

M.P.O.S MR Point of Sale Software
Version 8

User Guide



Software

**Registration Codes are available
Automatically by connecting to the Internet
Or
By calling 706-228-4616**

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MPOS-8-R1

INTRODUCTION

MPOS Pro is the solution to retail management problems. How do you manage and control your inventory both bar-coded and non bar-coded? How do you control employee theft and risk management? How do you calculate daily, weekly & monthly sales totals on the fly? How much sales tax do you need to pay to the government for any given period? Just how much products have you moved in the last week? What about client information, how much money has a particular client spent for a given period? And the many more important retail management questions you have? The answer to these questions and many more is MPOS Pro. In this document we will discuss how MPOS Pro can assist and manage all of these tasks and many more.

STANDARD FEATURES

- * Easy to use and install
- * Windows compatible
- * Touch Screen Compatible
- * Internal check verification system
 - * Credit card processing
 - * Client tracking
- * Price Checks & Discounts on the fly
- * Export to popular database formats (Via MS Access)
- * Multi level password security for all users & managers
 - * Setup Wizards
- * Cash Drawer Reconcile Wizards
 - * Hot Keys
- * Total Inventory Management
- * Total Report Management
- * Customizable Receipts with logos
- * And much more.....

Pre Installation Notes:

If your system freezes or restarted before installation was Complete see trouble shooting FAQ.

After MPOS Pro is installed the Installshield will start the installation of the optional software such as drivers and credit card processing modules.

Important Note!

If you are upgrading from a previous version of MPOS and you are using the CD to install. It is suggested you do a backup first before installing the newer version. Those upgrading from the CD should select the upgrade button. During the installation the setup program will automatically install the latest version without overwriting your current database setup. Those upgrading using the Internet should first backup their system and optionally create a copy of their installation directory "Point of Sale." This is located on your local hard drive in the Program Files directory. After backing up your system install the downloaded version and activate the application. To restore your data files simply use the restore backup function listed under your main file menu. Those experiencing problems restoring their data should use the copy of their "Point of Sale" directory that they created to find the files SMP.mdb and PRD.mdb copy these files into your original "Point of Sale" directory. This will restore your database to its original data.

Installation

System Requirements for install

A 586 compatible PC (Pentium 1000 MHz recommended)

16MB of Ram. (500MB of Ram recommended)

24 MB of hard drive space for Installation 16MB or more of free hard drive space for program

Windows 98SE, 2000, ME, XP, Vista, Windows 7

Installing Floppy Disks

Installing CD-ROM

If you are installing MPOS PRO from your CD-ROM insert the CD into your CD-ROM. If your CD-ROM supports Auto run simply wait until the startup program activates and follow the onscreen instructions. If your CD-ROM does not support Auto run, from windows, select the start button, select run and type your CD-ROM drive letter and the words install.exe (i.e. d:\install.exe) and follow the on screen instructions.

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Basic & Professional Versions

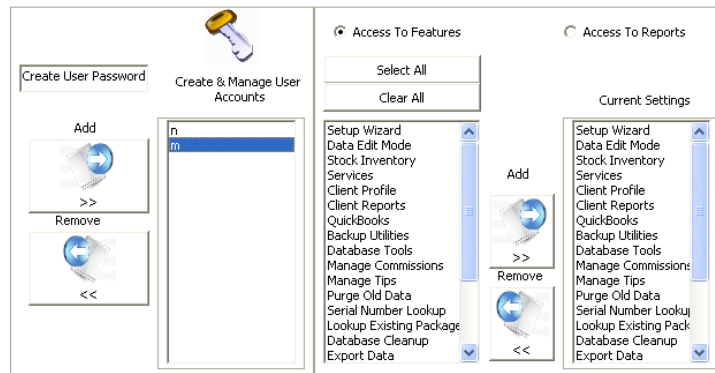
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Setting up your system

Here is a review of Setup Wizard Options

Set Passwords & Security Features

This section of the program is used for security and password access. This is the area is where you would set up both passwords and access levels to different sections of the application. You can use as many passwords as you would like, you can use the same password for a group of employees or you can set up a different password for each employee. Your passwords can consist of numbers or letters or a combination of numbers and letters. Passwords are case and space sensitive.



To use this feature you must first type it's password into the create user password box. Then once you have entered a password you should click the button labeled add. This will then create a new passport account using the password name as the account. Once this is done you can now select access levels for this account. This is done by selecting the radio button "Access to Features" or "Access to reports". You can optionally choose the select "button to select all of features this is useful for setting password accounts for managers and owners. And also use the clear all button to clear all features or report from a particular account. By selecting the Access reports radio button, you can select the reports you wish this password account to have access to. You can optionally use the select all and clear all buttons with this feature also.

You can also manage password user accounts by selecting the account name then using the "Add" or "Remove" button. This will allow you to add or edit an existing account.

Caution should be used when giving access to the setup wizard. Individuals that have access to this screen will be able to change their own access levels and security of. Also caution should be used when issuing several accounts with the same password. Duplications are not allowed so each user should have their password or you should assign a group password. If ever you have a problem accessing this feature or logging into your system there is a universal login code that can be acquired by calling your dealer support desk. They will be able to Override your pass codes and allow you to reset them. Please note that the system uses data and text encryption and any password created will be stored and encrypted therefore the only way to access this information will be through this screen. All other data will be encrypted for security purposes.

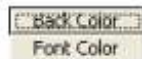
Select the next button located at the bottom of the setup wizard to continue.

Themes

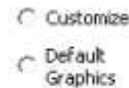
Graphical themes are a user feature that allows you to change the general look and feel of this application. By using themes you can optionally change the background color and text. In this screen you will be given the choice to select background color, and font color. These choices will affect all nonessential screens. To select a background color simply click on the button labeled Back Color and select the color of your choice. To select Font color select the button labeled font color, then select the font color of your choice.



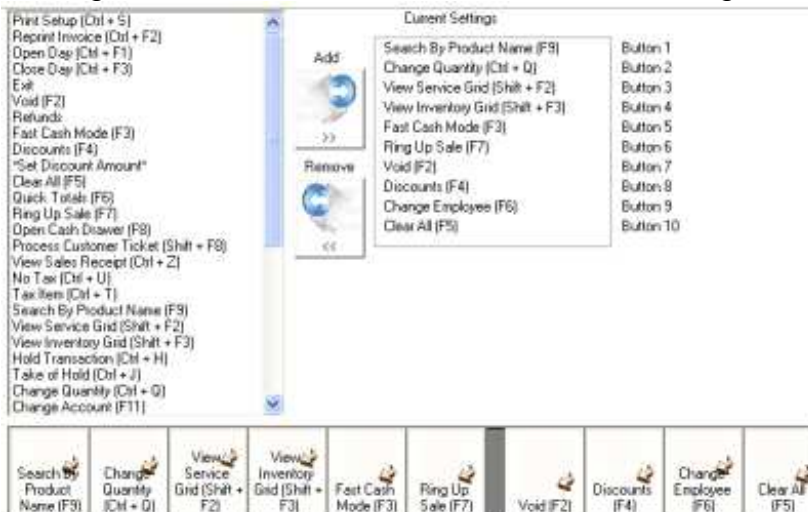
Font Color



Use this option to edit the Cash Register look and feel.



As an added feature you can also customize the cash register screen. This is done by clicking on the button labeled "Customize Cash Register".

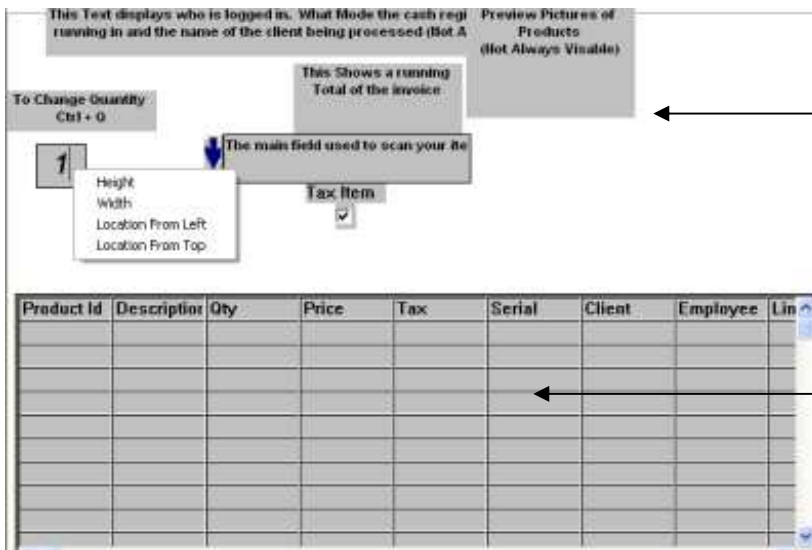


Once you enter the customize cash register screen you are now able to customize the ten buttons that will be used. It should be noted that by selecting these buttons you will still be able to use all of the features that are listed in your feature list. By selecting these buttons you are simply setting the default buttons that you wish to see when you start up your cash register system. These buttons should reflect the features that you feel you may use the most. To add a feature to the button simply select the feature to the left of the add button. Then click the add button this will add the new feature to the next available button. To remove a button simply click on the current settings list, then click the remove button. There is also a set to default button if he decides to change the buttons back to the

default settings. A special feature of this screen is the set discount amount option. With discount amount feature you can create a button that will reflect a certain discount either by dollar amount or by discount percentage. This is helpful for all those who issued certain types of discounts and would like to have a Quick reference to the discount buttons. To navigate to the customize cash register screen click on the Button labeled Customize Cash Register Screen.



Editing Cash register Screen



Customize the screen Width, Height, and location of any item on the cash register screen. This is done by clicking on the item and setting their positions on screen.

By clicking on a column on the grid you can set whether a column should be shown or hidden.

With this feature you are able to set the screen items back to there default settings by clicking on the button labeled “Setback to the Default Settings”.

Note: the Height and Width as well as location from left and location from top are not in inches or centimeters but are in screen Pixels. So you may need to adjust the numbers until it reflects the location you wish the item to be placed on screen. If an item is no longer visible use the Set Back to default button to reset the items on screen.

General Setup

General Setup

Sales Tax Setup **Quick Books Setup**

Company Name
Your Company Name Here

At what default number would you like to be warned when your inventory is low.
Items in Stock

Schedule For

(Start Up Screen) What screen should the software start on.

Automatically log off after how many minutes of inactivity.

(Cash Register) What Will Be Your Default View.

☐ Track employee activity (force employees to log in)
☐ Prompt for Client Info
☐ Verify All Checks Presented for Bad Account Profiles
☐ Keep Hot Keys Grid Visible
☐ Allow Fast Cash Mode to be Activated
☐ Show Inventory Pictures during Cash Out
☐ Use Fast Photo Loading
☐ Print Receipt Default Settings

☐ Log Employee Out after Each Sale
☐ * Must fill in all fields
☐ Activate Touch Screen Options

☐ Do Not Warn me at POS when Inventory is Low
☐ Print Serial Numbers On Receipts
☐ Show Low Inventory Report at Startup
☐ Print Reports using Pos Printer (Default settings are desk top printer)
☐ Activate Caller ID Feature *
☐ Prompt for Credit Card Information
☐ Prompt for Check Information

What time do you open What time do you close

☒ Don't Show Quotes

Network Options for Computer: MAIN

Use this option to network your software.

In the general setup this is where you setup your company's profile. Important information about your company is stored here such as the sales tax in your area. Your company name and stock inventory warnings.

"Show Items in Stock" are warning prompts that will appear when your inventory reaches the number of items you specified in this box. Note the system will automatically warn you when you reach 5 or below in your inventory count. Also note you can assign reorder points and stock warnings points for each product. If you have not assign a reorder point then this value will be used as the default stock warning. Please view *"Setting up your Inventory"* for information or reorder points.

"Sales Tax Setup" In this section you are able to set tax levels for each product based on percentages. If you have one product that should be taxed at 1 level and another product that should be taxed at a different level. Setting up your tax levels does this. For each level enter a percent of tax that is charged for this level. Once you've completed this section and begin entering your inventory into the system you will be allowed to choose which tax level will apply to each product, as it is setup. You are given a maximum of 7 tax levels that can be applied to one product. If you do not choose to use multiple tax levels simply use the first level and leave the other levels as they are. Your default tax rate is the first box indicated by the yellow background. If you choose not select any tax rates for your product during inventory setup the default will be used whenever taxing a product is selected. Each product stores its own tax rate. So when there is a change of tax rates, in the past you would need to change the main tax rate in this area. Then you would need to select each product and

change the rate to the new tax value. With the changes made you can now simply change the corresponding tax rate in the Sales Tax Setup and the system will automatically scan the product and service database and update all tax rates for you.

Skip this section if you are not using QuickBooks

Next you have the **QuickBooks setup** this section is for those companies that are using QuickBooks and wish to integrate MPOS with their QuickBooks system.

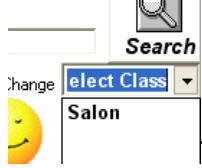
What Version Year of QuickBooks Are You Using 2008 2009 2010 2011 2012	What Version Type of QuickBooks Are You Using <input type="radio"/> Basic <input type="radio"/> Pro <input checked="" type="radio"/> Premier <input type="radio"/> Enterprise	Choose Your Connection to QuickBooks <input checked="" type="radio"/> Direct Connection (XML) <input type="radio"/> File Export (IIF) <input type="button" value="Import Data From QuickBooks"/>	Connect to a Quickbooks file on a remote computer using AcctSyncConnector <input checked="" type="checkbox"/> Remote PC IP Address: 24.236.98.129 Remote Port: 2080 <input type="checkbox"/> Remote Login with a password & username Username: Password: <input type="button" value="Setup Classes"/>
UNDEPOSITED FUND	What account will your pos sales be assigned to when being exported into QuickBooks. You can change the account during ringup by using hot keys. See QuickBooks help on "accounts" for more information. This can be a Bank or Undeposited Funds.		
Doral ACCESORIES	What is the income account to post your sales information.		
GA	What is the Name of your QuickBooks Sale Tax Account		
Register 1	What text should be used in the memo field when exporting into QuickBooks. You can change the account during ringup by using hot keys. See QuickBooks help on "memo field" for more information.		
<input type="checkbox"/> Will invoice be flagged (as Pending / Non Posting) when imported into QuickBooks			
<input type="checkbox"/> Create Customer Job for all Sales Transactions.			
How should MPOS software post your sales transactions by default. <input checked="" type="radio"/> Sales Receipt <input type="radio"/> Invoice			
<input type="checkbox"/> Allow QuickBooks To Change MPOS Sales Receipt Numbers !!Caution if this is selected the MPOS invoice number will not be used when exported, QuickBooks will assign a new Sale No.!!			
<input type="checkbox"/> Automatically Export Sales Into QuickBooks (XML Only) Export Automatically Export at what time? <input checked="" type="radio"/> Day 1:00PM How many times should we try before quitting? 3		<input type="checkbox"/> Automatically Export Hourly (XML Only) How many hours should pass between each export attempt. (Remember to make sure quickbooks is installed on this computer and is integrated with MPOS properly otherwise this option will be unable to communicate with QuickBooks.) 1 Starting Ticket Number: 1082 Ending Ticket Number: 1082	
<input type="button" value="Ok"/>			

The first step in setting up your QuickBooks integration system is to tell the system what version of QuickBooks you are running. Once you have selected the version year of QuickBooks you must now select the version type of QuickBooks. This will help the system to know what type of connection is needed to QuickBooks. This function allows you to create a file that contains all of your company information. If you are using QuickBooks Pro 2002 and above you can use the direct connection or (XML) connection this will allow you to connect directly to QuickBooks database as long as it is installed on the same computer or is accessible over a standard windows network.

The first box indicates what **QuickBooks account** you will post all of your sales when being exported into QuickBooks. You can change the account during ring up by using hot keys. If you do now know what an account is or how to set one up refer to your QuickBooks manual or help file for references.

The next option is the **QuickBooks income account** this is the account MPOS will post all sale transactions to. This information will be reflected in your profit and loss statements. The next option is the name of your QuickBooks Sales tax Account. This is the account you have setup in QuickBooks to handle your sales tax.

You can also setup classes by clicking on the button labeled “Setup Classes”. This feature is helpful when tracking sales by class.



To select a class when processing a sale select the client find option. You will then be able to select the classes that you have setup. If you have not created any classes this option will not be visible. This feature is an advance QuickBooks feature consult your QuickBooks documentation for more information on classes and how they are used. There are no MPOS reports for classes all reports by class will be generated in QuickBooks. This feature is only available in the XML compatible versions of QuickBooks.

See the Chapter on “QuickBooks” for more detailed information on accounts and its relationship to your sales transactions.

The next option is the check box “**Track employee’s activity (forces employees to log in)**”. In order to use employee login you must have first setup your employees with employee numbers see 'Employee Setup' for detail instruction. If this option is checked all employees must login by either scanning their ID Cards into the system or typing them in manually. If their ID is correct then they will be allowed to enter the cash register system or scheduling system. This process will be logged in the time clock system as logging in. Or Bed Audit report if you are using Tanning Modules.

The next option is the check box “**Log Employee Out after Each Sale)**”. If this option is checked the register will automatically log you out. Forcing the next employee to login before they can process the next ticket.

The next option is the check box “**Prompt for client info**” If this option is checked then every time you ring up a new sale you will be prompted to enter the customer information into the system. You can then cancel this if the customer does not want to leave his or her information or process their customer information. Client profiles are primarily used to collect and maintain a customer database. For more information on this topic, please refer to the section Tools You Will Use under Client Profile. Your customer database is also used to track specific customers spending habits you can run specific reports to determine any clients spending trends. See **REPORTS** for more information on clients reporting.

The next option is the check box “**Must fill in all fields**” If this option is checked your employees will have to fill in all of the customer details their full name and address before they can continue.

The next option is the check box “**Verify All Checks Presented for Bad Account Profiles**” If this option is checked, then every time a client presents a check it will check the database to make sure they have not presented a bad check in the past. The system is equipped with an internal check

verify system. This system will sort through every customer check to verify that it has not been presented in the past and returned as unpaid.

The next option is the check box **“Fast cash mode”** this option enables users to enter sales in cash register mode easily without having to scan or type an item in. When this option is checked users are given the ability to use hot keys to ring up sales. Sales can be rung up using the “F3” command. Sales can also be controlled from within inventory by simply changing the retail price of any product to \$0. If and inventory item is scanned, or if is typed or selected from the drop down option and the price is set to \$0 then you will be prompted to enter the retail price of the product. And alternative way of ring up a sale is using the F3 Hot Key. When using this option you will be prompted to enter the retail price for the item that is being sold. When using this particular option it is noted that you should have already set up this option in the setup wizard. When clicking on the **“Activate Fast cash mode”** you are given the option to enter the barcode ID. The barcode ID is used to identify this product in your report system it is also used to identify this product for voiding and refunding in the future. The next option is the product name this field will be used every time you use the fast cash mode option. This is the field that will be printed on your receipt, and also will be shown on your reports. Use the **“product name”** field to identify any product that will be sold using the fast cash mode, this way you can identify any sales that were sold using the fast cash mode. If you choose not to activate this option, then products that are sold in inventory at retail price of \$0 will actually ring up at \$0.

The next option available is the **keep the hot key grid visible**. This option is used when you are using the hot keys or service keys to ring up sales. Their may be times where you wish to keep the grid visible to ring up multiple products by clicking on this option you can keep the grid visible until you have concluded all sales then by simply clicking on the exit button you can remove the service grid. To learn more about Hot Keys & Service Grids see “Hot Keys” in *Setting up your cash register chapter*.

Print Serial Numbers on Receipts.

If you need to track serial numbers and would like to have the serial numbers of each product sold printed on the receipt then check this option. This will optionally print the serial number of each product underneath the products name and price.

Activate Caller ID Feature.



The client name and phone number pops up here.

If the clients is found you can either choose to schedule for this client or view their client profile.

To activate this feature you must have caller ID activated on your phone line. And your *modem must support caller ID*. If you activate this feature with Customer Pole display activated your client caller information can be displayed on your customer pole display. This screen only appears when a phone call is detected. Once the phone call has been disconnected then the screen will minimize itself until the next phone call. All calls are logged in either the temporary log or the client history if their profile is found with the caller ID system.

The next option available is **Printer default settings** these settings set your printing default. By checking this option each time you enter the cash register screen the print receipt option will be checked by default. If uncheck this setting, then each time you enter cash register screen the print receipt option will be unchecked by default.

The next option is the check box **“Do Not Warn me at POS When Inventory is Low”** If this option is checked and an item is either at or below the default low inventory value. Or reorder point value. MPOS will not prompt you at POS with a warning.

The next option is the check box **“Show Low Inventory Report at Startup”** If this option is checked then every time you start the computer up a report will be generated showing all the items that are below the indicating stock warning amount. You can then choose to disregard or print the message. If you choose to print you will be given the products name UPC and purchasing information such as cost of goods and vendors phone numbers.

The next option is the check box **“Print Reports using Pos Printer (Default settings are desk to printer”** If this option is checked then every time you request a report to be printed it will print to your pos printer rather than the default windows desktop printers. (Note only 1,2,3,4, column reports can be printed on the pos printers 7 columns reports must be printed using a desk top printer.)

The next option is the check box **“Prompt for credit card information”** If this option is checked then you'll be prompted to enter credit card information such as credit card numbers and expiration date. If you do not wish to collect this information from your clients, leave this option unchecked and you will not be prompted to collect credit card information. You still we be able to accept credit card as a form of payment even if this option is not selected.

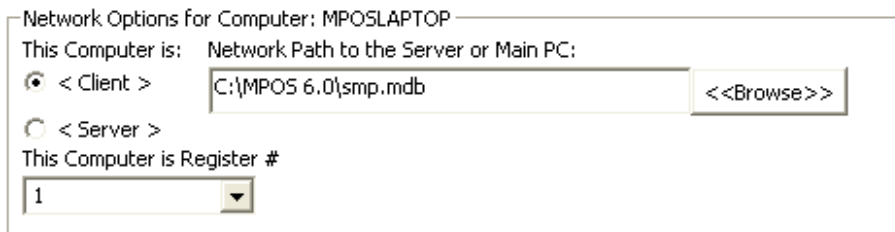
The next option is the check box **“Prompt for Check Information”**. If this option is checked then you'll be prompted to enter check information such as bank routing number and bank account number. If you do not wish to collect this information from your clients leave this option unchecked, you will not be prompted to collect check information. Please note you will be able to accept checks as a form of payment even if this option is not selected.

The next option is the combo box **“Schedule For”** With this option you can select what will be the default mode your scheduler will load in. You can still toggle between modes in the scheduler screen under the “File Menu” this option will simply set the default mode.

The next option is the combo box **“(Start Up Screen) what screen should the software start on.”** With this option you can select what screen will open first when you launch MPOS. You will still be able to navigate to other features. This option only works in registered version not in evaluation modes.

The next option is the combo box “**(Cash Register) What Will Be Your Default View**” With this option you can select what mode your cash register will load in. Your choices are “Classic View” for older users, “Modern View” for the newer view or “Prompt Me” which will ask you each time to choose between modes when you select “Process Sale” please note “Modern View” only support screen resolutions of 1024 x 768 and above.

“**Network Options**” can also be set up from this location. If you are installing the software on several computers and wish to centralize where the data is stored you should click on the option labeled “Network Options”.



Network Options for Computer: MPOS LAPTOP

This Computer is: Network Path to the Server or Main PC:

☒ < Client > C:\MPOS 6.0\smg.mdb <<Browse>>

☐ < Server >

This Computer is Register #

1

Next you must identify whether this computer is a client or the main server. If this computer is a client that will be connecting over the network to another computer you will need to specify the path, you can manually type the path of the main database. Or you can click the browse button and browse through your network to the location of your database file. In most installations the default Path will be in the Program Files folder in the Point of Sale Directory. i.e. (C:\Program Files\Point of Sale\) if this computer will serve as the server or main computer then you should select the server option. You can also designate what computer # this system will be. This is helpful when running reports or reconciling a drawer. You can select the computer you wish to count down. No further changes are necessary for this machine you will need to make sure that all other client computers point to this installation.

Select the next button to continue.

Accepted Form of Payments

XCharge

XCharge payment server is the default credit card processing module. Before settings up this option you should first install XCharge software and make sure it is configured properly. XCharge Installation Files should be located on your install CD. Or you can download a copy by visiting MPOS website or contacting a dealer. Once you have configured your XCharge system and have processed a test transaction using your merchant account. You are now ready to integrate MPOS software with XCharge.

PCI (Compliance) Do not Store Credit Card Data.

Credit Card Setup

PC Based Credit Card Setup

PcCharge Integration Setup

XCharge Integration Setup

XCharge Setup

Activate XCharge

Select the path to your Xcharge Installation.

C:\Program Files\X-Charge\LocalTran\ <<Browse>>

Error Time Out: How many seconds should we wait for a response from the server

20

Use Multiple XCharge Merchant Accounts

Activate XpressLink Secure With PinPad Support

Once you have set up your system you should now select the XCharge Integration Setup. Then you should click on the check box labeled “**Activate XCharge**”. If you have installed XCharge in another directory other than the default you can now use the browse button to find the local installation. The last step is the error time out; by setting this value you are telling the system how many seconds to wait before responding with an error. The waiting period is the amount of time the system will wait for a response from either the server program or the process. Before responding with an error informing you that the system has timed out. Please wait for response from the server or processor.

In this area you select the form of payments you will accept. To change a form of payment simply type over the ones you wish to remove. To add a new record press the Add button and type in the box that has the asterisk located besides it. To completely delete a field simply click your mouse on the left side of the grid and highlight the column you wish to delete, and then press the delete button on your keyboard.

The next option is the check box “**Use Multiple XCharge Merchant Accounts**” Use this option if your employees have setup there own merchant accounts and you want MPOS to process their credit card transaction through the individual accounts.

The next option is the check box “**Activate XpressLink Secure With PinPad Support**” This option is the suggested way of integrating with XCharge. This allows you to support debit pinpads and also direct connection with XCharge Server. This is the only option that will allow your transactions to be PCI compliant.

PC Charge

Warning! If you have not purchase PC-Charge Pro or Payment Server processing software from your dealer, then **DO not** activate this option. It will interfere with normal operation if activated without the PC-Charge being installed and registered. Contact your sales department for pricing on PC-Charge and other credit card options. Also as of 2008 although this feature will remain it will not be supported or updated, as XCharge will now be the default processing software.

MPOS integration

MR Point of sale is fully integrated with PC Charge Pro and Payment server this allows you to use the full features of PC Charge within the confines of MR Point of Sale. Allowing for smoother point of sale transactions and accurate reporting. In this brief you will find many points covered in your PC Charge manual and also information needed to integrate your PC Charge with MR Point of Sale. Before installing activate the PC Charge Pro option. It is important to first install PC Charge and fully test both your merchant account number and the modem to make sure the PC Charge interface is working properly. If you are unable to run or validate any test transactions, contact PC Charge for support on setting up your new system.

Setup Wizard

☐ PCI (Compliance) Do not Store Credit Card Data.

PC Charge Integration Setup

AcctSyncConnector.exe
curl.exe
gpmc.exe
MPOSQB.exe
MPOSUPDATE.exe

C:\
Users
Nigel
Desktop
MPOS 8.0
Backup

Activate PC Charge as your Credit Card Processing Software

User Name
User 1

This option integrates PC Charge Pro & PC Charge Payment Server. You must install and registered your version of PC Charge or Payment Server. Once you have installed and setup your merchant number and service provider you can now integrate that service into this product.

Merchant Number
3112

☐ I am using PC Charge Pro
☐ I am using Payment Server

PC Charge Cashier:

PC Charge Password:

Credit Card Company Setup

Save & Exit

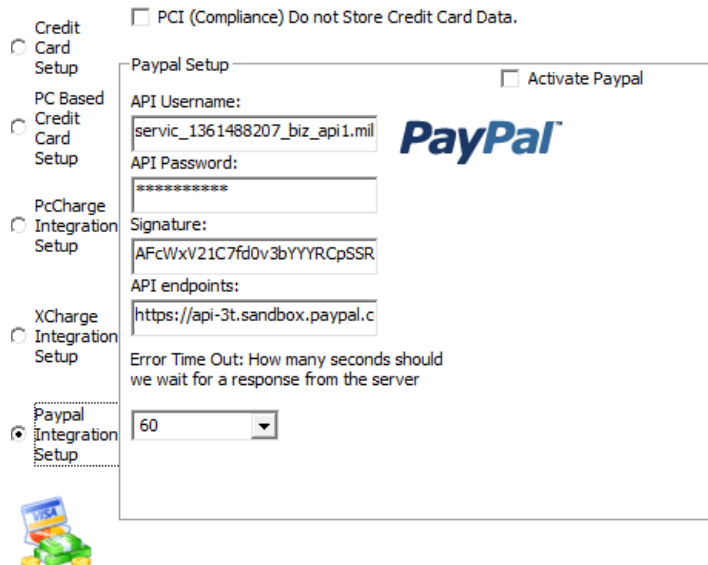
You can enter the setup wizard by selecting on the main screen, the options menu then selecting "Setup Wizard" or using the short cut key Ctrl W. Once you enter the setup wizard select the next button, until you reach the area for Accepting form of payments & PC Based Credit Card Processing. Select the third option labeled "PC-Charge Integration Setup". Once this has been selected the screen above should appear. The first step needed is to select the location that PC-Charge is located in. This is done by selecting the drive and the directory you chose to install in. Next select the

username you chose during the setup of PC-Charge. Next enter the merchant number assigned to you by your service provider. Then select the program you are using either PC-Charge Pro or Payment Server. The finale step is to select the command button labeled “Credit Card Company Setup”. By choosing this option you will be prompted to verify the processing company you are using. In the latest version of PC-Charge you will need to enter your username and password that you have set up in PC-Charge. Keep in mind you can not use the system username as it is not setup for pos transaction only administration setup.

This is all the information needed to integrate PC-Charge Pro and MPOS See cash register function about using and processing sales.

Accepted Form of Payments **PayPal**

You are able to process direct payments if you have a PayPal Payments Pro account. This allows you to accept credit card payments directly from your point of sale terminal. You are able to process sales transactions and credit transaction using this feature. This feature does support both manual entries and swiped entries although track data is not supported in this version of the integration.



The screenshot shows the 'Paypal Setup' window within the PC-Charge software. On the left, a vertical list of options includes 'Credit Card Setup', 'PC Based Credit Card Setup', 'PcCharge Integration Setup', 'XCharge Integration Setup', and 'Paypal Integration Setup', with the last one selected. The main window contains a 'Paypal Setup' section with a 'PayPal' logo. It includes fields for 'API Username' (filled with 'servic_1361488207_biz_api1.mil'), 'API Password' (masked with asterisks), 'Signature' (filled with 'AFcWxv21C7fd0v3bYYRCpSSR'), and 'API endpoints' (filled with 'https://api-3t.sandbox.paypal.c'). There is a checkbox for 'PCI (Compliance) Do not Store Credit Card Data.' and another for 'Activate Paypal'. An 'Error Time Out' section asks for the number of seconds to wait for a response, with a dropdown menu set to '60'. A small icon of a cash register is visible at the bottom left of the window.

Once you have set up your system with PayPal you can now click on the “**Activate Paypal**” option. Next you will need to get your API Username: this will be generated by PayPal log into your account and browse to the Payments Pro section and find your Username. Your API Password will also be listed on the same page copy and paste your password as well as signature. Your signature is a security code that gives MPOS permission to charge credit cards and post them to your PayPal account. You will also need to contact PayPal for the API endpoints. This is the URL that connects to your PayPal server for processing. The next option is your time out settings. Use this option to control how long MPOS will wait before timing out and declining the transaction.

Printer Setup

☐ Print Logo's using Fax

Select the printer you will be using with MPOS software

☒ Any Windows Supported pos printer 3" Format

☐ Ink Jet or Laser Desk top Printer 8x11" Format

Advanced Settings

Sales Receipt
Invoice Receipt
Report Printer
Barcode Printer

Select Text for Receipts

What Words will appear on the top of your receipt. This is also the welcome text on your pole display.
Thank You, Please visit again

What Retail Chain #do you want on your receipt
Doral Tanning Zone

Insert Logo
Receipt Layout

What Words will appear on the Bottom of your receipt. This is also the exit message on your pole display.
www.doraltanningzone.com

What Address would you like to print on your receipts
10363 NW 41 ST

Misc Data to print on receipt

What Phone number to display on receipt
1(305)513-3333
Addressed continued
DORAL, FL 33178

☐ Create a Credit Card Signature Line.
☐ Print Partial Credit Card #'s
☐ Print Double (2) Receipt
☐ Print Double (2) Receipt For Credit Card Sales Only.

