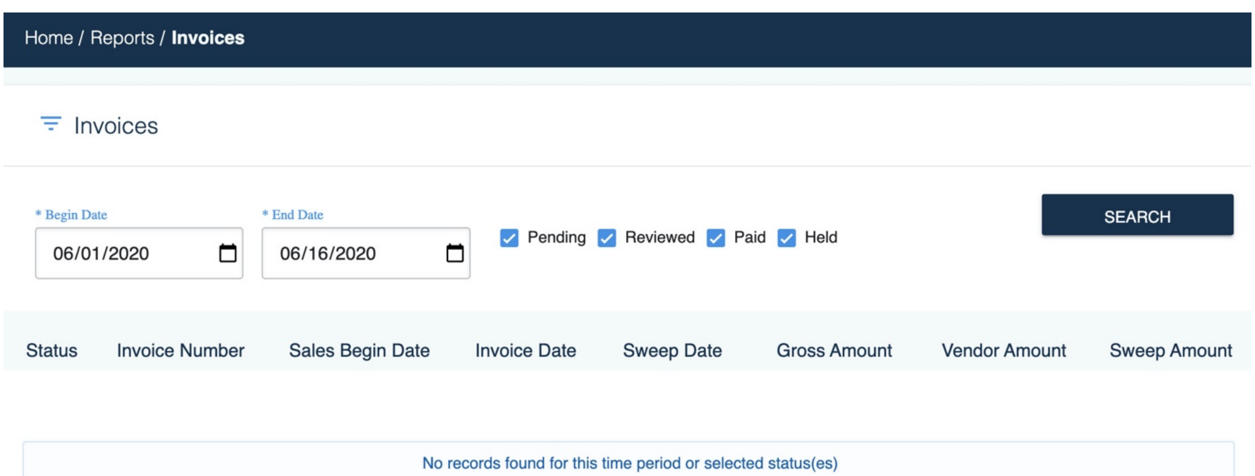
The Invoices Report lists all the invoices that have been generated by the system and emailed to your location's agent of record. To view the report, click the **Menu icon**. Expand the **Reports** submenu, and click **Invoices**.

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.




### *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

Home / **Support Materials**

Support Materials

| Title | Date of Upload | Open |
|---|---|---|
| Support Material Sample | May 12, 2020 | |
| 2019 DMP Target Odds | May 27, 2020 | |
| Carcass Tag Replacement Form | May 27, 2020 | |
| Deceased Profile/Customer Notification | May 27, 2020 | |
| Duplicate Profiles/Customer Account Notification | May 27, 2020 | |

# 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.

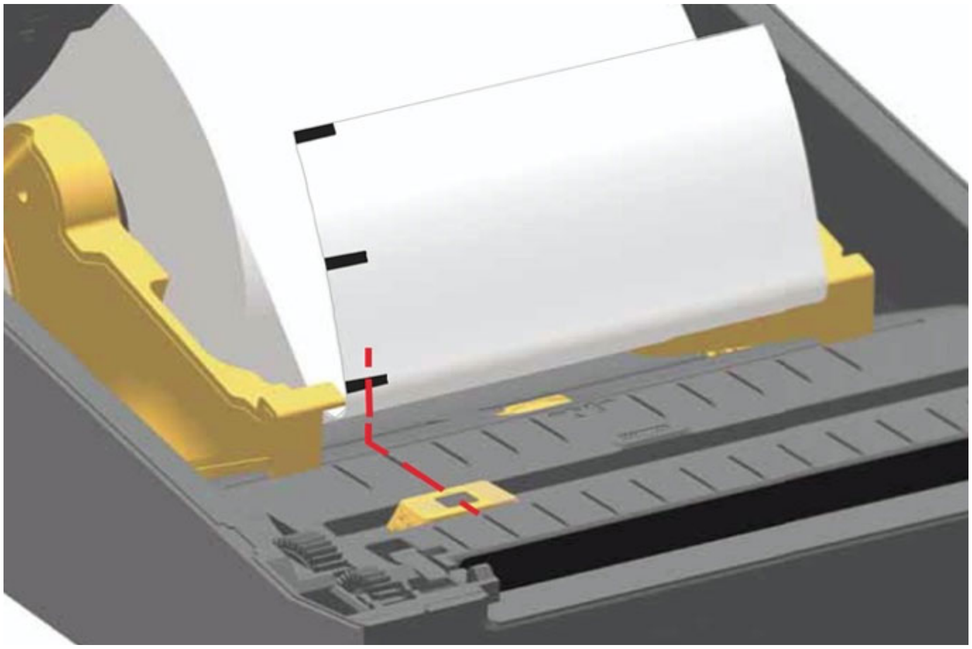
1. Open the printer.
2. Remove the empty core from the roll holders.
3. Remove the outside wrap from the new media roll to prevent contamination.
4. Place the supply media in the role holders.
5. Pull the end of the media out the front of the printer.
6. Verify the media sensor is in the correct location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

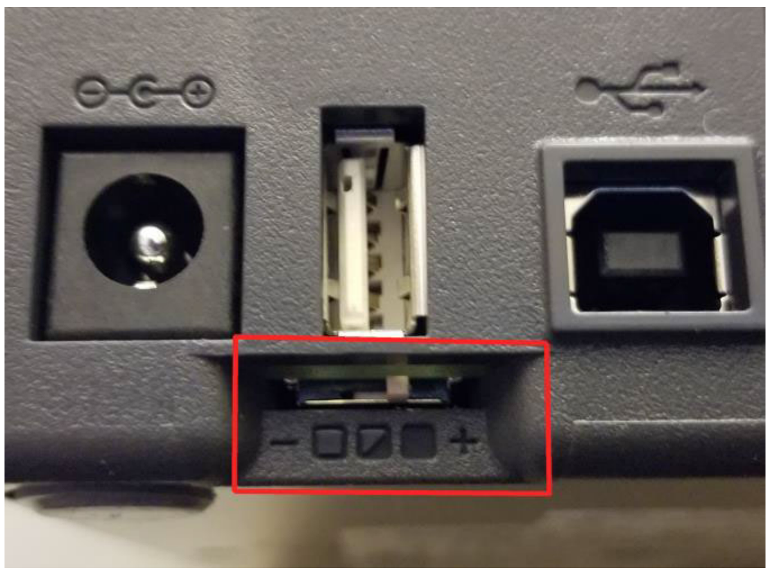
In this tutorial, you will learn how to perform routine cleaning of the printer. Before beginning, turn power off and remove all media.

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).

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