** Point of Sale – Best Practice**

**How to take payment without a Record/Application**

There is a Point of Sale fee schedule that can be built out for your agency. To take a payment without a Record/application created in the system you can open the Point of Sale page and collect a payment. However, there are many CONS to doing it this way.

**CONS:**

* Only a simple cashiering page (could also be perceived as a PRO).
* Lacks most financial functionality (can’t use exceptional payment types, can’t adjust, etc).
* Can’t use invoicing to pay later, only add a few and pay it now.
* Can’t void – only refund in full.
* Can’t use any fee formulas – if fee is not straight rate, EA or QTY etc flat fee type, it will not be displayed in the POS page fee list even though it has been configured and included in the POS fee schedule – so even copy fees have to be simply configured to use for this reason.
* Uses one single record type (10FDD-0000-#001) in financial reports (not necessarily a CON but agencies should know that essentially it is one record that they are continually adding fees to – however you cannot browse to this record in the Record list).
* Can’t add a fee comment or any other notes/information.
* Doesn’t identify to a specific module – therefore transactions can only be linked to one agency MID for CC transactions. If an agency has more than one MID, for instance one for BLD, PLN, PW – only one MID can be attached regardless of fee schedule/item assessed.

**PROS:**

* Doesn’t require a record to assess and pay a fee – so is ideal to receipt fees for copies and other standalone type fee items like maps, public records, etc.

We recommend instead of using the Point of Sale page, create and use a standing Inquiry record type – that you use for a month, or a quarter, up to you – and use this continuously to assess all POS fees. This way you will gain the benefit of all the record fee functionality missing from the POS page. You can then use all POS fee items regardless of fee formula. You can adjust, invoice, refund, etc – while you should still be thoughtful of how best to manage this ‘standing’ Inquiry record.