User Manual

Table of Contents

Getting Started

Notes:
The term Products and Items are nearly interchangeable in this document. This help document is for all POS versions. You may see references to Business, Restaurant, Bookstore, General Retail or Classic Retail versions. That information will only apply to that version.

The first window when starting the software is the Main Control. It has these options:

      Sales – opens the Sales window to enter sales transactions.

      Manager – opens the Manager Control window to enter new products, settings, and view reports.

      Website – takes you to our website.

      Help – opens the help window.

      Time Clock – opens the time clock window where employee's can log in.

      Kitchen (restaurant only) – opens the kitchen monitor window where kitchen staff can see what needs to be cooked.

      Bar (restaurants only) – open the bar monitor where the bar staff can see what needs to be made.

The "Setup Starter" window under the Settings menu in the Managers Control window has links to the basic information to get started. Such as adding new products, tax rate, employee names, payment methods, security and selecting a receipt printer.

Region and Language

The software will use the currency that is enabled in Windows. You can select the date format and other regional options.

To set your regional settings:
Windows XP: open the Windows Control Panel / Regional and Language Options. Change the settings to your country.

Windows 7: open the Windows Control Panel / Clock, Language and Region / Region and Language. Change the settings to your country.

Windows 10: open the Settings. Click on Time & Language. Click on Additional date, time, & regional settings. Click on Change location. The Location can be changed here and the Format for data and time. Click on the Formats tab and then click on the Additional settings... to change the currency format.

Company Logo

You can have your companies logo printed on your receipts by putting an
image file in the Pics folder. To find the Pics folder open the Help
window and press the Database link. A window will open showing
different folders and files. Put the logo file inside the Pics folder.
The file name of the image must be logo.jpg or logo.gif. This image
must be in each computer that will print receipts. The logo will be
printed on all your receipts. However, some print drivers, like the
Generic Text Only driver, cannot print graphics. So, you must have a
graphical print driver. There are no settings. The logo will be
printed automatically. Note, the software will not scale the image.
You may need to re-size the image to fit on the receipts.

You can also have a background image for the computer screen. This
file must be called BG.jpg or BG.gif.

Stop the program

To exit the program select the File | Exit menu from the sales screen.
Note: if you cannot see the menu bar at the top of the window, select
the Options button. This is on the left side of the window and looks
like 3 boxes with 2 check marks. This will open the Options window
where you can select the Close Sales button. This will close the Sales
window and smaller Main Control window will be displayed. Now use the
Exit button. The program will ask one time a day if you want to do a
backup.

Different Versions

General Retail Interface (Buttons)

 - This interface is best suited for quick and repetitive sales entry.
 - The interface works with a barcode scanner, touch screen or keyboard
and mouse.
 - You want to select your products by their pictures/description.
 - If you have a touch screen or want to use the mouse to select
products.
 - This interface is used in the General Retail & Restaurant versions.

Classic Retail Interface

 - This style is the simplest interface for use with a scanner.
 - If you have thousands of products or hundreds of product categories.
 - This style is used in the Bookstore & Classic Retail versions.

Business Interface

 - This style is best suited for maximum control and product searches.
 - If you have thousands of products or hundreds of product categories.
 - Excellent choice for business-to-business sales.
 - This style is only used in the Business version.

Entering Departments or Menus

From the Managers window select the Products/Department option in the toolbar. Or, select Products/Menu in the restaurant version. Enter a new department name in the Description box and press the Save button. Or, select an existing name and change the description and press the Save button. Department buttons appear along the top of the sales screen with the categories along the left side.

A department will not appear in the sales screen until a product is using it. When creating a new product select the Department and Category. That product will automatically be shown in sales screen when it's department and category button are pressed.

The order of the department/menu buttons in the sales window can be rearranged by using the Manager / Products / Sort.

Entering Categories

Select the "Main/Products/Categories" option on the toolbar. Enter new categories or change existing category information. All category names will appear on the left side of the sales screen. Departments are along the top (General Retail / Restaurant). Click on a Department button to see the associated Categories.

A category will not appear in the sales screen until a product is using it.

Each category can have a picture that will be displayed on the sales screen. The picture file must be placed in the Pics folder.

The order of the category buttons in the sales window can be rearranged by using the Manager / Products / Sort.

Entering Products

Select the "Products/Product Control" option on the toolbar. Choose the "New" icon and then press the Full Edit button. Enter in as much or little information as you wish. You must "SAVE" the product information before exiting this screen.
A complete explanation is outlined in the New Product section.
Note: We recommend entering the following fields as a minimum: Item#, Description, Retail Price, Department, Category, Tax, and Printers.

In the Products Control window under the Tools menu are shortcuts to creating products with relationships. For example, products with case and single quantities can be linked.

Settings

General

Select the "Manager/Settings/General" option on the toolbar. There are
many different setting that will control how the program works. You
will want to study this section very carefully.

Security

Select the "Settings/Security" option on the toolbar. Most functions
can be assigned a security level and each employee is assigned a
security level. This will allow fine control over which functions each
employee can use.

Taxes

Set up your tax screen by selecting "Settings/Tax & Precision" on the
toolbar. Set the values for GST/PST etc. Select the check box to have
taxes shown separately. The rounding box is usually set to .01 cents.
Select taxes being added or included in the overall price of the
product.

There can be up to 3 tax rates or VAT's. To read more about this open
the help on Tax & Precision.

Entering Employees

Select the "Settings/Employee" menu option. Input or change employee
information from this screen. Provide a password if required by your
company. Select a job for the employee such as Cashier or
Staff/waiter. Each employee will need to be assigned a security level.
This will determine which functions in the security window the employee
will be allowed to access.

Entering Customers

Select the "Customers/Customer Control" option on the toolbar. The
search screen is displayed; from here you can find/edit existing
customers using multiple search criteria. To enter a new customer,
just click the "New" button and enter as much or little information as
your company collects. Your customer database is now active.

Receipt Messages

Select the "Settings/Receipt Messages" option on the toolbar. You can
enter as little or as much information in these fields as you wish.
Note: Depending on "font size & style" we recommend keeping the overall
text messages to around 30 characters wide.
Note: We also recommend that each company use one of these message
areas to display their GST# or other required business information.

Payment Methods

Select the "Settings/Payment Methods" option on the toolbar. Choose only the payment types that apply to your company. If you need to add one like "Debit" simply choose the "Terminology" button and change a currently set value listed in the "Payment Methods" screen to the word "Debit". This will update the
Payment Methods screen and allow you to select the newly entered payment. Note: you cannot change the function of the payment types. For example to add a 'Debit' card option change the name of a CC (credit card) type. Do not rename a check, cash or other type of payment to a credit card.

Make A Sale

From the sales screen, add any item or items, which are immediately displayed in the "Sales Window". Then to complete the sale, select the "F12 Finish" icon, and choose your payment type and/or cash received. Press OK to continue. The sale is finalized, and a change window will be displayed (if this option has been selected under "General | Settings") to advise the cashier how much change to give the customer. There is also an option to print a receipt at this point if not done automatically. Press the OK button to close the window. A new sale screen will be selected to continue with the next customer.

Discounts

A discount can be applied to an item, entire sale, by customer or to club members. Since there are many types of discounts, a complete explanation is outlined in the Discount sections.

1) Item Discount:
After capturing an item into the "Sales Window" press the Edit button (pencil) or select the item with a single click from the mouse (or touch it, if using a touch screen monitor). An "Edit Product" screen is displayed. Simply change the "Discount%" value to whatever percentage you wish, and the item will sell for the "Normal Retail Price" minus the "Discount" you just entered. For example enter 10 for a 10 percent discount on the item.

2) Entire Sale Discount:
After capturing several items, press the Options icon and select the "Discount" icon. Enter whatever percentage you wish to apply to the entire sale.

3) Customer Discounts:
From the toolbar select "Customers/Customer Discount Levels". This is intended to be a "Blanket" discount for customers. You can identify a percentage for each level of customer, which will show as a discount % on each purchase. Each customer can be set to a discount level.

4) Club Discounts:

Customers can be assigned to receive the club discounts or a single sale can be given the Club discounts. The discounts can be set in the 'Settings | Club Discount' menu. This club option is associated with "Categories"; so all products under that specific category will be discounted.

Note: A discount line will only be displayed on the sales screen or printed on the receipt when a discount is used.

Backup Strategies

When you exit from the POS program, the system will prompt you to do a backup. The system backup should only be done once a day at the end, as the system will **not** give a second prompt on the same day if a backup has been completed.
We also recommend that the "EZP Backup" file be backed up to disk after the daily system POS backup has been completed. To find the "ezp Backup" folder open the Help window and press the Backup button.

Anytime Backups
- From the toolbar, select "File/Backup Files". Make sure the files are saved to the "EZP Backup" folder. If you choose to do this option, the "Nightly" prompt will not show up at days end.

Off-Site Backup
- We recommend storing a copy of the "EZP Backup" folder off-site daily.
This is just in case your computer encounters hard drive problems, and the data is un-recoverable. Just drag and drop a copy of the "EZP Backup" folder to a storage key, or the CD Burner drive (through Windows Explorer). Rename the folder to today's date, and complete the copy procedure.

General Retail / Restaurant

The General Retail and Restaurant versions have an interface where the functions can be customized. Use the Manager/Tools/Arrange Function buttons to select the functions you want on the sales screen. The number of Category columns can be set in the Manager/Settings/General.

The Departments/Menus, Categories and products are built automatically from the products. Any product without a Department/Menu or Category will not be shown on the sales screen.

Department or Menu

The buttons at the top are Departments or Menus (restaurants). Click on a department button to show all the categories in that department. The department buttons are generated automatically from the product information. The order, in which Departments appear, can be changed with the Manager/Products/Sort function. Departments that are not used by any product are not shown.

Category

The buttons on the left side are Categories. Click on a Category to show the first 24 products in this category. Click again to see the next 24 products. The Category buttons are generated automatically from the product information. The order, in which categories appear, can be changed with the Manager/Products/Sort function. Categories that are not used by any product are not listed.

The "Up" and "Down" arrow buttons (left side) scroll through the list of Categories if there are more Categories than can be shown. The number of visible categories can be changed in the Settings | General menu (Category Columns).

"Keyboard or Scan Item#"
An item# or UPC can be scanned or typed. If the item# exist it will be added to the sale. If the item# doesn't exist, the Quick Add window will open to allow the product information to be added to the database. The Quick Add can be disabled in the Manager/Settings/General menu.

"Edit Items"
Click on an item in the blue sales list or use the up and down arrows (right side of item list) and click on the Edit button to open the item edit window. The Quantity, Description, Discount% and Price may be changed. The changes are only for this sale and will not affect the product information in later sales.

Handling / Tips / Gratuity

The Handling and Tip charges are added after taxes. This amount is not taxed. Restaurants can add the tip after the sale has been completed.

Choose Your Functions

There are many different functions that you can pick from to put on
your sales screen. Use the Manager/Tools/Arrange Functions Buttons to
select which function you want. Each function will be assigned to a
Function key F2-F11. F1 is always the help window.

Control-R will open the z-out window.

These and many more functions are described in the Functions section.

Navigate Window

The Navigate window (green) shows all recent sales and their status.
View sales by clicking on a sale line. If the sale is finished all the
fields will be read only. If the sale is unfinished you can make
changes as normal.

Item List

The Item List (blue) shows all the products entered into the sale.

Bookstore & Classic Retail

Overview

This interface is designed for use with barcode scanners and is intended to be the simplest cashier interface.

Left & Right Arrows

The left and right arrows will show the previous or next sale. When navigating to a new sale, if the sale items are grayed out, this sale has been finished. To change a Finished sale, use the Sales/Edit This Sale function.

Business

Navigate

The Navigate window shows all recent sales and their status. View sales by clicking on a sale line. If the sale is finished all the fields will be read only. If the sale is unfinished you can make changes as normal.

The Navigate window will also control the "Payment History Window" and "Customer History Window".