☐ Print Sales Reps on Receipt
☐ Print Discounts on Receipt
☐ Print Tip Line On Receipt ***
☐ Print Subtotals On Receipt
☐ Print Barcode On Receipt
☒ Print Unit Price on Receipt

Select Receipt Printer

Receipt printing options

In this area you will setup the printers that will be used by MPOS PRO. Also the text and logos that will be printed on your receipt as well.

The first option is the **“Print Logo Using”** option box. Select this option if you are using a Windows Driver that supports printing logos. This option does not support Generic text only drivers.

Which Printer will you use?

If you are using a STAR, EPSON or a printer that uses a window drive then you can also select **“Any Windows supported pos printer”** (note that the pos printer must be installed by using windows printer setup and must be available before selecting this option. Also you may not be able to operate a cash drawer using this interface if you are not using a supported model.)

If you will be using your windows installed desk top printer then check the box labels **“Ink jet or laser desk top printer”**

You can select the printer that will be used for each category. To do this first click on the category you wish to set up, then using the drop down box select the printer you will be using for this category. You can select a different printer for sales receipts; invoice Receipts, Report printer and barcode printing. These settings are specific to this installation only. Each computer on a network will need to set up its own printer preferences. These settings can be changed at any time, by simply going to the file or print menu of that screen and selecting the new printer that the document will print to.

If you are using an Epson receipt printer and would like to use the OPOS drivers that use the esc/pos commands then select the button **“Advance Setup”** you can now check the box **“Epson POS receipt Printer & Cash Drawer”**

What will print on your receipt?

Next you must select the text that will print on your receipt. You are given seven lines of text that you can customize. Go to each box and type the text that you wish to have printed on your receipt.

By pressing the button labeled **“Inset Logo”** you can insert your company logo on any of the printers you have selected. You can set your logo to be printed by accessing the setup wizard as mentioned above. Tab to printer setup and press the button 'insert logo' if you are going to use your desktop printer, browse to the folder that has your logo file. The logo will be inserted into your database. To set your logo for your pos printer you must click the instruction button, which will activate the logo file in your window's paintbrush. You can then edit the file for your logo. (You are restricted to using 2 colors and size width of 206 x 173.

You can also select the button labeled **“Receipt Layout”** This option will allow you to change the words that print on the receipt. It will not change the actual area in which it prints but will change the default wording. Keep in mind that when you activate this feature by checking the box on the top of the page. You must fill out each line otherwise it will leave the field blank when printing out a receipt.

Print Sales Reps on Receipt?


If this option is checked then your employees name will print on the receipt underneath the service they rendered.

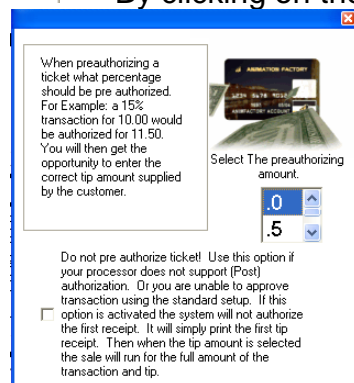
Print Discounts on Receipt?

If this option is checked then any discounts applied will print on the receipt

Print Tip Line on Receipt?

Click this option to activate the credit card tip system. This will allow you to print a special receipt with a line for accepting tips. This is to be used with XCharge or PCcharge only.

 By clicking on the advance button you can edit advance features.



Use this option if your processor does not support (Post) authorization. Or you are unable to approve transaction using the standard setup. If this option is activated the system will not authorize the first receipt. It will simply print the first tip receipt. Then when the tip amount is selected the sale will run for the full amount of the transaction and tip.

When processing a sale the screen shown below will be displayed. A receipt would have printed that should be given to the customer. A tip line would be available for your customer to fill in. Once they add the tip to the receipt you can then add the amount on screen. The system will then complete the transaction and print your final receipt. All tip data would be stored in the tip management system located under management tools.

DEMO-0

Sales Amount
\$90.00

Enter Tip Amount
\$0.00

Approved

Tip Amount
\$0.00

Total Sale
\$90.00

7 8 9
4 5 6
1 2 3
CLEAR ALL 0 .

Print Subtotals on Receipt

If this option is selected your receipt will print subtotal by service sales, inventory sales, package sales.

Print Barcode on Receipt

If this option is selected then a barcode will automatically be generated and printed on the receipt. The barcode will represent the ticket number.

Print Unit Price on Receipt

If this option is selected then an extra column will be displayed on your register screen. This will allow you to edit transaction quantities by units. It will also display those unit prices on the receipt that prints.

Open Drawer for Cash Sales Only

This option is located by clicking on the “**Advanced Setting**” button when this option is selected the cash drawer will only open if your transaction is a cash sale. Please note you will need to edit your settings in your printer drivers if those are used to open the drawer.

Click the next button to continue.

Email Notification

☐ Email & Text Message Notification Active.



How many hours should pass between each email.

0

Email Setup


To Email:

Email Server:

User Name:

Password:

☐ Server Requires Authentication

 *Test*

 Save

This option will email your daily Summary to the email address you select. The Daily Summary report includes Daily Cash, Daily Debit, Daily Check, Daily Credit Card, Daily Other, Daily Gift Card, Daily Invoice, Daily Grand Totals, Daily Cash Paid Out, Total Gift Certificate, Daily Opening Amount, Daily Closing Amount.

Email notification is a feature that will automatically email you your “Daily Summary Report” This is your end of day report. To use this feature simply check the option labeled “Email & Text Message Notification Active” If sending this report to a phone you must use the email format for your text message account; contact your carrier for this information. Next enter your email account and email server if you do not have this information contact your Internet carrier for SMTP server information. If your account requires authentication then enter your username and password and select the check box labeled “Server Requires Authentication” you can now test the feature by clicking on the button labeled “*Test*” If you receive an email you have configured email notification properly, you should now select the combo box labeled “How many hours should pass between each email. This will set the amount of time between each email that is sent to you. Next click the button labeled “Save” and you have completed email notification setup.

Click the next button to continue.

Hardware Setup

MSR READER

You can use any windows supported MSR (Magnetic Strip Reader) with this system. Setting up the System is done by attaching the MSR reader according to the specification included with your Reader. To activate the reader with this program simply click the check box option labeled MSR Reader. The system can be used to record the client credit card number, although the third party Software will still be needed to activate and send the credit card data for authorization and Processing.

SERIAL CASH DRAWER

You can use any standard serial cash drawer with this system that is fired by standard ASCII set. The specific style of cash drawer does not matter as long as it meets the requirements listed below:

1. Standard RS232 Serial Port Connection

2. Text Format: Any Character in ASCII SET, NO Parity, 8 Data Bits, 1 Stop Bit.
3. Baud Rate 110 to 9600.
4. Pinouts - 25Pin or 9Pin

You must connect the cash drawer to either COM 1 or COM 2, keep in mind if you are using these ports for other devices you can not substitute the port numbers you **must use either COM 1 OR COM 2**. Once you have connected the cash drawer according to the instruction provided with it, select the port from the two options displayed. You cannot test the connection by clicking on the test button. If the cash drawer opens you have successfully configured your cash drawer. If it does not open view the troubleshooting guide that came with your cash drawer. **It is again important not to activate this option if your cash drawer connects through your receipt printer. These are two different options and activating the wrong one will enable the other.**

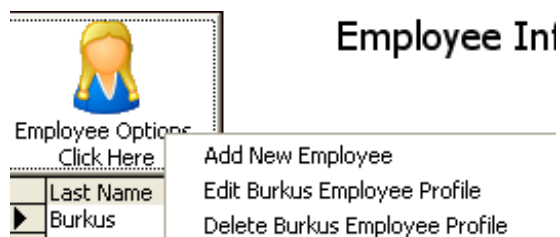
CUSTOMER POLE / LINE DISPLAY

This system is fully compatible with any standard serial pole display that uses either AEDEX modes or EMAX modes. Before installing your pole display **be sure to reference the manufacture user guide to find out what mode your pole display is running on.** And how to change the dip switches in order to change the mode to match either of the compatible modes. As this is the main reason why your pole display may not display your data correctly. Once you have determined the mode you will be operating in select the matching mode from the two check boxes. Then select the COM port that will be used for this display. Be sure not to choose a port that is already in use by another device (i.e. pos receipt printer & cash drawer.) You are only allowed to configure your pole display in either COM ports 1 or 2.

Click the next button to continue.

Employee Information

This is where you can store your employee information. To store employee data simply type the data into the labeled boxes. (The required fields are Employee Number; this is used to grant access into the cash register system.) Employee last name is used to report sales. Initials is used to track sales all the way through to QuickBooks, use this option if you are using QuickBooks and wish to report and record sales in QuickBooks reporting system.



Click on the button labeled “Employee Option” to:

- Add New Employee
- Edit Employee Profile
- Delete Employee Profile

General Information	Optional Information	Commission Information	Weekly Schedule
First Name <input type="text" value="Carlos"/> Last Name <input type="text" value="Brick"/> Initials <input type="text" value="CB"/> Address <input type="text"/> City <input type="text" value="Omaha"/> State <input type="text" value="Ne"/> Postal <input type="text" value="30909"/> Title <input type="text"/> Social Security No <input type="text"/>	Phone <input type="text" value="706-228-4616"/> Employee Cash Register login ID <input type="text" value="2"/>  <input type="button" value="Insert Picture"/> <input type="button" value="Clear Picture"/>	<input type="checkbox"/> Do Not Display In Scheduling System <input type="checkbox"/> Do Not Allow Employee To Issue Refunds <input type="checkbox"/> Do Not Allow Employee To Issue Discounts	<p>Enter your login ID here.</p> <p>Use this option to setup employee restrictions.</p> <p>Click here to enter your employee's pictures.</p>

Birth Date <input type="text" value="10/5/74"/> Date Hired <input type="text" value="12/1/88"/> Salary <input type="text" value="3000"/> Billing Rate <input type="text" value="10"/> Deductions <input type="text" value="10"/> Spouse Name <input type="text" value="Alice Prentice"/> Emergency Contact Phone <input type="text" value="706-736-1236s"/> Emergency Contact Name <input type="text" value="Jane Doe"/>	Employee Notes <input type="text" value="Need's Tuesday's Off"/>
---	--

This is where you store optional information about your employee's. And any notes you need to record.

Commission Paid for Inventory Sold	<input type="text" value="0.15"/>	%	<input type="text" value="0.15"/>
Commission Paid for Services Rendered	<input type="text" value="0.60"/>	%	<input type="text" value="0.60"/>
Commission Paid for Packages Sold	<input type="text" value="0.03"/>	%	<input type="text" value="0.03"/>
<input type="checkbox"/> Create Commission By Individual Service, Item or package for this employee			
<input checked="" type="checkbox"/> Standard Commission <input type="checkbox"/> Sliding Commission			

Use this option to setup commission rates

Use this option to create commissions for:

- Commission paid for inventory sold
- Commission paid for service rendered
- Commission paid for packages sold.

Sliding Commission:

☐ Standard Commission

☒ Sliding Commission

Sliding commission is a feature that allows you to setup different commission rates for different amounts. This allows you to use different amounts based on the total sales price of services, products or packages. Sliding commission will first total the amount of sales for the employee selected; it will then calculate the commission based on the rate that qualifies. To create the sliding rates you must first click on the check box labeled “**Sliding Commission**” then click on the button labeled “Add” to create a new commission rate. By default the commission rate will start with 1 then increment. You can then enter the amount to start from then the amount to end. After this is done you can then enter the rate for the range you created. i.e. (from 1 to 100 rate .1; from 101 to 200 .15) Once you have created the sliding rates you can select save and finish.

From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	
From:		To:		Rate:	

You are now ready to assign the rates to the selected employee. This is done by selecting the corresponding drop down boxes. The boxes should list all of your sliding rates that you have created. Click on the rate that will apply for each selection. A preview of the sliding rate will appear in the grid. Repeat this step for each employee that will be using the sliding commission system.

Sliding Commission Setup

Select Commission Rate for Burkus Rate

Commission Paid for Inventory Sold	<input type="text" value="2"/>	2
Commission Paid for Services Rendered	<input type="text" value="2"/>	2
Commission Paid for Packages Sold	<input type="text" value="2"/>	2

From	To	Rate
1	100	.1
101	200	.2
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0

Employee Override:

You can use employee overrides to override commissions, retail price, booking times and periods to leave open in your scheduling book. This feature is used when you give special commissions to employees that are not handled by standard or sliding commissions. You can also use this feature to

set prices for services, products or packages that are specific to certain employees such as in a case where one employee charges one price and another employee would charge a different price for the same service. Also this is where you can also override the time period it takes to render a service. This will override the standard time when booking an appointment. To create a record click on the column you wish to add then enter the value. Be careful to use the correct decimal format i.e. (percentages should be in the .1 format and not the % 10 format).

Item	Commissic	Retail	Book	Open
Additional Product	.1	50	60	15
Artistic Carmelizing				
Artistic Bang/Beard Trim				
Artistic Basic Perm				
Artistic Bleach & Tone				
Artistic Bleach & tone retouch				
Artistic Bridal Styling				
Artistic Brow Design				
Artistic Can Highlight				

Weekly Schedule:

Day	Start Time	End Time
Monday	9:00AM	
Tuesday	7:15AM	
Wednesday	7:30AM	
Thursday	7:45AM	
Friday	8:00AM	
Saturday	8:15AM	
Sunday	8:30AM	

Use this option to set up employee's weekly schedule. This option is helpful when you need to block out unavailable times for a particular employee. To set an employee schedule you must first click on the start time then click on the time period, and hit the enter key on your keyboard. Does this for each day of the week then repeat this step for each employee? By default the system will lock out the time periods you have selected. They will be displayed in the scheduling system with a lock icon that notes that this period is unavailable for booking.


Click the next and you have finished the setup wizard.

Setting up Tanning Module (Salon Manager Pro Only)

[Add New Equipment](#)
[Edit 1 Equipment Profile](#)
[Delete 1 Equipment Profile](#)
[Allow Open Tanning](#)

Click here to:

- Add New Equipment
- Edit Equipment
- Delete Equipment
- Allow Open Tanning


 Tanning Options
[Click Here](#)

DeviceName

Tanning Equipment

General Setup
Optional Information & Bed Readings

Delay / Undress Time Minutes

Maximum Tanning Time Minutes

Device Number Device Name

Com Port Setting Point Level

☐ Allow Clients to Use this Room without a package

☐ Control Beds With T-Max Timers

Delay / Undress Time: Is the delay time needed either to warm the bed or to undress before the bed starts.

Maximum Tanning Time is the maximum time this bed can run.

Device Number is the most important field. This is the number used to control the bed from within the system. This is the number assigned by the T-Max Manager and is also considered the display number. The system will automatically assign the device number to the next available number on the network. It is important to match the device name to the device number. As the system is unable to do this automatically. It is suggested that you start sequentially from the first bed on your network and then add them to the system one by one. This way you can test each bed to make sure you have assigned the correct Device name to the correct Device number. To see a list of your devices on the network run the AdNet 2000 program and view the parameter data.

A Com port setting is the port; the T-Max Manager is connected to.

Allow user to use this room without a package. If this option is checked then this room can be used without the client purchasing a package. If this option is unchecked then the room cannot be activated unless the client purchases a package.

<div style="border: 1px solid black; padding: 5px;"> Add New Equipment Edit 1 Equipment Profile Delete 1 Equipment Profile Allow Open Tanning </div>	<p>If you select Allow Open Tanning then the bed can be activated without scheduling an appointment or logging bed activity. It allows your employee's free access to controlling the rooms without accountability.</p>
---	--

Setup Wizard.

Tanning Equipment

Options

DeviceName

- ▶ **Bed1**
- bed2
- bed3
- bed4
- bed5
- Bed 6
- Bed 7
- Bed 8
- Bed 9
- Bed 10

General Setup
Optional Information & Bed Readings

Lamp Life (hr):

Purchase Price:

Purchase Date:

Installation Date:

Change Lamp

Reset Session Count

Computer Elapsed Time

735

Timer Session Count = 61

Computer Sessions Count:

63

Timer Lamp Hours = 23

Lamp Hours

32

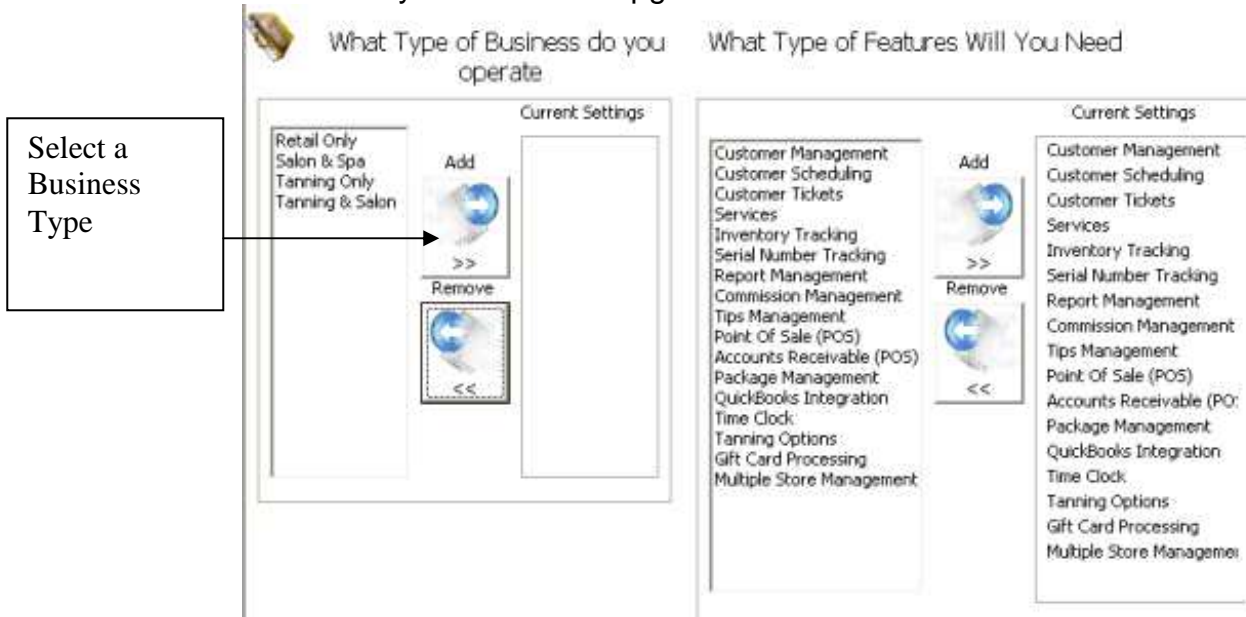
Cancel
< Back
Next >
Finish

- Lamp Life is the value you assign. This is the maximum life of a lamp.
- Computer elapsed time is the total time counted by the computer.
- Timer session count is the amount of session reported by your T-Max Timer.
- Computer session count is the total count of sessions counted by the computer.
- Lamp Hours is the total amount of hours logged for this room / bed.

When you are ready to change the lamps on your bed you can reset the computer count and the T-Max Timer count by clicking on the **“Change Lamp”** option. This will change the installation date to the present day and reset the lamp hours to 0. To reset the session count click the button labeled **“Reset Session Count”** This will reset the session counts on the computer and on the T-Max Timer.

FEATURE SETUP

This is the area where you setup the features you will be using. You can select the features that will be used for the entire application. By selecting a particular feature in this screen it will be displayed to those that have access to this feature. If the feature is not selected then it will not be displayed and will only be accessible if you return to this screen and select the feature you wish to add. Some features may not be available because of the version you have purchased. If you are unable to activate a feature contact your dealer for upgrade information.



To use this feature you must first select the type of business you operate. After selecting the type of business you operate you should select the add button. You can optionally remove a business type by clicking the remove button. When you select a business type the suggested features will automatically be set for you. You can manually add or remove a feature by clicking on its correspondent button. It is important to note that by disabling certain features in this screen you will also disable related features that are not listed. For instance if you do not select point-of-sale then by default Inventory tracking may not be available. Or if you do not select customer management, customer reports or customer tickets may also not be available. You should also note that this option only activates the features for this application. If the password account that has logged in does not have access to a feature it will not be available for that user. If you have set up a feature and you are unable to access it check your password account to make sure you have access to that feature.

Setting Up Your Inventory



To enter Stock Inventory you can click on the list item labeled **"Stock Inventory Setup"**. Or click on the main button for stock inventory.



**Stock Inventory
Setup**

Once you click on the button it will expand your choices of features you will be able to access. It will only display the first nine. If you need to access the full feature list. Try using the main navigation list on the left of your screen. You can see all the features available to you by selecting Stock Inventory from this section.

B A C K	 Quick Setup	 Normal View	 Grid View
	 Print Barcodes	 Print Product ID Sheet	 Find A Product
	 Discount _Price Change	 Purchase Orders	 Receive Items

Inventory	Discounts & Price Changes
Quick Inventory Setup	
Quick Receivable Update	Ctrl+Q
Find Product	
Normal View	Ctrl+N
Grid View	Ctrl+G
Low Inventory Report	
View Vendors	
Duplicate Your Product	Ctrl+X
Purchase Order	
Profit Margin Calculator	

Inventory Ctrl+I - This will activate inventory mode
Quick Inventory Setup - This will allow you to enter your inventory using the minimum fields required
Quick Receivable Update - This will allow you to enter or receive new items with one click access
Find Product - This will allow you to find products quickly by scanning their UPC or barcode
Normal View - Shows you the normal inventory view
Grid View / Ctrl+G - Shows you your inventory in a grid view
Low Inventory Report - Shows you a quick report on items that are low in stock
Print Barcodes - Allows you to print barcodes to any windows loaded printer.
Duplicate Item - This option allows you to duplicate the current inventory or service item. Use this to add multiple products. You can add multiple sequential items such as 10 products that are identical but their barcode or service codes are sequential (i.e. 1001-1010). Use this option when you have several products that are identical and you wish to make small changes

If you have the proper access to this feature or you have logged on as a manager you will be able to input and record your stock inventory using this option. You are able to automatically deplete products through your cash register sales and create & maintain barcode labels.

In order to properly control and maintain your inventory you must fill out several required fields in order to operate the cash register system in conjunction with the inventory system.

1. Product short name (A maximum of 15 characters describing your product)
 2. Product barcode ID (Either scan or type the products UPC or create your own this code will be used to ring up this product. This can be either a number or a name or a combination of both.)
- You can use the same barcode for several products. This can be used for products that share the same barcode but have different sizes or colors or schemes. When the products are sold you will be given the options to select the product from a list using the short name and description. Therefore it is important that if you will have several products using the same barcode or product code there description and short item name may be different so you can tell the difference between each product. In the example below 3 products share the barcode '1234' this is the screen that appears during a sale transaction whenever multiple products are found with the same UPC or barcode ID.

Multiple products share this product id or 'UPC' select below the product you wish to ring up.

ItemName	Description
JC Bub Gel	Bath Gel
JC Cond	Conditioner 8 oz
JC Dtglr	2 oz

Cancel

All products here have the same UPC or Barcode ID. When you sell an item or a service that shares the same UPC code the Multiple Product Grid will appear. And give you the choice of products to sell.

3. Amount of product in stock (The actual amount in stock)

4. Retail price (The amount you want to sell this item for before taxes) **(Important Note! If you have activated "Fast Cash Mode" In the setup wizard, you can set product prices to \$0.00. When you attempt to ring up a sale using this products barcode or name code you will be prompted to enter the current retail price.)** This is helpful for non-inventory products and large price fluctuations.

5. Tax levels should be filled in with proper percentages.

All other fields are optional and not required, but if possible should be filled out. If you will be using the inventory reports and warning system you should fill out the:

- 5. Manufacturer (The Company you purchased the product from)
- 6. Phone Number (The phone number of the vendor)
- 7. Model Number (The model number needed to reorder your inventory)
- 8. Dept Number (Used for reports based on department numbers and hot keys)



Do not use apostrophes in any sort able fields, as this will cause errors in your system.

To create a service check the box "Service Keys"
To create inventory check the box "Inventory Keys"

This option allows you to select unlimited amount of both inventory and products. When activating the grid you can either select with your mouse or keyboard, the service or product and press the enter key to send it to the ticket. Or if you are using a touch screen simply touch the product and send it to the ticket. This is helpful when you have services or products that are used frequently rather than

selecting or scanning these products you can create shortcuts keys to activate them with a touch of a button. These items you select are apart of your standard inventory or services list. They are listed in the service and inventory grid when you check the option “Hot Key” or “Service Key” located in the inventory and service screen.

You can optionally sort the keys by **category**. By doing this you are able to group all the buttons into sub categories allowing you to group and find products quickly. Assigning categories is done on either the inventory or service screen of the item.

To just fill out the request fields select the "**Quick Inventory Setup**" options this allows you to just fill in the required fields. It is however suggested you fill in the full product screen, for better report results.

To **add a record** simply press the Button labeled ‘Add’ then begin typing your items in the appropriate boxes. When you have reached the last box labeled Appraised Value, either click the tab button on your keyboard to move to the ‘Add’ button or press the ‘Add’ button to save your record and add another.

To **delete a record** select the records you wish to delete by either using the find button located on the inventory menu or use the ‘Select Product’ drop down box. You can also use the arrows located at the bottom to move to the first record, the previous record, the next record, or the last record. Once you have selected the record, click on the delete button or hold down the alt key + D to delete the current record.

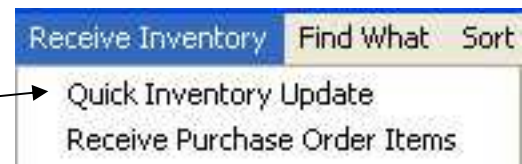
To **Close & Exit Inventory** select the button labeled Finished.

To enter a **Quick Update** click on the menu labeled Receive Inventory or hold down the alt key + Q then enter the products UPC code. Then enter the new amount that has arrived. The system will locate the inventory item then add the new inventory into the system.

To change the view from normal view to **Grid view** click the button labeled grid view or hold the alt key + G

To change the view from Grid view to **Normal view** click the button labeled normal view or hold the alt key + N

To **Save** your record or changes click the button



labeled Save.

To **Edit** your record click the button labeled Edit. This option is used if you wish to change a single record without adding a new profile.

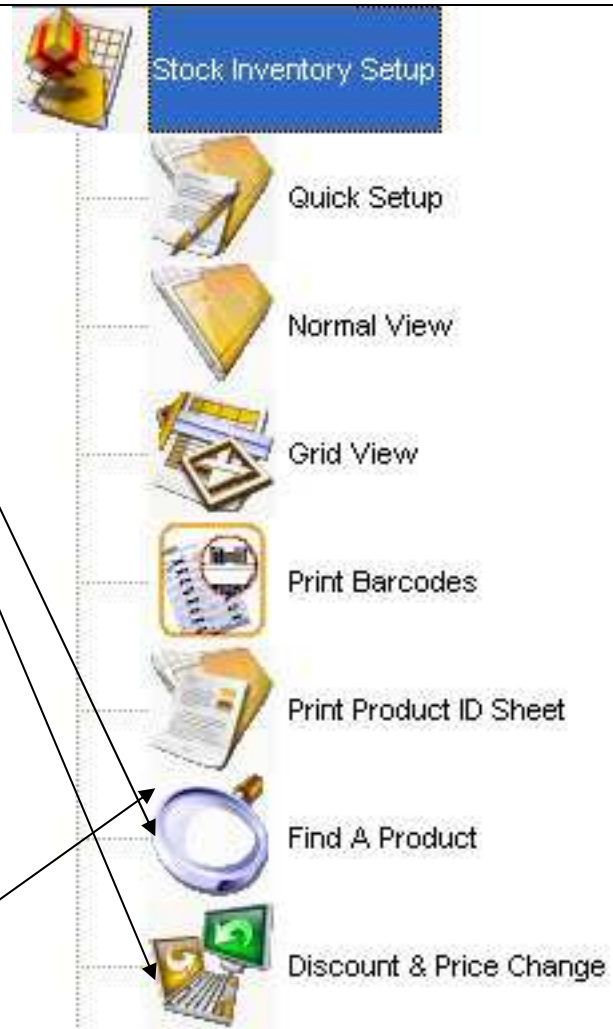
To **Print Product ID Sheet** click on the button labeled print product ID sheet or hold the alt key + P. This allows you to print out all your products key data on paper so you can either train your employees or have a printed backup of your current inventory configuration.

You can **search for a product** by using the find option on the inventory menu or holding down the alt key + F. This allows you to search for any product using the product ID or UPC codes.

To setup a product for **Timer Billing** select the check box located in the middle of the inventory screen adjacent to the barcode box. By checking this option you can bill this item on timer intervals. This is ideal for business that rent equipment entertainment or products and then bill their customers based on the time period they have used the product for. (Whatever you select in your retail price section will be the per hour / minute rate that will be calculated. The system uses the standard 60-minute cycle to calculate hourly or minute rates)

You can **Print Barcodes** directly from MPOS by typing the barcode ID or scanning the product into the indicated box. The system will generate a barcode for this product using the barcode type you select. The barcode will be generated and copied into your windows clipboard simply paste them into your, Excel, Word, WordPerfect or any other windows program. Please refer to printing barcode for further information. You have full control over all bar code dimensions and features support for color rotation. You can print to any printer supported by Windows, i.e. over 250 different printer types.

You can also print sheets directly from this program by selecting the "**Print Barcode**" button or option. You will be given the choice of creating a unique barcode based the on text you have selected. Or you can choose from a



product list. Once you have chosen the barcode text you must then select the barcode type. Choose from the list, the type of barcode you will be printing. Each time you select a type you will see a preview of how it will look. You also can use your mouse to select the sizes of the barcodes. Once you have chosen the barcode type click the print button. You must now enter the dimension of the labels you are using in terms of margins. Your labels should have the dimensions included. Simply set the appropriate margins and click the ok button to print.

Clicking on the button labeled Purchase Orders can also access “**Purchase Orders**” feature.

Clicking on the button labeled Synchronize Handheld can also access “**Synchronize Handheld**” feature. This feature is used to process data collected from a handheld device such as a PDA.



Navigating the inventory screen



Using these functions you can:

- Find a record
- Print a record
- Move to the first record
- Move to the previous record
- Move to the next record
- Move to the last record


Quick Inventory Setup

Short Item Name: *short description

Scan Barcode ID:

or


Type Barcode ID:



Amount In Stock:

Retail Price:

* Optional Tax Level



When activating the inventory mode you are given the quick setup screen first as your default startup screen. You are able to enter your inventory in quickly without entering detail information.

Click here to enter advanced mode.

Find Item

End Item

Short Item Name: 14K Gold 13.6oz Retail Price: \$81.00 Scan Barcode ID: or Type Barcode ID: 1251200270 In Stock: 2

* Optional Tax Level: 0.01 * Optional GST: Tax Level

Less Details..

Description: Use this to setup multiple price: 14K Gold Purchase Price/COGS: \$19.88 Recorder Point:

Manufacturer: Phone Number: Model Number:

Serial Number: Sales Account: Class: Options

Date Purchased: Notes: Dept Number:

Place Purchased: Appraised Value: Hot Keys Category:

Hot Keys (Turn this item into a button) Will this item be billed by time period

Item Insured

Multiple Pricing Price Levels

Product Profit Margins	Net Profit Margins	Retail Profit Margins
\$162.00	\$61.62	\$123.24

Click here to activate multiple pricing schemes

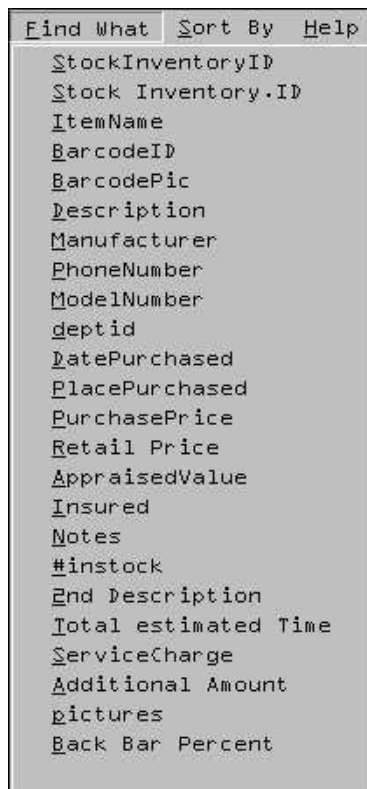
Advanced mode consists of your standard inventory type information. With the addition of the ability to insert pictures of products as is seen in this example. You are able to insert any *standard windows supported image* into the images box. This is done by selecting the button labeled insert image. You will then be prompted to locate the image on your computer. Once the image is located you will be allowed to enter it into your system. It is very important that you keep the images local or on an accessible drive. As the images are not stored in your database they are simply linked to the

Pricing Scheme

Quantity	Price	Quantity	Price
2	For 30	6	For 50
3	For 35	7	For 55
4	For 40	8	For 60
5	For 45	9	For 65

Exit & Save

Multiple pricing schemes allow you the ability to charge several prices for multiple products. This is helpful when pricing specials such as buy 2 for x amount of dollars or buy 3 get one free. To use this function simply activate it from the main screen and choose the price structure you will have for each product. You can have a maximum of 9 pricing structures for each product using the price scheme.



