CREATING AND MANAGING SCHOOL COMMERCIAL ACCOUNTS

Schools that are participating in Encorp's *Recycling Heroes in School* program must be given commercial accounts. All beverage containers your redemption centre receives from these schools as well as all beverage containers that customers wish to donate to the schools must be recorded as transactions in these commercial accounts.

Here is a detailed guide on how to create and manage commercial accounts for schools. If you have any questions or need help with setting up/managing commercial accounts, you can reach Encorp's operations team at **operations@encorpatl.ca** or by calling the main line at **1-877-389-7320** (press 1 to be directed to the help options for RCs).

Creating an Account



1. Press the "Commercial Accounts" button.

Acc Acc Na	count Info count # me	29 School Name					
Pho Coi	one ntact	Teacher's name		Search	ctive accounts	i E	8
		Name	Phone	Contact	Status		Ţ
19	Dogs are gr	eat!		Dogs	Active	1	
25	Habitat for	Humanity		John Windsor	Active	1	
26	brand new	account		BNA	Active	1	
27	megan gree	n		megan	Active	1	
28	École Franç	ois-Xavier-Daigle		Nadia Cormier	Active	1	
		ne 🛛 🕹		Teacher's name	Active	1	



- 2. Press the "Add" button.
- **3.** Fill in the contact information for the account. The only required fields are the account name and contact name. Press "Submit" when finished.

4. Get the school's account number from the left column in the accounts grid and provide that number to the contact from the school. In this example, the school's account number is 29.



Adding a Transaction to the Account



1. Begin a transaction as normal, then press the "Select Account" button.

Account # 9 Écol 10 Delu 11 Tide	Name e Mathieu-Martin	Phone	Contact	
9 Écol 10 Delu 11 Tide	e Mathieu-Martin		Jonnaer	
10 Delu 11 Tide			PL	^
11 Tide	ixe Mountain Rd.	555555555	Tom Lilly	
	& Boar Brewing		Chad	
12 Laur	ndromat Bar	555555555	Marky	
13 Not	re Dame de Parkton		Ben	
15 test			test	
16 New	/ User	555555556	test	
17 Tim'	s Resto	555555555	Tim Denver	
19 Dog	s are great!		Dogs	
25 Hab	itat for Humanity		John Windsor	
26 brar	id new account		BNA	
27 meg	an green		megan	
28 Écol	e François-Xavier-Daigle		Nadia Cormier	
a Schu			Teacher's name	

2. Click on the correct account from the list, then press the "Select" button.



3. You should now see the account name in the box.



4. Continue the transaction as normal. When finishing the transaction, there will be a pop-up asking if you would like to add the transaction to the account you selected. Press "Yes".

Paying Out the Account

			⊘ 🖵	
Lemo User Cash Register Station				
Countin	Cash Register	Inventory		
Counting	Casil Register	inventory		
Commarc				
Account	Reporting	Administration		

1. Press the "Commercial Accounts" button.

Account Transac	tions Acco	unt Adjustment	Account Details	Account Not	tes		
Transaction #	Operatio	n	Туре	Amount	Running Balance	Date	_
73	Credit	Counting Trans	saction	21.00	21.00	2025-01-24 10:03:12	ৃ
		Balance:					
Email Re	port	Balance: \$21.00					
Email Re	port	Balance: \$21.00 Select Payn	nent Method:				

3. Select the Payment Method you would like to use to pay out the school. If you choose the "Cheque" or "E-Transfer" option, you must finish the transaction outside the *EnSys-Connex* POS system.

Aco	count # me	29 School Name		Search		
Ph Co	one ntact	Teacher's name		Show ina	ctive accounts	
#		Name	Phone	Contact	Status	
19	Dogs are g	reat!		Dogs	Active	1
25	Habitat for	Humanity		John Windsor	Active	1
26	brand new	account		BNA	Active	1
27	megan gre	en		megan	Active	1
28	École Franç	ois-Xavier-Daigle		Nadia Cormier	Active	
29	School Nar	ne		Teacher's name	Active	

2. Find the correct account in the list, then press the Manage Account button (pencil icon) to the right of the account name.

Please arrange with each school when and how you will be paying them their deposit refunds.

Note: A receipt will be printed when you pay out the account. Give the receipt to the school along with its payment.