Item# or UPC

The first product field is the product ID or SKU. Type, scan or use the F4- Get Product button to enter the Item#. The rest of the product information will be entered.

Qty

Enter the number of items sold in the field.

Description

This field shows the item's description, which can be edited.

Sale%

Enter a discount percentage in this field (i.e. 10 for 10%). This field may be entered automatically with the products Sale% field when a (Sale(is active. To activate a sale open the menu Settings | Sale Dates and set the dates. When a sale is made within the sale dates, the Sale% field will automatically be entered with the valued in the Products %Sale field.

Price

This is the price of the product.

Extended

For taxed products, the Extended field can show a 'T'. This option is in Settings | Printer Options menu.

Discount%

Discount the entire sale by a percentage.

The Discount field holds a percentage discount for the entire order before taxes are taken out.
Discount% can be automatically entered by the 'Auto Discount%' in the 'Customer' options.

Subtotal

The Subtotal fields show the combined totals of the taxed and untaxed subtotals.

Tax

The Tax field shows the combined total for all taxes.

Handling

The Handling charges are added after taxes. This amount is not taxed.

Functions

Options

Opens a window with many different pre-defined function buttons. There are the Password, Time Clock, Recipe, Hide (menu bar), Close Sales (window), Tax Exempt, Club Discount and the On Screen Keyboard.

Club

Check the Club box to give this sale the Club discount. The discounts can be set in the Managers/Settings/Club Discount menu.

Toolbars

Employee toolbar.   Manager toolbar.
Toolbars can hold up to 10 functions and can be configured to any functions you want. Open the Tools / Arrange Function Buttons in the Manager's window to choose the functions you want.

These toolbars are only available in the General Retail, Restaurant, Bookstore and Classic Retail versions.

Find Product

Press the   button with the magnifier to find a product and have it added to the sale. The product will be entered in the next empty line. Or, if the product is already in the sale, the quantity will be incremented. This feature can be turned off in the Settings / General menu "One Item Per Line".

How to Find a Product

- Click on the Find Product button.
- Type part of a description or item# of the product.
- A list of products that match your description will be listed.
- Click on the product to add it to the sale. Or press the enter key if only one product is listed.

Option:
- Click on the button 'Advanced'.
- Type in a description of the product Item#, Description, Vendor or select a Category.
- Click on the button 'Search'.
- A list of products that match your description will be listed.
- Click on the Item# in the list.
- That item will be added to the current sale.

Cashier

Press the Cashier button to log in a cashier. The next time this button is pressed a window will open ask if you want to log off the cashier. The cashier will remain logged in until logged out. Cashiers can be set to auto log out after each sale. This option may be chosen in the Settings/General window "Cashier must log in each sale".

Cashiers can be required to enter a password for log in. Open the Manager/Settings/Security window and turn Security on. A Master Password will be required first. Check the box "Require employee's use password and uncheck "Don't require TimeClock login".

Employees must be added in the Manager/Settings/Employee window. A cashier is an employee with a job title of Cashier and Security Level of Cashier. Other employees will not be shown in the cashier login window.

Using a cashier is optional but can be made mandatory in the Settings/General menu. The z-out report can be performed automatically when a cashier logs out. Turn this option on in the Settings/General.

An optional cashier report detailing the sales made during their login time will be presented. This option can be changed in the Settings/ General menu

To review: to use cashiers, create an employee record with a Security Level of at least Cashier. Under the Payroll tab select a Job with a Status that includes Cashier. In the Settings/General you can require cashiers to log in before starting a new sale.

Sales Staff / Waiter / Stylist

Press this button to select a Sales Staff, Waiter or Stylist depending your software version. This is optional but can be made mandatory in the Settings/General menu.

Staff can have a password that is required to log in. Staff can be added in the Settings/Employee menu. A Staff is an employee with a job title of Staff and Security Level of Staff. Other employees will not be shown in the Staff or Waiter window.

Also, a Staff (Stylist) can be assigned to a single item in a sale. Use the Toolbox / >>Stylist to assigning the Stylist to that item. This can be used when calculating commission.

Customer Info

Pressing the Customer icon opens the customer window. Type part of a name or ID# in the customer field and the software will try to match the name with a customer already in the database. If only one is found

press the tab or enter to key.

If more than one is found click on the desired customer. If a match is not found you can enter a new customer by pressing the New button.

Finish Sale

The Finish button will check that everything is correct, save the sales information and deduct from inventory all the sold products. This will open the Payment Methods window unless it's turned off.

Prints a receipt and saves the sales transaction. Up to two receipts can be printed, depending on the Settings option in Settings | Printer & Equipment menu.

New

Press the New button to create a new empty sale

Edit Item

Click on a product in the item list or use the up and down arrows and then press the Edit button to open the item edit window. The Quantity, Description, Discount% and Price may be changed. The changes are only for this sale and will not affect product information in later sales.

Modifiers that are not connected to this product can also be added.

Item Toolbox

A collection of tools to change the selected item.

Discount

Discount the selected item by a percentage. A window will open to select the discount percentage. Enter 5 for 5%.

Modifier

Opens the modifier window for the current selected item. The product must have modifiers attached to the product. If you want to attach a modifier use the Edit Item button first.

The modifier button will ask the cashier to re-choose the modifier selection of the selected item. Each product can have modifiers. When a product is added to a sale the modifiers automatically ask the cashier to choose from a selection. Use the Modifier button to change the selection.

Add-ons

Add-ons offer the ability to present a list of items that can be added onto another product. Example: adding additional cheese and toppings to a pizza. See Add-ons in the Product Control section for a complete description. This function allows you to change the selection of Add-on choices. For example, the customer wants to change the pizza toppings they made at first.

Delete Item

The delete button will remove the selected item(s) in the item list.

Price Change

Change the selling price of the selected item.

Long Description / Kitchen Notes

Add additional information to an item in the sales list. This information can be printed on the sales receipt or kitchen notes. For example, 'Hold the Onions'.

Split Item

(Restaurant only) Split or share an item with multiple customers.

Product Information

Shows detailed product information on the selected item.

Change Size

Each product in the sales list can be changed to the next size bigger or smaller. To use this function, first open a product in the Product Control / Product Edit window. Press the Functions Tab and then use the "Next Bigger" or "Next Smaller" buttons. A window will

open to define what the next size is. Do this for each product that
has a bigger or smaller size. During a sale if you want to change the
size first highlight the item in the sales list and then click on the
Change Size button. A window will open for you to select Bigger,
Smaller or Cancel.

Packages

Packages are sold for future use. For example, you can sell a
package of 10 services. The customer pays for the package now and
can use the service now and later. Any product can be made a
package on the fly at the register. Use the function Make Package

under the Item Toolbox   .
Or, check the Make Package option when creating the item. This will
make the item a package automatically when sold.

To buy or use a package a customer must be selected for the sale. To
redeem or use a package item go to the menu Tools / Use Package. Or,
there is also a function button Use Package.

Packages will have a prefix of P- or Use- in front of the description
in the sales window. P- is for Package and Use- is an item from the
package being used/redeemed. A package item can be redeemed in the
same sale as the package is being purchased.

Quantity

Change the selling quantity of the selected item.

Discount Sale

Discount Entire Purchase.
After capturing several items, enter a discount percentage you wish to
apply to the entire sale.
Note: A discount will only be displayed on sales where a discount has
been used.

Up & Down Arrows

The arrows will select the next higher or lower item in a
sales list.

Quick Add

Quick Add allows new products to be entered on the fly during a
sale entry.

The Quick Add window opens automatically when an unknown Item# or UPC
is entered. This window allows all the fields to be entered and the new
product created. This option can be turned on/off in the Settings |
General menu. Or, the Amazon window can alternately open.

Amazon

The Amazon button will search the Amazon website for products which
can be loaded into the database. This window can be set to open
automatically when a new product code is scanned.

Print Copy

Prints a copy of this sale.

Open Drawer

Open the drawer now. This function can be restricted by a password
in menu Settings | General. Set the password in Settings | Security.

Clear Order

This will clear a Sale if it hasn't been 'Finished'.

Bad Checks

Will open a window to search for Bad Checks.

TimeClock

The TimeClock button will allow employees to log-in or log-out.
Edit a TimeClock entry
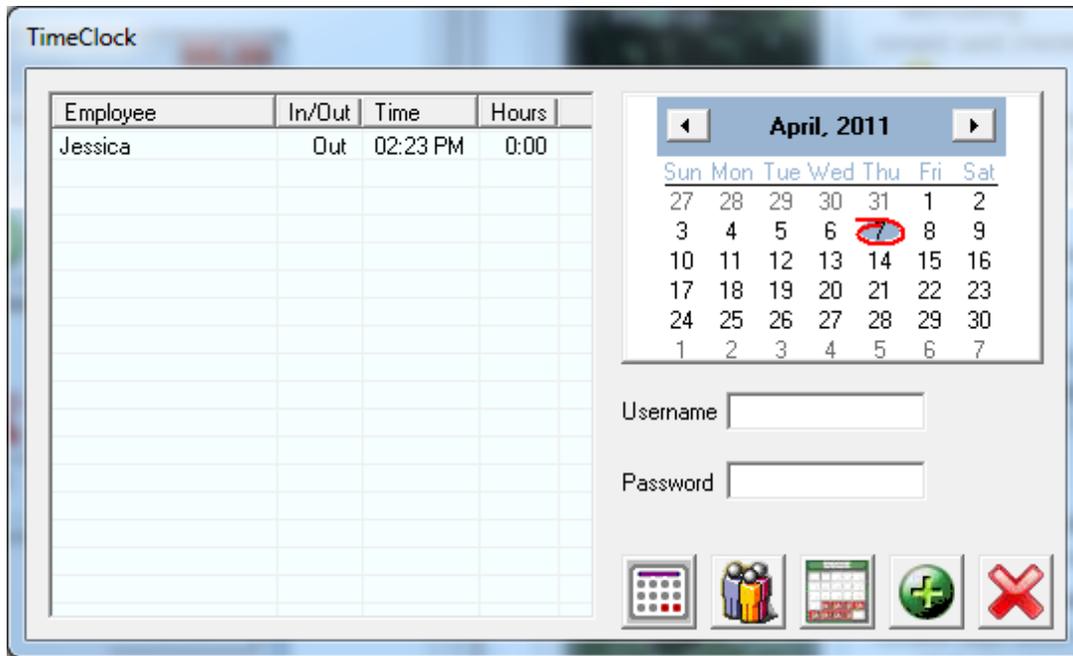
Open the TimeClock and click on the Reports & Time Edit button. It
looks like a calendar.
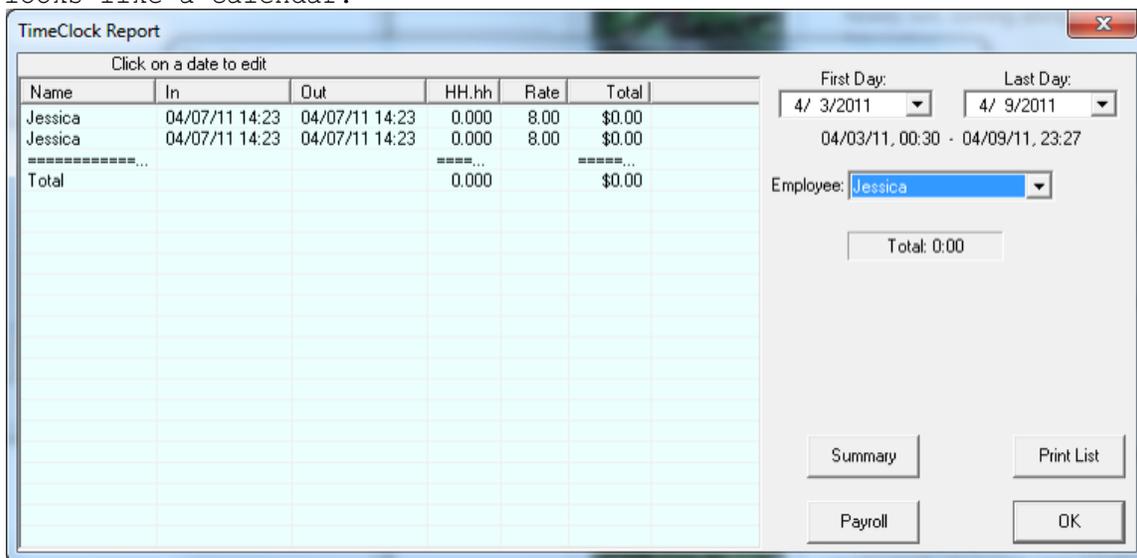
Select an employee from the drop down menu.
Select the date when the log error occurred from First Day & Last Day.
From the List of times on the left click on the time to be edited.