Using the “Find what” and “Sort By” menu option allows you the ability to sort your inventory list or find any inventory item based on the information supplied. To active these functions simply click on the menu you wish to activate, then select the field you wish to either sort or find.

Sales Accounts & Classes:

Sales Accounts and classes are features that are used in conjunction with QuickBooks accounting software if you do not use QuickBooks then you can skip this section. If you do use QuickBooks you can optionally track products sales by sales accounts and class. If you are not familiar with Sales Accounts and Classes see your QuickBooks documentation for more information on the usage of these features. If you do not currently use Sales Accounts or classes you should leave these fields blank as they can cause errors when exporting your sale if setup improperly.

Sales Account:

Class:

Price Levels:

Price level is a feature that can be used to set a specific price for clients. This can be set for up to 6 levels such as retail, wholesale and shop prices. These prices are controlled in the client profile. You set the price of a product or service that would correspond to there price level i.e. (a whole sale client receives a product at 10.00 where a retail client would receive the product at 15.00). This option requires that every product or service have a price for each level you will be using.

Price Levels

Level	Price
1-Retail	<input type="text"/>
2-WholeSale	<input type="text"/>
3-Shop	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

Use this option to create price levels for specific clients. You can set retail, wholesale or discount prices here. Then when creating the client profile you can select the price level the customer will receive.

****** **Exit & Save**

☐ Apply price levels by Points or percentage.

Price Level % i.e (.10)

☒ Add to Cogs ☐ Discount From Retail

Price Level % i.e (.20)

☐ Add to Cogs ☒ Discount From Retail

Price Level % i.e (.30)

☒ Add to Cogs ☐ Discount From Retail

Price Level % i.e (.40)

☒ Add to Cogs ☐ Discount From Retail

Price Level % i.e (.50)

☒ Add to Cogs ☐ Discount From Retail

Price Level % i.e (.60)

☒ Add to Cogs ☐ Discount From Retail

Save & Exit

An advance feature can be activated by clicking the button labeled “**” this will open the advance price level screen. By clicking on the check box labeled “Apply price levels by Points or percentage” you can override standard price levels. You can then set the price levels to a percentage allowing you to either generate your price by adding to the cost of goods or discounting from the retail price. These percentages are universal so you would not have to change each items record. By selecting the price level and setting its properties the system will adjust prices for each client based on the levels you have set. This feature is helpful when your products or services price changes frequently. You will not have to change the price levels prices each time there is a change. The system can recalculate the price based on the advance options you have selected either for cogs or retail.

<u>P</u> rint	<u>I</u> nventory	<u>F</u> ind What
Print 7575_Test Only	F3	
Print <u>A</u> ll Records	F4	
Print <u>B</u> arcodes		

Use this option to print your entire inventory list or just one item. You can also activate the barcode printing function from this menu.

Grid View allows you to view all your products in a grid format. This is an editable format so you can add and make changes that will affect your inventory list. To permanently hide a column that you do not need click on the column with your opposite side mouse and select the hide option. You can also reset the columns to there original settings by clicking the reset all option.

Quick Inventory Setup	Advanced Inventory Setup	Services	Grid View	Serial Number Tracking
* Denotes Required Fields				
* Item Name	* Barcode ID	Description		
Eval CD	SALON			
Footaction	1003			
MPOS Eval Kit	kit			
PC BASED	99	PC Credit C		
PC CAT	99	PC Credit C		

Serial Number Management

Serial Number Management

☒ Serialize Tecno Adapter



832040001064

Tecno Adapter

Amount in Stock 8

BarcodeID	SerialNumber
832040001064	2001
832040001064	2002
832040001064	2003
832040001064	2004
832040001064	2005
832040001064	2006
832040001064	2058
832040001064	2059
832040001064	2060

Add Serial Numbers

Add Sequential Serial Numbers

Delete Serial Numbers

- Use this to add a serial number for this product.
- Use this to add multiple serials numbers using sequential numbers (i.e. starting at 1 to 100)
- Use this option to delete a serial number you have created

Some businesses need to keep track of serial or model numbers for several reasons, including security, warranty, and manufacturer's recall. Use Serial management tracking if you sell products that need to be tracked by serial numbers. By creating a serial database you can sell a product using its serial number. The first step in creating a serialized item is to create the main item. This is done by entering the item using either the **Quick Inventory Setup**, or the **Advanced Inventory Setup**. Once you have created the item click on the tab menu labeled **Serial Number Tracking**. And click

the check box labeled serialize (Your product name). In the example shown above the main item **"Tecno Adapter"** has 8 items in stock. And has serial numbers 2001-2060. When you scan or select this product with the barcode Id **"832040001064"** you will be given the option to select or scan the serial number to sell. The serial number then is stored with the sales invoice, client history and serial lookup database. The serial number can optionally be printed on the receipt. Whenever you sell a product the serial number will be removed from this database leaving only the serial numbers that you have not sold. Whenever you receive more products you must browse to the item and add the new serial number to the database. For more information about looking up a sold serial number view the chapter *"Tools of the Trade"*.

When you **void** a serialized product your item will be replenished in inventory and the serial number will be returned to the serial number database. Those wishing to view or import large serial database the table is as follows:

Database Path = (Installation Directory)

Database name = smp.mdb

Table =MultipleSerial



Serialized items are not compatible with kits or packages. If you choose to create a package or a kit from a product that is serialized you will not be able to track the serial numbers. And vice a versa. Items that are apart of a kit cannot be serialized as the system only support one or the other during ring out.

Manage kit / Packages

-Manage Kit / Packages-

☐ **Create Kit For Tecno Adapter**



832040001064

Add To Kit (SCAN)

Add To Kit (SELECT)



Delete From Kit

BarcodeID	ProductNar	BarcodeKit	Price	SerialNumt
832040001	Tecno Adaj	832040001	\$2.50	113
832040001	Tecno Adaj	832040001	\$2.50	117
832040001	Tecno Adaj	832040001	\$2.50	122
832040001	Footaction	1003	\$5.00	10031
832040001	Footaction	1003	\$5.00	10031
832040001	Footaction	1003	\$5.00	10031
832040001	Footaction	1003	\$5.00	10031
832040001	CamCom	111	\$25.00	105
832040001	CamCom	111	\$25.00	106
832040001	CamCom	111	\$25.00	107

- Use this to add a product to a kit scanning the bar coded code.
- Use this to add a product to a kit by selecting it by name.
- Use this to delete a product from the kit.

Total Value of Kit.

\$102.50

Use this option if you will sell several products or parts that make up a package or a kit. (I.e. you sell a computer with a Computer, CPU, and Printer. When you sell this product you select or scan 200 MHz PC Kit. Your inventory automatically updates to deduct 1 Computer, 1 CPU, and 1 Printer from your inventory) this option is good for faster processing of sales. It is to be noted that you do lose some options, when you choose to process a sales as a kit.

1. You cannot track the serial numbers of the products sold in a kit.
2. You cannot track the sales data of the items individually. You can only track the sales as a kit. In other words when you run your sales reports. It will show that you sold a 200 MHz PC Kit. But it will not justify the 3 Items (i.e. computer, CPU, printer) individually on either your sales or inventory reports. It will only show the sale of the Kit as a single unit sale. You will need to be aware of what products are apart of what kit when you do your inventory As each time a kit is sold the products that make up the kit is deducted from your inventory.


To activate this option simply create the inventory item first (i.e. 200 MHz PC Kit). Giving it a retail price for the entire kit. Then select the tab option labeled **kit / Packages**. Click the check box to activate this inventory item as a Kit. Then either scan or select the products that will be a part of this kit. A total value will be shown at the bottom of the screen. This should not be confused with the retail price of the kit. The retail price of the kit was created when you first setup the inventory item. The total value of the kit simply shows you the value of this kit, if it was sold separately at the designated retail price. After you have created a kit, to sell the kit in point of sale mode or Cash Register Mode either scan the kit's assigned barcode id or select the name of the kit. The system will automatically sell the kit at the price you designate and will deduct each item from inventory.

Reorder Points List

-Reorder Points List-

Eval CD	SALON	MR	1-111-1111	Walmart
MPOS Eva	kit			

Please wait as the list is generated. This may take a few minutes depending on the size of your inventory count. Currently processing record 24 of 918



Use this option to generate a reorder list.

Use this option to generate a reorder list. If you have entered **Advanced Inventory Setup** and have entered a reorder point for each of your products (*reorder points is a flag or warning when a product is low or needs to be reordered.*) You can use this function to create a list of all products that need to be reordered. By clicking on the button labeled **Generate Reorder List** this will begin the database

search. The system will scan your entire list of products and generate a list of each product that needs to be reordered based on its own individual reorder point. Using the print menu options can print this report.



*This function is used in conjunction with the “**Stock Inventory Warning**” feature found in the **Setup Wizard**. If you have setup a general inventory warning then this will be used during Point of Sale or Cash Register Mode as default, if no reorder points are assigned. If you have setup a reorder point then this number will be used during Point of Sale or Cash Register Mode instead of the general number you assigned in the **Setup Wizard**. In other words the system will first check to see if there is a reorder point for the product being sold. If there is no reorder point it will search for the default stock warning. So if you have setup a general stock warning this will only be used if you do not specify a reorder point.*

Purchase Orders & Receiving Stock Items



If you will be using QuickBooks XML interface it is suggested that you do your purchase orders and item receipts in QuickBooks as this data does not export using XML. You can then use the QuickBooks synchronize feature to update your inventory count once you have processed your purchase orders and item receipts.

PURCHASE ORDER

☐ * Received all items on P.O.

☐ * PO has been exported

Select Vendor

Generate PO
From Invoice

2/1/2013

1

☐ * Need

Use this option to create Purchase Orders, Print, and Receive Stock Inventory items and manage vendor list.

* Select Customer

STEPHANIE HARRIS

* Enter Class

Select Product

Select Product

ITEM	DESCRIPTION	MODEL NUMBER	QTY	RATE
MPOS Testing			1	\$0.00

◀ ▶

* Memo

* Optional not required

Total:

\$0.00



Email PO

With Purchase orders and item receipt you can manage your ordering system and receiving system's both together. The Purchase Order system is a stand-alone purchasing function although its features are best capitalized with the use of Intuits QuickBooks System. All facets of ordering can be control using the purchase orders, which can then be exporting into your QuickBooks accounting system. You will notice several fields that are marked with the (*) these fields are primarily for tracking data through QuickBooks. Information such as:

PO has been exported = Purchase order or item receipt has been exported to QuickBooks and will not be exported again unless this option is unchecked.

Need to Print in QB = Purchase order will be flagged as "Need to be printed" when exported into QuickBooks.

Select Customer = Customer/Job that will be assigned or created for this purchase order in QuickBooks. This list is generated by your customer job list located in your client profiles section. At the top left corner of the screen, every customer can be given a customer job name.

Enter Class = What is the Class that will be assigned or created for this purchase order in QuickBooks.

Memo = What memo should be associated with this purchase order or item receipt in QuickBooks

Account = what account should this purchase order or item receipt be posted to when exported to QuickBooks. (Default "Inventory Asset")

These fields although important in usage with QuickBooks are optional and not required if you do not or do not plan to use QuickBooks with your system. Please refer to your QuickBooks manual in reference to the definition and usage of the fields flagged above.

To use the purchase order system you must have your inventory already inputted in the system. Vendors list are shipped blank so you will need to fill in the Vendors names and address as you create and print your purchase orders. To create a new item you can use the buttons on the left side of your screen. Use the add button to add a new purchase order or use the delete button to delete an entire purchase order. Refresh and update can also be used in purchase order mode. To update and check the vendor list you can select the inventory menu and select the view vendor's option. You can update and delete any vendor at any time. To create new vendors begin by typing in the blank field under select vendor. All vendor information will then be saved in both the purchase order database and the vendor list. The purchase order number will auto increment although you can override the purchase order number with any number you wish. Also the dates can be changed to match any ordering date. The ship to option can be manually typed or you can select the customer job. By selecting the customer job the ship to address will automatically fill, with the address you have on record in your client profile section.

Next you must select the product that you will be ordering. Use the drop down combo box to select the name of the product. Once you have selected the product then press the enter key on your keyboard. This will then prompt you to enter the reorder amount. Once you have entered this information it will then place the item on the purchase order. You can repeat these steps in order to create a purchase order with multiple products. You can edit most data on the grid by simply clicking on the grid. And entering the information you wish to change. Some fields only allow you to change the text temporarily as items are linked to other list that cannot be changed from purchase orders. You can **delete** any line on the purchase order by selecting the row and using the delete button on your keyboard. Once you have completed your purchase order you can print the document by selecting the print menu and selecting purchase orders. You can also find multiple purchase orders by using the find what menu and typing the purchase order number you wish to locate. As you navigate through each record you will notice the color change from default to Yellow. This indicates that all items on the purchase order have been received and the purchase order is considered closed.

RECEIVING ITEMS FROM A PURCHASE ORDER

Purchase Order (Receive Items)

0 PO # 1

Quantity Received Date 12/05/02

Back Order Ref. No. 1

0 Total

* Memo ☐ * Item Receipt has been exported

Received Items (bill to follow)

*Account

Inventory Asset

* Class

Receive Item

Receive Entire PO

Cancel

You can receive items from a purchase order in two ways. You can either select the purchase order by using the arrows to navigate from one purchase order to another. You can then select the button "Receive Items". You will then be prompted to receive either a single item on a purchase order, or receive the entire purchase order. You can optionally receive this prompt if you click on **RECVD** column on the purchase orders grid. After entering the quantity received and the total cost you can then click the receive button and receive the items into inventory. By selecting either receive item or receive entire PO buttons you will be entering new stock items into your inventory quantity list.

To void or adjust quantities for back orders or overstocks, you will need to enter the product list and make changes manually to the inventory count. Also special notes should be considered when exporting these items into QuickBooks. The system will export the full purchase order into QuickBooks and assign it as open. When you receive an item this to will also be exported to QuickBooks. But it will not auto post to the purchase order, **it will however update your inventory count in QuickBooks.** Though it post as an expense receipt with a detail breakdown of each product that was received in the memo line. Those wishing to auto post on purchase orders or wish their item receipts not to post as an expense receipt, should only export the purchase order and not the item receipt. This way you can manually receive the items and auto post them to a purchase order in QuickBooks. Special care should be taken when changing the exported status. This should only be done in case of erroneous information exported. Other wise un-checking these options will create duplicates if they have already been exported. You may also generate a PO from a sales order, estimate and invoices this can be done by clicking on the button labeled "**Generate PO from Invoice**". You can also email any PO directly from the system by clicking on the button labeled "**Email PO**".

Standard & Scheduled Discounts

Schedule Change of Price

Change

☐ Price by Category

Change

☐ Price by Retail Price

Change

☐ Price by Item

Use this option to select what group you will discount.

StockInventoryID	ID	ItemName	BarcodeID
681			
683	inventory	Your Product	123
690	service	Your Services	123
691	inventory	ff	MPOS-5-R
692	packages	Tan Session Sabas	111

You can use the discount feature to do 2 types of discounts.

1. Discount items
2. Schedule a starting time and an ending time for a Discount

To discount an item you must first select from the inventory menu list, then sort the discount you will apply. Once you have chosen the discount type you must then select how you will apply this discount. You can optionally change the price of an entire category, or change the price based on retail price that is \geq \leq the value you specify. Or simply selecting the item to discount. Once you have chosen the group of products or services, you then must select the discount. You can select a dollar amount or select a percentage. After selecting the amount or percentage you will be prompted to confirm the price change. As you confirm the items they will be updated the next time you refresh the system. If you have scheduled a discount it will not take affect until after the start date has expired. The day the scheduled start date begins on the first startup of MPOS software, the system will check and make any necessary price changes. It will also change the price back to the original amount once the ending date has expired.

Barcodes an Overview



Bar Code is an automatic identification technology. It allows data to be collected accurately and rapidly.

A Bar Code symbol consists of a series of parallel, adjacent bars and spaces. Predetermined width patterns are used to code actual data into the symbol. To read information contained in a Barcode symbol, a scanning device, such as a light pen (or wand), is moved across the symbol from one side to the other. As a scanning device is moved across the symbol, the Barcode decoder analyzes the Barcode width pattern of bars and spaces, and the original data is recovered.

The most visible application of this technology is the supermarket industry, where it has been in use since 1970. Barcode is now the de facto automatic identification technology, for virtually any application.



What's a Bar Code Software Keyboard Wedge?

A Barcode Software Wedge is a software program that is installed in a PC, to perform the functions typically performed by a hardware Barcode Keyboard Wedge. Or RS-232 Decoder (basically, decoding signals generated by Barcode Scanners, and converting them to alpha-numeric codes). These programs allow connection of an 'undecoded' Scanner into a PC RS-232 port, with the PC software performing the Barcode decoding functions (Not to be confused with DECODED RS-232 Scanners, which include hardware Barcode decoders and provide Decoded data via RS-232 interfaces).

Costs for Software Wedges are as expected, lower than traditional hardware Barcode Keyboard Wedges. However hardware versions are far superior. Barcode Software Wedges have various limitations. For example when compared with traditional hardware Barcode Keyboard Wedge or RS-232 Decoders, Software Wedges are: slower, less accurate, sensitive to noise (usually picked-up by the Scanner cable - cables must be short!), and worst of all, they are operating system specific (if they work with MS-DOS, they may not work with Windows 3.1, if they work with Windows 3.1, they may not work with Windows 95, etc.).

How do you print Bar Codes from MPOS PRO?

You can **Print Barcodes** directly from MPOS PRO, by typing the barcode ID or scanning the product into the indicated box. Then click on the button located on top of the barcode on screen labeled **Copy barcode into clipboard**.

You can optionally change the barcode type and size. By clicking the button at the bottom of the barcode with the double asterisks "**" this will give you the properties tab and you can change the font barcode color and font color. Once the Copy barcode into clipboard buttons is pressed, the system will then generate a barcode for this product using product name and the format you have selected. The barcode will be generated and copied into your windows clipboard for easy pasting into your, Excel, Word, WordPerfect or any other windows program. You can easily add perfect bar codes to Word, Access, etc. This is done in any windows application by easily adding professional quality barcodes to documents or labels created with any windows program. You can print to any printer supported by Windows, i.e. there are over 250 different printer types.



You can also print sheets directly from this program by selecting the **"Print Barcode"** button or option. You will be given the choice of creating a unique barcode based on text you have selected or you can choose from a product list. Once you have chosen the barcode text you must then select the barcode type. Choose from the list the type of barcode you will be printing. Each time you select a type, you will see a preview of how it will look. You also can use your mouse to select the sizes of the barcodes. Once you have chosen the barcode type click the print button. You must now enter the dimension of the labels you are using in terms of margins. Your labels should have the dimensions included. Simply set the appropriate margins and click the ok button to print.

Print using your Cognitive or compatible barcode printer.



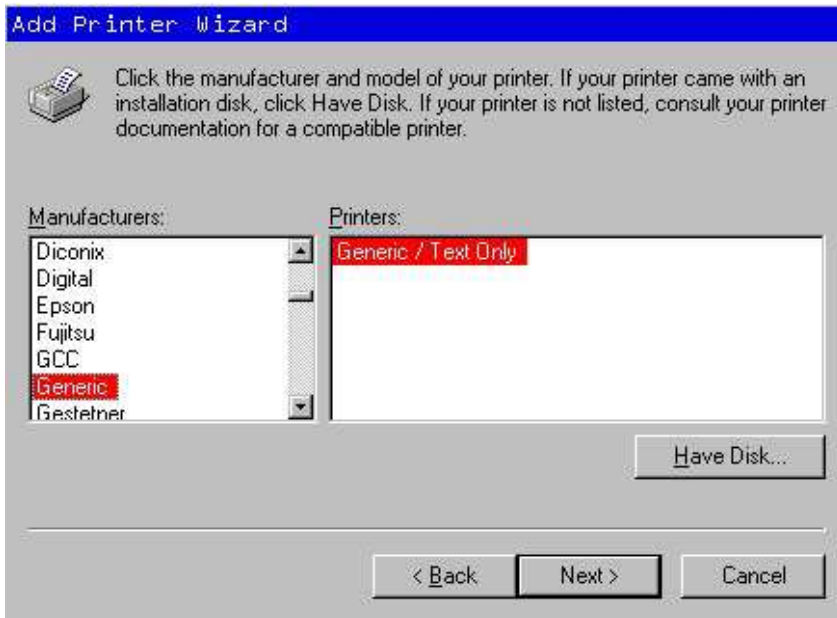
Installing Printer Drivers

An automatic setup program, SETUP.EXE, is provided with the Intellidriver. Install the desired printer drivers by running SETUP.EXE from within Windows and following the displayed instructions. Restart your system after installing the Intellidriver. After the drivers are installed, you can send data to Blaster just like any other printer on your system: simply specify Barcode Blaster in the print dialog box of your application. Please refer to the on-line help and the README.TXT file on the Intellidriver disk for detailed operating instructions. After installing the printer, you are ready to setup MPOS software, to begin printing using your barcode blaster printer.

Printing both paper tags and labels.

If you will be printing with both paper tags and labels you must follow these instructions. If you will be printing just labels only then you can skip this section, as the printer is shipped default calibrated for labels. If you will be printing just tags please continue with the instructions.

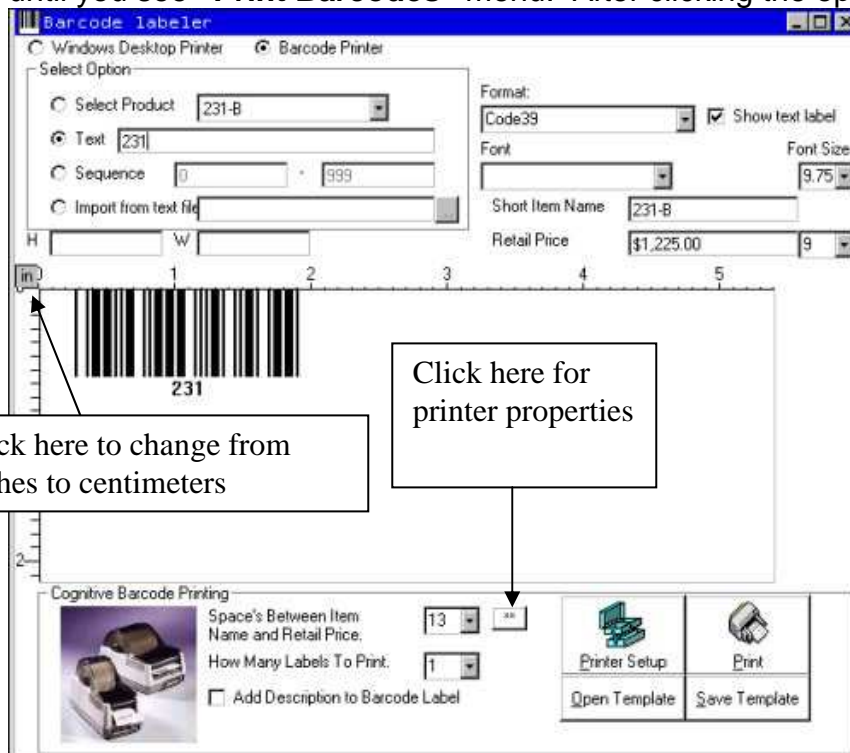
In order to tell your printer what sort of media it will be printing, either paper tags or barcode labels, you will need to be able to tell the printer what media is loaded into the printer. Calibrating the printer does this. Unfortunately the printer can only be calibrating from a driver that supports only ASCII texts. MPOS software allows you to easily change the calibration of you printer without having to leave windows. This is done by using a “**Generic Windows Driver**”, every version of windows has the drivers for the generic windows printer. You must install this driver in order for MPOS software to communicate with the printer and change the calibration from bar to gap index. (Index is the media type the printer uses, to distinguish which label is loaded in the printer, paper tags usually have black bars to separate one tag from another, and labels use the gap space between each label to separate one label from another.) Installing the driver is different in each operating system but is similar in that you Click **Start**, point to **Settings**, click **Printers**, and then double-click **Add Printer**. Then simply follow the instructions on the screen. When you are asked which printer to install select Generic / Text only.



After installing the printer you are ready to move on to the next step.

Create and print labels on Cognitive Printers.

To activate the barcode-printing module from the main menu select, Inventory menu and scroll down until you see “**Print Barcodes**” menu. After clicking the option you will then see the following:



You must now select the 2nd option labeled **Barcode Printer**. You will now be able to begin selecting and creating your barcodes. To print a barcode you must either select the product option or select the text option, if you wish to edit the barcode. Once the barcode is generated you can resize it by either using your mouse on the rulers (to either make the barcode smaller or larger). Or use the boxes labeled H for Height and W for Width (to change the size and dimension of the barcode). Once you have selected the size you can now press the print button to begin printing labels. Below are a discussion of each field and what their purpose is.

- **Select Product**

Use this option to select the product you wish to create a barcode from. Simply scroll down until you find the product. All of the product information will automatically pull up such as the barcode text short Item Name and Retail Price. You can edit any of these texts by simply typing over them. This will not change anything permanently as you are working with just a copy of the database and no changes are permanent.

- **Text**

The text field is the field that is used to generate the barcode that will be printed if you are selecting from your product list. It will automatically fill in the field if you wish to simply type into this field and freely generate barcodes, you can do this by simply typing into this field.

- **Sequence**

The Sequence option allows you to create barcode that are sequential starting from a number you select. It will create the barcode and add one to the following sequence of barcodes.

- **Import from text file**

Use this option if you have a text file that has your barcodes listed. Use this function to open and print out your barcodes from a text file list.

- **H**

This changes the Height of the barcode that will be printed in either inches or centimeters.

- **W**

This changes the Width of the barcode that will be printed in either inches or centimeters.

- **Format**

Format is the type of barcode you will be printing. Use this to change the type of barcode you will print. This option is especially useful when trying to print small or complex barcodes (*note some barcodes only support certain characters or support a certain amount of characters*). Below is a definition of barcode compatible types.

Supported barcode types

Code 128	Full ASCII-Character set with Code128 ABC auto selection
Code 128A	Char Set A: Capital letters and special characters
Code 128B	Char Set B: Letters in upper and lower case
Code 128C	Char Set C: Optimized for numbers
EAN 128	Special form of the Code 128 also known as UCC/EAN 128
EAN 13	European-Article-Number with 13 digits
EAN 8	European-Article-Number with only 8 digits
EAN 5	Add on price code for ISBN
EAN 2	Add on found on newspapers
ISBN	International Standard Book Number
ISSN	International Standard Serial Number
UPC A	Universal Product Code with 12 digits
UPC E	Universal Product Code with 6 digits
Code 39	Also known as Code 3 of 9. Digits, uppercase letters and _ . *\$/+%

Code 39 Ext	Full ASCII-Character set. Also known as Code 3 of 9 Extended.
Codebar	Numeric code. Often used on medical equipment.
Code 2 of 5	Numeric only code.
Interleaved	2 of 5 Numeric only code. Compact.
POSTNet	Numeric only code. Used by post offices.
Post 2/5	Numeric only code. Flavor of Interleave 2 of 5. Also known as Identcode or Leitcode.

- **Show Text Label**

If you wish the barcode text to show along with the barcode, then check this option, if you uncheck this option then only the barcode will print. If this option is checked then both the barcode and the barcode text will print. The barcode text prints underneath the barcode.

- **Font**

Use this option to select the font of the barcode text. Be sure to use a common or easy to read font, so that if you are ever unable to scan a barcode the operator can easily read the numbers and type them into the system manually.

- **Font Size**

This controls the size of the font. The first option controls the size of the barcode font. The second option controls the size of the price field.

- **Short Item Name**

This is the short Item name that is used in the inventory system. You can optionally change this name for each product. It may be wise to shorten this name if you are printing on small barcode fonts, as it will leave room for prices and descriptions.

- **Retail Price**

This is the retail price that is used in the inventory system. You can optionally change this field for each product.

- **Space Between Item Name and Retail Price**

This field indicates the spaces between the short item name and the retail prices. The default is set to 13 spaces assuming you will be using 2-inch labels at 9inch fonts. If you change font sizes or barcode sizes you will need to change the spaces needed, in order to allow for the text to fit evenly on your labels.

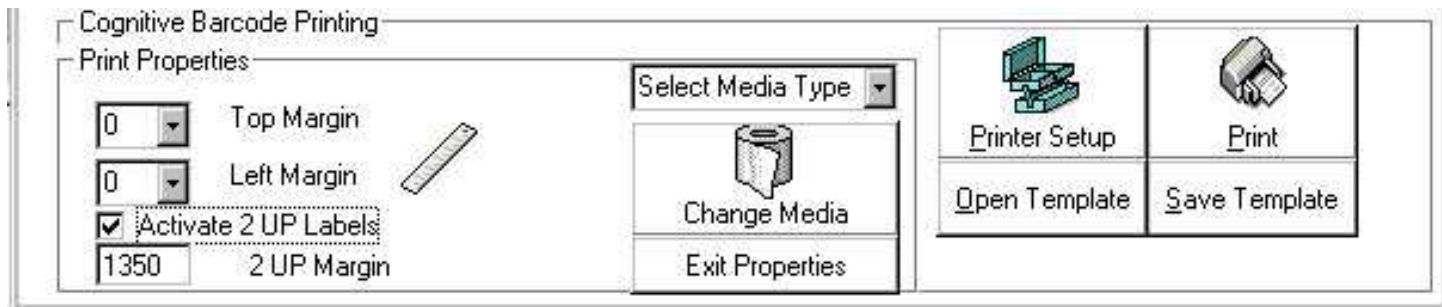
- **How Many Labels To Print**

This field indicates how many labels or tags should be printed for the selected barcode.

- **Add Description to Barcode Labels**

This field allows you to add an addition field to print. You can activate this option by checking the box. This will automatically fill in the labels with your product description. These fields can be optionally changes for either promotions or any changes you would like to reflect on your barcode.

- **Printer Properties (Advanced Options)**



Those printing tags or having difficulty aligning the labels with the printing should use this option to preset their margin to match the labels or tags you may be using. If your alignment is correct and you are not printing 2up labels (labels that have two labels across) then you may not need to view this section in detail.

- **Top Margin**

Top margin reflects the amount of spaces from the top of the label to the bottom. Use this to add spaces as needed.

- **Left Margin**

Left margin reflects the amount of spaces from the left of the label to the right. Use this to add spaces as needed.

- **Activate 2up Labels**

This option is used to activate 2up labels if you are using Cognitive Stock numbers 03-02-1520 or 03-02-1897 1.15 x 1 or any compatible labels that have 2 labels side by side then you will need to activate this option to allow you to print using double labels.

There are several things to keep in mind when activating the 2up labels option. The first is that all fields must be shrunk in order to fit within the small parameters of the label. This is done automatically changing all fonts to the size of (5) you have no control over the size of your fields except the retail price. This field will still reflect the sizes you choose. All other fields will reflect the font size of (5) **Bold** also the barcode will automatically be resized to match the size of the labels. This will in some cases change the barcode from its normal view to the word (SIZE) this is an indicator that you cannot print this barcode using either the barcode type or using the size you specified. The system will automatically set your barcode type to Code128, which is better suited for small barcode printing. The system is tested with a maximum of 8 Characters being allowed in 2up print mode. You must make sure that your barcode does not exceed 8 characters and that there are no illegal characters that code128 will not support.

- **2UP Margins**

2UP Margins are the spaces needed to align your second label by adding and subtracting from this number you can move the spaces over from left to right. The default is 1350, if you find that your labels are not aligning properly simply add or subtract from this number and it will move the second label over either left or right.

- **Select Media Type**

If you are printing tags or other media supported by this printer you will need to use this function to change and edit your media.

By clicking on the option box you can change your media. You can change to labels with gaps by selecting **GAP** then pressing the Change Media button below. You can change to tags or media that supports **BAR** by selecting bar and pressing the Change Media button. You can also optionally edit the data that is sent to the printer by selecting the **EDIT CALIBRATING**. The **SEND** option sends any optional data to the printer such as spacing calibrating. **DRIVER SETUP** is where you select the driver that will communicate with the printer. Those using this option should have already installed the windows generic printer described above after doing so use this option to select that printer as the driver that will communicate with your printer.