Change time or date in this window:

Returns

 To accept product Returns.
1) Press the Return button.
2) Scan or type in the Receipt# or press the No Receipt button.
3) Scan the item or find it using the search field.
4) Select the item to return.
   A Return will give the customer the full amount of the item plus tax and add it back to inventory. You can edit the quantity being returned if more than 1.

Payout

 Pay in cash from out of a cash register. A window will open to enter a description of the payout. A payout receipt can also be printed. This option is in the Main/Settings/General "Print Payout Receipt". On the receipt there is a line to write a description and sign the receipt.

Tip / Gratuity

 (Restaurant version) Add a gratuity to a sale. The gratuity can be added after the sale has been finished.

Handling

Add a handling charge to a sale.

Hide Menu

Hide the menu bar at the top of the screen.

Customer History

Customer History opens a floating window showing all the sales for this customer. Click once on a sale in the list to see the details of the sale. Double click on a sale in the list to open the sale in the Sales window. The new sale button will start a new empty sale. Or the Duplicate button will start a new sale filled with the items of the selected sale.
The customer's balance, purchase count, total purchases and average purchase amount are listed at the top of the window.
The Customer History window can be left open and will update automatically as the cashier enters new sales.

Handling

The Handling and Tip charges are added after taxes. This amount is not taxed.

Waiter Report

The Waiter or Staff report shows sales information for this employees shift. It is especially useful in restaurants. The report shows sales, payments, voids and gratuity information. This is a report you may want to give your employees access to. The waiter report can be run automatically when a waiter employee logs out. Check "Waiter Closing Report" option in the Settings / General

Food Stamps

The Food Stamp function can be used at anytime during a sale to see how much of the sale is eligible for payment by food stamps. To accept food stamp payments open the Settings / Payment Methods window and check the Food Stamp box. Now there will be a food stamp option in the payment window after pressing the Finish button. The food stamp payment will show you the eligible amount at the top of the window.

Calculator

This function will try to open the default calculator in Windows.

Name Tag

The Name Tag function will put a customers name on a sale but will not save it to the customer database. This is useful when you only want the customers name temporarily and do not want to create a whole customer account.

On Screen Keyboard

A small keyboard will be displayed for data entry using the default Windows OSK (On Screen Keyboard). Note: the program will attempt to open the default Window OSK.

User Defined

The user defined functions will open up a website or run another program whenever the button is pressed. For example if you want one button access to your website. Or, if you want to run another program, use one of the user defined buttons.

Manager

The Manager window contains all the setup windows and reports. It shows the daily sales, inventory and payroll at a glance. The complete menu options are only available in the Managers window for File, Settings, Products, Sales, Customers, Accounts and Tools.

The sales, labor and customer graphs take a couple of weeks of sales activity before they are useful. They log each day's activity for easy comparison of this day compared to the highest, lowest and average for this day of the week. The graphs update every 5 minutes.

File

The File menu is inside the Managers window. Close the sales screen if it's open and press the Managers button.

Connect... (Network Setup)

(Network version only)

How To Connect to a Network

The POS Network version allows multiple PC's (registers) to connect and share the same files. If you're familiar with windows 'My Network Places' that's just about all you need to know. First your PC must be connected to a network. We recommend a wired network, as wireless is slower and less reliable. If you're not sure how to set up a network with file sharing, go to the Start Menu and open help. Type in the Search window: 'To share a folder or drive with other people' and follow those directions.

Things to know first:

- Decide which PC is to host the shared files and act as the server.
- After installation any pictures must be in the Pics folder on each computer.
- You may need to be logged on as a member of the Administrators, Server Operators, or Power Users group.
- The Firewall must be set to allow the POS full access to the network.
- The server will always use the files in the DR14 folder (or DR13, DR12, DR11 depending on your version#). Open the Help window and click on the Database button. This will open a window that the server is using. Each register should also point to this location on the server. The Help window will always show were this computer is connected.

Firewall

You may have a firewall running from your security software. The POS
program must be given full network access. Windows also comes with a
firewall that may be running. Here are some examples of how to set the
Windows firewall.

Windows 7:

Open the Windows Control Panel. Click on System and Security. Click
on "Allow a program through Windows Firewall". Click on "Change
settings". Click on "Allow another program..." Select the POS program
(POS.exe) and click on the Add button.

Vista:

Open the Windows Control Panel. Open the Security Center. Click on
"Windows Firewall". Click on "Allow a program through Windows
Firewall". Click on "Add program..." . Select the POS program
(POS.exe) and click on the OK button.

Sharing Over Network

The file sharing may need to be turned on. Here are some examples.

Windows 7: Open any folder and expose the
Navigation Panel. Open the Libraries /
Documents. You will see the DR14 folder
here.

Windows 8:
C:\Users\Public\Documents\DR14.

Right click on the "ezp" folder and
select "Sharing and Security". Check the
box "Share this folder on the network".
Check the box "Allow network users to
change my files".
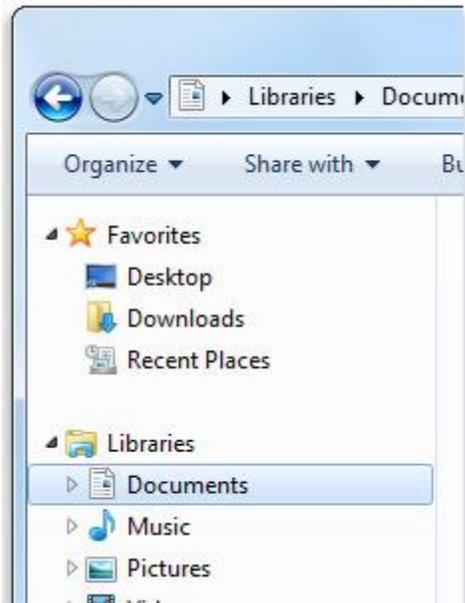
Network Tips

Sharing can sometimes be tricky to setup.
We have found that XP & Windows 2000 work
well together and Vista and Windows 7
work well together. But the two groups
can be difficult to work together. If you have a mixture of OS's then
make the XP or 2000 the server. It seems much easier to have Vista
connect to XP than the other way.

We consider wireless networks to slow for this application. A standard
wired network 10/100 works very well.

Server / Host

1) Run the install program on the server.
2) Run the program.
3) A window will open to enter the Register#. Enter 1 and click OK.

Open the Managers window, menu Tools / Network Server. You will be
able to see the registers as they log on and know they are working.

Rules about register numbers:
1) The server/host must be numbered register 1.
2) All clients must be numbered 2 through 8.
3) Don't duplicate numbers.

Registers

1) Run the install program on a computer that is to be a register.
2) Run the program. You will be prompted to enter the register#.
Enter a value from 2 to 8.

If the software can't find the shared "ezp" folder automatically it
will ask you to find it. A navigation window will open.   Use the
navigation to find the 'ezp' folder inside the 'DR14' Public folder on
the server.

Examples on different computers:
XP:
Network > *server name* > Shared Docs > DR13 > ezp.
MyNetwork Places > Public on *server name* > Public > DR13 > ezp.

Vista:
Network > *server name* > Users > Public > Public Documents > DR13 >
ezp.

Windows 7:
C:\Users\Public\Documents\DR14.
 > Libraries > Documents > Public Documents > DR14

Windows 8:
C:\Users\Public\Documents\DR14.
 > This PC > OS(C:) > Users > Public > Public Documents > DR14

Select the shared "ezp" folder and click ok.

If you have already installed and run the software on a register and
you want to re-connect to the server, use the Manager menu
File/Connect... to find the "ezp" folder. There should only be one ezp
folder and it should only be on the server.

That's it! You're done. Each time you run the computer it will connect
to the same file on the network. Of course the server computer needs
to be running. The server computer and POS program must be running or
the registers will run very slow and you will see an error message in
the Managers window on the server. The registers may still work but
they will work very slowly without the server program running. The
product and category pictures must be in the local Pics folder on each
computer.

Backup Files

Saves a backup of all the data files. A navigation window will open to set the backup location. All backups will now be done to the specified location. Including the automatic backups. The default back location is inside the "ezp Backup" folder in the installation folder. To restore to a backup copy all the files in the "ezp Backup" folder to the "ezp" folder.

Automatic backups are done once a day when using the Exit button.

Choose Receipt Printer

Use this to select the printer driver, receipt format and copies of receipts to print. Note: if Copies is 0 (zero), a receipt will not be printed automatically after each sale.

Print Drivers

Most printers work fine with the Generic Text Only driver. This driver comes standard on most Windows computers. It prints very fast but doesn't allow much control over the font face or size. You can also use the manufactures printer driver if you have it. They can often be found on their websites.

"Generic Text Only driver:"
1. Go into your "Start menu" and open the control panel.
2. In the control panel open "Printers and Faxes".
3. Open "Add Printer" which will start a "wizard".
4. Set Local or Network printer and click "Next".
5. Click "Next" at New Printer Detection.
6. Set printer port and click "Next".
7. Scroll down the list of Manufacturers and select "Generic".
8. Scroll down the list of Printers and select "Generic / Text Only" and click "Next".
8. If it says on the next screen to "Keep existing driver (recommended)" select that radio button and click "Next"
9. This next box will allow you to name the driver, click "Next"
10. The next window will allow you to print a test page, click "Next"
11. Click on Finish.

Now open the printer properties and find the Paper Source and set it to Continuous Feed with breaks.
For Windows XP & 2000:
1) Open the Control Panel.
2) Double click on Printers and Faxes.
3) Right Mouse click on the Generic Text Only driver.
4) Select Properties.

For Windows Windows 7:
1) Open the Control Panel / Hardware and Sound / Devices and Printers.
2) Right click on the printer icon and select Printer Properties.

1) Click on General tab.
2) Click on Printing Preferences... button.
3) Click on Paper/Quality tab.

4) Paper Source: Cont. Feed - With Break

<h2 style="text-align:center; color:green">Choose Kitchen Printer</h2>

All products are normally printed on the customers receipt. But products can also be printed on other printers like a kitchen or bar printer. Each product can be configured to which printers it should be sent. In the product edit window, press the printer button to select which printers it will be sent to:
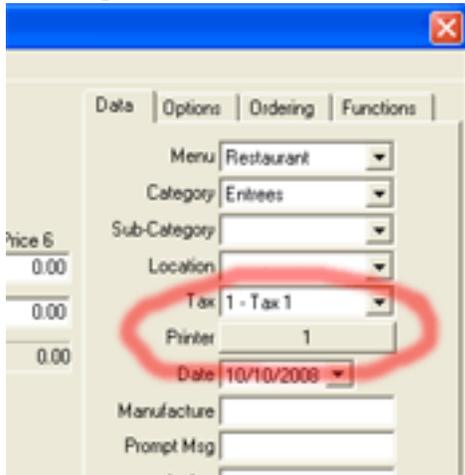
For example in a restaurant, products can be printed to the kitchen or bar for preparations. In the restaurant application to print products to the kitchen, use the Send button. Items newly added to a sale will be sent to the kitchen only once to avoid duplication. The Finish button will also send any newly added items to the kitchen or bar printers as well as print a receipt. The Send button will not print a receipt.

On each register select the kitchen printer in the Managers window, under File / Choose Kitchen Printer. A window will open to select the Kitchen Printer. After selecting the printer click Ok and select one of the Styles:

<h2 style="text-align:center">Styles</h2>

Roll Receipt – customer receipts on a continuous roll of paper.
Roll List – list of items without prices. This is for kitchens, bars and packing list.
Roll Quote – customer quotes on a continuous roll of paper.
Invoice Receipt – customer receipts on full sheets of paper.
Invoice List – list of items without prices. This is for a packing list.
Invoice Quote – customer quote on a sheet of paper.

<h2 style="text-align:center">Print All Items</h2>

This is the normal setting for customer receipts.

Print New Items

Restaurants can use "Print New Items" for the kitchen or bar printers. This will only print new items to the kitchen or bar. For example: a dessert is added to the ticket and the ticket is sent to the kitchen using the Send button. Only the dessert is printed. Items that were already printed will not be printed a second time. Do not use the Service Option for products. Products that use the **Service** Option will always print.

Print Matching Items

This option can be used for printers in delivery or packing stations. For example some products may need to be packed at station 1,2 or 3. Set the printer selection in the product edit window. Each time the sale is printed, the products will be printed to their assigned printers.

Open each product in the Product Edit window and press the Printer button. A window will open to select which printers this product will be directed to.

Open Drawer

This will manually open the drawer. You must first set the drawer open method in the Settings | Printer & Equipment window.

The drawer will automatically open when a sale is finished depending on the payment method option. Set this in Settings | Payment Methods. Check the box by each payment type to open the drawer under the Open Drawer column.

Settings

The Settings menu is inside the Managers window. Close the sales screen if it's open and press the Managers button.

This software was designed to run with the monitor set to a resolution of at least 800x600. The screen resolution can be changed in Windows by going to the Start: Control Panel: Display. When the Display control opens click on the Settings tab. Slide the Screen resolution control. Click Apply and wait a few seconds for the monitor to change. Click OK to close the control. DPI settings of greater than 96 dpi can cause display problems with some versions.

Logo

Put your logo file in the Pics folder. The file name must be Logo.jpg or Logo.gif. To find the Pics folder open the Help window and press the Database button.

The logo will automatically be printed on receipts. When using a logo
the company name will not print on the receipt. Your print driver must
support graphics. The Generic Text Only driver does not print
graphics.

Scanner Information

This software is compatible with scanners.
Set the scanner to add one "tab" or "enter" character to the barcode.
You will need to follow the directions supplied by the manufacture.

Setup Starter

This is a collection of functions that are useful in setting up your
software. All these functions are accessible separately. This window is
for getting a quick start.

General

Customize the settings for your business. There are many configuration
options here. Look through this window carefully.

Global Settings

Cashier Closing Sales Report

A cashier report is displayed when a cashier logs out. The report can
be printed.

Cashier Z-out

A Z-out is generated each time a cashier logs-out.

Cashier Must Log In Each Sale

For every transaction (sale) a cashier must log into the system.

Must enter Cash paid

When cash is the payment method the cashier must enter the amount
tendered.

Must enter Payment type

Before a sale can be completed the payment method must be entered.

Always to cash payment

The system will only display the cash option when a sale is finished.

Always to terms payment

The system will only display the terms option at end of sale.

Show Change Window

The system will display the change screen on each transaction

Show Print Option

The system will display the print option on each transaction. This gives the cashier the option to print a receipt. A receipt can be set to print automatically in the Printer & Equipment window.

Show Club Option

Displays the check box "Club Discount" options in the customer window and Sales Info window.

One Item (qty) Per Line

Each item selected will have its own line. If not selected each same item will increase the current number sold on the same line.

Auto Quick Add

Allow new products to be entered into the database with a Quick Add window when the barcode or item# is not found.

Ask For Check #

Will display a prompt to enter a specific check #.

Bad Check Search

When customers pay by check (and select payment type is also selected) a prompt will be displayed indicating the customer has a bad check on file.

Offer Store Credit on Returns

Store credit will be given to customers on negative balance sales. The credit amount will be saved to the customers record. The customer can use the credit on following sales. You must select the customers name to the sale for the system to offer the store credit.

Check Scan for Drivers License

Will scan for driver's license swipes.

Check Scan for Credit Cards

Will scan for credit card swipes.

Print Open Drawer Receipt

Whenever the cash drawer is opened (not a sale), an 'Open Drawer Receipt' will be printed.

Print Payout Receipts

A 'Payout Receipt' will be printed whenever a payment is done.

Local Settings

List Only Open Sales

Displays only open sales. This function can also be selected using the "Open Sales" button in the sales display window on the main screen.

List Only Today's Sales

Display only today's sales, as opposed to all sales.

List Only Cashier Sales

List the sales for a specific cashier. This function can also be selected using the "Cashier Sales" button in the sales display window on the main screen. Specific cashiers need to be selected.

List Only Staff/Waiter Sales

Identify all sales by specific staff/Waiter.

Show Navigate Window

Show or hide the sales navigate window.

Show Cashier Button

Show or hide the cashier button in the navigate window.

Must Select Cashier

A cashier must be logged in to complete a transaction.

Must Select a Staff/Waiter

A salesperson/Waiter must be selected to complete a sale.

On Screen Keyboard

A small keyboard will be displayed for data entry using the mouse or touch screen.

Blind Closing Reports

Cashiers will not be able to view sales totals on the screen when doing z-out or Daily Reconciliation.

Hide Menu Bar

Hides the toolbar. If hidden, bring the menu bar back using the "Hide" icon located on the main screen through the "Options" icon.

Don't Maximize Order Window

The POS window size can be adjusted as opposed to full screen size. Note: Double click to maximize.

Show Alternate Products

This option will list alternate products if the product selected is out of stock.

Show Staff/Waiter

Displays the Salesperson icon at different windows. Can be used if the salesperson and/or cashier are different individuals.

Hide Finish Button

Will hide the F12 'Finish' button.

Sales Screen

(General Retail & Restaurant versions only)

Grey Buttons

Shades all product buttons to gray.

Full Product Description

The product (being sold) description is recorded in the open sales window.

Show Product Pictures

Display pictures of each product on the product buttons if one is available.

Enlarge Buttons Mouse-over

When selected, the standard 'product' buttons will be enlarged when the mouse arrow goes over them.

Categories

There is 1 column of categories shown by default. This can be changed
to up to 3 columns of categories, for a total of 18 individual
categories.

Product Watch

Margin Watch On

Select this option to activate the margin watch option.

Warn If Product Margin Is Below a %

Input a margin % and select the "Warn" option, and the system will
prompt the cashier with a message if the margin on a specific product
being sold is below this amount.

Out of Stock Warning

System will display a prompt when last product has been sold.

Font

This font will be used in the main sales screen.

Start In

Normally set to "Sales Window"

Register

(Network versions only)
This is the register number of the computer, which needs to be unique
with all other computers running the software.
With the 9.0 Network versions and later these rules must be followed:
1) The server must be numbered register 1.
2) All clients must be numbered 2 through 8.
3) Don't skip numbers.

Security

Turn Security on/off.

Turning Security ON will prevent viewing of sales totals, reports,
product cost and other sensitive information. Set the password by
entering the password in the 'New Password' and the 'Confirm Password'
fields. Click the 'Confirm Change' button.

Most functions can be assigned a security level and each employee is
assigned a security level. This will allow fine control over which
functions each employee can use. The security option should only be

started after speaking to a tech/installer. The password will lock the system if forgotten.

Require Employee's use Password – employees are required to enter a password to log in. If this option is off employees will only need to select their name from the screen. If you have more employees than buttons will fit on the screen then you must use the password entry method.

Don't Require Time Clock login – with this option all employees names are displayed when selecting a cashier/waiter/employee. With this option off only logged in employees will be listed.

Printer & Equipment

Printing Receipts:

Receipts are normally printed at time of purchase. This option can be turned on through the toolbar under "Settings/Printer & Equipment". Just change copies 0 to copies 1 under the printer you have selected to be the receipt printer.
Note: the printer needs to be selected first from the menu File/Choose Receipt printer.

Cash Drawer

The standard cash drawer will connect to a receipt printer. The receipt printer will open the cash drawer when it receives an open command. There are many ways to send an open command depending on how the printer and drawer and connected to the computer and what print driver is being used.

Cash Drawers Connected to a Printer

This is the most common setup with a printer that connects to the computers parallel port or LPT port. With this configuration use the Setting "Open Epson – LPT" (Star Epson, Samsung…).
However many new computers do not have an LPT port and a serial or USB port must be used. The LPT is the preferred port with the serial port next in preference and followed by the USB port. When using a serial or USB port printer, the software cannot directly send commands to the drawer. An OPOS driver is needed to open the cash drawer. These are drivers provided by the manufacture of the printer.

Cash Drawers Connected to the Computer

Cash drawers connected to the computers serial port can be directly controlled by the software. Use the setting "Open Direct COM#" and enter the COM port number.

"Open Star"
"Open Epson"
"Open Citizen"

"Open Samsung"
Send the open drawer escape sequence to the printer.

"Open Star OPOS"
"Open Epson OPOS"
"Open Samsung OPOS"
Send the open drawer control characters using the control font.

"Open Direct COM#"
Send the open character (bell ASCII 7) directly to the COM port.

"Open ESC/POS (user defined)"
Send the user defined escape character sequence to the printer.

Pole Display

A pole display or customer display can be used to show the sales information to the customer. The software supports serial port displays from Epson, Logic Control and EMAX. Also, many different display brands will operate in an Epson emulation mode.

The software also supports a second monitor as a customer display. In the Printer & Equipment window select Window as the Pole Display option to use a second monitor.

The second monitor as a display will also show image files like a slide show. Open the Help Center by clicking on the Help button. Now click on the Database button. This will open the folder where the program information is stored. There is a folder called "Slides". Put the images (gif or jpg) into the "Slides" folder. A new image will be shown automatically every 15 seconds on the second monitor. To try this option set the Pole Display to "Window". The port setting doesn't matter. Set the next option to "2 Line Display". Click OK and open the sales screen. A small display window will open. Drag this window to the second monitor and press the Maximize box.

Scale

A scale can be used to weigh products at checkout time. For example a product that must be weighed at checkout time will use the Option "Read Scale" in the product edit window. The "One Item per Line" option should also be used.

The scale must connect to the serial(COM) port of the computer. Weigh-Tronix and CAS PD-II scales have been tested and verified. The CAS PD-II is set to mode 5. Other scales may work but have not been verified.

Port settings:
9600 BAUD
7 Data Bits
1 Stop Bit
Even Parity

Embedded Barcodes

Open the Settings / Printer & Equipment and press the UPC button. Use the Preset button to select one of the common formats. Use the Check UPC button to read a barcode.

The barcode commonly contains the total price of an item. The software requires the item be entered into the database with the same Item# as the barcode. The item# must be the IIIII in the example of 02IIIIIVPPPPC. The item in the database must also have a price price/lb or whatever the unit of weight is.

For example:

Barcode: 0245678V0540C in the 02IIIIIVPPPPC format

Item# is 45678

Total Price is 5.40

If the items price per lb is 2.00 then the software will put 2.7 (5.40/2.00) in the Quantity field during the sale.

It's important to not use a leading 02 or 2 in any of your products that are not using the embedded barcode. The 02 or 2 when this function is turned on will be interpreted as a embedded barcode.

To turn this function off set the Format to Off.

Printer Options

Roll Width in.

This is the width of the roll paper in inches. With some printers the width may need to be set larger or smaller than the actual width to achieve the desired results.

Barcode

This is the barcode font to be used for printing. You must supply your own barcode font and install it into Windows. Some fonts are available for free on the Internet.

Print Customer Addresses

Print the customer address on the receipt.

Print a T for taxed items

Taxed products can have a T after the total.

For example:

9.99 (tax exempt)

9.99T (taxed)

Receipt Messages

Receipts have 2 message areas that can be customized to your business. This window allows the Header and Terms message to be edited.