- **Change Media**

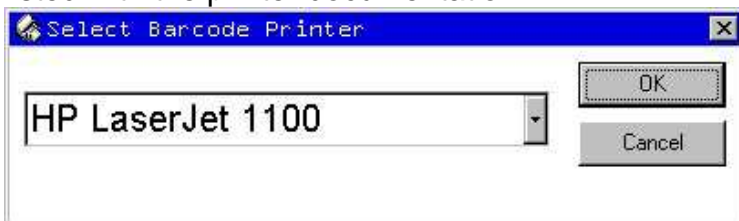
Use this button to change the media based on the selections you have chosen in the media type. You must press this button for the changes to take affect.

- **Exit Properties**

Use this option to exit out of advance properties.

- **Printer Setup**

Use this option to select the Cognitive barcode printer you will be using. You must have the Intellidriver already loaded before attempting to setup this option. If you have not installed your barcode printer's drivers then you should refer to the information above or the information that is listed with the printer documentation.



- **Open Template**

(Templates are basic formats for a certain labels. If you are printing using different sizes or different medias such as tags and labels or two distinct sizes then you may want to create a template. You can save the template with the barcode size print options font sizes and all the information needed to quickly reprint any barcode type you have selected.)

If you have saved templates use this option to open up an existing template.

- **Print**

Once you have created your barcode use this option to print.

- **Save Template**

(Templates are basic formats for a certain labels. If you are printing using different sizes or different medias such as tags and labels or two distinct sizes then you may want to create a template. You can save the template with the barcode size print options font sizes and all the information needed to quickly reprint any barcode type you have selected.)

Use this option to save a new template (templates use .tpl extensions)

Trouble shooting barcode printing.

1 My printer is blinking red and is not responding to the software

1A. Try turning the printer off checking for paper jams and make sure the media is inserted correctly. Turn the printer back on and press the feed button once. If the printer still responds with a red light consult your printer documentation for more trouble shooting options.

2. My printer blinks green and prints several labels then stops and then ejects several more, it will not respond to the software

2A. your printer is not calibrating correctly, it is either calibrated for a bar media and you have loaded gap media or vice of versa. Insert the proper media and calibrate using the advance features mentioned above.

3. I have calibrated my printer but it is still keeps ejecting paper

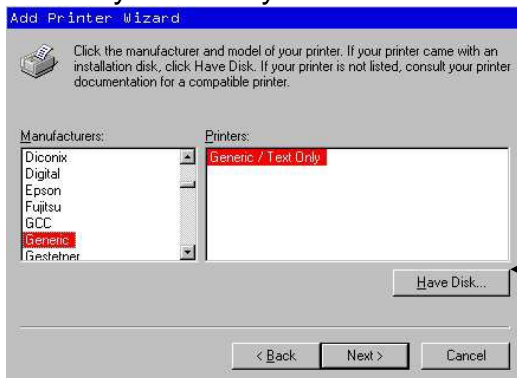
3A. you may have calibrated the printer with the wrong media. If you calibrate the media before changing the labels or tags you will not completely calibrate the printer. First changes the media type from the printer then follow the instruction listed above on changing your media type.

4. I have calibrated successfully but my media still does not align correctly

4A. The Intellidriver that was installed may be out of date or not fully compatible with your operating system. You should download the latest drivers from cogsol.com. If you are still unable to align properly, use the advance properties option described above to add spaces to your top and left margins as needed.

1. I have downloaded the latest version or have installed from the CD and I can't find the Advantage printer anywhere?

5A. when installing the advantage printer software you should fully follow the installation instructions. You may need to still install the printer after you have run the installation program. In many cases the installation program will load the needed files on your computer usually in the C:\Program Files\Cognitive\ folder. Once this is done you must follow the instruction on installing your printer from windows. When you are asked what printer to install click on the have disk option and browse to the directory that has your driver information i.e. c:\program files\cognitive\



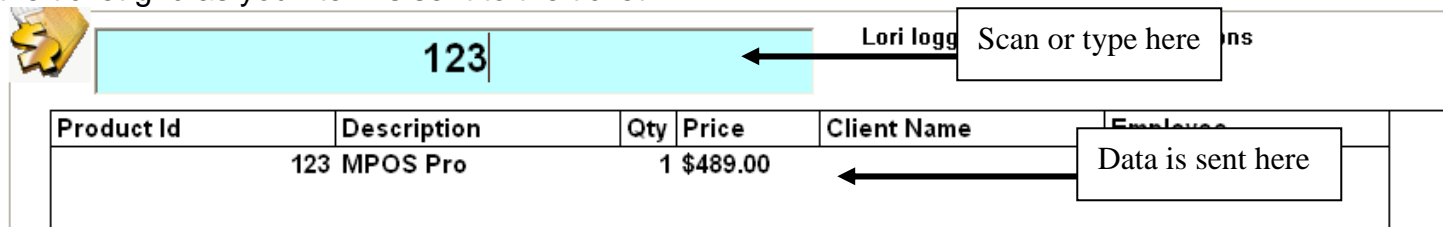
When prompted to install your printer, if the printer you wish to install is not listed click on the **have disk** option and browse to the folder where the drivers were installed. You may need your windows disk if all the needed files are not readily available on your PC.

How do you print Bar Codes from Windows Programs?

When you use a Barcode Font. In fact, it is as easy as changing Fonts. Basically, all you have to do is to select the specific Barcode Font you want to use (for the field, cell, or data you want to Barcode), on your Letter, Report, Form, Document, and Label etc. To change from your default text font to a specific Barcode Font, you use the same font selection window you normally use to change between your various texts fonts, except now you also have a Barcode Font to select from. You can also change the font size to suit your taste, just like with your other text fonts. Nothing could be easier.

How do you read Bar Codes into MPOS PRO?

Reading Barcodes directly into MPOS PRO is easy. When you activate the Cash Register screen you are ready to scan products. If you have set up your products in inventory to process a sale you simply scan the product. The cursors default location is in the middle of the screen. This is where both scanning and typing is done. To read a barcode into the system simply scan the product and watch the ticket grid as your item is sent to the ticket.



The screenshot shows the MPOS PRO Cash Register interface. At the top, there is a large text input field containing the number '123'. To the right of this field is a button labeled 'Scan or type here'. Below the input field is a table with the following structure:

Product Id	Description	Qty	Price	Client Name	Employee
123	MPOS Pro	1	\$489.00		

Arrows indicate data flow: one arrow points from the 'Scan or type here' button to the input field, and another arrow points from the 'Data is sent here' label to the table.

You can optionally scan the product in with your barcode scanner. Or type the barcode ID into the box located in the middle of the screen. You can also use the name look up option, located on the view menu or use the corresponding shortcut key F9. This will allow you to type the product name into the text box; the system will anticipate your keystrokes and pull up the closest match until it finds the product you are searching for. Once it is found and the products description and price match your product, simply click the enter button on your keyboard to send the item to the ticket.

<u>K</u> ey	<u>E</u> mployee	<u>Q</u> uick Book	<u>O</u> ption
<u>V</u> oid		F2	
<u>R</u> efunds			▶
<u>D</u> iscounts		F4	
<u>C</u> lear All		F5	
<u>Q</u> uick Totals		F6	
<u>R</u> ing Up Sale		F7	
<u>O</u> pen Cash Drawer		F8	
<u>T</u> ax Status			▶
Sear <u>ch</u> Product <u>N</u> ame		F9	←
View <u>S</u> ervice Grid		Shift+F2	
View <u>I</u> nventory Grid		Shift+F3	
<u>F</u> ast Cash Mode		F3	

Use this feature to process sales by searching item name. Use this as an alternative to scanning barcodes.

When you use a Barcode Keyboard Wedge. Basically, all you have to do is to connect your Barcode Keyboard Wedge and scanner between the keyboard and your PC (No Special Software Required). With the Keyboard Wedge now installed, whenever you scan a Barcode, the data will automatically go directly where your cursor is. If you are scanning a product for a sale you only need to scan the product.

As an added automation feature, the Barcode Keyboard Wedge sends an "ENTER" character upon completion of reading the Barcode information, which automatically advances your system in anticipation of the next product to be scanned.

MPOS PRO works with most industry standard scanners. Quality varies, depending on the specific model. MPOS PRO suggests using Metro logic scanners with keyboard wedge interface contact your local sales representative for more information.

Setting Up Your Hardware



MSR READER

You can use any windows supported MSR (Magnetic Strip Reader) with this system. Setting up the System is done by attaching the MSR reader according to the specification included with your Reader. To activate the reader with this program simply click the check box option labeled MSR Reader. The system can be used to record the client credit card number, although the third party Software will still be needed to be activate, and to send the credit card data for authorization and Processing.



SERIAL CASH DRAWER

You can use any standard serial cash drawer with this system that is fired by standard ASCII set. The specific style of cash drawer does not matter as long as it meets the requirements listed below:

1. Standard RS232 Serial Port Connection
2. Text Format: Any Character in ASCII SET, NO Parity, 8 Data Bits, 1 Stop Bit.
3. Baud Rate 110 to 9600.
4. Pinouts - 25Pin or 9Pin

You must connect the cash drawer to either COM 1 or COM 2, keep in mind if you are using these ports for other devices you can not substitute the port numbers, and you **must use either COM 1 OR COM 2**. Once you have connected the cash drawer according to the instruction provided with it, select the port from the two options displayed. You can test the connection by clicking on the test button. If the cash drawer opens you have successfully configured your cash drawer. If it does not open view the troubleshooting guide that came with your cash drawer. **It is important not to activate this option if your cash drawer connects through your receipt printer. These are two different options and activating the wrong one will enable the other.**

CUSTOMER POLE / LINE DISPLAY



This system is fully compatible with any standard serial pole display that uses either AEDEX modes or EMAX modes. Before installing your pole display, **make sure to reference the manufacture user guide to find out what mode your pole display is running on.** And how to change the dip switches in order to change the mode to match either of the compatible modes. As this is the main reason why your pole display may not display your data correctly. Once you have determined the mode you will be operating in, select the matching mode from the two check boxes. Then select the COM port that will be used for this display. Be sure not to choose a port that is already in use by another device (i.e. pos receipt printer & cash drawer.) You are only allowed to configure you pole display in either COM ports 1 or 2.

RECEIPT PRINTER & CASH DRAWER

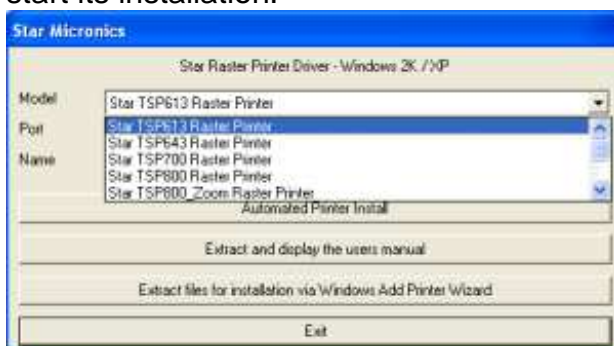
These instructions are for Star Sp series Printers or Epson TM series printers.

Star TSP Printer & Cash Drawer



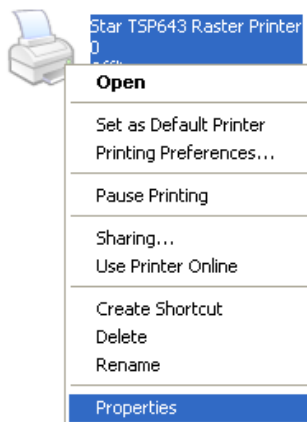
The first step in installing your receipt printer and cash drawer is to install the Windows Driver for your printer. If you have purchased the equipment directly from your dealer the drivers are located on your installation CD-ROM.

To install your drivers for a star printer you will need to browse to the folder labeled “**Star Windows Drivers**”. You will find an application labeled Star Drivers. Click on this application and allow it to start its installation.

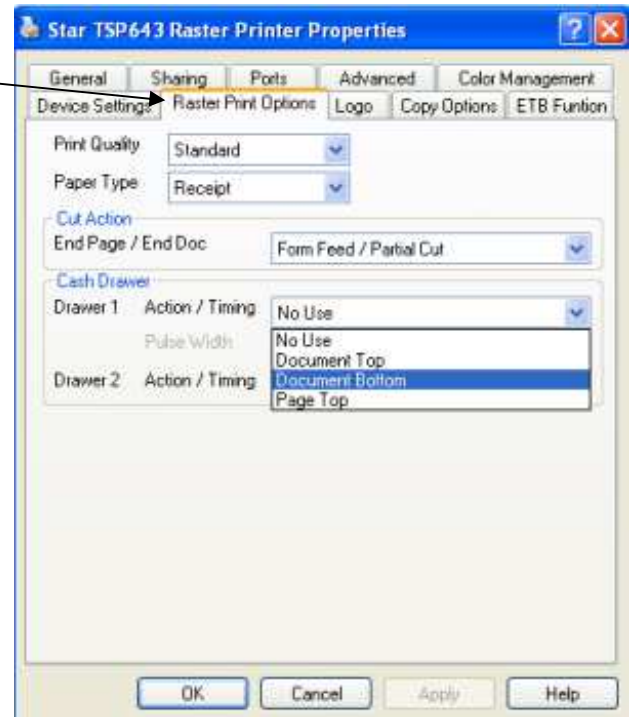


The first step is to select the model number of your receipt printer by using the drop down box. Then select the model numbers you wish to install. This option is very important because if your receipt printer has advanced options such as auto or partial cut it must be selected from this list. Next you will select automatic installation as well as any port settings that are needed.

Then allow the application to install its Windows Driver on your computer. Once this is done you'll be able to view your printer from the windows printer folder. You can also control a Cash Drawer from your Windows Driver. In order to do this you must first access the driver information. This is done by right clicking on your new Windows Driver and scrolling down to properties.



Now select the tab labeled Print Options. You can select Advanced Options such as auto cut or partial. You can also activate the Cash Drawer from this area. To activate your cash drawer select Drawer 1, then select the action timing to Document top. Optionally you can choose any of the options listed in the drop down box. By selecting this option you are telling the cash drawer to open either at the top, middle or bottom of printing the document.



To test your Installation simply apply, the changes and click on the **General** tab, then click on the option labeled "Print Test Page". A test page should be printed and the cash drawer should open. If the test page fails to print check your cable to make sure that it is plugged into the rear of the printer and also plugged into the computer. Also make sure that the papers properly loaded and that you do not have any error lights flashing. If a receipt prints and the cash drawer fails to open, verify that the cable is plugged into the correct device. If the cash drawer has interchangeable cables you may want to switch the sides that are plugged into the receipt printer and the cash drawer. You may also wish to retest printing a test page to see if your cash drawer opens after each adjustment.



*With star or Epson receipt printers the cash drawers have to be specifically wired for that receipt printer make sure that the cash drawer that you have purchased is wired for the receipt printer you are using. It is also important to note that if your receipt printer uses a **serial connection** and plugs into your 9 Pin Serial Port on the computer.*



*You **must** use a **Null Val Modem Cable**. This cable is required for Serial Communications and cannot be adjusted with adapters or gender changers.*

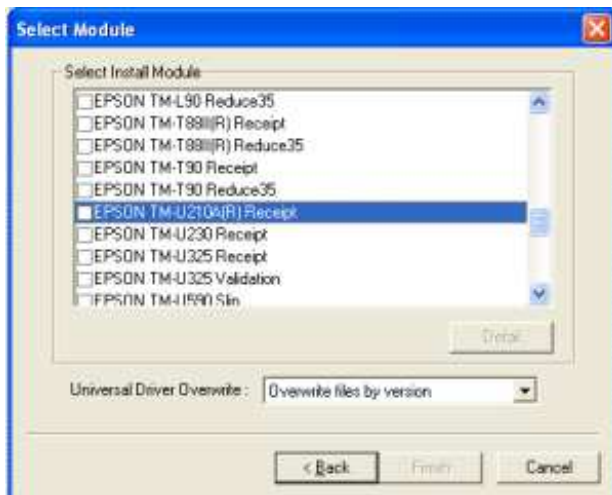
Once you have installed the windows drivers you are now ready to tell the system what receipt printer you will be using. This option is done in the setup wizard of and MPOS software. See the instructions printer setup discussed earlier for more information.

Epson TM Printer & Cash Drawer



The first step in installing your receipt printer and cash drawer is to install the Windows Driver for your printer. If you have purchased the equipment directly from your dealer the drivers are located on your installation CD-ROM.

To install your drivers for a Epson printer you will need to browse to the folder labeled “**Windows TM Drivers**”. You will find an application labeled “**Advance Drivers for Windows 95-XP**”. Click on this application and allow it to start its installation.



The first step is to select the model number of your receipt printer by using the drop down box. The select the model numbers you wish to install. This option is very important because if your receipt printer has advanced options such as auto or partial cut it must be selected from this list. To change the port settings click on the “**Detail**” button.

Then allow the application to install its Windows Driver on your computer. Once this is done you'll be able to view your printer from the windows printer folder.



*With star or Epson receipt printers the cash drawers have to be specifically wired for that receipt printer. Make sure that the cash drawer that you have purchased is wired for the receipt printer you are using. It is also important to note that if your receipt printer uses a **serial connection** and plugs into your 9 Pin Serial Port on the computer.*



You **must** use a **Null Val Modem Cable**. This cable is required for Serial Communications and cannot be adjusted with adapters or gender changers.

Once you have installed the windows drivers you are now ready to tell the system what receipt printer you will be using. This option is done in the setup wizard of and MPOS software. See the instructions printer setup discussed earlier for more information.

Customizing receipt print out

☐ Print Logo's using Inbuilt Internal Printer

Select the printer you will be using with MPOS software

☐ Any Windows Supported pos printer

☒ Ink Jet or Laser Desk top Printer

Advanced Settings

Sales Receipt
Invoice Receipt
Report Printer
Barcode Printer

What Words will appear on the top of your receipt. This is also the welcome text on your pole display.
Thank You, Please visit again

What Words will appear on the Bottom of your receipt. This is also the exit message on your pole display.
ORDER BY PHONE, MAIL, O

What Phone number to display on receipt
1(706)736-1236

What Retail Chain #do you want on your receipt
Store 23

What Address would you like to print on your receipts
1705 B Valley Park W

Addressed continued
Augusta GA 30909

Create a Credit Card Signature Line.
☐

Print Credit Card #'s
☐

Print Double (2) Receipt
☐

Print Double (2) Receipt For Credit Card Sales Only.
☐

Misc Data to print on receipt
Enter your text here

Insert Logo

You can customize receipt printout by entering data in the setup wizard. You can access the setup wizard by selecting 'setup wizard' from the 'options' menu of the main screen. After supplying the password you have set, click the next tab until you are at the printer setup screen. You are able to set 4 lines of text, 2 lines for address, 1 line for phone numbers and full color logos for desktop receipt printing and 2 color logos for point of sale printers.

Cash Register

File Keys Employee @uick Book Options Ring up Sale As Employee Login Number Pad
Price Check Client Info Form Of Payment Set Timers Paid Out Go to



Open & Closing Days

Optionally before you start processing transactions you can open the day by logging in. Once you have entered the cash register system from the file menu select 'open day'. You will be prompted to enter the amount you will be opening the cash drawer with for the day.

File	Keys	Employee	@uick
Print Setup			Ctrl+S
Reprint Invoice			Ctrl+F2
Open Day			Ctrl+F1
Close Day			Ctrl+F3
Exit			

Use this to open your daily sales. **Important note if you use this option (the cash amount you open with will not be added into your daily cash totals.)**

Use this to close your daily sales. **(Important note if your totals do not match you will be prompted to run reconcile wizard.)**

You can also close the day in the same manner by selecting 'close day' from the file menu. You will again be prompted to enter the total amount of funds in your cash drawer. If you're closing numbers match your daily totals you have successfully closed the day. If your numbers do not match then you will be prompted to run the reconcile wizard see 'Reconcile Wizard' for more information about reconciling your daily totals.

Ring up sales

It is best to enter inventory items into your system before ringing up sales. You can however ring up sales with out having products in your inventory. If you have activated “**Fast Cash Mode**” You can process sales using the hot keys. You can optionally use the **F3** hot key or activate the key menu.

Keys	Employee	Quick Book Options	Rir
Void		F2	
Refunds			▶
Fast Cash Mode		F3	◀
Discounts			▶
Clear All		F5	
Quick Totals		F6	
Ring Up Sale		F7	
Open Cash Drawer		F8	
Process Customer Ticket		Shift+F8	
View Sales Receipt		Ctrl+Z	
Tax Status			▶
Search Product Name		F9	
View Service Grid		Shift+F2	
View Inventory Grid		Shift+F3	
Hold Transaction		Ctrl+H	
Take Off Hold		Ctrl+J	
Change Quantity		Ctrl+Q	
Sell Gift Card		Shift+F4	
Add Receipt Memo		Shift+F12	

This option allows you to ring up a sale quickly using one key. Instead of scanning a product or typing the product detail into the system you can use the Fast Cash Mode. You will be prompted to enter the retail price of the product. To see the details of how this feature works and how to activate it and setup the assigned text used. *See Setting up your system chapter*

Also if you have products in inventory and the retail price is set to \$0.00 you will be prompted to enter the retail price for the product.

To learn how to input your inventories see “*Setting up your inventory chapter*” for instructions. If you have selected employee login or client scans options in your setup wizard, then you will be prompted to enter your information.

There are several ways to ring up a product or a service

1. **Barcode scanning**
2. **Selecting your products name or service**
3. **Selecting your Product or Service Using programmed buttons**
4. **Using Fast Cash Mode to sell products using just the retail price**

Classic Mode

Scan product ID or Barcode ID here. Or type the product ID or Barcode ID and press the enter key. Each time you enter a sale it is sent to the details grid.

Modern View

With Modern View you can simply type the first few letters of your product and MPOS will display matches based on item names, descriptions, barcodes, and manufacturer. Simply click on your choice in order to select the product.

You can optionally preview product pictures during ring out. Selecting the preview pictures option in the "Setup Wizard" does this. When barcode scanning the products, this picture will automatically appear. When using the name search feature (F9) the preview of the picture will appear on the screen also.

Barcode scanning

You can read barcodes directly into MPOS PRO. When you activate the Cash Register screen you are ready to scan products. The cursors default location is in the middle of the screen. This is where both scanning and typing is done. To read a barcode into the system simply scan the product and watch the ticket grid as it enters the data from your inventory. You can also type the barcode ID into the box and press the enter key to sell the product.



You can optionally scan the product in with your barcode scanner.

[illegible]

You can change the Quantity by either changing the quantity amount before scanning or selecting your product. This is done by either clicking with your mouse on the quantity box.

Click here to change the quantity
before scanning or selecting a
product.



Those not wishing to use there mouse to change the quantity can use the hot key **Control + Q**. Or you can click on the grid column (**Control + G**) and make the changes after the product is scanned. You can optionally change the quantity, price, tax, serial number and employee receiving credit for the sale.

Changing an employee is done by clicking (or pressing enter key on your keyboard) over the column with the employee name listed. Simply choose the new employee that will receive the credit.



You can also discount a line and void a line by clicking or pressing the enter key on your keyboard over the product row. You will be given the menu shown below.



If you have a pole display configured. You should see the retail prices and the product name appear.

The pole display scrolls the text that appears at the top of your receipt before a sale. And displays the information at the bottom of your receipt at the end of a sale.

Non Inventory Sales use (*) Asterisk

A special feature is available for sales that are not listed in your inventory. This is done by typing the asterisk * in the text box that is normally used to scan your products. Then pressing the enter key you will be prompted to enter a product ID, next enter a product name, then enter the quantity and retail price. This is how you can ring up a sale that may not be in inventory or a service that is not listed. The data is stored in your report management area with the rest of your data.

Multiple products sharing the same barcode

You can use the same barcode for several products. This can be used for products that share the same barcode but have different sizes or colors or schemes. When the products are sold you will be given the options to select the product from a list using the short name and description. Therefore it is important that if you will have several products using the same barcode or product code, there description and short item name be different, so you can tell the difference between each product. In the example below (3) products share the barcode '1234' this is the screen that appears during a sale transaction whenever multiple products are found with the same UPC or barcode ID.

Multiple products share this product id or 'UPC' select below the product you wish to ring up.

ItemName	Description
JC Bub Gel	Bath Gel
JC Cond	Conditioner 8 oz
JC Dtglr	2 oz

Cancel

All products here have the same UPC or Barcode ID. When you sell an item or a service that shares the same UPC code the Multiple Product grid will appear. And give you the choice of products to sell.

Selling Items that are serialized

If you have set up products in your inventory system to be serialized when you scan that products barcode Id or select that product by name. The menu below will be shown, you can optionally select the serial number of the product you are selling. If you wish to simply scan the serial numbers using your barcode scanner this can be done by pressing the letter **(s)**. This will create a prompt that will allow you to scan your products serial number into the system. You can then continue with the sales transaction.

Keys	Employee	Quick Book Options	Rin
Void	F2		
Refunds			▶
Fast Cash Mode	F3		
Discounts			▶
Clear All	F5		
Quick Totals	F6		
Ring Up Sale	F7		
Open Cash Drawer	F8		
Process Customer Ticket	Shift+F8		
View Sales Receipt	Ctrl+Z		
Tax Status			▶
Search Product Name	F9		
View Service Grid	Shift+F2		
View Inventory Grid	Shift+F3		
Hold Transaction	Ctrl+H		
Take Off Hold	Ctrl+J		
Change Quantity	Ctrl+Q		
Sell Gift Card	Shift+F4		
Add Receipt Memo	Shift+F12		

This activates the box that allows you to type the product name instead of the barcode ID, or UPC code. The hot key for this option is **F9**

Selecting your Product or Service using programmed buttons

MPOS Software - [Processing Sales]

File Keys Employee Quick Book Options Ring Up Sale As Employee Login Number Pad Price Check Client Info Form Of Payment Set Timers Paid Out Go to

Scan or Type Your Item Here

Inventory Grid Sort by Category Show Button Graphics

Lori logged into Sales Transactions

Product Id	Description	Qty	Price	Client N:

Click here to exit service grid view.

MPOS Pro \$489

To sell a product click on the button using either your keyboard or mouse, or touch screen. By floating your mouse over the product the barcode ID will be shown. Click or press enter and the sale will be sent to the ticket.

Help Search By Product Name (F9) Change Quantity (Ctrl + Q) View Service Grid (Shift + F2) View Inventory Grid (Shift + F3) Fast Cash Mode (F3) Ring Up Sale (F7) Void (F2) Discounts (F4) Change Employee Clear All (F5) Finish

Service and inventory grids are activated by selecting, the short cut Shift F2 for Services and Shift F3 for inventory.



To maximize screen usage it is suggested that your screen resolution be set to at least 800x600 Pixels.

Or using the menu “Hot Keys” and activating either service or inventory grids.

Keys	Employee	Quick Book Options	Rir
Void		F2	
Refunds			▶
Fast Cash Mode		F3	
Discounts			▶
Clear All		F5	
Quick Totals		F6	
Ring Up Sale		F7	
Open Cash Drawer		F8	
Process Customer Ticket		Shift+F8	
View Sales Receipt		Ctrl+Z	
Tax Status			▶
Search Product Name		F9	
View Service Grid		Shift+F2	
View Inventory Grid		Shift+F3	
Hold Transaction		Ctrl+H	
Take Off Hold		Ctrl+J	
Change Quantity		Ctrl+Q	
Sell Gift Card		Shift+F4	
Add Receipt Memo		Shift+F12	

Shift + F2 or Shift + F3 will activate the programmable button grid.

You can also add a 254-field memo to the bottom of the receipt by selecting the option labeled “Add Receipt Memo”

This option allows you to select unlimited amount of both inventory and products. When activating the grid you can either select with your mouse or keyboard the service or product and press the enter key to send it to the ticket. Or if you are using a touch screen simply touch the product and send it to the ticket. This is helpful when you have services or products that are used frequently rather than selecting or scanning these products you can create shortcuts keys to activate them with a touch of a button. These items you select are apart of your standard inventory or services list. They are listed in the service and inventory grid when you check the option “Hot Key” or “Service Key” located in the inventory and service screen. You can optionally sort the keys by category. By doing this you are able to group all the buttons into sub categories allowing you to group and find products quickly. Assigning categories is done on either the inventory or service screen of the item.

Using Fast Cash Mode to sell products using just the retail price

“ **Fast cash mode**” this option enables users to enter sales in cash register mode easily without having to scan or type an item in. When this option is enabled by the manager users are given the ability to use hot keys to ring up sales. Sales can be rung up using the “F3” command.

Keys	Employee	Quick Book	Option
Void		F2	
Refunds			▶
Discounts		F4	
Clear All		F5	
Quick Totals		F6	
Ring Up Sale		F7	
Open Cash Drawer		F8	
Tax Status			▶
Search Product Name	F9		
View Service Grid	Shift+F2		
View Inventory Grid	Shift+F3		
Fast Cash Mode	F3		

F3 will activate “**Fast Cash Mode**”

Sales can also be controlled from within inventory by simply changing the retail price of any product to \$0. If an inventory item is scanned, or if is typed or selected from the drop down option and the price is set to \$0, then you will be prompted to enter the retail price of the product. And alternative way of ringing up a sale is using the F3 Hot Key. When using this option you will be prompted to enter the retail price for the item that is being sold. When using this particular option it is noted that you should have already set the options in the setup wizard. To activate and change settings see the chapter “*Setting up your system*”

Voids

You can void out any transaction by clicking on the void button or using your hot key F2. Then scan the product you will be voiding or type its product ID and press the enter key on your keyboard. You can optionally click on the grid and select your product manually to void.

Discounts

If you will be applying discounts you must insert the discount before scanning or entering your product into the system. You can click on the discount button or use the hot keys F4 to activate the discount box, enter the dollar amount of the discount you will be applying. Then scan or type your product ID into the system.

Keys	Employee	Quick Book	Option
Void		F2	
Refunds			▶
Discounts		F4	
Clear All		F5	
Quick Totals		F6	
Ring Up Sale		F7	
Open Cash Drawer		F8	
Tax Status			▶
Search Product Name	F9		
View Service Grid	Shift+F2		
View Inventory Grid	Shift+F3		
Fast Cash Mode	F3		

You are also able to program the default buttons that will be displayed. These buttons can include preset discounts as well.

Refund

You can refund any sales transaction by using the Refund buttons or hot keys Ctrl + F for a Full Refund. Ctrl + R for partial refunds. To issue a refund select the refund type you wish. You will be prompted to enter the original invoice number. After entering the original invoice number. The invoice will pull up into sales mode. If you are processing a full refund press the F7 key or the ring up sale button and conclude the refund by pressing the conclude sale button. The invoice will generate a negative invoice and process the refund. When processing partial refund enter the original invoice number then you will be prompted to void out the selected items you will be voiding using the void option (F2). Then press the F7 key or the ring up sale button and conclude the refund by pressing the conclude sale button.

Quick Totals

You can generate totals by pressing the quick total button or using your hot key F6

Search By Product Name (F9)	Change Quantity (Ctrl + Q)	View Service Grid (Shift + F2)	View Inventory Grid (Shift + F3)	Fast Cash Mode (F3)	Ring Up Sale (F7)
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Void (F2)	Discounts (F4)	Change Employee (F6)	Clear All (F5)	Finish
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You can use the main navigation menu. To activate many cash register features.

Splitting Form of Payment:

Other

Split

Gift Certifi

Gift Card



Cash	Ctrl+P
Check	Ctrl+K
Credit Card	Ctrl+D
Other	Ctrl+M
Split	Ctrl+W
Gift Certificate	Ctrl+A
Gift Card	Ctrl+F4
Cancel Split	

To split a form of payment click on the form of payment labeled **"Split"** then select the form of payment you would like to split the transaction with. If you are going to split your transactions with either a Gift Card or a Credit Card make sure to select these payment methods as the last form of payment as they will need to be processed through either the gift card system or credit card module. Before starting the split process you should add any tip separately from the spit.

Clearing Tips & Splits:

Form Of Payment	Set Timers
Cash	Ctrl+P
Check	Ctrl+K
Credit Card	Ctrl+D
Other	Ctrl+M
Split	Ctrl+W
Gift Certificate	Ctrl+A
Gift Card	Ctrl+F4
Cancel Split	

You can cancel and clear a split transaction in the middle of a sale by clicking on the Form of Payment menu then selecting "Cancel Split". Also if you have added a tip to a ticket and wish to cancel all tips you can click on the button labeled "Add Tip" then type "x" and press ok this will cancel and remove all tips added to the ticket. This feature will only work when the ticket is active or being processed once it has been completed you must either void the whole ticket or enter advance mode to make adjustments on completed tickets.