If you have a pole display, put your general messages here.

Select the "Settings/Receipt Messages" option on the toolbar. You can enter as little or as much information in these fields as you wish. Note: We recommend that each company use one of these message areas to display their GST# or other required business information.

Tax & Precision

This dialog is opened by the menu Settings | Tax & Precision.

o Up to 3 Tax Rates
o 123.45 or 123 & Rounding
o Tax method: Tax Added or Tax Included (VAT)

To set the tax rate enter your tax rate in the Tax1, Tax2 or Tax3 fields. Each product can use any or all of the tax rates. For example, if your tax rate is 7.3%. Enter 7.3 in Tax field.

You can also control the cash rounding. For example Australia needs to set their cash rounding to 0.05. Other fields can be rounded such as the Quantity. For example if you only sell products in whole quantities set the Quantity Decimals filed to 0 (zero).

Terminology

Change the actual spelling of a term used specific to the system's naming conventions.
- In the toolbar, select "Settings | Terminology"
- Select a word from the terminology list; this will bring the word down into the change window. Change the spelling to the new word that you want to input, and hit the change button to change the spelling. Now everywhere in the software the spelling will be changed.

Payment Terms

Payment Terms allows you to define the payment terms specific to your customers.

For example, to create a 2% discount if paid by 10 days or 30 days net, put '2' in the Discount% field and '10' in the Discount Days field and '30' in the Net Days field.

Customers can have their own terms option. Use the Customer Control window to create a customer; the Terms you created will be a 'Terms' option.

Payment Methods

This window allows you to select which payment methods will be offered to the cashier when finishing a sale.

Payment Description

Check the boxes in this column to select the payment methods you use.

Requires Customer

This column will require a customer be selected for this payment type.

Open Application

This option will run a program or open a website whenever this payment method is used. Use the Locate button to find the program or type in the website address.

Credit Card Integration

The POS will integrate with credit card processors. To get started processing credit cards contact your reseller. Also, you can always use a separate terminal to process credit cards.

Split Payments

Use split payment when the customer wants to pay with more than one type of payment method.

When finished entering sale items, click the button 'Finish'. A window will open with all of the different payment methods. Select the button 'Split' to enter each type of payment. Click on a payment type to enter the payment amount. Enter payments until the field 'Balance' is zero and click 'OK'.

Employees

Add Employee Names.

This window allows the Employee names to be edited or added.

The password is optional. The Employee password is required when logging into the Time Clock. And may be required to log in the Cashier window unless this option is turned off in the Security window.

Currency Conversion

This function is for showing the correct change amount in your currency
when a customer pays with a different currency. The currency type &
exchange rate can be input or changed.
- In the toolbar, select "Settings/Currency Conversion".
- Make necessary changes.

Email Setup

Setup your email account information. The email setup information is
the same as what is used in Outlook Express. Web mail accounts are not
supported. It must be a POP3 account.

Remote Report Options

The POS system can send email reports.
Open the Settings / Email. The Email Setting fields directly match the
fields in Outlook Express. Also, open the Settings / Email Report
Options. The Email Report Options allows you to select what types of
reports are to be sent automatically and to which email address. To
send emails automatically complete the Automatic Email Reports area.

Products

Part of the Products menu is available in the sales screen. The full
Products menu is available in the Mangers window.

Product Control

The ability to locate, print, add, delete, and change product
information. From the toolbar, select "Products | Product Control".

Search

Enter a description in any of the fields and click the Search button. A
list of products will be shown that match the search criteria.
The search can use any combinations of fields: All fields must match
the product to be listed. Only 2000 products can be listed at one time.

List All

Click the List All button to see the first 2000 products.

Clear

This clears all the search criteria. Product information will not be
changed.

New

This will open a window to enter new products.

Edit

This window allows the editing of products.
Left mouse click on the Item# and click on the Edit button. Or double
click on the product Item#, this will open the Product Edit window.

Delete

Completely remove the selected product from the database.

Note: do not delete products that have been sold. This will prevent
reports from displaying sales information for the deleted product. You
can edit a product and check "No Search". This will hide the product
from being sold; but will allow reports to function correctly.

o Right mouse click on the Item# of a product in the list.
o Select 'Delete Product'.

Or,

o Left mouse click on the Item#.
o Click the button 'Delete'.

Show More

Show or Hide columns in the products list.

Qty Search

This field is for searches only.

For example, select a 'Vender' and type 12 in 'Qty Search'.

Press the 'Search' button and all the products with less than 12 'Qty'
and by 'Vender' will be listed.

Product Edit

o Use the 'List All' or 'Search' buttons to find the product to be
edited.
o Double Click the left mouse button on the Item# in the Item# column
of the list. The product information will open up in a new window.
o Edit any of the fields and click the button 'Save'.

Item#, Code#, Book#, SKU

This must be a unique product descriptor. Numbers and letters can be used. The Item# and UPC fields are both used in a product searched.

Examples:
1000
Red Bike
A41-103948

More than one product can have the same UPC descriptor. During a sale if there is more than one product with the same UPC value, the cashier will be asked to choose.

UPC, ISBN

This can be any combination of numbers and letters. The Item# and UPC fields are both used in a product searched. The best way to enter the UPC value is to scan the products UPC label. Make sure your scanner adds a 'enter' or 'return' key at the end of each scan.

More than one product can have the same UPC descriptor. During a sale if there is more than one product with the same UPC value, the cashier will be asked to choose.

Price, Markup%, Cost

The Pro versions can have up to 6 prices for each product.
The prices can be given any name. The default names can be change in the Settings | Terminology window. Price 1 should be the highest, followed by Price 2 and so on.
To use the Markup% first put in the Cost and then the Markup%. This will cause the Price to be entered automatically.

The Average Cost is calculated automatically by the Purchase Order functions. Each time a P/O is received the Avg Cost is calculated. If 12 items were ordering and 3 were in stock, the Avg Cost is calculated by using the 12 Cost + the 3 Cost averaged together to reflect the average cost of the entire inventory.

Stock, Reordering

The Stock field holds the inventory count. The Order Qty field is the default amount to order in the Purchase Order window. This quantity can be changed in the P/O.
The Order Point field is the point at which this product needs to be reordered. It's used in various windows to suggest which products need to be reordered.

Points, Redeem

Points: a point value can be given to each product. The points are added to the customer after each sale. The Points are used to earn free products.

Redeem: the number of Points needed to receive this product for free. If a customer has points from previous sales, the software will prompt the cashier to use the points to get a free product.

To use the point functions the customers name must be selected on each sale. Turn the Points function on in the Settings / General, "Offer to Redeem Points". The points total will be printed on the receipts automatically.

Price Prompt

Enter a value in the Price Prompt field and when this product is sold a window will open for the cashier to enter a price. The product Description field will be shown to the cashier.

The price can be forced to a negative value by entering a –1 in the Retail Price field. This will force the amount the cashier enters to a negative.

Lottery payout example:
Create a new product and select these options: Service, Price Prompt, and –1 for the Retail Price. Enter the rest of the fields you want. When the product is sold a window will open for the price to be entered. If the cashier enters 20.00, it will be changed to –20.00.

Picture File Name

This field holds the file name of product picture which is shown on the sales screen. The picture must be in the Pics folder. Only use the file name. Example: name.gif, name.jpg, name.bmp.

Click inside the picture box and navigate to the picture. Select the picture file. This will copy the file to the Pics folder. Or type the file name (somename.gif) and put the file inside the Pics folder. Open the Help window and click on the Database button to find the Pics folder.

If the picture file is inside the Pics folder and the file name is correct, the picture should appear in the box as soon as the cursor leaves the file name field.

Add-ons

The ability to create a list of items linked to any product. Example: adding additional cheese and toppings to a pizza at a pre-determined cost. Add-ons are regular products that are added onto another product. For example create these products: pizza, cheese, pepperoni, onions and olives. Open the pizza product in the edit window, click on the Functions tab and then the Add-on button. The list on the left is all the available products for Add-on use. Click on the cheese, pepperoni, onions and olive items and they will be copied to the right

list. This is a list of items that will be shown to the cashier during
the sale. The cashier can select from these items (Add-ons).

Add-on information:
 - Each product can have it's own list of Add-ons.
 - Open a product in the Product Edit window, Select the Function tab
and Add-on button.
 - Add-on products are regular products and can be taxed or not during
the sale just like any other product.
 - Add-on products can have their own Add-ons!
 - Add-on items need to be input into the product database before they
can be used.
 - Each product has a limit of 32 Add-ons at a time.
 - Each Add-on can have its on price. Note the Meatball is 1.00.
 - The X column is the default settings. These items will be selected
by default but can be changed during the sale.

 - Max Choices can restrict the number Add-ons that can be selected.
 - Use the Free Choices number to offer a number of Add-ons for free
with the rest of the Add-ons being charged. For example, there can be
15 Add-ons from which the first 5 are free.
Import note: when creating your pizza in the Add-on window, always
enter the cheapest Add-ons in the list (right side) first. In the Add-
on example the Onions are first and the Meatball is last. This is so
if you are giving some items for free, no matter in which order the
Waiter selects them, the cheapest items will be free.
 - The Filter box will only list (left side) items that match what is
in the Filter box.

- Don't Ask box when checked will automatically include the default (X) items in the sale. The choices can be changed during the sale with the Modifier button.
 - Price Roll Up will hide all the Add-ons on the printed receipt and just include their price with the main product.

Example: This can be a powerful tool when used with "Build From Parts". For example build these products, **Salads**, Italian Salad, Asian Sesame, Chicken Salad, and Fruit Salad. Open the Salads product and use the Add-on function to attach the salad products. Now build a similar set of products for **Soups**. Create the main product 'Lunch Combo'. Use the Build From Parts function to attach the **Salads** and **Soups** products. Now when the Lunch combo is sold it will let you chose the salad and soup from each Add-on list. Any product offering salads can just attach the **Salads** product using the Build From Parts product. And if the choices of salads ever changes you only need to change it in one spot. Remember Add-ons can be nested. So, if you have a buy 2 for $20 just create the main product like Two-4-20 and use the Build From Parts to select the main Lunch Combo twice. Put the $20 as the price.

Discounts

There are many ways to have automatic discounts applied to products. In the Product Edit window click on the Functions tab and then click on the Discounts button.

Sale Discount

The **Sale Discount** options allows you to set a period of time for a sale. During that period, automatic discounts will be applied to any product that has a value in the Sale% field. Press the Control button to set the sale period. There is also a second discount option to use the Second price as the sale price. The Sale Date determines when the sale will take place. You can also use the Happy Hour option for weekly discounts on specific days and times.

Buy 1 Get 1 Free

The Buy 1 Get 1 Free only works on Products that have the same Item#. You can not Mix-n-Match with a different Item#. When this option is selected the discount is always given. It does not use the time period settings in Sale Discount.

Buy 1 Get 1 Discounted by Category

This discount works on any selected product that has the same Category. Press the Category button to set the Buy 1 Get 1 %Off discount amount. For a 10.5% discount enter 10.5. When selected, the discount is always given and does not use the time period settings in the Sale Discount.

Multiple Purchase Discount

This discount only works with Products that have the same Item#. It does not work on Mix-n-Match. Enter the Buy quantity and percentage off. Up to 3 discount levels can be used. And each level must be higher than the previous. It does not use the time period settings in Sale Discount.

Mix-n-Match Discounts

This discount can discount a variety of products as a group. Each product to be discounted needs to have the same Sub-Category selection. There can be up to 5 levels. Each level must be higher than the previous. The discount can work based on **Quantity** purchased or the **Amount** of the products regular selling price. Amount is calculated only including products in this Sub-Category. You could create a Sub-Category like Clearance or Special and set each product to be discounted.

Example:
Buy 3 and Get 10% off.
Buy 5 and Get 20% off.
...

Or

Buy $10 and Get 10% off.
Buy $20 and Get 20% off.
...

Rentals

When creating a new product change the Sell type to one of the four rental options: Rent By Hour, Day, Week, and Flat Rate. There is a field for the "Rent Price". This price is used when the product is rented. A product can be rented or sold. If you have a price for both a window will ask the cashier if the product is being sold or rented.

There are 3 new rental choices, Rent Auto Hour, Rent Auto 30 Minutes and Rent Auto Minutes. These options will automatically charge the rental amount based on the time when the sale was started to when it's finished. For example Rent Auto Hour will charge the Rental Price times the hours used. A minimum of one hour will be charged. The time is rounded up. A time period of 1.1 hours will be charged 2 hours.

Under the toolbar "Sales | Rental Return" will list all rentals, past due and rentals that have not been returned.

Consignment

Consignments by a percentage:
When a product is sold with this option the cost is calculated by:
Cost = Selling Price * Consignment / 100

To use the consignment% option:
1) Start a new Supplier record. This will be the name of the supplier
of the products being sold under consignment.

2) Create a new product and select the Supplier.

3) Select the Consignment% option.

4) Enter the Consignment percentage in the Consignment% field. This is
the percentage of the selling price you will be paying the supplier.
Example: 50 will be 50 percent of the selling price.

5) Enter all the other options you want.

When the product is sold, 50% of the selling price will be entered into
the Cost of the product. Use the report Supplier / By Product to see
the Cost of sold products by this supplier. The cost is the amount of
consignment.

To sell by a fixed consignment cost and not by percentage:
1) Start a new Supplier record. This will be the name of the supplier
of the products being sold under consignment.

2) Create a new product and select the Supplier.

3) Select the Sell option.

4) Enter the Cost amount as the amount you are paying the supplier.

5) Enter all the other options you want.

To see how much you owe a supplier view the Reports | Supplier | By
Products.

Coupons

Coupons are special products, which are entered into the sales list
with the other products being purchased. You can create coupon
products in the Product Control window. Create a product like normal
but select the Coupon or Coupon% option instead of Sell. Enter a
number in the Price field. The value in the Price field will be

deducted from the total sale before taxes. The Coupon% option can also be selected to give percent discounts.

File

Import / Export Products

You can import or export products in the Products Control window under the menu 'File | Import Products'.
The file format is a standard tab delimited text file. You can open into Excel. When saving from Excel, you must do a Save As… and select Text (Tab Delimited).

Under the toolbar menu "Products/Product Control" screen select "File/Import Products".
Follow the steps:
1 Select the file version# or type to be imported.
2 Open the file to be imported.
3 Use the View function to ensure the data is spaced correctly.
4 Import the file.

Note: redefine the import order if necessary by clicking in the 'Field' column and changing the data type. You may have to massage the file somewhat prior to importing, due to the fact that different files are stored differently. The import file must be a regular text file with each field separated by a tab and each record separated by return. The Fields in the left column 'Import Data' must match the right column 'Field' data.

Labels with Barcodes

1 - You must have a label printer. A regular printer with Avery sheets will not work. It must be a label printer that prints one label at a time.
2 - Open the Products / Product Control window.
3 - The File menu is were the label options are located.
4 - Use the "Choose Product Label Printer" to select your label printer.
5 - You can design up to 3 label formats. Select one.
6 - Now you are in the Label Layout window where you can design your label.
7 - Put up to 8 fields on the label.
8 - For the Barcode field select UPC, Item# or whatever product field has your UPC's.
9 - Use the Font button to select your barcode font. The barcode font does not come with the POS. Usually a label printer will include some barcode fonts. If not, you can use the "Free 3 of 9" font available on the internet. You must also check the "Barcode Format" box. This tells the POS to add the start and stop characters to your barcode.

Tips:
Barcode fonts are printed in large sizes. Anything from 36 and bigger. Set your label printer for maximum print quality.

Change All and Change Menu

The functions in the Change Menu affect all the products shown in the
list, usually with the 'Change All' field.

  - All Vendors, Categories and Departments can be changed.
  - All Qty, Cost, Sale%, and Prices can be changed.

1) Type the new information in the 'Change All' edit box.
2) Right mouse click in the column to be changed and select an option.
That function will be applied to all the products shown in the list.

Or,

1) Type the new information in the 'Change All' edit box.
2) Select a menu option from the 'Change menu'. That function will be
applied to all the products shown in the list.

Other columns have options. For example, right mouse click on a product
in the Tax column. You can change all the listed products tax option at
once.

Define Product & Case

This is a shortcut to defining a product and a case package of the same
product. This function will actually create two products. One product
will be a single unit. The second product will be a case of the same
product.

For example:
Product 1 - can of soda.
Product 2 - 12 pack of soda.

Product 1 will be linked to Product 2. When product 1 is out of stock,
during a sale, the computer will automatically break a case of product
2.

This function is only a shortcut to what can be done in the Product
Edit window. Once this function has been used to create the products,
the Product Edit window must be used to change or edit the product
settings. Open the Product Edit window and press the "Parts or Case"
button.

Define Product & Bulk Supply

This is a shortcut to defining a product portion and the bulk quantity of the same product. This function will actually create two products. Or, you can use products already created. One product will be a portion of the bulk. The other product will be the bulk quantity of the same product.

For example:
Bulk - bulk bag of beans (or Keg).
Portion - portion of beans (or Glass).

The Portion product will be linked to Bulk product. When the portion product is sold, the computer will automatically deduct the inventory from the Bulk product.

This function is only a shortcut to what can be done in the Product Edit window. Once this function has been used to create the products, the Product Edit window can be used to change or edit the product settings. Open the Product Edit window with the Portion product and press the "Build from Parts" button. You will see the link to the Bulk product.

Define Product Kits

This is a shortcut to defining a Combo Kit that is made up of more than one product. This function will actually create one product. The product will be a kit that 'points' to other products (parts). The kit product can be thought of as the base product. The parts must have been already created before running this function.

Kits are built automatically at the time of sale. The parts are taken from inventory to build the kit at the time of sale. This happens automatically at the time of sale anytime a kit is sold.

Example:
Kit: Dinner Special
 - Part 1: Steak.
 - Part 2: Fries.
 - Part 3: Salad.

1) The product parts must be created first before running the Define Combo Kits function. The parts are just regular products.

2) Run the Define Combo Kits function and enter the kit information.

3) Press the Choose Parts button. This will open the 'Built Products or Kits' window.

4) Use the Add button to select the kit parts. Make sure to put in the Qty for each part.

5) Click the OK button when finished.

6) Now click the Save button and the Done button when you are ready.

This function is only a shortcut to what can be done in the Product
Edit window. Once this function has been used to create the kit, the
Product Edit window must be used to change or edit the product
settings. Open the Product Edit window and press the "Parts or Case"
button.

Define Mirror Product

Mirrored products allow you to create a product that is the same as
another product but with a different price and/or category. For
example:

COKE $2.00 Menu / Drinks, Category / Soda.
Using the Mirror product you can create a second coke item that takes
all it's inventory from the original coke product.
COKEhh $1.00 Menu / Happy Hour, Category / Drinks.

When **COKEhh** is sold the product **COKE** is really sold but the Price, Tax,
Menu/Department and Category of **COKEhh** are used. And the inventory of
COKE is used. The **COKEhh** product uses the Service Option and has no
inventory. And the **COKEhh** product never appears in any report and is
never actually sold. It's only use is to sell products at a different
price and category.

Matrix

New Matrix

Will define a group of products at one time

New Matrix Example:

1) Matrix Name: this will be the name of the matrix shown in the 'List
Matrix' function.

2) Item# Base: each product must have a unique Item#. This field will
be used as the beginning of the Item# followed by a 4 digit number to
be added to each product created.

3) Matrix Base: each product created will start with this information.
The Product Edit window will open. Enter all data common to each
product in the matrix.

4) Modifiers Used: select each modifier to be used by checking the Use
box. Every combination of modifiers used will create a new product in
the matrix. For example if 2 modifiers, size and color are used, every
combination of size and color will be used to create a product.

5) Create Matrix: the last step to create all the products in the
matrix. The Product Edit window will open with the first product in the
matrix. Unique information can be entered now like the UPC field. Use
the Left and Right arrows to see all the products created. Click Exit
when done.

List Matrix

Will show a list of all Matrixes in the system. Click on a matrix name to list all the products in that matrix.

Discount

Discount Item Control
The Discount window gives you control of when you have discount days or times.

The discount can be by date or time (Happy Hour). You can also use the second product price instead of the Discount% (each product can have 6 prices).

Each product can be given a discount percentage. The discount percentage for each product is set in the Product Edit window. Open the Product Control window and edit a product. Press the Discount button and enter value (10 for 10 percent) in the Discount field.

- From the toolbar select "Products/Discounts". Use this option to discount all purchases within a date / time range.
- Options 2/3 are driven from the individual product "Discounts" button.
- Each product has 6 levels of pricing, Retail, Wholesale, Employee, Price 4, Price 5, and Price 6. The second price field needs to be filled to use options 4/5 below.
Note: If a customer/staff has been given an individual discount level in their customer profile, and options 2/3 are being used here, the customer/staff will receive their normal discount (wholesale for instance) PLUS the individual product discount. Shown in the "Extended Price" column.

The Price field names can be changed in the window 'Sales/Discount Levels'.
- This discount will show itself in the "Extended Price" column next to the item description.

Supplier

Opens the Suppliers window. These are companies you purchase from. Specify the supplier for each product in the Product edit window.

Department or Menu

Opens the window for managing your product Departments (Menu for
restaurants). Each product is assigned to a department and category.
The department is the top level. For example, a hammer could be in the
Tool department and the Hand Tools category.

Category or Book Type

Edit or add new product Categories.
Opens a window for managing your product Categories. Each product is
assigned to a department and category. The department is the top
level. For example, a hammer could be in the Tool department and the
Hand Tools category.

Categories can have a picture. The picture file must be in the Pics
folder. Only put the file name in the Picture field (example:
hammer.gif)

All products can have an optional Category. Changing a Category
description will change all descriptions in previous sales.

Vendor or Publisher

Edit or add new product Vendors.

All products can have an optional Vendor. Changing a Vendor description
will change all descriptions in previous sales.

Modifier

A Modifier gives the cashier the option of changing a product. For
example, the cashier could be asked to select how the customer wants
his steak cooked.
The steak modifier Temperature could offer the options of Rare, Medium
and Well.

There are 8 different modifiers and each of them can have 255
selections.

Modifiers can add or subtract from the price of the product.

Modifiers can be printed on the customers receipt by opening the window
Settings | Printer Options, check the box Print Modifiers.

First create the modifier and connect the modifier to a product. Open
the product edit window and press the Modifiers button. You will see a
Ask box, check this to have the cashier prompted to select the
modifier.

The names of the modifiers are changed in the Terminology window under
the Settings menu.

Check Stock

Check the inventory for products that are low in quantity. There are 3
different checks that can be used.

1) If Stock is below Order Point. Each product can have an Order point
(re-order). Check this box and press the Search button (magnifying
glass) to see all products that are below their Order Point.

2) If Stock is below Qty [___]. Check this box and enter a value in
the Qty field. Press the Search button (magnifying glass) to see all
products that are below the Qty value.

3) If Stock is below estimated Days of inventory [___]. Check this box
and enter a value in the Days field. Press the Search button
(magnifying glass) to see all products that are below the estimated
quantity needed for number of Days entered. The needed quantity is
estimated based on passed sales.

Adjust Stock

Inventory adjustment window. Build a list of products that one of these
functions can execut:

1) Receive Stock - add to stock levels.

2) Transfer Stock - remove stock from this location and transfer it to
another location by saving a change file.

3) Send to Shortage - remove stock and add to shortage list. This is
for stolen, missing, broken or unusable stock.

4) Stock Correction - count stock and set the current stock levels.

Scan product into the list or use the Find button. With the "1 per
Scan" box checked each scan will add 1 to the stock count.