Conclude Sale Classic View

Once your product is entered into the ticket simply repeat the step for each product. When you are ready to check out press the **“Ring up Sale”** button located at the top right corner or use your hot key F7. You will now be directed to the final stage of your transaction. Select the form of payment,

Form Of Payment

Cash
Check
Credit Card
Other
Split
Gift Certific
Gift Card

Add Tip

Ring Out

Amount Due
\$1.00

Amount Paid
\$0.00

Amount Still Due
\$1.00

Print Receipt

Conclude Sale Cancel Transaction

Click this option to record a tip.

After pressing the Ring up Sale button or F7 you must select the form of payment.

Then enter the amount paid

Uncheck this check box to not print a receipt

Click here to conclude sale and open cash drawer

You will be accepting. You will then be prompted to enter the amount paid, once you have entered the amount your change will be calculated. You now can select if a receipt will be printed or not. Press the open cash drawer button to conclude your session. You have concluded the sale and you are now ready to process the next sale.

Amount Paid
350.00

Amount Still Due
\$149.99

Print Receipt

Lpt Printer

Conclude Sale Cancel Transaction

You will notice that your **Conclude Sale** button will be disabled until you enter the correct amount of the sales transaction. You can enable the button by

- Entering an amount greater than amount due and pressing the enter key
- Entering an amount greater than the amount due and pressing the tab key
- Entering an amount greater than the amount due and moving your mouse towards the conclude sales button.
- Entering an amount greater than the amount due and activating the Print Receipt option (**Alt + P**)

Conclude Sale Modern View

Once your product is entered into the ticket simply repeat the step for each product. When you are ready to check out press the **“Ring up Sale”** button located at the top right corner or use your hot key F7. You will now be directed to the final stage of your transaction. Select the form of payment,

Form of Payment (Amount): **Cash** **Check** **Credit Card** **Other** **Split** **Gift Certificate**

Amount Due: **\$493.89**
 Tax Collected: **\$4.89**
 Amount Paid: **\$500.00**
 Change Returned: **(\$6.11)**

Print Receipt: **Yes** **No**

Conclude Sale **Cancel Sale**

After pressing the Ring up Sale button or F7 you must select the form of payment.

Then enter the amount paid

Select Yes or No to print receipt then click the “Conclude Sale” button.

You will be accepting. You will then be prompted to enter the amount paid, once you have entered the amount your change will be calculated. You now can select if a receipt will be printed or not. Press the open cash drawer button to conclude your session. You have concluded the sale and you are now ready to process the next sale.

\$500.00

1 5 10 20 50 100

0 1 2 3 4 5 6 7 8 9

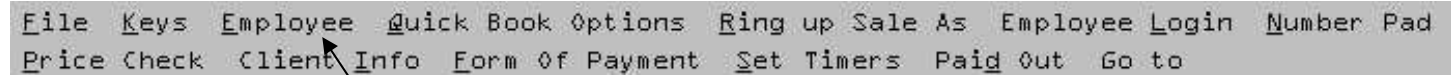
Enter

Cancel

You will notice that your **Conclude Sale** button will be disabled until you enter the correct amount of the sales transaction. You can enable the button by

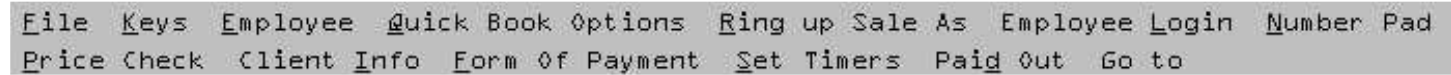
- Entering an amount greater than amount due and pressing the enter key
- Entering an amount greater than the amount due and pressing the tab key
- Entering an amount greater than the amount due and move your mouse towards the conclude sales button.
- Entering an amount greater than the amount due and activating the Print Receipt option (**Alt + P**)

Change Employee



File Keys **Employee** Quick Book Options Ring up Sale As Employee Login Number Pad
Price Check Client Info Form Of Payment Set Timers Paid Out Go to

Use this option to change the credit for a sale from one employee to another by selecting the employee button you will be given a list of employee's to choose from, click on the employee you wish to change to. It is important that you change the employee name first before you scan the product or enter the service code.



File Keys Employee Quick Book Options Ring up Sale As Employee Login Number Pad
Price Check Client Info Form Of Payment Set Timers Paid Out Go to

Price Check

If you are unable to scan a product you can run a price check by selecting price check button or by using Ctrl + C. You can then type the product name and press the find button or you can scroll down until you see the product. Once you have located the product you can double click on the product to send it to the cash register or select the product and press the send button.

Placing a Sale on Hold

You have the option to choose to place a sale on hold. This feature is useful if you don't want to void out an entire transaction. To activate this option click on the keys menu and select **"Hold Transaction"** or use the hot keys **Ctrl + H**. Whatever invoice you are currently processing will be placed on hold. To process a sale that has been placed on hold. Click the keys menu and select **"Take Off Hold"** or use the hot keys **Ctrl + J** this will activate a grid that will show all invoices that are on hold. To take an item off hold simply type the invoice number in the text box highlighted or double-click on the grid. This will send your held invoice back to the ticket simply process the sale as normal.

Important Notes!

When using the Hold function several things are affected. Whenever you leave the cash register mode you will be prompted to clear all items that are on hold. If you decide not to clear them these files will remain in hold mode. They will be incomplete records that have not been flagged as complete. If you are running reports such as daily product totals and daily details you totals will not match as you have orphan files or files that are associated with transactions placed on hold. If you are running QuickBooks Pro and are exporting data and you have items on hold you will receive incomplete data or error line messages when you export to QuickBooks Pro. Also when you run Database Cleanup any record that is found that is on hold will be flagged as orphaned and you will be given an opportunity to delete these files. *It is therefore very important that before closing any day you clear or delete any items that are on hold.* This can be done by selecting the delete button that is located at the bottom of the hold screen (*this is activated with Ctrl + J*). To manually change the status of an invoice that will not clear using the delete method, enter **"Edit Mode"** and find the invoice number using the Edit "Cash Register Data" option. Find any invoice with the department number listed as **"Hold"**. Simply remove the words (hold) to remove the item from hold status. This does not remove the orphaned files but instead removes it from the grid that displays all of the invoices that are on hold.

File Keys Employee Quick Book Options Ring up Sale As Employee Login Number Pad
Price Check Client Info Form Of Payment Set Timers Paid Out Go to

Employee Login



In order to use employee login you must have first setup your employees with employee numbers. See 'Employee Setup' for detail instruction. Scan your employee card 'See ID Pro' for creating ID badges or type the employee number and press the enter key on your keyboard. If your ID is correct then you will be allowed to enter the cash register system.

File Keys Employee Quick Book Options Ring up Sale As Employee Login Number Pad
Price Check Client Info Form Of Payment Set Timers Paid Out Go to

Client Profiles



You can create and maintain a client profile on all of your customers. You must type the client phone number into the first text box and press the enter key on your keyboard. If the client has a previous profile it will be pulled up. If the client does not have a profile you will be prompted to create one. You must then fill in the information listed and click the continue button. As an added feature you can also change the default find field, this is the field used to find your client in the database. You can change this field by clicking on the file menu of the client profile screen. Then selecting "Change Default Find Field". Once this is selected you can change the field to any of the following.

HOME PHONE
WORK PHONE
MOBILE PHONE
FAX NUMBER
EMAIL ADDRESS
FIRST NAME
LAST NAME
ORGANIZATION ANEM
USERDEFINED FIELDS 1-16

This is helpful when you will not be using phone numbers as search criteria or if you will be using account numbers that are associated with pre printed stock numbers. You can simply use the user defined fields assign the account numbers to those fields and use those numbers as the default find field.

Check Verify

Your system is equipped with an internal check verify system. This system will check every check to verify that it has not been presented in the past and returned as unpaid see 'bad check system' for more details.

Credit Card Verify

Your system is equipped to process credit card transaction. If you have enabled pc processing, PC Charge Pro or XCharge you will be able to process credit cards. *See setting up your system for more information.* If you are using a standard bank terminal or another form of credit card processing the system simply flags the sale as credit card and allows you to continue your sales transaction.

Gift Card Verify



To process gift cards within your system it must first be issued. To issue a gift card it must be created in **"Gift Card Manager"** then it must be sold through your inventory system. Once it has been sold or marked as issued it can then be used as a form of payment. In order to validate a gift card simply scan or type the gift card number and press the enter key on your keyboard. The system will check and validate the value of the gift card, and present you with an authorization or a decline of transaction. To learn more about this feature see **"Gift Cards"** in the *Tools you will use* chapter.

Invoices

Ring up Sale As	Employee Login	Number Pad
Sales Transaction		Ctrl+Q
Invoice		Ctrl+Y
Post Invoice (Receive Full Payment)		Ctrl+Z
Receive Partial Payment		Shift+F5
Sell Package		Shift+F6
Void Package		Shift+F7

Use this option to invoice sales transaction



The invoice feature is used when you are billing a client and wish to hold the invoice until payment is secured. For instances you want to bill a service that require payment after services have been completed. (I.e. laundry services, alteration, etc.) By ringing up the transaction as an invoice you hold it open until you post full payment on the invoice. When you post open invoices you are completing the transaction. The invoice is closed & removed or archived and the transaction is given a sales number and stored & reported as a sales transaction.

Reprint Invoice

File	Keys	Employee	Quick
Print Setup	Ctrl+S		
Reprint Invoice	Ctrl+F2		
Open Day	Ctrl+F1		
Close Day	Ctrl+F3		
Exit			

Use this option to
Reprint a sales ticket
or invoice

What is the invoice number or sale ticket number?

Scan or type invoice number

☐ Customer Last Name-F ☐ Customer Job ☒ Invoice Number

DATE	Invoice	At
2/25/2004	5	

Invoice #5
Date 2/25/2004
Employee Client Name

Product Qty	Price
Your Product	1 \$1.00
Taxes Collected	\$0.00
Amount Due	\$1.00
Form of Payment Cash	
Amount Tendered	\$1.00
Change Returned	\$0.00

Select Invoice # 5

Exit

In the instance you need to reprint an invoice select the file menu then select reprint invoice. You can search for invoices by name, customer jobs or invoice numbers. On screen previews are also available.

Selling a Service Package

When you are about to sell a package, enter the cash register then either use the menu “Ring up sales as” or use the hot key Shift F6.

Ring up Sale As	Employee Login	Number Pad
Sales Transaction		Ctrl+Q
Invoice		Ctrl+Y
Post Invoice (Receive Full Payment)		Ctrl+Z
Receive Partial Payment		Shift+F5
Sell Package		Shift+F6
Void Package		Shift+F7

Use this option to sell a package or to
void a package.

You will be prompted to type or scan a membership card if you have purchased membership package cards, simply type or scan the barcode ID'. If you are using your own stock or if you will be using non-card account numbers, simply type the account number and press the enter key.

— Sell Package

070074111193

Select A Package

Package Description

Unit Amount

Retail Price

Sell Package

Void Package

Cancel

You can now select the package from the combo box listed “Select a Package”. Once you select a package you must now select the sell package button. This will sell the package and add it to your ticket. Voiding a ticket is done in a similar way by clicking on the void package button or using the hot keys Shift F7. When you sell a package you are creating a service item in your inventory & service database this is then treated as a normal service or inventory item.

When your client returns to use their card, simply scan the card into the system or type the ID number into the main text box.

When the item or service has been depleted it will inform the user and either remove the expired account or place in on hold until used again. Managing the packages is done using several reports. The first is “Package Report” this report is located on the main screen in the report section also available is the “Package Details” Report. You can also run daily sold packages by running a daily department report. Each package that is sold and created is assigned to department “packages” therefore allowing it to be tracked and reported separately from other services. Once the package has been processed it will now show up in your item & service list. So along with your products and services you will now see packages. You can now select them the same way you would select a product or service either using the account number or using “Name Search” and typing their name into the system. Or you can optionally use the “Look up Packages” menu.

Timer Modules

Set Timers P

Timer 1

Timer 2

Timer 3

Timer 4

Timer 5

Timer 6

Timer 7

Timer 8

Timer 9

Timer 10

When activating a timer module the name on the menu will change from Timer to the name of your client. You can then check on the timer session by either clicking on the timer menu again or selecting the client’s name. Or you can select the client’s timer session on your taskbar. The caption of the timer should have the clients name listed.

You have up to 10 timer modules that can be run simultaneously. To start your timer module click on the option set timer then click on the next available slot which will be the word timer followed by a number. Now select the service from the drop down box then select the client. You must now press the start button to activate the timer. Timer modules allow you to preview a sale before stopping the timer by selecting preview current total. You can also void out a previous timed billing by pressing the void timer session option. If at any point you decide to put the invoice on hold simply answer no to the question asked when you click on the stop button. This will put the invoice on hold and will also minimize the screen. When you are ready to conclude this sale simply find the module on your windows taskbar and click on it. Then from the menu option select the un-hold session option.

Tools you will use

Tools of the Trade



You have different tools that are available in MPOS that will enhance the over all system performance. Below is a list of features available at what they do.



Edit Cash Register Data

Edit mode is a handy tool used to edit raw data. If you are familiar with using spreadsheet programs such as Excel or Access, You will be right at home in edit mode. Every single transaction that has to do with your system is recorded in your Access database called smp.mdb and prd.mdb. If you need to purge some of the data or to void out an entire transaction. (Note this is not the suggested way of voiding out transactions or changing records. It is suggested you use the void method to cancel out transactions). Edit mode is broken into 2 specific categories.

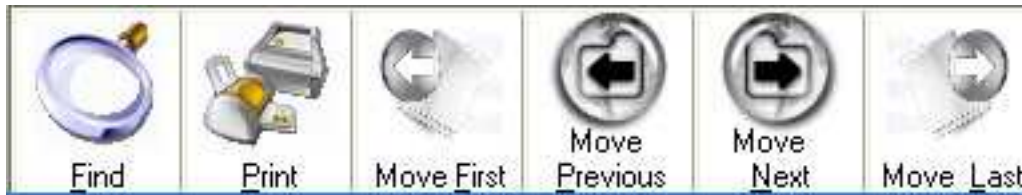


The first category is Cash Register Data, this is the data that is stored in your database that correspond with point of sale transactions, and this is started by clicking on the button labeled **“View Cash Register Database”**. The next is product data, product data is the same data that is stored in the cash register database but is broken up specifically for product manipulation this is activated by clicking **“View Product Database”**. To understand how to operate in this area you must be very sure what records you need to modify or delete. The records are permanently deleted from your database and cannot be recovered. It is suggested that those that are comfortable with spreadsheets use this tool.

To **modify** a click on the cell you wish to update

Edit Data

invoice	Date	Employee	Form Of
5	2/25/2004		Cash
1			



Use the standard navigation tools to move from record to record.

To view the full invoice information on any invoice you can double click on the invoice number, this will activate the **Preview Sales Receipt** option and will show you the entire sales transaction if available. You can then either scroll down to the appropriate record or click the find button and enter the invoice number you wish to modify. Once you have located the invoice you wish to modify. Simply edit the record by clicking on the column that has the invalid data i.e. form of payment fields list cash when it should be check etc, **deleting** a record is done the same way after you have identified your record click the delete button on your keyboard to delete the entire record. Make sure if you are deleting the record that you also delete the related product data in the Product database. See **Database Cleanup** for more information on editing and maintaining your database.

Advance Mode:

To enter Advance mode click "Management Tools" "Edit Cash Register Data" then select "Advance mode" This is a feature that can be used to edit any of MPOS database records. Because tables can be added with each update a list of the main tables will be shown below

Table Name	Database	Purpose
StockInventory	smp.mdb	Maintain inventory, packages, services
Mnumain	smp.mdb	Customer Profile table
Cashregister	smp.mdb	Cash Register table receipt data only
GiftCard	smp.mdb	Gift Card Table encrypted
Splitpayment	smp.mdb	Detail data from all form of payments that have been split
Tip	smp.mdb	Details of all Tips recorded
TimeClock	smp.mdb	Details of all time clock transactions
ReportProd	prd.mdb	Details of all cash register items sold per ticket
1-30	day.mdb	Scheduling table for employees columns 1 - 30
1-30	ts.mdb	Scheduling table for tanning columns 1 - 30

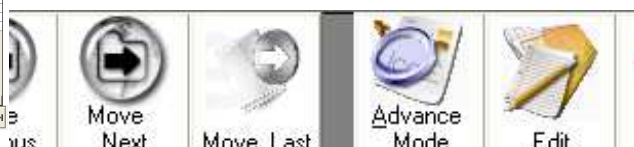
☒ smp.mdb
 ☐ prd.mdb
 ☐ day.mdb
 ☐ ts.mdb

Database

Invoice	Date	Employee	CardNumber	Tip
1	2/18/2004	Bulus		Credit Card
2	5/2/2004			Cash
3				
4				
5	5/2/2004			Cash
6	5/2/2004			Cash
7	5/2/2004	Bulus		Cash
8	5/2/2004			Cash

Click to Navigate

Delete





Manage Commissions

Commission Calculator is used to calculate commission for each of your employees. Before you can use this feature make sure you have completed the **setup wizard** and have setup each of your employee's with valid commission rates. There should be a rate for inventory, services, and packages.

Commission Calculator

Payroll
Week Starting: 1/29/02 Week Ending: 2/5/02

Others: Jean, Craig, Porter, Johnson, Green

☒ Services ☒ Inventory ☒ Package

Inventory Commission: 03 Service Commission: 05 Package Commission: 13

Standard Commission Report | Employee Commission History

Total	Date	Invoice	Description	Amount
\$659.99	1/29/02	461	Buju Banton	\$25.00
	1/29/02	461	Buju Banton	\$25.00
Inventory Totals	1/29/02	460	Buju Banton	\$25.00
\$125.00	1/29/02	460	Buju Banton	\$25.00
Inventory Commission Totals	1/29/02	459	Buju Banton	\$25.00
\$3.75	1/29/02	458	25 Minute Tan	\$30.00
	1/30/02	536	PC Charge Pro	\$49.99
Service Totals	2/3/02	558	Tecno Adapter	\$1.50
\$30.00	2/3/02	558	Tecno Adapter	\$1.50
Service Commission Totals	2/3/02	558	Tan Session	\$1.50
\$1.50	2/3/02	558	Tan Session	\$1.50
	2/3/02	558	Tan Session	\$1.50
	2/3/02	558	10MultiTan	\$1.50
	2/3/02	558	Tan Session	\$1.50
Package Totals				
\$504.99				
Package Commission Totals				
\$65.65				
Total Commission Paid				
\$70.90				

You can change the report totals by selecting what sales type to calculate.

You can view any invoice by clicking on the invoice number.

Invoice #458

Date

Employee Wells **Client Name**

Product	Qty	Price
25 Minute Tan	1	30

Taxes Collected \$0.00

Amount Due \$0.00

Form of Payment

Amount Tendered \$0.00

Change Returned \$0.00

Commission on this Product \$1.50

When you open the Commission Calculator it automatically will fill in the calendars dates with the last 7 days. You can however change the date range to any date you choose by clicking on the date text boxes. Once you have selected the date range you must now select the employee. Click on the employee from the list. You can then check which sales types you wish to view. Once you have chosen your employee the grid will fill with the sales data for the period you indicated. It will also be color coded to show what sales belong to each category. Also you can change any commission rate without permanently changing the employee's commission profile. In cases you need to override the standard commission rate with a temporary one. You can optionally view the sale receipt by clicking on the sales number. The sales receipt preview will show the full invoice and the commission due on the product you have selected (*not the entire invoice*).



Manage Tips

Manage Tips

Week Starting 5/2/2010 Week Ending 5/7/2010

Burkus Turner

☒ Cash
☒ Check
☒ Credit Card
☒ Other
☒ Gift Certificate
☒ Gift Card
☒ Invoice

Total Cash Totals \$0.00
Total Check Totals \$0.00
Total Credit Card Total \$0.00
Total Other Totals \$0.00
Total Gift Certificate Tc \$0.00

Totals for all employees from 5/2/2010 to 5/7/2010

☐ Print

	DATE	INVOICE	EMPLOYEE	AMOUNT	FOP	Client
Total Tips						
\$0.00						

The **Tip Manager** is used in much the same way the **Commission Calculator** is used. By default when opening the screen you will be given the last seven days as a date range. You can change date ranges to reflect any date you wish. Once you have selected the date range simply click on the employee name you wish to generate the report for. You can optionally filter the report by form of payments by clicking on the check box labeled cash, check, credit card or other.

The report that will be displayed will show all transactions were tips have been collected. The report will give you a detailed explanation as to each transaction that has been processed. It will then give you totals for each of the form of payments you have selected. Then at the end of the report the total for all forms of payment is selected. This report also supports *Invoice Preview*, by clicking on any invoice number you are able to preview the entire invoice selected. You also have an option to print the listed report using your default report printer. The information contained in this report is stored in the main system database and is not accessible using edit mode. You can however use database tools to access tip manager in your Microsoft Access database the name of the database is smp.mdb the tables name is "TIPS". Also on screen you can view grand totals for all employees for all forms of payments. You can optionally select the print check box and include totals on your print out. Also when you print your "Daily Summary" tip totals will be assigned a row to print.



Manage Gift Cards

The gift card system is used to manage create and maintain gift cards within the system. The first option in creating a gift card is telling the system how you will be managing your gift card account. You must let it know if you are managing it (locally) meaning in one location. You should choose local even if you are networking several computers in one location. Or if you are using this system remotely and have setup an account with your dealer to access the gift card database over the Internet. In order to use the remote or multiple location option you must first set up the account with your dealer and your account should active before setting up this option.

Next you must set the options for your gift card accounts.

Manage Account Locally (This Location Only)

☐ Maintain Balance on Card

☐ Cash Out Cards Balance After Use

Manage Account Remotely (Multiple Locations)

☐ Delete Gift Card Account After Full Balance is Used. (Reporting information will remain.)

Store Account No: 1322

Create New Gift Card Accounts Manage Existing Card Accounts

Before you can begin you store account No. should exist if this is blank contact your sales office to receive your store account number.

By selecting **“Maintain Balance on Card”**, whenever you issue a gift card a balance will be maintained on the account allowing the customer to continually use the card until the balance is equal to zero.

By selecting **“Cash out Cards Balance after Use”**, whenever you issue a gift card the balance will not be maintained on the account. Therefore the card can only be used one time and the remaining balance will be cashed out during the point of sale transaction.

The next option is **“Delete Gift Card Account after Full Balance is used”**, this option will delete the gift card number or account number after it has been used in full, if this option is checked the actual gift card number will be removed from your database. All the historical data such as the gift card it self being sold. Any transactions purchased with the gift card will remain in your historical report data. Use this option to maintain an efficient account list. By default when connecting to the remote gift card system all gift card accounts that maintain a zero balance for more than 30 days are automatically purged from the system.

To create a gift card account click on the button labeled **“Create New Gift Card Account”**. The following screen will appear allowing you to type the sequence numbers of the gift cards you will issue.

Select Gift Card Account Numbers

Start From: 105 To: 205

Set Gift Card Values from 105 to 205

You can create a single gift card or a sequence of gift cards. It should be noted that when you create a sequence of gift cards, they must all be created with the same value. If you will be creating several gift cards with different values then it may be necessary to issue the cards separately.

After you have selected the sequence numbers of your cards that will be created you must now assign a value to your gift the cards. This can be done by selecting a value from the selected buttons, or by manually typing a value in the suggested area.

Select Gift Card Value
Select the value for all the cards in this series or type the value in.

5	10	15	20	25	30	35	40
45	50	55	60	65	70	75	80
85	90	95	100	105	110	115	120

5

Set Gift Card Values
Exit

☐ After creating Gift Cards put them into inventory automatically

You can also check the option “**After creating Gift Cards put them into inventory automatically**” this will put cards into inventory automatically. If this option is selected then the system after creating gift cards will put them in your general inventory. It will serialize the sequence numbers under one product line with the name gift card. When you are ready to sell your gift card simply type or select the product gift card into the cash register system.



To Change
Quantity Ctrl + Q

1



gift card

Tax Item



A list of available gift cards will be displayed.

This Item is Serialized you must select the serial number that will be sold.

BarcodeID	SerialNumber
Gift Card	1757
Gift Card	1759
Gift Card	1760
Gift Card	1761

Cancel

\$5.00



Gift card

Tax Item



Product Id	Description	Qty	Price	Tax
gift card	Gift Card	1	\$65.00	\$0.00

After selecting the gift card account you can then ring up the sale as normal.

By doing this, the gift the card is now considered issued and is now available for use by the clients. This option is a security feature that requires cards to be issued or sold to a client before they can be used.



Due to the complexity of issuing cards over multiple locations you will not be able to use the issuing feature when using remote or multiple location gift card account. Once an account has been issued and placed on the main server it can then be used on any location as a valid form of payment.

After gift cards have been issued they can then be viewed in the “Manage existing gift card accounts” Section.

Manage Existing Gift Card Accounts

☐ View Un-Issued Cards
(Cards Not sold to a client)

☒ View Issued Cards
(Cards sold to a client)

Click on data cell to edit a record

Date Create	Store Acco	Card Number	Amount	
1/25/2004	1315	1758	5	History

Exit

By clicking on this option you are now able to view issued cards as well as non-issue cards. You can also view card history by selecting the button labeled “**History**”. This will display a history of transactions used in conjunction with this gift card account. You can also preview sales receipt by clicking on the invoice number associated with this account.



Due to the complexity of issuing cards over multiple locations you will not be able to view the history of transactions when using the remote or multiple stored gift card option. Sales information however will be stored in each of the independent locations and is available from within their systems.



Manage Multiple Stores

Manage Multiple Stores

Manage multiple stores is a feature that is used to help you review and manage data from multiple locations. This feature when enabled will allow you to dial into another location and access their report and inventory system. This system uses regular telephone lines to connect to locations. In order to use this feature you will need to make sure that both computers are running the same version of MPOS software and that they're both connected to either a dedicated or a standard phone line. The following documentation will review the features that are available. As well as the steps needed to set up this feature on both the main computer / server and the individual stores or client machines.



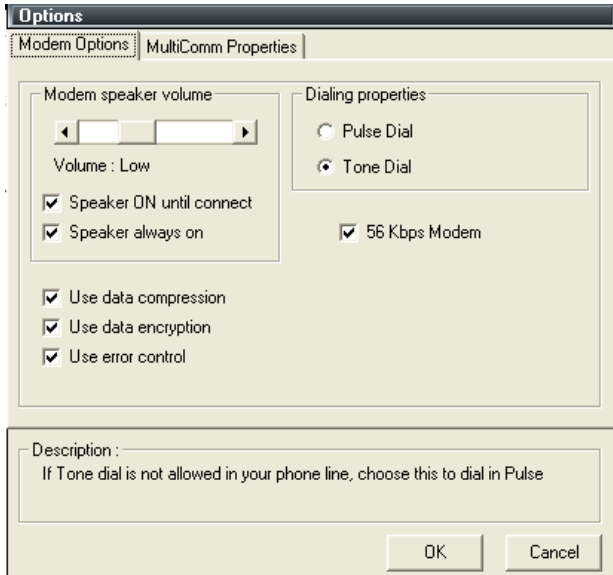
The first step in setting up your system is to manage and maintain multiple store data. You must select the computer type. If you select **Client / Remote Computer**, then you are identifying this location as a remote store. If you select **Server / Main Computer** then you are identifying this computer as the main system that will dial into multiple locations. The next option you will see is the **Answer Button**, this button is made available to manually answer an incoming call. This feature is helpful when you cannot have a dedicated phone line and need to share it with voice and fax lines. You need to inform the staff that you will be dialing in to this location; they will need to enter the screen and select the answer button. You can optionally set the auto answer function by checking box labeled **Auto Answer the Phone**. By checking this option and then selecting the amount of rings before answering, the system will automatically answer the phone at the amount of rings you have selected. By setting this feature to Auto Active you are allowing the system to answer the phone without having an attendant supervising it.



When you activate Auto Answer the following image will be shown, notifying you that Auto Answer is active.



Caution should be use when activating this feature, as the system will answer every phone call including voice, data and faxes.



The next option is the **Setup This Terminal** button. By clicking this button you can configure the Modem properties of this computer. You can set the modem speaker volume as well as speaker compression, encryption and error control, as well as dialing properties. Also note a brief explanation of each option is available by moving your mouse over the button or option.

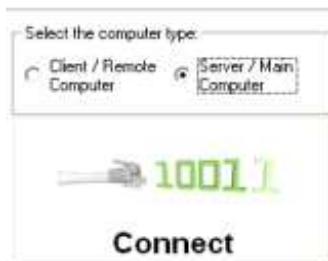


You can also set advanced modem properties such as:

- The default phone number
- COM port settings of your modem
- Parity Replace
- RTS enable Settings
- Input buffer size
- Output buffers sizes

These options are important, as it sets the size of data that can be sent and received from each machine.

To set up the server or main computer you must first set up the store account. This is done by clicking on the button labeled “set up store”.



Store Setup

STORE #	Store Location
Augusta, GA	Augusta, GA
Athens, GA	Phone Number
Atlanta, GA	2284616
Macon, GA	

Add **Delete**

Setup Modem **Exit Setup Store**

To set up a store you must click on the button labeled **Add**. Then you will be able to type in the store location and phone number that the client computer is plugged into. If you are required to enter an area code or special characters such as 1 for long distance in order to dial the store location it is important to enter those here as well. You can optionally edit or delete a record by either typing over an existing record, or clicking on the **Delete** button to remove a record permanently. Once you have made your adjustments or added store locations you can click the **Exit Setup Store** button to return to the main screen.

Once you have configured each location that the main computer will connect to you are now ready to connect. To access a location click on the store account located on the top right corner. Then click the connect button. If your modem speaker volume is on high you should hear your telephone dialing. At this point you should have the other location either set the system to Auto Answer or have an attendant ready to click the answer button. When the two systems connect you should hear the modem handshaking then you will receive a message saying you have successfully connected to the remote location. The picture below will now be displayed. You can now use the drop down box to select the report you wish to view. Depending on the speed and quality of connection the request will be sent to the remote computer. The remote computer will assimilate the data and send the data back to your computer. Your computer will then decrypt the information and display it on the grid of your screen. From here you can view or print any information. You can also query a report using date ranges based on the report specification. Certain reports are not available due to there complexity or availability over a standard phone lines.



It is important to note that due to modem limitations only a certain amount of data can be viewed on screen. If you select a date range or a detailed report and do not receive the full report. It may have exceeded the modems buffer count. It is suggested then that you run the report using a smaller date range. You can do this multiple times in order to receive the full report information.

Also if you send a request and it is ignored or you do not receive any response. Try disconnecting from the current location, and calling that location again. This will reset the connection mode and allow you to reconnect.

Select the computer type:

☐ Client / Remote Computer ☒ Server / Main Computer

Connect

Augusta, GA/2284616
Athens, GA/275-2289
Atlanta, GA/275-2289
Macon, GA/275-2289

Setup Modem Setup Store

Manage Data

☒ Reports ☐ Stock Inventory

Select Report

- Daily Card Types
- Daily Cash Totals
- Daily Check Totals
- Daily Client Totals
- Daily Credit Card Bal
- Daily Credit Card Tot
- Daily Department Id
- Daily Details



By clicking the stock inventory button you are sending a request to the client machine to assemble a list of stock inventory items. The system will send a request for the first 20 stock inventory items. You can then send a request for the next 20 items in the list. This assures that you do not overrun the modems buffer count and that you are able to view as much data as possible.

Once you have found a record and you wish to see, click on the inventory item. This will send a request to the client machine to send the full inventory data for the record you specified.



Please note: with this version you are unable to edit any of the client data, you can view print or request information from the client machine. But you will not be able to edit modify or delete any of the data you are viewing.



Reconcile Wizard

Reconcile Wizard

The reconcile Wizard is used to reconcile your cash drawers and find any discrepancies. To enter the reconciles wizard select either the drop down box on the main screen or from with the cash register select from the file menu close day. You will be prompted to close out your draw by counting the amount of cash in the drawer. You can then enter that amount in the prompt box. The reconcile wizard will match the numbers, if your numbers match then you have completed the reconcile wizard if they do not match you are then asked to begin the reconcile process. The first step is to click on the date you are reconciling. Once you have entered the day you are now able to break down your daily sales by cash, check, credit card or other. Once you have entered your totals you must select the next button or holding down the alt key + N. It will now add the system totals against your totals then list each categories transaction. You can now look at the details of each transaction and find out exactly what numbers are throwing you off. Then simply click on the grid above the category to edit the fields that are not matching and press the next button or hold the alt key + N. Once you have completed each category you have completed the reconcile wizard.



Purge Old Data

Purge Old Data



The purge feature allows you to remove old data from your system. This allows you to free up database space allowing the applications to run quicker and more efficient. By selecting this option you will be deleting old records from your system permanently.

After the system has removed all selected data, it will display a report of what records have been deleted and removed.

You can optionally purge just your inventory, services or customer list.