The Add button can be used to add any amount to inventory. For example if you receive a case of 144 items, uncheck the "1 per Scan" box. Scan or Find the product. Enter 144 in the Add box and press the Add button.

Once all the products have been added to the list use one of the four functions.

Sales

Sales Control

Today's sales will be listed first when the window is opened. Double click on the Record#/Ticket# to view that sale in the sales window.

How to Find a Sale

o Type in a description of the sale using Description, Cashier, Vendor, Pay Method, Customer or use any of the fields.
o Click on the Search button.

Double click on the sale to view that sale.

"Example"
Find all sales records last week that included Item# 7748.
 o Type 7748 in the Item# field.
 o Check the box 'Search by Dates'.
 o Select the Start Date and Stop Date to only include last week.
 o Click the button 'Search'.

Sales Total

Click the button Sales Total to see a report on the sales listed. Only the sales shown in the list are included in this report.

"Example"
Report for a Cashier last week:
 o Type in the cashiers name.
 o Check the 'On' box in the Search by Dates.
 o Set the Start Date and Stop Date to include only last week.
 o Click the button Search and then Sales Total.

A sales report is generated for the sales last week, by that cashier only.

File

Import Sales & Export Sales

Import or export sales information.

Import Sales

Import sales information from a text file created by the POS software
using the Sales export.

Export Sales

Export sales information to one of four formats.
1) Products Sold - saves only the products sold.
2) Sales Summary - saves a summary report of sales information.
3) Sales in QuickBooks format - saves sales information to a QuickBooks
file. This is for importing sales information into QuickBooks.
4) Sales... - Saves sales information to an POS file format. These
files can be imported into POS.

Options with a (new sales) save only sales that have not be saved
before. For example you can save your 'Sales (new sales)' each day and
the POS will keep track of which sales have been saved.

Clear All Sales

CAUTION - This function will delete all sales information from the
database. Products, customers and all the settings are not affected,
only the sales information.

Discount Levels

Select Manager/Sales/Discount Level. This is intended to be a
"Blanket" discount for customers. You can identify a percentage for
each level of customer, which will show as a discount % on each
purchase.

The first step to enable these discounts is to identify how many
pricing levels you want as a company. Six are available in each
product (Retail, Wholesale, Employee, Price 4, Price 5, and Price 6).
Enter as many prices as needed. Zero prices will be ignored and the
next (left) price will be used. For example, price 3 customers, buying
a product that only has price 1 and 2 entered, will receive price 2
since price 3 was zero.

Next, you must enter in customers into the customer database and
identify the discount level for each of them. Open the customer

window. Click on the Level tab to show the price levels. When this is in place, all additional discounts that are established are accumulated In Addition to this discount.

There can be up to six prices for each product, and six discount levels.
The prices for each product are set in the Products Edit window.
The discount percentages are in the Settings / Discount Levels menu.
They will apply a percent discount to the entire order.
Each customer can be assigned to a discount level in the Settings / Customer menu.

Example 1:
If a product has two prices, a customer with a price level of 2 or greater will receive the second price.

Example 2:
If discount percentage #2 were 10, the same customer would receive a 10% discount on the entire order.

Optionally the discount level can be determined by the subtotal of the order instead of the customer level. This option is in the Settings / Discount Levels menu.

Example 3:
Open the Manager/Settings/Discount Levels window. Check the "Subtotal determines discount". Now enter 200 in Subtotal Level #2 and 10 in % field. Click OK. Now any purchase of 200 or more will receive a 10% discount on the entire order. Further you can put 500 in Subtotal Level #3 and 15 in the percent field. Now order (subtotals) of 500 or more will receive a 15% discount and orders of 200-499.99 will receive a 10% discount.

Sales Information

Message

This message will appear on the receipt and is saved with the sale.

Notes

These notes will not appear on the receipt. But will only be visible to the cashier / operator.

Clear This Sale

This function is only available in the Sales screen under the Sales menu.
Clears all the information in the Current Sale. The option is only available when a sale has not been completed (Finished).

Edit This Sale

This function is only available in the Sales screen under the Sales menu.
Return all the products back into inventory. Opens the sale for making changes. The payments remain unchanged and are not affected. After making the changes Finish the sale as normal.

This function is only available after a sale has been Finish. If the sale has not been "Finished" the sale remains open for editing.

Void This Sale

This function is only available in the Sales screen under the Sales menu.
On a closed sale, void the sale being viewed in the sales screen. Items are returned back to stock, and refund payments.

Split Sale

This function is only available in the Sales screen under the Sales menu.
A sale can be split into two sales. Or products can be moved from one sale to another sale.

There are two sales lists, left side and right side. Use the Find Sale (Find Ticket) button to select the sale on the right. The left sale will automatically be the current sale or the sale shown in the sales window.

You can move a single item to the other sale by left clicking on the item. In the Restaurant version you can do a right click to move all the items assigned to a seat#.

Quote Functions

This function is only available in the Sales screen under the Sales menu.

Save a quote in the database for later viewing, editing or printing.

Quote Save...

Saving a sale as a quote:
o Enter all the information in the sales screen just as you would for a normal sale.
o Do not press the 'Finish' button, select the menu: 'Sales | Quote Save...'.
You can now print the Quote by using the Sales | Quote Print...

Use the Sales | Clear Sale to clear the quote items from the sales window.

The quote can be re-loaded at any time by using the Sales | Quote Find...

Quote Print...

Printing a Quote:
o Enter the quote information into the sales window like a regular sale or use the Sales | Quote Find...
o Select the menu: Sales | Quote Print...

Quote Find...

Find a Quote:
o Select the menu: 'Sales | Quote Find...'.
o Select the date range or scroll through the list of quotes.
o Click on the quote.
o The quote will be shown in the main edit window.

Customers

Manage addresses and customer information

Customers can have their own Discount Rate, Tax Rate and Order Limit automatically entered during a purchase. In addition, customers can be categorized in one of 5 types.

Customer Control

Manage customer information.
- In the toolbar, select "Customers/Customer Control". From this main screen, all functions are possible.
- Enter a new customer or change the information/options specific for each customer.
- Select discount level, club option, additional limits, etc.
For a new customer press the New button.

New customers can also be entered from the sales screen use the Customer button to find, edit or enter a new customer.

General Customer Information

There can be more than one customer record with the exact same name. An internal serial# identifies the customers. This is important to know in some cases. Creating a new customer with the same name will "**not**" be identified as the same customer and will not connect the sales to the new customer record.

Customer Button Tools:

"Edit" - Open the customer edit window with the selected customer.

"Delete" - Delete the selected customer record from the database. Normally customers should not be deleted, unless the customer has not been associated with a sale. Once a customer record has been attached to a sale, deleting that customer record will result in the sale being disconnected from the customer.

"Balance" - Opens a customer balance report on the selected customer record.

Account Balances
This software has the ability to carry an account balance for customers. Any
"Debit" limit can be specified, and is specific to each "customer" only.

1) Customers must first be entered into the customer database.
2) Select a customer to "Edit" and fill in the "Debit Limit" amount.
3) If the company requests, the "Terms" may also be specified in the customer screen at this time. If the terms are 30 days, and the account has not been cleared, a message will be given.
4) The customer is now able to purchase items up to his/her limit.
5) The cashier should start the sale as usual by selecting the customer, add whatever items, and complete the sale using the "terms" option instead of cash or visa.
6) The receipt will print as usual with a "Balance Due" tag on the receipt.
7) The transaction will close (turns to grey scale when selected) but will read as "NO" under the paid column on the sales screen (bottom right).
8) The customer's balance will show for each future purchase.
9) The customer can make payments to their account in 2 ways. When they make a future purchase, the system will ask if they wish to make a payment. If "Yes" is selected, the cashier will be taken to the payment screen and secondly, through the customer control screen.

Payments - The customer either has a charge account, layaway plan, or an agreement with the store to hold a debit balance for a period of time. Simply select the customer from the menu displayed, and enter a payment to that customer's account. By selecting the specific purchase (if layaway) and applying the payment, the purchase will finalize and show as completed.
Note: Select the purchase and/or payment by selecting the 'first column' where the "X" is, and then hit the apply payment button.

"Bal. List" - Fills the list with only customers that have a balance.

"Payment" - Opens the Advanced Payment window. This window will allow you to make payments, delete payments and print a customer balance report.

Customer Tools Menu:

"Edit" - Open the customer edit window with the selected customer.

"Delete" - Delete the selected customer record from the database. Normally customers should not be deleted, unless the customer has not been associated with a sale. Once a customer record has been attached to a sale, deleting that customer record will result in the sale being disconnected from the customer.

"Delete All Customers" - Caution! This will delete all customer records.

"Import Customers"
"Export Customers" - Import/Export customer records. Records are saved to a tab delimited text file. Excel can read these files.

"Define Fields" - The customer field names can be changed. There are four special fields that are used during customer searches.

Customer Payments Menu:

"Make A Payment" - Opens the Advanced Payment window. This window will allow you to make payments, delete payments and print a customer balance report.

"Customer Payments" - Customer payment history record. Click on a customer name first then select this function under the Payment menu.

"Customer Balance" - Opens a customer balance report on the selected customer record. Click on a customer name first then select this function under the Payment menu. This is the same as the button Balance.

"Customers With a Balance" - Fills the list with only customers that have a balance. Click on a customer name first then select this function under the Payment menu. This is the same as the button Bal. List.

"Sales with a Balance" - Opens a sales report with all sales that have not been paid for.

"All Payments" - Opens a payment report with all the payments. The list can be filtered to show only payment within a date range; or payments to a specific Record#.

"Reset Customer Balance" - Will recalculate a customer's balance by scanning the entire database for sales and payments. Click on a customer name first then select this function under the Payment menu.

Club Discounts

- From the toolbar select "Customer/Club Discounts" to set up a discount % for the internal "Price Club".
- This club option is associated with "Categories", so all products under that specific category will be discounted.
- The "Club" option is located on the customers profile selected through "Customers/Customer Control". Simply select the Club box to activate.
- Again be careful here, if used alone this discount is very specific. If used in conjunction with other discounts, it will have a cumulative effect.

Accounts

New Purchase Order

Overview of Purchase Order Procedure:

1) Select a vendor from the 'Step 1: Vendor':
2) Click on the items you wish to order.
3) Change the Qty to the desired quantities.
4) Enter a Title and PO#.
5) Print the PO and then Save.
6) Place your order with the Vendor.
7) Once the order has been received, open the PO with 'Receive Order'.
8) Make any necessary B/O (back ordered) quantity changes.
9) Print and Save.

Note: only products with a Vendor# will be displayed.

Clear Invoice# Line:

To remove an item from the order, click in the Vendor# edit box and select this menu option.

Order Estimator

Historical sales analysis by date range

This function helps you estimates how much to order based on past sales. It works by using how much has sold in the past and how many days of inventory you want to carry.

First select the Vendor to place the order with. Set the two dates, the starting date and the ending date. The 'Days of Inventory' field indicates how many days of inventory you want to carry. Press the 'Go' button and the 'Sold' and 'Short' fields will be filled in. The 'Short' field indicates the quantity to order.

For best results set the dates to reflect the sales pattern for your business.

For example if sales are seasonal, then use last years season to predict sales for this season, adjusting for growth.

If sales are not seasonal and sales have grown, use the most recent months sales (~3 months) to predict future sales.

Tools

Pay Out

Pay out cash from the register for specific reasons.

General Pay Out
1) Press the Pay Out icon or use the menus Tools / Pay Out
2) Enter the amount to pay out.
3) Enter a description of the pay out.

Note: if the 'Print Payout Receipt' option is checked in the Settings / General a Payout receipt will be printed with the amount, date, time, description line and signature line.

TimeClock

Have the staff clock in and out for their shifts. Produce reports, etc. for timekeeping purposes.

Manage up to 250 employee time cards. Print time sheets with employee hours calculated.

Arrange Product Buttons

(General Retail & Restaurant)

The ability to change the location of product buttons on the sales screen.
- In the toolbar, select "Tools/Arrange Buttons"
- Follow the instructions to move buttons to specific locations.
- First, select the product to move.
- Second, click on the product to move in front of.

Recipe

Build a Recipe or Sub-parts list for a product. The recipe will update the cost of a product it is linked to. Recipes are a list of ingredients that determine the cost of a product. Ingredients are different than products. They are none-inventoried and will not show

up in the product list. Changing the cost of an ingredient will change
the cost of all products using it. The price of the product will not
be changed unless you use the Calculate button, which uses the markup%
and cost fields to change the price.

It's important to understand the difference between the Kits (Build
from Parts) function, which builds a kit from other products, and
Recipes.

A kit example would be a computer system that includes a computer,
monitor, keyboard and mouse. This kit is made up of 4 products that
can be sold separately.

A Recipe example could be an apple pie. The pie is made from apples,
flour, milk, salt, baking powder, sugar and butter. The apple pie is
the only product and you must create the apple pie product first. All
the ingredients are then created and then the apple pie Recipe can be
created. The value of a recipe is when the cost of apples change, the
cost of all the products using apples will change.

Step 1: create an Apple Pie product in the Product Control window.
Step 2: create all the ingredients that are going to be used in the
Recipe window.
Step 3: start a new recipe.
Step 4: use the Product Link button to link the Recipe with the Apple
Pie product.
Step 5: use the ingredient Add button to build the recipe.

Other recipes can also be included in the apple pie recipe. These are
called sub-recipes. The Markup fields can be use to calculate a new
price for the product liked to. When the recipe is done use the Done
button. Now use the Update button to update the products with any new
recipe changes or ingredient changes.

Gift Cards

Gift Cards can be sold at varying amounts, towards future purchases.
After the card is sold it's used as a payment method.

1) You must have "Unique Numbered Gift Cards" for individual purchase.
There are many businesses that provide this service. The gift cards can
be bar-coded or use a magnetic strip. The information on the card must
be a unique number that is terminated by a 'Enter Key' character.

2) Create a new product called "Gift Card" or whatever you want.

3) Check the "Service/Price Prompt " options on the product screen. No
"Cost or Tax" should be selected.

4) Change the **Sell** selection to **Gift Card**.

5) To sell this service, select the product "Gift Card" in the sales
window like a normal purchased item, and use the "Finish" icon as
normal to complete.

6) Select the payment option (cash for example) and a prompt will ask you to input the gift card number. Swipe or scan the gift card. You can even type the serial# in.

7) The system will continue to track the outstanding balance of all cards.

8) As displayed below, reports on purchased gift cards, and outstanding balances through the toolbar under "Accounts".

Reports

Open the Managers window and press the Reports button.

Z-OUT

A balance report specific to each cashier or register. The z-out report is the same as the Daily Reconciliation report except for the time period. A z-out is from the last z-out until now. And once a z-out is finished the z-out totals are zeroed to start the next z-out period. The Daily Reconciliation report is for a calendar day and can be run at anytime for any date. This report has no effect on the totals and can be rerun at anytime. Use the z-out report if you count the drawer more than once a day.

Manual Selection - Can be generated by selecting z-out under reports.
Automatic Generation - is available from the 'Settings | General' menu, check the 'Cashier z-out' option. This will produce the report when the cashier logs out.

The 'Drawer Start' should be filled out. This is the amount of cash the register starts out with.

Note: After completing the Z-Out report, the system will ask you if you want to Z-Out the register. A yes response will zero the totals; a no response will continue the totals until a z-out is done.
Note: You can also select or deselect the boxes located on the bottom left of the report, providing an extended printout of totals for department, category, payment details and taxes.

Z-Out History

A report listing of all the Z-Outs, which have been completed.

Daily Reconciliation

A report totaling all the day's transactions (by cash drawer). Usually
done at day end, after one or several Z-Out's have been completed.
This is a compilation of all of the sales for the day. The date being
totaled can be changed by using the calendar. The Daily Reconciliation
report is for a calendar day and can be run at anytime for any date.
This report has no effect on the totals and can be rerun at anytime.
Use the z-out report if you count the drawer more than once a day.

Note: If all sales have not been completed (open sales) this report
will prompt you as to which sales have not been finalized (by record
number). The record number is usually hidden, but can be displayed
through the sales window by selecting the "Open Sales" button, or by
positing the cursor to the far left of the "Paid" column and expanding
this column to see the record column. Finalize the sale if required,
and continue the Daily reconciliation.

Sales

The Sales Reports give a quick report for any given time period.

Sales This...

These menu options give a one button sales report for sales during:
- o Today
- o This Week
- o This Month
- o This Quarter
- o This Year

Sales Last...

This menu option gives a one button sales report for sales during:
- o Yesterday
- o Last Week
- o Last Month
- o Last Quarter
- o Last Year

Remote Reports

The Remote Reports show data from each of your store locations. The
reports can be viewed from the main office or home office. You need a
reliable and responsive website (web server) that allows files to be
saved on their server (FTP). Each store will send their reports to the
web-server for collection and viewing by the office.

First, all the stores must be setup to send their data to the website. Once this is done the office can get the data from the website and view the reports.

Each store can be setup to send the data automatically to your website. Some reports can be sent during business hours, like the "Today's Sales Report" and the "Inventory" report. They can be set to run as often as every 15 minutes for very close monitoring, or as slow as once a day or once a week.

"Caution" - These functions are available in both the Pro and Network versions of the software. But we recommend using these reports during business hours only if you are using the Network version of the software with a dedicated network server. Sending report data in the Pro version while a cashier is using the software may cause the software to be slow in responding to the cashier during report generation times. In all cases, for these functions to work well the website server must be reliable and responsive. Using a slow responding web-server is not supported! You must verify that your web hosting service supports FTP.

"Note" - Each store or different location that sells must have it's own software license. The head office or home office, if it doesn't sell products, can use the same store copy. If you only have one store you can still use the Remote Report functions to monitor sales and inventory from home!

Other reports can only be sent once a day, like the "Detailed Sales Report". This report may take several minutes to run and should be set to run automatically after store hours.

Settings

Webserver Settings

These are the settings required to send and receive information to your website. The Website field needs your website address (example www.mywebsite.com). The Base Directory information depends on how your website is set up. A common configuration is /public_html/. You will need to check what directory name your website uses. You may also want to create a sub-directory for storage of the Remote files (example /public_html/ezp/). In this case you need to create the folder named ezp.

Store Settings

"Store Number and Store Name"
Each store must have a number 1-255. The store name can be anything but a shorter name is easier to view in the reports. This must be done at each store but is not required for the head office.

"Register"
After entering the store name and number use the Register button. This must be done on all the stores but not at the head office.

"Get Product Updates"
Check this box and enter the interval minutes. You can use the drop
down menu for pre-configured times. Once checked, the store will start
checking for product updates. For example, check the box and enter 240
minutes. Now this store will check for new or updated products every 4
hours, but only during the "Execute Times" and "Execute Days".

"Send Inventory Report"
Check this box and enter the interval minutes for this store to start
sending inventory report data to the web-server. For example, check
the box and enter 180 minutes. Now this store will send inventory
stock levels every 3 hours, but only during the "Execute Times" and
"Execute Days".

"Send Today's Sales Report"
This will send today's sales information to the web-server. This
report is for quick viewing of today's sales at a glance. For example,
check the box and enter 30 minutes. Now this store will send sales
data every 30 minutes, but only during the "Execute Times" and "Execute
Days".

"Send Sales Summary Report"
This will send summary sales information to the web-server. The report
can be viewed for any date period. For example, check the box and
enter a time. Now this store will send summary sales data at that
time, but only during the "Execute Times" and "Execute Days". This
report may take several minutes so; it's recommended the time be set
after store hours.

"Execute Only on Days"
This will limit the days the data will be sent. On the days the store
is closed nothing will be sent.

"Execute Time"
This will limit the times the data can be sent. Only during this time
period will any of the data be sent or checked automatically.

Store Reports

After all the stores are sending their data the reports can be viewed.

Use the "Stores" button to select which stores you want to see in the
report. You can view all the stores at once or only a selection. The
default is all the stores.

Each report uses different data files to build the report. To collect
the data use the Get Data button next to the report you want to view.
The Get Data button only needs to be used one time in a session to
collect the data. The report can be viewed over and over. To get
updated data use the Get Data button again.

"Today's Sales"

This report shows a quick view of today's sales. Use the Get Data button first and the Stores button to view a subset of all the stores. This report will show the last report sent by each store. If all the fields for a store are asterisks (*) the data was not on the web-server. The column descriptions are as follows:

Store - store number and name.
Total - total of all sales.
Subtotal - subtotal of all sales.
Count - the number sales.
Time - the date and time the report was sent (local time).
Cost - the total cost of all the sales.
Tax - all taxes collected.
Shipping or Tips - the total for all shipping or tips (gratuity).
Profit - gross profit of products sold.
Hours - the number of employee hours worked today.

"Sales Summary"
This report will first ask for a date range for the report. The report contains basic sales, payment and statistical information. The report can take several minutes to generate. We suggest that it be scheduled to run after stores hours. The column descriptions are as follows:

Store - store number and name.
Sales - total of all sales.
Cash - total of all cash payments.
Credit Cards - total of all credit card payments.
Payments - total of all payments.
Shipping or Tips - the total for all shipping or tips (gratuity).
Discount - total of all discounts given.
Hours - the number of employee hours worked today.
Voided - the number of voided sales.
Customers - the number of customers.

"Inventory"
The Inventory report will show the stock levels of each store at the time the report data was sent from each store. This report can be run during stores hours; but only should be done so if you are using the Network version with a dedicated server. The shortest time interval the report can be generated is 15 minutes. This means that it is possible to see stock levels that are no older than 15 minutes. Of course, if you do not need it that frequently then set the interval to a longer period.

The main office should have all the products in its database that all the stores have. If a report is run and the office doesn't have a product that a store has, the product will be added to the office's database automatically. But only the product's basic information will be added.

If the product count for a store is blank that means the store has zero in stock.

Helpful Tips

Screen Size

The order window will Maximize to the whole screen unless the "Don't Maximize order window" option is checked in the Settings | General.

Tax-exempt

The Tax field determines tax-exemption. Set this field in the Product Edit window. Products that are tax-exempt should be set to '0 - No Tax'.

Excel

How you can view reports and other information with Excel.

All Reports, Customer information, Products and any other information that is exported is saved in a tab delimited text format (nnn.txt).

These text files can be imported or pasted into Excel. From inside of Excel use the Open File command and change the 'Files of type:' to Text File. Select Tab Delimited information.

Excel can open these files directly. Press the right mouse button on the text file. Select 'Open With -> Excel'.

When you save from Excel use the 'Save As' menu with the 'Files of type:' set to Text File. Don't worry about the warnings from Excel; no information will be lost.

Quick Add window

Quick Add allows new products to be entered on the fly during a sale entry.

The Quick Add window opens when an unknown Item#/UPC is entered. This dialog allows all the fields to be entered and the new product created. This option can be turned off in the Settings | General menu.

Returns

1) Press the "Trade-in/Return" button (two chasing arrows).
2) Scan the item or find it using the search field.
3) Chose either Trade-in or Return:
   A Trade-in will give the customer the amount of the item minus the "Trade-in Discount%" and add it back to inventory. No tax refund will be included.

A Return will give the customer the full amount of the item plus tax
and add it back to inventory.
4) Enter the quantity being returned if more than 1.

Using a negative Qty will return the products back to inventory and
adjust the price and taxes properly.

How to give Cash Back

Example: a customer wants make a purchase using his Visa card and wants
$10 back.
- Enter the sale as normal and press the Finish button.
- Press the Cash Back button first and enter the cash back amount 10.
Press OK.
- Press the Visa button.

Now complete the sale as normal. The change window will show the
amount 10.00 for change (cash back) and the receipt will show the cash
-10 and the visa payment amount.