To use this feature click on the button labeled begin purge. The system will then prompt to select the date range of records you wish to delete. Once you have selected the date range you will then be prompted to confirm the amount of records that will be deleted.

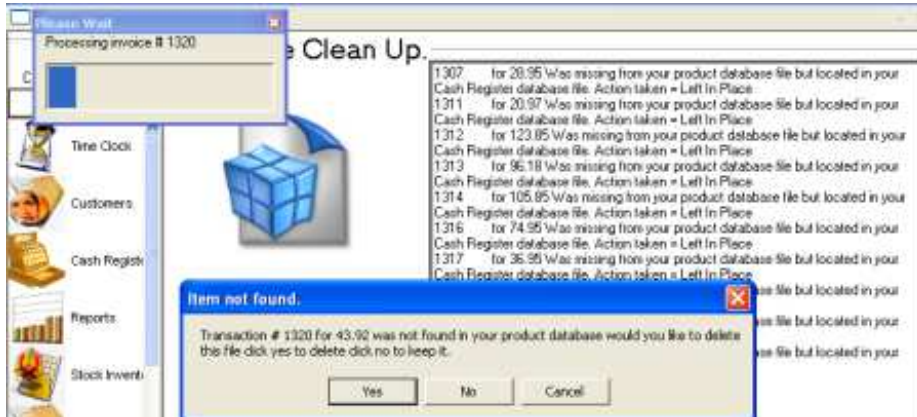


Caution should be used when using this feature it is suggested that you back up your data before purging any records, as any data removed will be lost permanently.

After you have purged your data you can now restart your software. After restarting the software you should enter the database tool and Compact your database. This will scan and repair any problems within your database.



Database Cleanup



Database cleanup is a tool that allows you to scan your database and locate invoices or sales receipts that are orphaned or have problems. To use this feature click on the option labeled **Database Cleanup**.

When using **Database Cleanup** the system will scan through your entire database starting with your product database (prd.mdb) then your cash register database (smp.mdb). It will run a step-by-step analysis of your database comparing records from your product database to your cash register database. If it finds a record that exists in one database but not in the other it will report the error to you. You are then prompted to either delete this invoice or keep it. If a record shows up in this report then it is considered orphaned meaning the transaction was started but did not conclude properly. The record may have been abandoned or the system may have crashed in the middle of the transaction. It is best to not delete these records at first you should allow the system to create a log for you. Then using this log attempt to identify if the records are valid. If the record is considered invalid you can return to this screen and allow the system to delete and removed all orphaned files. This is important because if you are exporting this data to another application it may cause problems if Invoices are not balanced. It may be a good idea to run database clean up before you do a backup. This will insure that you are backing up a clean database.



Export Data

Export Data

☒ Export Inventory
☐ Export Services
☐ Export Customers
☐ Export Vendors

☒ Select All ☐ Select None ☐ HandHeld Data Only

[View Export List](#)

The export data feature is used when you wish to export your existing database files. By default you can export your inventory, services, customers and vendor list. This information is helpful if you wish to send data to third-party applications for printing sorting and editing. Or if you wish to export your data to another application for processing. This application is used to create text files or csv file formats, used with Excel and spreadsheet application.

The first step in exporting your data is select what data will be exported. You can do this by clicking on the option box labeled inventory, services, customers or vendors. Once you have selected the list you wish to export click the button labeled **“View Export List”**. The export list will then show you all data associated with this list. You can optionally filter the lists by selecting the **Select All** button or **Select None**. You can optionally click on the columns to manually add or remove a column from your list. You can optionally click to edit or remove a row from your list.

Export Data

☐ Export Inventory
☐ Export Services
☐ Export Customers ☒ Export Vendors

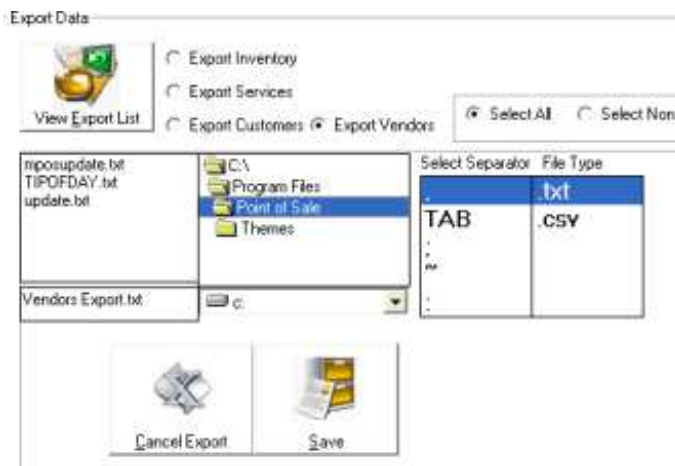
☒ Select All ☐ Select None

VENDORID	Addr1	Addr2	Addr3	Addr4	VENDORMI
<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Export
GA - Assess	GA - Assess				
GA - Withho	GA - Withho				
Gap Kids	Gap Kids				
Gary Whim:	Gary Whim:				
Gas	Gas				
Gasoline	Gasoline				
General Hai	General Hai				
General Nut	General Nut				
General's Pres	General's Pres				

If you are exporting an inventory lists for a hand-held device you must first select Inventory list, then select the option the **Hand-Held Data Only**. This will create a list showing just Item Name Product barcode and the amount in stock.



Once you have selected rows and columns that you wish to export you are now ready to begin the export. This can be done by clicking on the button labeled **Begin Export**.



You are now ready to save your export file simply click the button labeled “**Save**”.
 You have now completed the export Function. You can repeat this step for each list you wish to export.

You will now be given the choice to select what format your data should be saved as. This is done by clicking on the list box labeled file type. If you select txt your data will be exported as a text file. If you select csv then your database will be exported in a spreadsheet format. You can also select how your record should be separated. This is done by using the Select separator list box. You can select what character will be used to separate each record from the next. By default commas are selected but you can choose any of the separators listed. Once you have selected both the file type and separator you are now ready to select the location you wish to save this file. Using the Windows folder Directory click the path you wish this file to be saved to. Next will need to type the name of the file in field that contains your file name.



Import Data

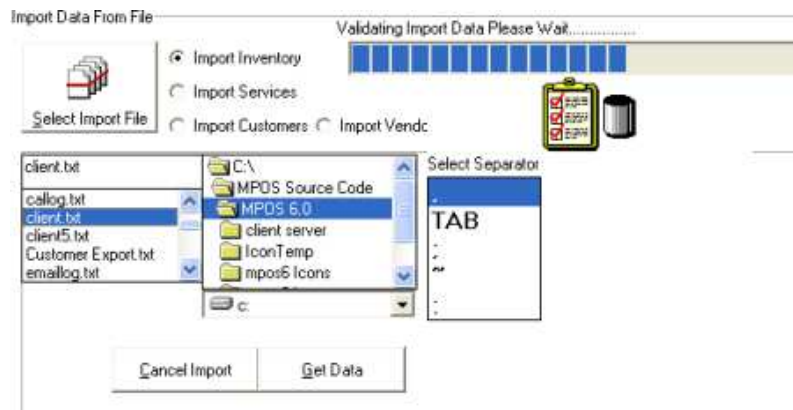
The Import Data system allows you to import your data from another application or another database source. Use this feature to import data into your inventory list, services, customers or a vendor list. To use this feature the database format should be in either a text format or a CSV format. Data can be separated by commas, tabs or other specified Characters. To start the import processed you must first select the file that you wish to import into your system.

Import Data From File



- ☒ Import Inventory
- ☐ Import Services
- ☐ Import Customers
- ☐ Import Vendors

Before selecting the file you must tell the system what separator your file is using. This can be done by selecting the list box labeled **“Select Separator”**. The system will then filter through your import file and separate all records based on the character you specified. Once you have selected the name of the file the system will then validate the data to make sure it is in the format that can be imported. You can now press the button labeled to **“Get Data”**.



After data has been validated it will be displayed in a grid on screen. You can now begin to select which columns will be imported into your system. To do this click on the column that you wish to import.

	FirstName	MiddleName
51	David	
70	Cheryl	
35	Gayle	
30	Mhari	
25	Julie	

This menu box will appear you can now choose to add, remove or edit the column.

Select corresponding field
ItemID
FirstName
MiddleName
LastName
anniv
Title
OrganizationName
Address

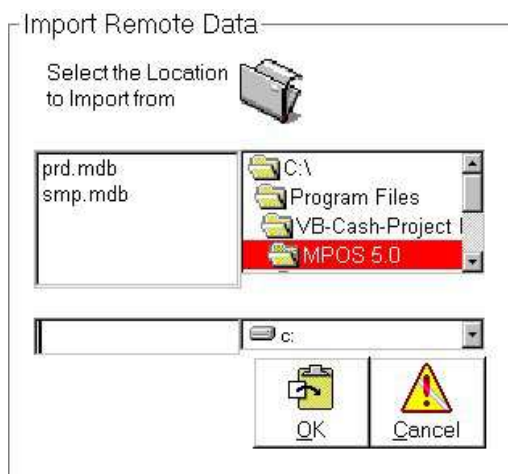
If you choose to import a column the drop down box will appear. You can then select the corresponding field in the MPOS database i.e. (Item Name or customer name) that matches the column you are importing.

Repeat this step for each column you wish to import into the system.



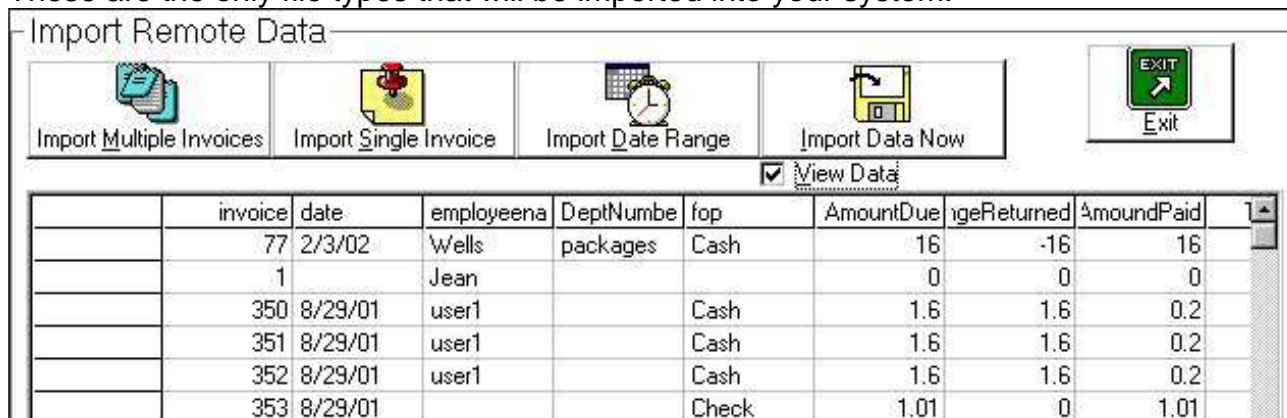
To begin the final stage of importing you can now click on the button labeled "**Begin Import**" this option will begin importing all of your data that has been selected.

Import Sales from Another Computer



This feature is used to import MPOS sales from a remote file. If you have another remote area that is using MPOS software and you wish to synchronize sales and inventory data. This can be done using this feature. You can convert sales from another MPOS database into your current system. This feature is not backwards compatible and will only work with MPOS database's that is up gradable using the system upgrade wizard.

To import a remote data file. You must first find the file that you will be importing from. You can search either your local or network drives for this file. The names are listed as prd.mdb and smp.mdb. These are the only file types that will be imported into your system.



Once the files have been found you can now view the data and select the invoices you wish to import. This can be:

- Single invoices
- Multiple Invoices
- Date range of invoices

Once you have determined the invoices you will import select the **Import Data Now** option. This will begin the data import procedure. Each invoice that is imported will be assigned a new invoice number. A log will be created that you can print that shows the change in invoice numbers. I.e. (If invoice number 8 was in your original file before import. Once it is copied over invoice number 8 may be in use so it will be assigned the next available invoice number instead in your main system.)



Manage Customer Bad Checks

Manage Customer Bad Checks

This option is used to make sure your previous customers have not presented a bad check in the past. The system is equipped with an internal check verify system. This system will check every customer check to verify that it has not been presented in the past and returned as unpaid. To use this option simply enter the check information into the system if it has been returned unpaid from your bank enter the check routing number, account number, etc. Once the check has been cleared you may choose to delete the bad check profile by clicking on the **delete** button or holding down the alt key + D

To **add a record** simply press the button labeled 'Add' then begin typing your items in the appropriate boxes

To **Close & Exit Bad Check Profiles** click the button labeled close or hold the alt key + C

To **refresh** your file click the button labeled refresh. If you are running a network version of MPOS PRO and wish to get the most up to date records use the refresh button.

To **update** your record click the button labeled Update or hold the alt key + U, this option is used if you wish to change a single record with out adding a new profile.



Serial Number Look up

Serial Number Look Up

Product Qty	Price	Serial Number
TestData2	1 \$45.00	
TestData2	1 \$45.00	
Tecno Adapter	1 \$2.50	2039

If your business needs to keep track of serial or model numbers for any reason, including security, warranty, and manufacturer's recall. Use this feature to find an invoice by scanning or typing the serial number of the product that has been sold. You can optionally scan a products serial number into the system. Or you can type the serial number into the box shown and the press the find Serial Number button.

When you select this option the original invoice will be generated. Giving you invoice information client information as well as detail transaction information.



Look up existing packages

Look Up existing packages

Lookup Packages

Packages

Select Client

Client Name

Alba Anderson-A

Nigel Prentice

Nigel Prentice

Nigel Prentice

Oscar Floyd-O

Paula Pickett-P

Smithh-N

Smithh-N

Stange-M

Package Name

Unlimited Alba Ander

Item ID

1004

Package Description

Unlimited Service Package for Alba Anderson-A

Purchase Date

1/31/2004

Number of Units Left

799

Activate Room Controller

Process This Visit

Exit

Use this feature to find a package that was sold using the clients name and package detail. Those not using the plastic bar coded membership cards will find this feature useful in finding clients that have purchased packages and wish to redeem the services. If the package you select is valid you can then ring up any service package directly using the **Ring up this package** button.



View Customer Profiles

View Customer Profiles (POS)

First Name	Last Name	Company Name	Customer Job
Alice	Aguilera		Alice Aguilera
Alice	Prentice		Alice Prentice

If client profile has been selected in the set up wizard then every time you ring up a new sale you will be prompted to enter the customer information into the system. You can then cancel this if the customer does not want to leave his or her information. Client profiles are primarily used to collect and maintain a customer database. You can set the system up to prompt for customer information before ringing up each customer or you can select it for specific customer.

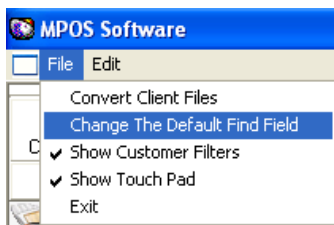
To create a new customer click on the button labeled “Add New Customer”. You can then start typing the first name and last name. In order for the record to be properly saved you must enter a first and a last name. Failure to enter either of these fields will create unusable client profiles.

You can create and maintain a client profile on all of your customers. You must type into the first field what data you are looking for.

Type Or scan First Name Or
Customer Card

bill

By default the system will search for clients by their first name. But with Modern View you can now search on first name, last name, company name, customer job, phone numbers all at the same time by just hitting the enter key.



To change the “default field” that you will search for click on the file menu and select **“Change the Default Find Field”**

You can also set whether the Customer Filter Icons are visible. And whether the Touch Screen Pad is visible.

Select Default

FirstName
LastName
OrganizationName
HomePhone
WorkPhone
MobilePhone
FaxNumber
EmailAddress

Then select the field you wish to be the default search criteria. You can now search for a client by the new default field. You can simply click the client name and select them from the list of matches. Or you can type the exact name or number and press the enter key on your keyboard. The system will attempt to find the client. If the client exists already, they will be selected. If the client does not exist you will be prompted to create a new client if you wish.



View Sales Receipt

View Sales Receipt

Preview Sales Receipt

551 [Print] [EXIT]

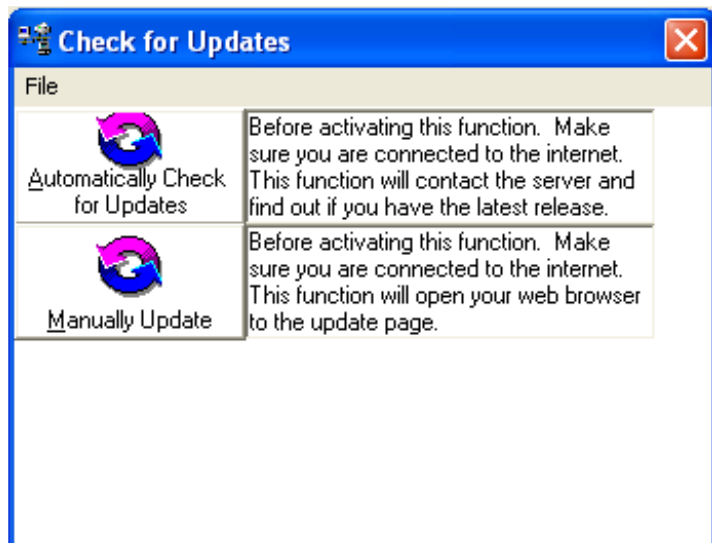
Invoice #551
Date 2/3/02
Employee Prentice Client Name Foster-G
Product Qty Price
Eval CD 1 0
Taxes Collected \$0.00
Amount Due \$0.00
Form of Payment Cash
Amount Tendered \$0.00
Change Returned \$0.00

The Preview Sales Receipt option is located on the main screen under Cash Register or can be activated automatically by clicking on an invoice number in most screens.

This feature is used to view any sales receipt that has been processed. You can either invoke this from another screen by simply clicking or double clicking on an invoice number. Or you can activate this feature manually and type the receipt number into the system. This will generate a printable sales slip. This is helpful when you need to see the full detail of a particular invoice.



Check for Updates



The check for updates option is located on the main screen in bottom left corner.

This feature is used to check online for the latest version of your software. To check, connect to the Internet then click the button labeled **Check for Updates**. The system will scan the manufactures server and find out what is the latest version and release. If you have the latest version it will notify you and close the connection.

If you do not have the latest version, you will be prompted to either download the latest version or request one from your dealer. In most cases if you are in need of a minor update this can be downloaded by the update feature. Once it is downloaded you can then close MPOS and run the update program which will update your current version to the latest release.



QuickBooks

QuickBooks Features

Before you enter this portion of the system you should have already setup your system based on the version of QuickBooks you are using see *setting up your system (QuickBooks)*. If you are using QuickBooks Pro 2002 and above refer to the **XML** portion of this document. If you are using QuickBooks Basic or a version older than 2002 you should view the **IIF** portion of this document.

☒ Connect to a Quickbooks file on a remote computer using Remote Connector

Remote PC IP Address:

24.236.98.129

Remote Port:

2080

☐ Remote Login with a password & username

Username:

Password:

Setup Classes

With this feature you are able to connect to a remote computer's QuickBooks company file. You will need the pro version of MPOS and you will need to copy the connector file on the remote computer along with its dependency files they will be located in the install folder of MPOS the file names are Connector.exe, ibizqb3.dll, and ipwssl6.dll.

You will then need to start connector and configure it to listen to a local port. Make sure QuickBooks is running as you will need to allow MPOS to get permission to connect. From your client machine you will need to enter the remote ip and port and attempt to connect. If you are unable to connect view the trouble shooting your TCP connection section at the end of this manual for suggestions and tips.

<input type="checkbox"/> Automatically Export Sales Into QuickBooks (XML Only)	<input type="checkbox"/> Automatically Export Hourly (XML Only)
Export Automatically	Export at what time?
<input checked="" type="radio"/> Day	1:00PM
How many times should we try before quitting?	Or
3	1
	Starting Ticket Number: Ending Ticket Number:
	1082 1082

To use the automatic export feature you must make sure of several things first.

1. Make sure you have successfully exported sales into QuickBooks. If you are just setting up your system do not activate this feature until you have gone through all the setup steps.
2. Open QuickBooks and attempt to import or export, QuickBooks will ask your permission to allow MPOS Remote Utility to connect to your Database. Allow this process.
3. Begin Exporting a few sample sales if any error reports are generated resolve these issues, such as accounts, items or names missing in QuickBooks.
4. Once you have successfully integrated MPOS with QuickBooks you can now activate this feature. If you still have problems connecting or you do not see your sales inside of QuickBooks, browse to your install folder (i.e. c:\point of sale\) and look for recorded error logs titled "Automatic Export Log" it will include the invoice numbers in the title. Open this text file for the reason behind why the invoice failed to export.



Importing Data from QuickBooks

(XML eXtensible Markup Language) QuickBooks Pro 2002 and Above

QuickBooks Options

☐ Connect to a Quickbooks file on a remote computer using AcctSyncConnector

Remote PC IP Address: Remote Port:

☐ Remote Login with a password & username

Username: Password:

C:\Intuit\Cleantest.QBW

<<Browse>>

Import (FROM) QuickBooks

Export Data (TO) QuickBooks

<< Synchronize Inventory >>

Once he had activated the QuickBooks option screen, you have the option to browse the QuickBooks company file or import data from QuickBooks. You can also export data to QuickBooks. Or synchronize your inventory list. This documentation will explain in detail these features and how they or are used in combination with QuickBooks Pro.

To set up your system to work correctly with QuickBooks it is important to import your current lists. Such as your inventory, customers, services, vendors and sales tax. For the best results you should have QuickBooks running on the same computer as MPOS. To begin the import process click on the button labeled **“Import from QuickBooks”**.

Import QuickBooks Data

☐ Import Inventory ☐ Employee List
☐ Import Services ☐ Sales Tax Items
☒ Import Customers ☐ Import Vendors ☐ Synchronize Inventory!

Get Import Data

CustomerID	FirstName	LastName	Address	City	State	PostalCode	WorkPhone	FaxNumber	Alternative1
Abercrombie, Kisty	Abercrombie	press Hill Rd	Bayshore	CA	94326	15-555-6579			
Alba Anders	2973	Teton	Tallahassee		32303				
Baker, Chris	Baker	Chris	Islet Bloom	Bayshore	CA	94326	15-555-2253		
Balak, Mike	Balak	sunrain View	Bayshore	CA	94326	15-555-6636			
Barley, Rene	Barley	an Valley Rd	Middlefield	CA	94471	15-555-7262			
Bea Soto-B	17250	Knoll	Dallas		75248	34-416-4577			
Bill Moore	706	Live	Tallahassee		32312	30-222-8000			
Bisa Philip	210	Divie	Tallahassee		32304				
Bolinski, Raf	Rafal	Bolinski	Iverbell Ave	East Bayshc	CA	94327	15-555-3262		
Bristol, Sonya	Sonya	Bristol	Lighthouse	Bayshore	CA	94326	15-555-5239		
Burch, Jason	Jason	Burch	N. Wetmore	Bayshore	CA	94326	15-555-2351		
Burney, Toni	Burney	Tony	910 S. Ivy	Bayshore	CA	94326	15-555-8669		
Cook, Brian	Brian	Cook	Cherry Lane	Middlefield	CA	94482	15-555-2248	555-022	
Craven, Pam	Pam	Craven	5 N. Landon	E. Bayshore	CA	94327	15-555-7264		
Cuddihy, Mz	Matthew	Cuddihy	21 S. Flower	E. Bayshore	CA	94781	15-555-6188		
Duncan, Da	Duncan	Dave	f. Charleston	Bayshore	CA	94326	15-555-3823		
Dunn, Eric C	Dunn	Eric	N. Liberty Ln	Bayshore	CA	94326	15-555-3866		
Eastley, Paul	Paula	Eastley	40 Bay View	East Bayshc	CA	94327	15-555-7311		
Eckler Desig	Deanna	Eckler	95 Amber St	Bayshore	CA	94326	15-555-6687	15-555-0011	
Fisher, Jenn	Jennifer	Fisher	arkana Lane	E. Bayshore	CA	94326	15-555-5366		
Fomin, Slavi	Slavi	Fomin	66 E. Maple	Bayshore	CA	94326	15-555-7528		

You are now ready to edit any fields. This can be done by clicking on the column or row you wish to change. You can remove the entire row or edit just a single record. Once you are ready you can the click the 'Start Import' button.

You should now open your QuickBooks company file. The system will automatically connect to the QuickBooks company file you have opened. Your first step is to select the inventory list you will be importing. Click on any of the option boxes to load a list directly from your QuickBooks database. You will notice the grid on screen will populate with all of your list information.



You can start the import by clicking the button labeled **Start Import**. The system will import your selected list.



The system will not allow duplications, if any record already exist in the system you will be informed at the end of the import as to which record have been imported and which were not, due to complications or possible duplication. This feature is helpful as you can import your entire list at anytime and only the new records will be appended. Also you are able to import barcodes from custom fields this is done by first clicking on **"Get Import Data"** after loading the data

Import QuickBooks Data

☒ Import Inventory ☐ Employee List
☐ Import Services ☐ Sales Tax Items
☐ Import Customers ☐ Import Vendors ☐ Synchronize Inventory!
☐ Import Invoices ☐ Import Purchase Orders

Get Import Data

Inventory Part

Import barcodes from:

Barcode 1

Then select from the field labeled **"Imported barcodes from:"** and change it to match your custom field. You will then need to click on the **"Get Import Data"** button again to refresh the list. You can now click on the **"Begin Import"** button.



Sending Data to QuickBooks

(XML eXtensible Markup Language) QuickBooks Pro 2002 and Above

For the best results you should have QuickBooks running on the same computer as MPOS. To begin the export process click on the button labeled **“Export (TO) QuickBooks”**.

From here you can select the different formats to send your data into QuickBooks. By checking the box labeled **“Will Invoices be flagged to print in QuickBooks”**. You can flag invoices to print using the print forms menu in QuickBooks. **“By checking the box Create Customer Job”**, you can make sure that every transaction is posted to a customer account or customer job. You can also select the account that your sales data will post to. This can be an actual checking account or undeposited funds.

Select Date Range

To begin select the date range by clicking on the calendar and select the starting date and the ending date.

You can alternately select a range of invoices by clicking the **Select Invoice Range**. You can then type a range of invoices you wish to export to QuickBooks.

Type	Count
CASH SALE	251
INVOICE	4
PAYMENT	3
All Types	

☐ Will invoice be flagged (to print) when imported into QuickBooks

☒ Create Customer Job for all Sales Transactions

Checking What account will your pos sales be assigned to exported into QuickBooks.

invoice	date	employee	top	AmountDue	Taxtotal	clientname	TRNSTYPE	Customer
2799	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2800	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2801	2/13/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2803	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2804	2/13/2004		Credit Card	0	0		CASH SALE	NEW DUST
2805	2/13/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2806	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2807	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2808	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2809	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2810	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2811	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2812	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2813	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2814	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2815	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2816	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST
2817	2/6/2004		Credit Card	47.2	2.25		CASH SALE	NEW DUST

Validated Data (will be exported)

Problem Validating this record (will not be exported)

☒ (Full Export) validate each transaction to ensure accurate export <<Suggested>> ☐ (Fast Export) Do not Validate Each Transaction Generate report showing errors

Start Export Exit

The grid will now populate with invoices, payments, cash sales, and credit memos. You will also notice a second grid will appear on screen. This will give you a detailed count of what is included in your range of information. You can sort the list by clicking on any of the transaction types. To view the entire lists again click **All Types**.

Allow Duplications

If this option is checked then MPOS will export all sale transaction with out checking to see if they exist already. Use this option if you don't want any duplication. If this is checked your export will take longer and some transaction may not post as there transaction numbers may be used in inactive transactions.

Include Time Tracking

If this option is checked then MPOS will export all time clock entries that have been recorded between the date range you have selected. You will also need to enter the payroll item that will be used. Before this feature can be used you must make sure that in QuickBooks under the "Payroll and Compensation Info" that the check box "Use time data to create paychecks" is checked otherwise MPOS will return an error and not export any time clock data for the employee.

Include Purchase Orders

If this option is checked then MPOS will export all purchase orders that were processed between your date range. This will not update inventory on hand only export PO created in MPOS.

Export Sales

When this option is checked then all sales receipts, invoices, sales orders, estimates, credit memos, and payment receipts will be exported into QuickBooks.

Sync: Update MPOS Inventory & Services to Match QuickBooks Inventory & Services

If this option is checked MPOS will synchronize its inventory and service list to match that of QuickBooks. QuickBooks will be considered the master list so if there is any discrepancy in the synchronizing then MPOS will adjust its list to match. This includes amount in stock, description, retail price and cost of goods. If any items exist in QuickBooks that do not exist in MPOS they will be automatically be created in MPOS.

Sync: Update QuickBooks Inventory & Services to Match MPOS Inventory & Services

If this option is checked MPOS will synchronize QuickBooks inventory and service list to match that of MPOS. MPOS will be considered the master list so if there is any discrepancy in the synchronizing

then QuickBooks will adjust its list to match. This includes amount in stock, description, retail price and cost of goods. If any items exist in MPOS that do not exist in QuickBooks they will be automatically be created in QuickBooks. *(Warning when MPOS adjusts QuickBooks amount in stock this will be done by using the adjustment feature and posting the adjustment to an income account i.e. inventory asset)*

You will also notice the records are separated by colors. If a record is green this means the record has been validated and the system will attempt to export the transaction. If the record is Yellow this means the record could not be validated and will not be exported. There are several reasons why a record would show up yellow. The record could be an orphan file or Invoice and may need to be repaired before it can be exported. The record may be missing required information such as transaction type or customer job or account. Or the Invoice may be incomplete or out of balance. Any record that shows up yellow will need to be entered manually or repaired before it can be exported using MPOS.

You will also notice that you have three options for exporting data. The first option is **“Summary Export”** This option is used to send all transaction in a batch format. Instead of sending each transaction one by one this format groups transaction by date and payment method. So you will have a transaction for each payment type as well as sales type such as sales receipt, invoice, and credit memos.

“Fast Export” this option is used to quickly export your transactions into QuickBooks. Use this feature if you have imported your entire QuickBooks list and you are sure all items will match. This function will not validate any data, items or customer job accounts. It will assume these accounts exist and attempt to append to them. If an error is encountered (item not found or customer job does not exist) it will not attempt to create the missing information, it will simply move to the next Invoice. At the end of the export a list of invoices will be displayed, showing any invoices that could not be exported and the reason why.

“Full Export” The full export is the suggested format. A full export will validate every transaction, every item and every customer. If an item does not exist it will be created in your QuickBooks database. This format will take longer to process but will ensure that each invoice is processed properly. This function should be used if you are not sure if your full item list and customer lists are imported in MPOS software. Or if you have made changes to your MPOS system and not updated your QuickBooks system.



Checking for
Customer Job NEW
CUSTOMER



You will notice the progress bar will begin to fill showing the progress of the export. On top of the progress bar is the explanation of what the system is doing. In this area you will notice the system checking for items, customers and special list fields. Once the export is complete the animation on screen will stop, and a message will be displayed regarding the status of your export.

Validated Data (Will be exported)
Problem Validating this record (Will not be exported)
[Full Export] validate each transaction to ensure accurate export. << Suggested >>
[Fast Export] Do not Validate Each Transaction Generate report showing areas



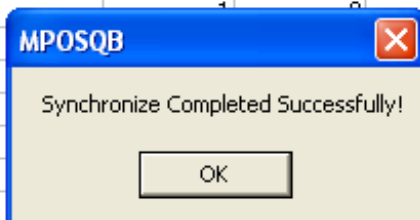
If exporting a transaction and it does not have a corresponding item in QuickBooks MPOS will create the item as a service.



Synchronize Inventory List

(XML eXtensible Markup Language) QuickBooks Pro 2002 and Above

ItemName	#instock	Our Count	Adjustment
A.D.D. Therapy	0	-10	10
Adren-Plus	-1	0	-1
Adrenal Cortex Fr.	-1	3	-4
Adrenal Support	-1	0	-1
Arbu-tone	-2	0	-2
Basic Prenatal	-1	2	-3
Bee Pollen	-1	1	-2
Beta 1 3 D-Glucan-30	-1	7	-8
BFP	-1	4	-5
Bilberry Extract	-1	0	-1
Bio-Zyme-100	-1	0	-2
Body Fx (Choc)	-1	0	-161
Cabinets	-1	0	-1
Cabinet Pulls	-1	0	0
Light Pine	-1	0	0
Charles Choice	-1	0	-26
Clinic Nut Male/Teen	-2	1	-3
Clinic Nut Men	-1	2	-3
Clinic Nut. 45+Wo.	-1	5	-6
Clinic Nut. Antioxidant	-1	2	-3
Clinic Nut. Diabetics	-1	0	-1
CN 40+ Men	-1	19	-20



You can use the synchronize inventory feature to update your inventory count in MPOS software. This feature replaces the purchase order and item receipt function previously used in MPOS to update your inventory and item counts. All purchase orders and item receipt should be done in QuickBooks. Periodically you should enter this screen and click the button labeled **“Synchronize Inventory”**. The system will synchronize QuickBooks inventory count with MPOS software. And will automatically update MPOS to match the item count. The system will display a report showing each item that has been modified in MPOS. And show the amount in stock and the adjustments made to the stock count. Use this feature after you have exported sales transactions into QuickBooks, or after you have received items in QuickBooks.



If you receive error messages during the import or export this may be caused by a bad connection to your QuickBooks database. Open the QuickBooks Company and try the process again. The integration tends to run better when QuickBooks is actually running on the same computer.



Sending Data to QuickBooks

(IIF Intuit Interchange Format) QuickBooks Basic / Pro 1999 – 2002

If you've been using MPOS PRO financial software product, and you'd like to import and export information from this product into QuickBooks. To create the data file follow the instructions below.

Quicken Export
Select the start date.

☒ QuickBooks
☐ Inventory List
☐ Include Purchase Orders & Item Receipts

February 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	1	2	3	4	5	6

Export Multiple Invoices

Export Single Invoice

If you've been using This program and you'd like to export information from this product into QuickBooks, you can do so by selecting the date period you wish to import. Make sure not to import data that you have already imported in the past this will cause duplicate transactions and you will have to manually edit these transactions in QuickBooks. You can export lists that correspond to QuickBooks' lists, transactions. QuickBooks adds the data to your company file, updating any lists as needed. For example, if you have imported a list of vendors, QuickBooks adds the new vendor names to your Vendor list. Once you have exported your data see the help files in QuickBooks for information on importing your data.

Use this to import multiple invoices (I.E. from 1 – 100)

Use this to import a single invoice (I.E. sales transaction # 52)

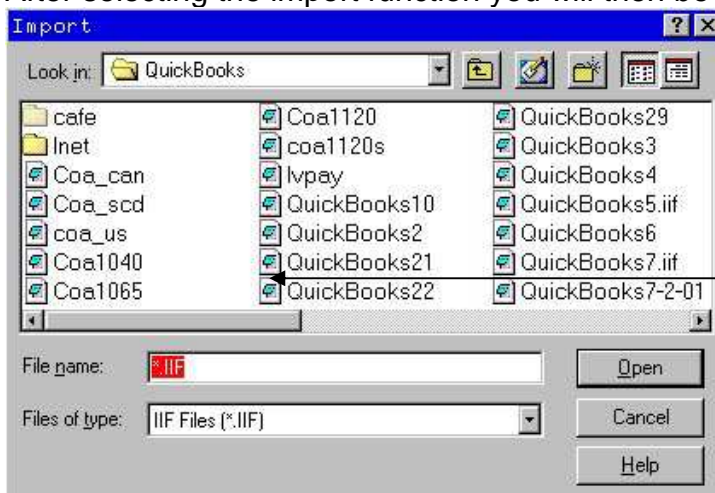
Use this to import a date range of invoices (I.E. 1/1/01-1/30/01)

To export any sales transactions into QuickBooks Pro you must first select the range of data you will be exporting. You can select to **export multiple invoices** this is a range of invoice numbers. Or you can choose to **import a single invoice**. By selecting the checkbox include purchase orders this will export all purchase orders and item receipts that have not been exported in the pass. This is not invoice or date sensitive it will generate the information based on any data that has been created and not exported. The third way is to import from a date range by clicking on the calendar and selecting the date range you wish to export. Once this is completed you will be asked to select the location to save the exported file format. Once you have selected the file folder you wish to export, click the ok button. This will create a file with an ("IIF") extension. To import this data into QuickBooks Pro open your company in your version of QuickBooks and using the file menu scroll down until you see the words import or utilities / import.



Use this option to import your data into QuickBooks. Note depending on your version your import menu may be located in a different location.

After selecting the import function you will then be asked to select the file you wish to import.



Use this function to select the file you created in MPOS.

Use the "Look in:" box to select the location you saved your MPOS file. Once you have browsed into the directory simply click on the button labeled "Open" this will import your sales transactions into your QuickBooks system. To see your sales transactions enter the cash sales area of QuickBooks and scroll through the daily sales. Or use your reporting options.

Understanding QuickBooks Account types

There are two main types of accounts in the QuickBooks chart of accounts:

Balance sheet accounts
Income and expense accounts

QuickBooks provides nine types of balance sheet accounts to choose from as you create and add to your chart of accounts. The following table describes each type of balance sheet account and the transactions you can use it for.

Use an account to track bank account checking, savings, and money market accounts. Add one bank account for every account your company has at a bank or other financial institution. (You can also use this type for petty cash.) Accounts receivable (A/R). Transactions related to the customers that owe you money, including invoices, payments, deposits of payments, refunds, credit memos, and statements. Most companies have only one A/R account. Other current asset that is likely to be converted to cash or used up within one year, such as petty cash, notes receivable due within a year, prepaid expenses, and security deposits. Fixed asset depreciable assets your company owns that aren't likely to be converted into cash within a year, such as equipment or furniture. Other asset, any asset that is neither a current asset nor a fixed asset, such as long-term notes receivable. Accounts payable (A/P) Transactions related to money you owe, including bills, bill payments, and any credit you have with vendors. See also current and long-term liability accounts. Credit card purchases, bills, and payments. Current liability. Liabilities that are scheduled to be paid within one year, such as sales tax, payroll taxes, accrued or deferred salaries, and short-term loans. Long-term liability, liabilities such as loans or mortgages scheduled to be paid over periods longer than one year. Equity Owner's equity, including capital investment, drawings, and retained earnings.

Income and expense accounts

Income and expense accounts track the sources of your income and the purpose of each expense. When you record transactions in one of your balance sheet accounts, you usually assign the amount of the transaction to one or more income or expense accounts. For example, not only do you record that you took money out of your checking account, but you keep track of what you spent the money on: utilities perhaps or office supplies. QuickBooks does not display balances for income and expense accounts in the chart of accounts. Use this account. To track Income the main source of money coming into your company. Other income money received for something other than normal business operations, such as interest income. Expense money that's leaving your company. Other expense money spent on something other than normal business operations, such as corporate taxes. Cost of Goods sold the cost of goods and materials held in inventory and then sold. QuickBooks sets up non-posting accounts for purchase orders and estimates if you turn on those features.

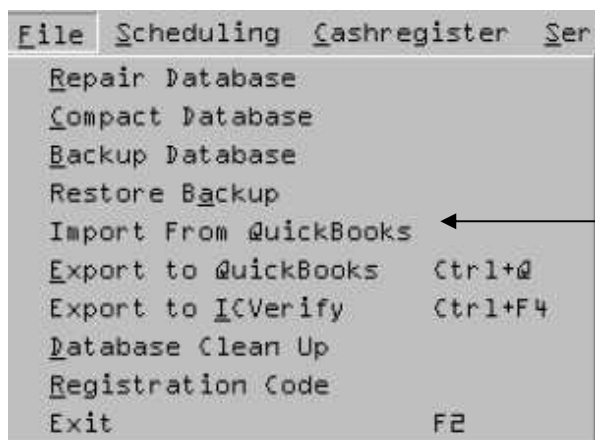
Memo text box

This is where you indicate the reference text that will be displayed in your QuickBooks memo line this is the memo text that is reference during a cash sale.



Importing Data from QuickBooks

(IIF Intuit Interchange Format) QuickBooks Basic / Pro 1999 – 2002



Click here to import from QuickBooks

You are able to import data from QuickBooks Pro into your Point of Sale system. In order to import from QuickBooks you must use the proper format. This format is a standard Datasheet such as Excel or Lotus file format. **Note: Do not use QuickBooks export feature, as the file format is not supported.** In order to create file format follow the instructions below.

You can transfer the information in any QuickBooks report, list, or register to other programs, such as word processors, spreadsheets, or database programs.

Important. If you have QuickBooks Pro and want to transfer a report to Microsoft Excel, you can export the report directly to an Excel spreadsheet. To do this, display the report and then click the Excel button in the Report window.

- 1 Display the Reports menu select list "Reports", select "Item"; select "Item Listing". From here a printable report will appear showing all of your inventory data. Those familiar with QuickBooks reports can click on the "Customize Report" button on the top left. From within this area uncheck all fields accept the following:
 - 1A. Item
 - 1B. Description
 - 1C. Quantity on Hand
 - 1D. Price
 - 1E. Cost

2 From the File menu, choose Print.

3 In the "Print to" section, select the file format you want to use.

4. Select the Excel / Lotus 123 Spreadsheet format

5 (Optional) if the list is long and you only want to transfer part of it, click Pages. Then enter the beginning and last page numbers of the section you want to transfer.

6 Click Print.

7 Enter a filename for the disk file.

8 Choose the drive and directory where you want the file to reside in.

9 Click OK.

You can then use the **Import Data** feature to import the data into your system. *See the chapter Import Data discussed earlier in this document.*

Note: MR Point of Sale will automatically create a barcode ID from the Item Name, because QuickBooks Pro does not support barcode types. To changes this to a barcode format simply enter the inventory edit screen and edit the barcode ID's.

MPOS PRO allows data integration with Intuit products such as Quicken, QuickBooks Pro 99 and above. Sales transactions or posted invoices can be exported out of MPOS PRO and into QuickBooks. These transactions are importable as cash sales in your Intuit product. You have the flexibility of creating & changing QuickBooks accounts and invoices memo lines on the fly or during an actual ring out session. Use the setup wizard and select QuickBooks option to set up the default accounts that will be used for every transaction. You can enter the QuickBooks export screen by clicking on the file menu option and selecting **Export to Quicken** Below are common question and answers.

Q. I am ringing up a sale, the account I have setup in the setup wizard is "store sales" I would like to change the sale I'm about ring up, to another account how can I do this.

A. Before scanning or typing the product or services into the system click on the QuickBooks option then select "account" type the account name that you would like to post the transaction to. You can optionally create a sales account in the item list of MPOS. This is either the stock inventory list or the service list screen. Look for a field label **Sales Account**.

Q. Do I have to export a group of records into QuickBooks; I just need one or two records?

A. You do not need to export a batch of records you can export either a range of records by date ranges using the calendar. Or you can export a single invoice/receipt by clicking on "single record". You can export a range of invoices / receipts using the receipt number i.e. from invoice 12-40. Clicking on export multiple invoices does this.

Q. I exported a date range or an invoice that was previously exported in the past; will this create duplicate invoices in QuickBooks?

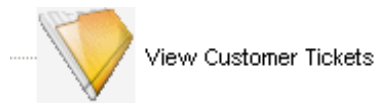
A. Yes neither MPOS PRO nor QuickBooks will stop duplicates records from being imported / exported from their system. If this happens you must manually remove these items from QuickBooks.

Q. I tried to import a record but during the import I received several error messages from QuickBooks Pro. Some or all of my sales transactions did not import into QuickBooks, what could I do?

A. MPOS PRO only takes your data and formats it to be imported into QuickBooks. If you have manually changed data in edit mode or you have used invalid account types or data QuickBooks will inform you of the line number that is causing the problem. To edit this file open the file you created using notepad or any word processor. You can also use spreadsheet programs to edit these files. See QuickBooks help under import for specific instructions on editing data that is formatted for importing.

Q. Can I export open invoices into QuickBooks?

A. No, only sales transaction can be exported into QuickBooks. In order to export an invoice you must post open invoices. This is done by clicking on the QuickBooks option then select "Post Invoices" Then ring out the sales transaction. Once it has been closed it can be exported.



Customer Tickets

Tkt #
2

Date
2/27/2004

Fomin, Slava

Barcode
2

Buttons: First, Previous, Next, Last

Time	Service	Serviced By
9:45:00 AM	Perm	Marcia Mat

Bottom Bar: Add to Ticket 2, Clear Ticket 2, Print, Advance, Exit

View
Today's Ticket: 7/25/2003

TktNumber	ClientName
1	Youngblood-M
2	Fomin, Slava
5	Hatcher-A

Print Options:

☐ Print Template with Ticket

☐ Print Client Formula Card with ticket

Printing Properties:

Increase Font Size: 0, Decrease Font Size: 0

☒ Print 8 x 11 Format, ☐ Print 3" Format

Create Template

Customer tickets are used to create tickets that can be preprinted and can include services that will be rendered to a client. As well as any other client formula information. It can also include your own template information. This information is helpful for creating work tickets for your staff. Or creating templates that can be used by your employees to service a client. All customer tickets print with barcodes. And can also be scanned into the cash register for quick processing.

Click here to create a new ticket

Click here to navigate through existing tickets

Click here to create a template to print on your ticket

Click here to add a service to the ticket

Click here print ticket options

Select Client

Time

Service

Serviced By

Amount

Add to Ticket

Cancel

After you select the button labeled **“Create a New Ticket”** The following screen will appear. You can now select the time of the service, service name, employee and the estimated price of the service. Then click the button labeled **“Add to Ticket”** this will add the new service to the existing ticket.

Keys	Employee	Quick Book Options	Ri
Void		F2	
Refunds			►
Fast Cash Mode		F3	
Discounts			►
Clear All		F5	
Quick Totals		F6	
Ring Up Sale		F7	
Open Cash Drawer		F8	
Process Customer Ticket		Shift+F8	
View Sales Receipt		Ctrl+Z	
Tax Status			►
Search Product Name		F9	
View Service Grid		Shift+F2	
View Inventory Grid		Shift+F3	
Hold Transaction		Ctrl+H	
Take Off Hold		Ctrl+J	
Change Quantity		Ctrl+Q	

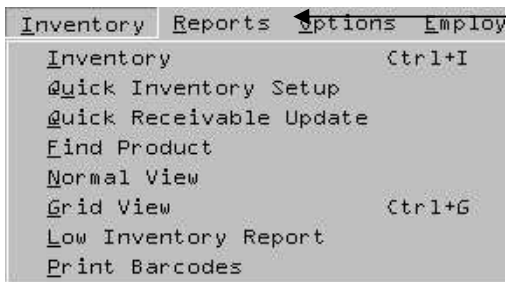
You can then process any customer ticket by using **“Process Customer Ticket”**. This can be found in the cash register under the **“Keys”** menu. If you select this option you can optionally scan the customer ticket’s barcode. Or type the ticket number and press the enter key on your keyboard. This system will then allow you to process the customer ticket.

Report Management



Management Reports

To enter the report system from the main screen, select the reports button or hold down the Ctrl + R button.



Use this menu to activate "Reports".

You can use the cash register reports to track and display your daily, weekly monthly sales. This fully integrated system allows you to print and view in a number of formats. There are several forms of reports available from daily, to monthly, to yearly. You can also run reports by employee's sales.

Once you have entered the reports areas you can run any report by clicking on the report name then the date you wish to view. The grid on your right side will populate with the data you requested. You can then print the current report by clicking on the print button or you can hold the alt key + P. You may also choose to print just the daily summary by clicking on the button labeled **Print Daily Summary** or holding down the alt key + D. You can exit the system by pressing the exit button or holding down the alt key + E. All totals for reports will be displayed at the bottom of the buttons next to totals label.

Available Reports

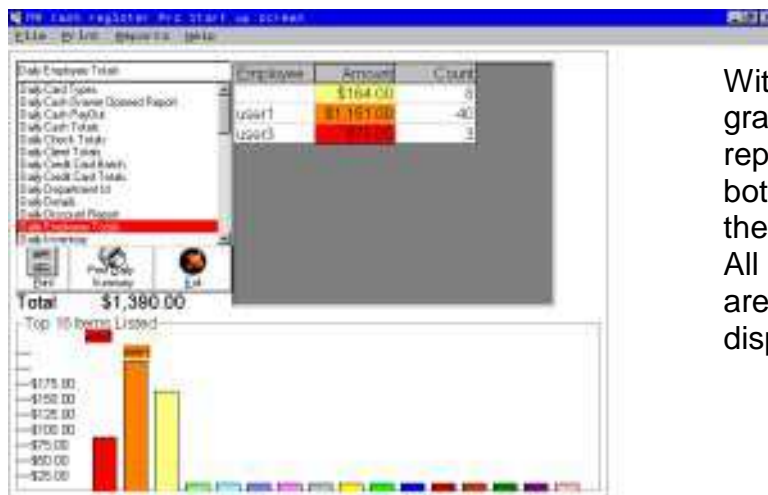
All reports a password protected for security

Daily Credit Card Batch	Shows daily credit card batch totals
Daily Card Types	Shows daily card types & totals I.E. Visa, MC, AX

Daily Cash Totals	Shows your daily cash totals
Daily Check Totals	Shows your daily check totals <u>including</u> sales tax, tips, and cash paid out on checks, all added to the total. (The total the client wrote the check for)
Daily Client Totals	Shows your daily client totals <u>including</u> sales tax, tips all added to the total.
Daily Credit Card Totals	Shows your daily Credit Card totals <u>including</u> sales tax, tips, cash paid out on Credit Card, all added to the total. (The total charged to credit card)
Daily Department Id	Shows department numbers totals including sales tax, tips all added to the total.
Daily Details	Shows details of each sale transaction <u>including</u> sales tax, tips all added to the total.
Daily Employee Totals	Shows totals based on employees <u>including</u> sales tax, tips all added to the total. This does not reflect the employee that rendered the service only the employee that processed the sale through the cash register. Use Commission Calculator to view employee totals by service rendered.
Daily Inventory	Inventory report showing a snap shot of inventory
Daily Other Totals	Other totals reflecting sales that use the other feature <u>including</u> sales tax, tips all added to the total.
Daily Product Totals	Daily transaction totals <u>not</u> including sales tax & tips.
Daily Profit Reports	Shows profit reports for each product listed
Daily Sales Tax	Shows sales taxes collected for any given period
Daily Totals	Shows daily totals of all sales <u>including</u> sales tax, tips all added to the total.
Selected Daily Totals	Shows totals of all sales for a range of days <u>including</u> sales tax, tips all added to the total
Selected Daily Totals (Listed)	Shows totals of all sales listed for a range of days <u>including</u> sales tax, tips all added to the total
Selected Open Invoice Client Totals	Shows totals of all open invoice client totals for a range of days <u>including</u> sales tax, tips all added to the total
Selected Open invoice Daily Totals (Listed)	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Open Invoice Employee Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Open Invoice Product Totals	Shows report based on a range of days

	<u>including</u> sales tax, tips all added to the total selected
Selected Open Invoice Profit Totals	Shows report based on a range of days selected
Selected Open Invoice Sales Tax	Shows report based on a range of days selected
Selected Cash Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips, all added to the total
Selected Check Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Client Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Credit Card Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Department Id	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Employee Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips, all added to the total
Selected Other Totals	Shows report based on a range of days selected <u>including</u> sales tax, tips all added to the total
Selected Product Totals	Shows report based on a range of days selected <u>not</u> including sales tax & tips.
Selected Sales Tax	Shows report based on a range of days selected
Package Reports	Shows report on package sales <u>including</u> sales tax, tips all added to the total
Void, Discount, Open Drawer Reports	Manage selected reports <u>including</u> sales tax, tips all added to the total
Selected Details	Same as Daily Details but with date ranges
Product Totals by Quantity	Allow you to view actual product quantity by the amount of products sold, not the amount of sales transactions <u>not</u> including sales tax & tips.
Running Totals	Report list form of payment totals reports <u>including</u> sales tax, tips, all added to the total
Inventory Value Report	Report show total value of inventory based on Cost of goods sold.
Employee Report	Report that allows you to calculate each employee sales totals with subtotals <u>not</u> including sales tax & tips.
Gift Card Liability Report	Report that will allow you to view outstanding gift card values.

Gift Certificate Report	Report that calculates Gift Certificate totals <u>not</u> including sales tax & tips.
GST Sales Tax Totals	Report that generates GST sales tax collected only.
Multiple Tax Rate	Report that shows totals by tax rate. Listing the tax rate collected the amount collected and total transactions by tax rate.
Packages Only Totals	Report showing packages sold totals <u>not</u> including sales tax & tips.
Payment Report	Report showing payment-received totals <u>not</u> including sales tax & tips.
Services Only Totals	Report showing services sold totals <u>not</u> including sales tax & tips.

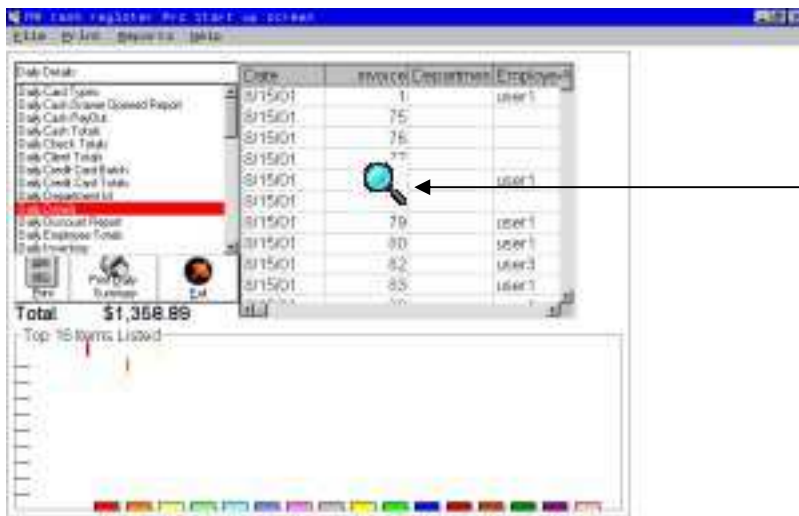
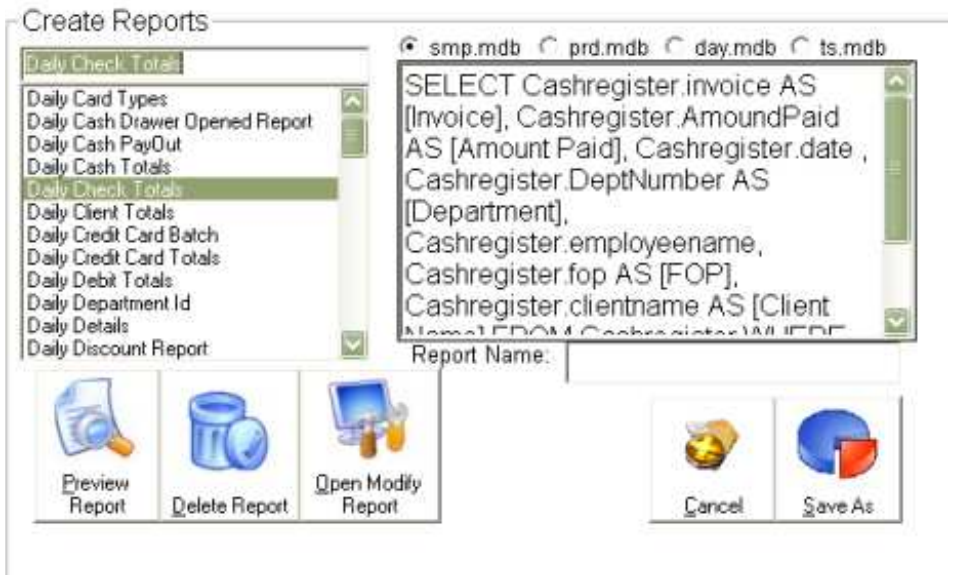


With the Professional Version you can deploy graphical reporting. By selecting certain reports you can generate a color graph at the bottom of your report section. This report list the top 16 items listed in your reports section. All reports that use the graphical chart system are sorted by dollar amount. Then are displayed in the color of each graph.

Use this option to print selected reports that you have generated on screen. You can also print the daily summary and print the graph bar at the bottom of the screen. You are also able to print selective invoice numbers if you have selected their details.

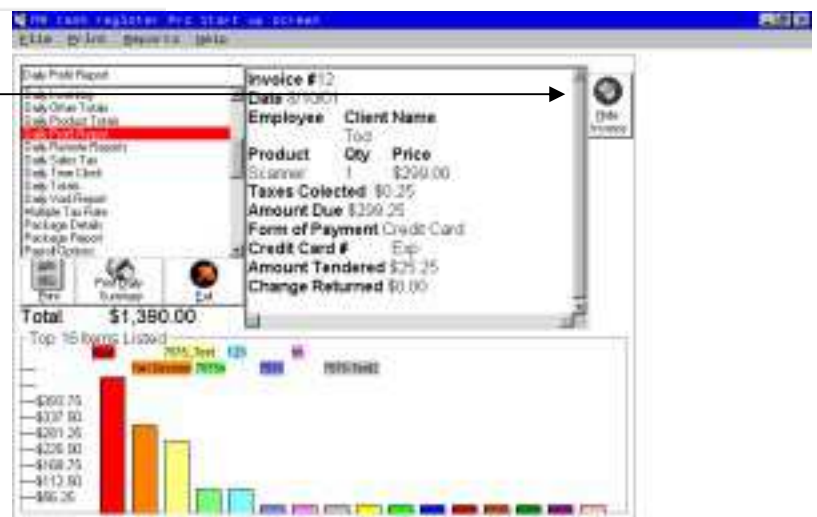
Print	Reports	Help
Print	Daily Profit Report	
Print	Daily Summary	F3
Print	Graph	F4
Print	Invoice #12	

Custom Reports has been added to MPOS. This feature is for advance users who understand SQL language and wish to modify or customize reports. This feature can also be used by our support team who may be able to generate a report for you and email it to you. You then can use this feature to import the report. No further documentation is provided for this feature, as extensive knowledge of SQL is necessary to use this option.

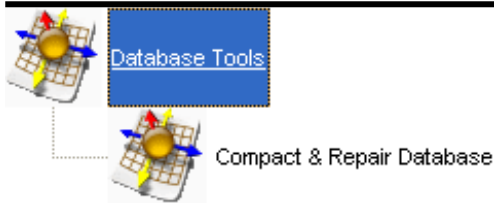


To see added details of a specific invoice. You can click on the column labeled invoice when you hover your mouse over the column your mouse icon should turn into a magnifying glass. Click on invoice number you wish to preview this will then show the details of the invoice.

The details view should appear showing the full product information. You can also hide this invoice view by clicking on the Hide Invoice button. Printing of this invoice is also available by clicking on the print menu and selecting the print invoice option. This option will only be enabled if you have a invoice selected in detail mode.



Advanced Features



Compacting & Repair Database

To ensure optimal performance, compact & repair your Microsoft Access databases on a regular basis. If you delete data or objects in an Access database, or if you delete objects in an Access project, the Access database or Access project can become fragmented and use disk space inefficiently. Compacting the Access database or Access project makes a copy of the file and rearranges how the file is stored on your disk.

Compacting optimizes the performance of both Access databases and Access projects. However, in an Access project, compacting does not affect database objects — such as tables or views — that reside in the Microsoft SQL Server database instead of in the Access project itself. Also, compacting has no effect on auto numbering in an Access project. However, in an Access database, if you have deleted records from the end of a table that has an AutoNumber field, by compacting the database resets the AutoNumber value; the AutoNumber value of the next record you add will be one greater than the AutoNumber value of the last undeleted record in the table.

Repairing an Access database

In most cases, MPOS PRO detects that an Access database is damaged when you try to open it and gives you the option to compact it at that time. In some situations, Microsoft Access may not detect that an Access database is damaged. If an Access database behaves unpredictably, compact it.



Network Options

Connecting to a Network

If your network is setup and you have already mapped your network drive, then you are ready to connect MPOS software to your network. Please note you must have a network license or an additional license in order to connect two MPOS software systems together. To access another system's database and synchronize both report management and inventory, install the software on both computers and register them with your dealer. Each computer will need to be configured on the network. See the Chapter “**Setting Up your System**” under networking options

Below are some brief points on networking your computers. This is made available as a reference if you are having problems with your network or with administering it. Please contact your local network dealer or a windows representative. Your dealer does not support users on networking or networking problems.

Networking an overview

A *network* is made up of client and server computers. A computer that connects to the network and uses shared resources is called a *client*. A central computer that contains shared information is called a *server*. This section explains setting up a client computer.

To connect to a network, you need the correct hardware installed in your computer. This includes a network adapter (network card or other device) and cables.

Along with additional hardware, your computer must have certain software components to communicate with the network. Software needed to connect a computer to a network includes the following:

- Client software, which allows your computer to connect to servers.
- A *protocol*, which is essentially the language your computer uses to communicate over the network. Several protocols are available. Two computers must use the same protocol to communicate with each other.
- Service software, which allows such functions as file and print sharing.

Before proceeding, you need to know which types of software to use. Ask your network administrator about client software and configuration options. Windows also automatically detects and installs the other components you need in order to connect to the network. Windows also automatically detects and installs TCP/IP networks during setup.

If you're connecting to another type of network, or if you're not connecting during Windows installation, use the following procedure. This procedure assumes that your computer is already physically connected to the network—for instance, by network cable. You can also connect computers by serial or parallel cable.

For more information about individual connections, look up “Direct Cable Connection” on the Index tab in Windows Help.

To connect your computer to a network

1. Click **Start**, point to **Settings**, click **Control Panel** and then double-click **Network**.
2. In the **Network** dialog box, click **Add**.
3. Click **Client**, and then click **Add**.

A list of client software appears.

4. In the **Manufacturers** list, click the name of the manufacturer of your network software.
5. In the **Network Clients** list, select the client software you are using, and then click **OK**.

The client software is added to your computer.

6. On the **Configuration** tab, select your client and then click **Properties**.
7. Enter the configuration options for your network and then click **OK**.

If you don't know the options for your network, contact your network administrator.

8. Click **OK**, and then click **OK** again.

The client software is installed and your computer restarts.



Sending Data to QuickBooks

(IIF Intuit Interchange Format) QuickBooks Basic / Pro 1999 – 2002

Discussion

Below is an explanation of how MPOS generates the files used to import your data into QuickBooks Pro. This information may be helpful to you if you need to make line item changes or wish to understand exactly what is entered into your QuickBooks System.

Importing transactions to QuickBooks

You can import transactions to QuickBooks, provided that the transaction data is in a text file that conforms to QuickBooks' import file format. This is a tab- or comma-delimited text file in which the transaction data appears in columns. Special keywords identify the beginning and end of each transaction, and provide headings that indicate the type of information in each column.

Instructions

1 If the transaction data is already in a file, open that file. Otherwise, create a new file in either a word processor or a spreadsheet.

Important. If you are using a spreadsheet, it must be capable of saving the file as a tab-delimited text file (most spreadsheets can). If you are using a word processor, it must be capable of saving the file as a straight text file without embedded formatting codes. In either case, your end result is a file in which tab characters separate blocks of transaction data.

2 Set up the first column. This column is reserved for special keywords that identify the beginning and end of each transaction. Follow the guidelines that apply to the type of program you are using:

Spreadsheets Use the first (leftmost) column in the spreadsheet. The first three cells in the column must read as follows:

!TRNS

!SPL

!ENDTRNS

For now, leave the remaining cells in the column blank.

Word processors the first three lines of the file must begin as follows:

!TRNS <tab>

!SPL <tab>

!ENDTRNS <tab>

Note <tab> indicates that you press the Tab key after entering the text. Do not type "<tab>".

3 Add the headings for the other columns. (For a model, use the two examples below.) In general, follow these guidelines:

For a list of the keywords you can use for column headings, see the keyword reference.

The keywords must appear at the beginning of the file, before any of the transaction data. In a spreadsheet, put the keywords in the first two rows, like this:

```
!TRNS TRNSTYPE    DATE  ACCNT . . . etc.
!SPL  TRNSTYPE    DATE  ACCNT . . . etc.
```

In a text file, put the keywords in the first two lines. Press Tab after each keyword:

```
!TRNS <tab>  TRNSTYPE <tab>      ACCNT <tab>. . . etc.
!SPL <tab>    TRNSTYPE <tab>      ACCNT <tab>. . . etc.
```

The first row of keywords covers general information that appears in each transaction (the date of the transaction, the customer's name, the vendor's name, the transaction total etc). The second row of keywords applies specifically to the distribution lines of the transaction (the amount of each distribution, the income or expense account to which you assigned the distribution, etc.). In some cases, the same keyword can apply to both the transaction as a whole and to a distribution line.

Use only the keywords that apply to your transactions you do not have to use all the keywords listed in the keyword reference. For example, if you do not include payment terms on your invoices, you do not have to have a Terms column in the import file.

Only three keyword columns are absolutely required for transactions all others are optional. The required keywords are:

TRNSTYPE Indicates the type of transaction.

ACCNT For the transaction as a whole: the name of the balance sheet account to which you assigned the transaction. For a distribution line: the name of the income or expense account to which you assigned the distribution line.

AMOUNT For the transaction as a whole: the transaction total. For a distribution line: the amount of the distribution.

4 Enter the specific details of each transaction. (Again, use the two examples in Step 3 as a model.) In general, follow these steps:

Start at the beginning of the first row or line after !ENDTRNS. This would be row 4 in a spreadsheet and line 4 in a text file.

Type the keyword TRNS to indicate the beginning of the first transaction. If you are in a text file, press Tab after TRNS.

Go to the beginning of the next row or line and enter the keyword SPL to indicate the first distribution line of the transaction. If you are in a text file, press Tab after SPL.

If the transaction has more than one distribution line, repeat the last step for each distribution line. Use a separate row or line for each distribution line.

Type the keyword ENDTRNS in the first row or line after the last distribution line. If you are in a text file, press Tab after ENDTRNS.

Fill in the transaction details. General information about the transaction goes into the row or line that begins with the keyword TRNS. Information about the distribution lines goes in the rows or lines that begin with SPL. If you are in a text file, press Tab after each item of information.

Note The column headings you added in Step 3 indicate where to put each item of information. For example, transaction dates go into the DATE column.

Transaction amounts require special attention. See Step 5 below.

The names of accounts that you enter must be the names of accounts in the chart of accounts of your QuickBooks Company. If they are not, you can set up the accounts in the import file. The account information must precede the first transaction in the import file.

You cannot create a link between two transactions. For example, if one transaction is an invoice and another transaction is a payment for the invoice, you cannot indicate in the import file that the payment is to be applied to the invoice. To apply the payment, you would wait until you have imported the transactions into QuickBooks. Then, you would go to the Receive Payments window and apply the payment from there.

Repeat this process for each additional transaction.

5 In the Amount column, enter the transaction amounts. For each transaction, do the following:

Enter the total amount of the transaction in the Trns row of the Amount column.

Enter the distribution line amounts in the Spl rows of the Amount column.
Important Follow these guidelines for making an amount positive or negative:

If the amount is in . . . Make the amount

An asset account

(Like accounts receivable) Positive if it increases your assets. (Example: an invoice.) Negative if it decreases your assets. (Example: a credit memo.)

A liability account

(Like accounts payable) Negative if it increases your liabilities. (Example: a bill from a vendor.) Positive if it decreases your liabilities. (Example: a credit from a vendor.)

A capital or equity account Negative if it increases your equity or capital. Positive if it decreases your equity or capital.

An income account Negative if it increases your income. Positive if it decreases your income.

An expense account Positive if it increases your expenses. Negative if it decreases your expenses.

As a final check, add up all the amounts. For each transaction, the amounts should total zero.

6 When you've entered all the data, save the import file. Follow the guidelines that apply to the type of program you are using:

Spreadsheets. Save the file as a tab-delimited text file.

Word processors. Save the file as a text file.

7 In QuickBooks, choose Import from the File menu.

8 Enter the location and name of the import file.

9 Click OK to import the transactions.

Check example

The following example shows a check in QuickBooks' import file format. To see the entire example, you may have to widen this Help window. You can also print the example by choosing Print Topic from the File menu of the Help window.

Because there are too many columns of information to show, we have split the check into two parts. Here are the first seven columns:

```
!TRNS TRNSTYPE DATE ACCNT NAME AMOUNT DOCNUM
!SPL TRNSTYPE DATE ACCNT NAME AMOUNT DOCNUM
!ENDTRNS
TRNS CHECK3/31/94 Checking Koeplinger Landowners -550.00 1985
SPL CHECK3/31/94 Rent 500.00
SPL CHECK3/31/94 Utilities 50.00
ENDTRNS
```

Here are the remaining columns. If we had not split up this example, these columns would appear to the right of the first seven columns:

```
MEMO CLEAR TOPRINT ADDR1 ADDR2 ADDR3
MEMO CLEAR QNTY INVITEM

April rent N N Koeplinger Landowners 876 West Paul Avenue Sycamore, CA
N
N
```

Notes

This example could have been created in either a spreadsheet or a text file. In a spreadsheet, each item of information would have a cell of its own. In a text file, tab characters would separate the data columns.

The check is made out to Koeplinger Landowners for the amount of 550.00. The import file shows the amount as a negative number (-550.00) because a check decreases the value of a company's assets. This is purely for QuickBooks' internal accounting purposes. If you viewed this check in QuickBooks, the check amount would be 550.00, not -550.00.

The check also has two distribution lines (designated SPL in the import file). The first distribution line assigns 500.00 of the check to an expense account named Rent; the second distribution line assigns 50.00 of the check to an expense

account named Utilities. Here, the amounts are positive because they represent increases to the company's expenses. Note that the detail amounts and the check amount add up to zero.

The import file also contains other information about the check. The check number (1985) is in the DOCNUM column. A memo to the payee ("April rent") appears in the MEMO column.

The TRNSTYPE column identifies the type of transaction check, invoice, bill, etc. The keyword to use for checks is CHECK. It must appear in each line of data the SPL lines as well as the TRNS line.

The accounts (Checking, Rent, Utilities) must be either in the chart of accounts of your QuickBooks Company or defined in the import file. When neither is the case, QuickBooks creates the accounts when you import the transactions, making each account a bank account. If you are using the import file to set up the accounts, the account information must precede the first transaction in the file.

Invoice example

The following example shows an invoice in QuickBooks' import file format. To see the entire example, you may have to widen this Help window. You can also print the example by choosing Print Topic from the File menu of this Help window.

Because there are too many columns of information to show, we have split the invoice into two parts. Here are the first nine columns:

!TRNS	TRNSTYPE	DATE	ACCNTNAME	AMOUNT	DOCNUM	MEMO	CLEAR
!SPL	TRNSTYPE	DATE	ACCNTNAME	AMOUNT	DOCNUM	MEMO	CLEAR
!ENDTRNS					N		
TRNS	INVOICE	3/31/94	Accounts Receivable	Lisa Yee	669.62	679	Light fixtures N
SPL	INVOICE	3/31/94	Sales Income	-456.92	Light Fixtures	N	
SPL	INVOICE	3/31/94	Labor Income	-175	Labor	N	
SPL	INVOICE	3/31/94	Sales Tax Payable	Tax Board	-37.70	Sales Tax	N
!ENDTRNS							

Here are the remaining columns. If we had not split up this example, these columns would appear to the right of the first nine columns:

TOPRINT	ADDR1	ADDR2	ADDR3	DUE DATE	TERMS PAID	SHIP DATE	INVTITLE	INV MEMO
Y	Lisa Yee	541 Surf Road	Sycamore, CA	4/30/94	1%10 Net 30	Y	3/31/94 Invoice	Thank you!
	EXTRA							
	INVITEM							
128	AUTOSTAX							
	Resale							
	Labor							
	Auto Tax							

Notes

This example could have been created in either a spreadsheet or a text file. In a spreadsheet, each item of information would have a cell of its own. In a text file, tab characters would separate the data columns.

The invoice is made out to Lisa Yee at 541 Surf Road, Sycamore, CA. The invoice total (669.62) is a positive number because an invoice increases the value of a company's assets.

The invoice contains three line items (designated SPL in the import file). The first line item is for a light fixture (-456.92), the second is for labor hours (-175.00), and the third is for sales tax on the light fixture (-37.70). The amounts are negative because they are increases, either to the company's income (as in the case of the light fixture and the labor hours), or to the company's liabilities (as in the case of the sales tax). The negative amounts are necessary for QuickBooks' internal accounting purposes. If you viewed this invoice in QuickBooks, the line item amounts would all be positive. Note that the invoice total and the line item amounts all add up to zero.

The import file also contains other information about the invoice. The payment terms for the invoice (1%10 Net 30) appear under TERMS. A message to the customer ("Thank you!") appears under INV MEMO (QuickBooks will print this message at the bottom of the invoice). A notation that the invoice is yet to be printed (Y) appears under TO PRINT. All of this is information that QuickBooks stores with the invoice.

The TRNSTYPE column identifies the type of transaction invoice, check, bill etc. The keyword to use for invoices is INVOICE. It must appear in each line of data the SPL lines as well as the TRNS line.

The accounts (Accounts Receivable, Sales Income, Labor Income, and Sales Tax Payable) must be either in the chart of accounts of your QuickBooks Company or defined in the import file. When neither is the case, QuickBooks creates the accounts when you import the transactions making each account, a bank account. If you are using the import file to set up the accounts, the account information must precede the first transaction in the file.

The EXTRA column contains the keyword AUTOSTAX, which creates a sales tax line on the invoice. You must enter AUTOSTAX even if you do not charge sales tax.

Profit Margin Calculator

GPMC in Calculate Taxes mode



You can access Gross Profit Margin Calculator by clicking on the menu labeled **Profit Margin Calculator**. The Gross Profit Margin Calculator is a 32 bit Windows application for calculating Gross Profit Margin based on Cost of Goods Sold.

The GPMC can be used for:

- Calculating resale prices with or without taxes
- Calculating Profit Margins from income statements
- Calculating purchasing prices based on a fixed margin and current market values
- Calculating hypothetical figures by allowing you to edit calculated results
- Periodic reviews of ongoing projects

Gross Profit Margin Ratio

Gross Profit is the amount of sales dollars remaining after the cost of goods sold has been deducted.
Gross profit margin is calculated with the following formula:

$$\text{Gross Profits} \div \text{Sales}$$

If your gross profit margin is declining over time it may mean that your inventory management needs to be improved or that your selling prices are not rising as fast as the costs of the goods you sell.

If you are a manufacturer it may mean that your costs of production are rising faster than your prices and adjustments on either side (or both) are necessary.

Additional Features

Cash Register Functions

Also you can use special character when ringing up sales to accomplish several things.

1. By placing a "*" symbol in the cash register screen and pressing the enter key you can enter Non-inventory items into the system and create a sales ticket.

By placing a "e" in front of the product code you can change the employee name so as to give the appropriate credit to each employee.



Scheduling

Scheduling

Schedule Appointment

	Bed 1	Bed 2	Bed 3	Bed 4	StandUp 1	Spray Room
9:00AM						
9:15AM						
9:30AM						
9:45AM						
10:00AM						
10:15AM						
10:30AM						
10:45AM						
11:00AM						

Single Scheduling:

The scheduling system allows for scheduling appointments blocking out time periods and viewing multiple schedules. Navigating the scheduling system consist of selecting the date you wish to view through clicking the calendar and choosing your date. The scheduling system will then open the day you have chosen showing all employees and any appointments they may have. You are able to edit any time period by simply clicking on the time period under the employee's name.

To schedule for an operator either an employee or room. Click on the beginning time slot you wish the appointment to start. *(Do not click on the actual time but on the column that your operator or employee is listed)* The following menu will appear. You now have 6 options:

- Schedule with Helper (Use this option to quickly schedule using the helper)
- Edit Appointment (Use this to edit an existing appointment)
- Add New Client (Use this to Add a New Client / Walk In)
- Delete Appointment (Use this to delete or clear appointment)
- Look up Existing Package (Use this to find an existing membership package)
- Block out this period (Use this to block out a period)
- Move Appointment (Use this option to move a appointment from one cell to another)
- Email Client (Use this option to email a client directly from the scheduler)

Prentice	Jean	Wells	Craig

- Schedule With Helper
- Edit Appointment
- Ring Up Appointment
- Add New Client
- View Client Profile & History
- Delete Appointment
- Look Up Existing Package
- Block Out This Period

Select Schedule with Helper.

Schedule Helper
Type text here, then double click or press enter to save.

Select A Client

Cundiff-W

Hendrickson-K

Johnson-M

Petrie-K

Cundiff-W

German-S

Poston-J

Ferguson-J

Shapiro-L

☒ Word Block

☒ Color Block

Time Min: 30

☐ Standing Appt

☐ Block Period

OK Cancel

bed3 Bed 4 d5 Bed 6

If it is a new client or / walk in. You can type the word "new" into the box you will be given the option to add a new client.

You can now select the client you wish to book. Scroll down until you find the client you wish to schedule for all clients, should be sorted in descending order. The client's names are loaded from your client profiles list (last name first Name). Next select the service that will be rendered.

Schedule Helper
Type text here, then double click or press enter to save.

Select A Client

Cundiff-W

Select A Service

mens cut

Perm spiral

straighten

color virgin

touch up

highlights

nail set

fill in

add new tips

☒ Word Block

☐ Color Block

Time Min: 30

☐ Standing Appt

☐ Block Period

OK Cancel

bed3 Bed 4 d5 Bed 6

This is generated by the services listed in your (services list). The Time / minutes should automatically fill with the amount of minutes for the services. You can optionally change this to fit any time in minutes. You can also select whether you will be blocking the period on your scheduler with a **word block** or a **color block**. Selecting the check boxes labeled word block & color block can do this. To enter this transaction into your scheduler click on the **ok** button this will enter & save your appointment in your scheduler as shown below.

1/19/02	Prentice	Jean	Wells
9:00AM	German-S (BDIC) ←		
9:15AM			
9:30AM			
9:45AM			

When scheduling click on the column that shows your operators name next to the time you wish to schedule.

Ring up Sale from the scheduler

You have the option to ring up a service after or before it has been rendered. To do this click on the appointment with either your mouse or pressing the enter key on your keyboard over the appointment grid. The menu shown below will appear. Scroll down to the **Ring up Sale** option. It will show the services that was scheduled, the client name and the amount due for the service (This amount is the amount you provided in your service list) If you will need to make changes to the service it is suggested that you do not ring up the sale via the scheduler. Enter the cash register mode and either sell the service using the discount or change price option.

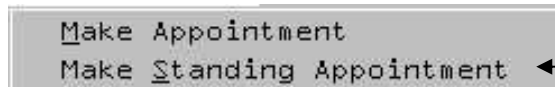
1/19/02	Prentice	Schedule With Helper
9:00AM	German-S (BDIC)	Edit German-S (BDIC) Appointment
9:15AM		Ring Up German-S (BDIC) Appointment \$10
9:30AM		Add New Client
9:45AM		View German-S Client Profile & History
10:00AM		Delete Appointment
		Show Personal View
		Show Today's Notes
		Block Out This Period
		Print Schedule
		Create Standing Appointment
		Save

You can also view client history or client profiles by clicking on the option labeled **View Profile & History** this option will only be enabled if the client can be found in your client history.

Multiple Views

The scheduling system affords you several views the combined view that allows you to view up to 30 employees combined. You can use the scrollbars located at the bottom of the schedule to scroll over to the left or right to view the employee's side by side. To view a single schedule simply clicks on the employee's name. It will expand the schedule for that employee. You can also use the menu labeled employee and selected the employee name. Also available is weekly view you can view a 7-day period of any employee by clicking on the button labeled weekly view. You will be prompted to select the employee name.

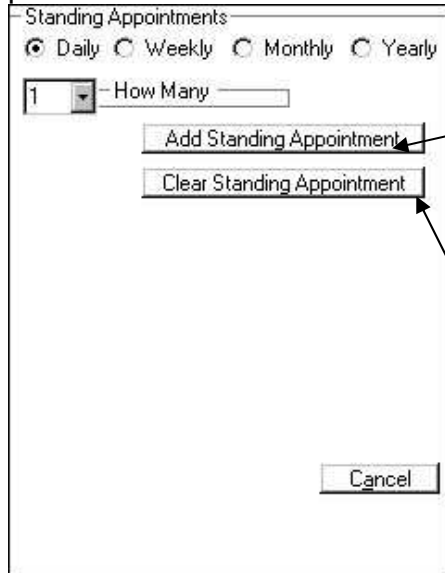
Standing appointments



Make Appointment
Make Standing Appointment

Click here to create a standing appointment

To set a standing appointments set your appointment up as if you were setting up a single appointment. Once the helper appears fill in the client name and services. Check the **standing appointment** option from this point select the period (day, week, month, and year) then the amount of periods that will be blocked for this standing appointment.

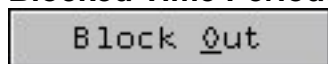


Standing Appointments
☒ Daily ☐ Weekly ☐ Monthly ☐ Yearly
1 - How Many
Add Standing Appointment
Clear Standing Appointment
Cancel

Clearing Standing Appointments

Clearing standing appointments is done by duplicating the initial steps followed to create a standing appointment simply click on the day that you booked the standing appointment, select the client name and service then click the standing appointment check box. Select period that was blocked. From here simply click the **clear standing appointments** button.

Blocked Time Periods



Block Out

Blocking Time Periods is done by selecting the time slot that you wish to begin blocking. Now you can type in the text box the characters *b then the enter key. This will activate the blocking system starting at the text box you are currently on. Simply fill in the type of block you will be blocking i.e. vacation, sick or lunch. Then press the enter key, now enter the amount of time that will be blocked in minutes i.e. (120) = 2hr) then press the enter key again. Your time period will then be blocked. Either word blocked or color blocked depending on what option is selected on the helper located above the scheduling grid.

Note: If you have to block a continues period i.e. "Mary will not work on every other Friday" you can do this by following the procedures of creating a standing appointment. Simply replace the client name with your blocking notes then replace the service text with your notes and select the time period this block will consist of.

Navigation	
Move Next Day	Ctrl+N
Move Previous Day	Ctrl+P
Move To Next Week	Ctrl+D
Move To Previous Week	Ctrl+W
Move To Next Month	Ctrl+M
Move To Previous Month	
Move To Next Year	Ctrl+Y
Move to Previous Year	
Move To Today	Ctrl+T
Move to Opening Time	Ctrl+O
Move to Closing Time	Ctrl+C

Use the Navigation Option to move from day to day. Or use it to move from time periods throughout the day.

Copy
Cut
Paste
Select All
View Customer Sales Ticket
Resize Row Width
Resize Row Height
Resize Grid Height
Resize Grid Width
Font Options
Scheduling Time Intervals
Include Phone Numbers

Use the edit menu to copy, cut and past records. You can also change the size of the rows and the height. Depending on the screen size you may need to change the grid height and grid width. You can do this by selecting these options here and entering the desired size. You can also change the interval of time scheduled from 15 minutes to any other time interval i.e. 5-10-15-20

Use this option if you wish to see customer phone numbers included with each appointment.

Customer Tickets

Schedule With Helper	
Check In	
Scan Package Card	
Activate Package Lookup (Room Requires A Package)	
Edit Appointment	
Ring Up Appointment \$	
Add New Client	
View Client Profile & History	
Add to Customer Ticket	
Delete Appointment	
Show Personal View	
Show Today's Notes	
Block Out This Period	
Print Schedule	
Create Standing Appointment	
Save	
Move Appointment	
Email Client	
File Edit Appointments Block Outs	
Schedule For Employee	F3
Port Error Time Out Setting	
Print	F9
View Schedule Rebuild	
Exit	F2

Use this option to send an appointment to a new or existing customer ticket. You can also view current customer tickets for any day by clicking the customer ticket button. *See Customer Tickets in the Tools you will use Chapter.* For more information on Customer Tickets.

2/27/201	TktNumber	ClientName
Double Click on ticket number to preview ticket.		

If for any reason your scheduling system is unable to load your day a feature is available to help rebuild any lost data. This feature is located under the file menu "View Schedule Rebuild" This feature allows you to recreate scheduling data based on the history logs of each client.

The system systematically scans every client database and rebuilds a text log of appointments that may have been lost.

Find Open Appointment:

You can access this feature by clicking on the button labeled “Find Open Apt” Once you click on this feature you will then be given a choice to select the employee you wish to view. Once you have selected the employee you will be given a view of all available time periods. You can change the amount of days to view by selecting the menu labeled “How many Days to Search” Once you have found the slot you wish to schedule click on that time period and you will be able to begin scheduling into that slot.

Printing:

To access print options click on the button labeled “Print Options” This will give you the option to print, preview or change printing properties. You can change the font size the spaces between columns and even the amount of characters to print. This is helpful if you need to format the print out to fit on a particular paper size these properties will affect weekly view and all columns view. To print a single appointment you can select the column then select the menu “Print Single Schedule for” This will print just the column you selected.

Confirming Appointment:

Burkus	Schedule With Helper
	Check In
John Doe	Appointment Confirmed
~Artistic	Scan Package Card
Basic	Activate Package Lookup (Room Requires A Package)
Perm~	Edit Appointment
	Ring Up Artistic Basic Perm Appointment \$65.00
	Add New Client
	View John Doe Client Profile & History
	Add to Customer Ticket
	Delete Appointment
	Show Personal View
	Show Today's Notes
	Block Out This Period
	Print Single Schedule for Burkus
	Create Standing Appointment
	Save Current Record
	Move Appointment
	Email Client

cf* John
Doe
~Artistic
Basic
Perm~

To confirm an appointment click on the appointment then select the menu "Appointment Confirmed" The appointment will then change to a yellow color and the letters "cf*" will proceed your appointment. This will give you visual indication that the appointment has been confirmed.

Color Block:

Primary Description:	Artistic Basic Perm *short description
Description:	basic perm short hair by artistic
Service Code:	147
or	
Service Word:	
* Optional Tax Le	
* Optional GST Te	
<input type="checkbox"/> Will this item be	
Aprox Time	
Leave How Much	
Another Appointm	
Retail Price:	
Service Colors	
Category:	
** Dept Number:	
BackBar %:	
Sales Account:	

Color

Basic colors:

Custom colors:

Define Custom Colors >>

OK

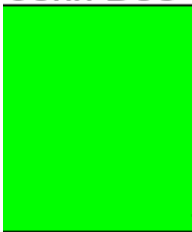
Cancel

By entering the Service Setup Screen from your main screen you can access the color schemes that can be used in conjunction with your scheduling system. After selecting the service click on the button labeled "Service Colors" then select the color you wish to represent this service. Once you click on OK the button will change to the color you have chosen.

<input type="checkbox"/> Word Block
<input checked="" type="checkbox"/> Color Block
<input type="checkbox"/> Standing Appt

You also want to make sure that the "Color Block" option is selected in the schedule with helper area.

John Doe



The end result will be you appointment will reflect the color you have chosen.

Multiple Appointments:

To add multiple appointments quickly you can select the option labeled “Multi Appt” This will generate the screen displayed below. You can then select the client then the service and time. Once you have completed you can click on the button labeled “OK” you can then repeat the steps by selecting the next service. The system will automatically move the scheduling time to the next available slot. If you select the menu labeled “Create a Customer Ticket Automatically” then every appointment will be created as a customer ticket giving you the ability to process customers through the ticket system.

Overriding Locked Out Periods:

You may find that you will need to open sections of times that were previously locked out. Simply clicking on the time period can do this; you will be given a prompt to unlock the period. To unlock click yes and repeat the steps as necessary, this will not change any permanent schedule times.

Employee Overrides:

You can optionally program retail prices and service times for each employee. This feature is helpful if you have different service prices for each employee or different service times. This feature can be accessed in two places. Under the setup wizard under employee commission profiles. Or you can select them from the Service Setup Screen and click on the button labeled “Employee Override” You can then enter the commission, retail price, booking time and space between services.

Touch Screen Options:

You can activate touch screen options in “Setup Wizard” under “General Setup” by selecting the option labeled “Activate Touch Screen Options” This will increase the menu sizes to make it easier to select options including services and customers.

- ☐ Track employee activity (force employees to log in)
- ☐ Log Employee Out after Each Sale
- ☒ Prompt for Client Info
- ☐ * Must fill in all fields
- ☐ Verify All Checks Presented for Bad Account Profiles
- ☐ Keep Hot Keys Grid Visible
- ☒ Activate Touch Screen Options

5/1/06	Burkus	Select Option		
8:30AM		Schedule With Helper	Check In	Appointment Confirmed
8:45AM				
9:00AM				
9:15AM	John Doe			
9:30AM		Move Appointment	Ring Up Artistic Basic Perm Appointment \$65.00	View John Doe Client Profile & History
9:45AM				
10:00AM				
10:15AM				
10:30AM		Print Single Schedule for Burkus	Delete Appointment	Edit Appointment
10:45AM				
11:00AM				
11:15AM				
11:30AM		Show Personal View	Create Standing	Add New Client
11:45AM				
12:00PM				
12:15PM				

Edit menu options:

Edit	Appointments	Block Outs	Options	Employees	N
<ul style="list-style-type: none"> Copy Cut Paste Select All View Customer Sales Ticket Resize Row Width Resize Row Height Resize Grid Height Resize Grid Width Font Options <ul style="list-style-type: none"> Caption Font Size Font Color Type Font Scheduling Time Intervals Include Phone Numbers 					

You can use the “View Customer Sales Ticket” option to activate the customer sales ticket system.

You can use the “Resize Row Width” to resize the width of all rows.

You can use the “Resize Row Height” to resize the height of all rows.

You can use the “Resize Grid Height” to resize the height of the whole grid.

You can use the “Resize Grid Width” to resize the width of the whole grid.

You can use “Font Options” to change caption font sizes, font colors and select the type of font you wish to use.

You can use the “Scheduling Time Intervals” to change the time intervals between rows.

You can use the “Include Phone Numbers” to include phone numbers on screen and on printouts.

Keep in mind that numbers will only display if they are listed in the client profile and also if the print margins are set to a large enough setting to include numbers. This is also true with column and grid screen margins they must be set to be wide enough for them to be visible. “See above on resizing grid”



Note: If another user is currently using the scheduling system for that day and has not exited the screen. You will not be able to schedule, MPOS will generate a message stating what user and what computers is currently using the books. They will need to exit the day in question before you can

continue scheduling. This option is vital to make sure the scheduling database is totally accurate over a network.



Caution should be used when changing the time interval from the default 15 minutes. By changing the fields to a lower value you may shorten the amount of time that can be scheduled. The system has physical restraints of 255 fields that can be used on a certain scheduling period. So if you change your default time to 5 minutes you may only be able to schedule for a certain amount of hours depending on what time you open. If you receive error messages or you are unable to save certain time periods try increasing the time intervals to a higher number.



Client Profile Management

The client profile system is used to manage client information such as client addresses or phone numbers and other important information. The client profile management system can also generate customer reports. You can set price levels for clients or set whether a client is taxable or nontaxable. You can use the client profile system to insert pictures of clients or keep a running history log. You can also use the client profile system to create and maintain client cards or customer cards. The client profile system can also be used to print marketing and mailing labels. You can also use the system to email clients. In this chapter we will discuss in detail how many of these features can be used.

File Edit Card Options Client Option View Customer List Find Sort Client List

Alice

Find Customer

FirstName: Alice MiddleName: LastName: Prentice Address: Ship To:

City: State: PostalCode: WorkPhone: Home Number: AlternativePhone:

EmailAddress: Title: Anniversary Birth Day

OrganizationName: FaxNumber: MobilePhone: First visit

Served By: Referred by: Last visit 11/30/2009 Click to Change

☐ Do not accept checks ☐ Currently inactive

label1 label2 label3 label4

label5 label6 label7 label8

label9 label10 label11 label12

label13 label14 label15 label16

Customer Job - Client Index

Alice Prentice

1902563358

Clear Image Insert Picture

☐ This Client Is Non Taxable

Customer Price Level

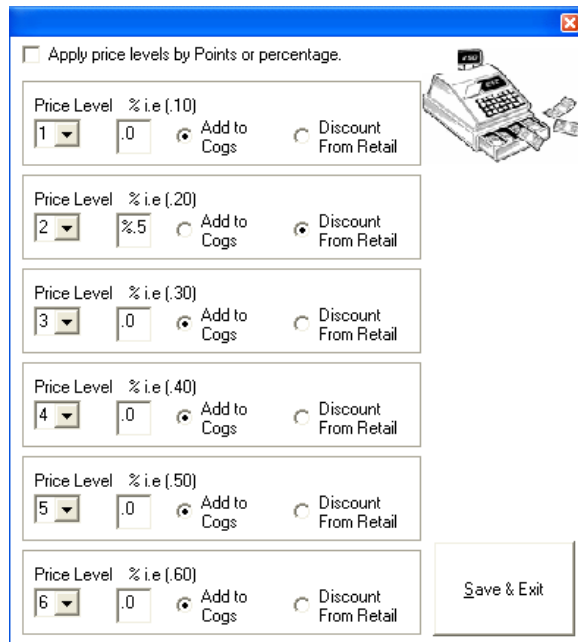
☐ Apply Customer Rewards

☐ Release Form on File

The most important field used in the client profile section is the customer job field. This field is used to find and list the customer in all other screens. The customer job field is a combination of the customers first and last name. It can also be the customer business name. This system automatically fills the customer job field in when you type a last name in. Problems occur when you change or edit the customer name but fail to edit the customer job. If you have problems pulling up the wrong client

or the client history is not posting to the correct customer your problem will originate with the customer job field.

Price Levels:



An advance feature can be activated by clicking the button labeled “**” this will open the advance price level screen. By clicking on the check box labeled “Apply price levels by Points or percentage” you can override standard price level. You can then set the price levels to a percentage allowing you to either generate your price by adding to the cost of goods or discounting from the retail price. These percentages are universal so you would not have to change each items record. By selecting the price level and setting its properties the system will adjust prices for each client based on the levels you have set. This feature is helpful when your products or services price changes frequently. You will not have to change the price levels prices each time there is a change. The system can recalculate the price based on the advance options you have selected either for cogs or retail.



You insert and clear pictures by clicking on the buttons shown above. Make sure that the pictures you are using will be stored on the same computer or network that MPOS is running on as MPOS creates a link to these images. You can also edit the image by double clicking on the picture. If images are blurry you will need to resize them to a size of 100 x 100 or until it no longer is blurry.

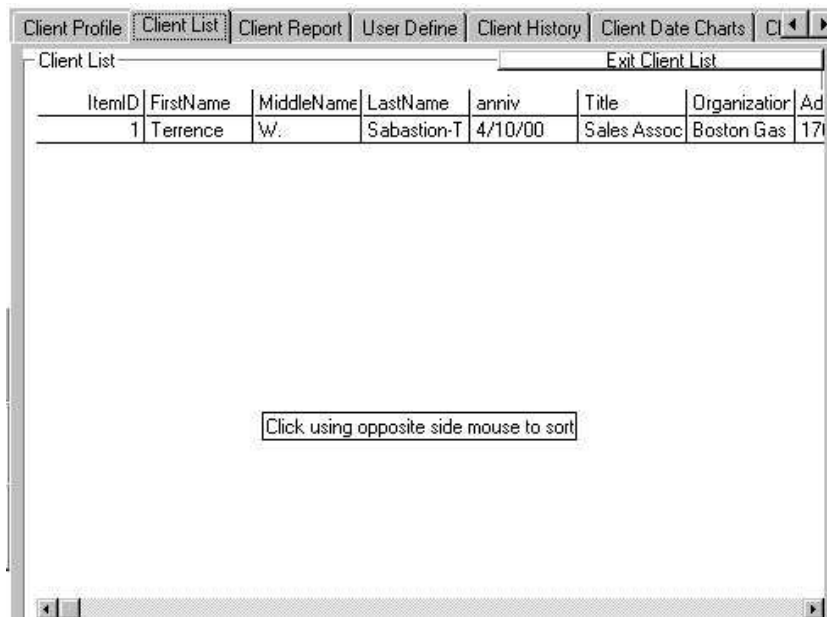
Navigating Customer Profiles



Use these options to navigate through the client profile system.

- Find (Find a Client)
- Print (Print a record)
- Move (First, Previous, Next, Last)
- Add (Add a record)
- Edit (Edit a record)
- Delete (Delete a record)
- Finish (Close & Exit)

Client List View



You can view your client database in a list or grid format. You can also change and print your entire client list.

Profile & Membership Cards

You are able to update manage delete and run reports on any clients created in this mode. This screen also relates to the Client Info screen that appears in cash register Mode. All client data that is collected for a client is stored in this area for future use. The most important fields in this screens is as follows:

1. Client Last Name & First Initial.
2. Client Home Phone Number

All other fields are not used in any other function and are not required. The fields above are needed for the following.

Client Last Name & First Initial is used by the cash register system when printing the clients name on receipts and also in report mode when running client reports.

Client Home Phone Number is used in the main field to find a client during cash register mode. You will usually ask the client for their phone number during the ring out session in order to find their profile. As was noted all fields are not required but should be filled out for your use. Please be sure that these fields are always filled out.



When using Service Membership cards in conjunction with your client profile, scan or type the client card number into the home phone number field. You can alternately use the define fields to create another Phone number field. Or use the alternative phone number field for this client Home phone number.

Inserting Images



You can create your own membership cards using card options.


You can insert images by selecting the "insert image" button. This will open your browse directory screen. Select the images you wish to insert. You will be given a preview of the images you have selected. Once you have selected your image and the method of storing it simply press the "Ok" button to save your images. (Note some distorting may occur if your image is too large or too small then the standard size of 100x100, if distortion is high you must use imaging software such as MS Draw to resize the image into the appropriate size.

Membership & Key Cards

Options
Format
Code39
Font
Arial
Size
8.2
Select the Barcode Field
FirstName
Barcode Text
Michelle

Color Options
All Fonts

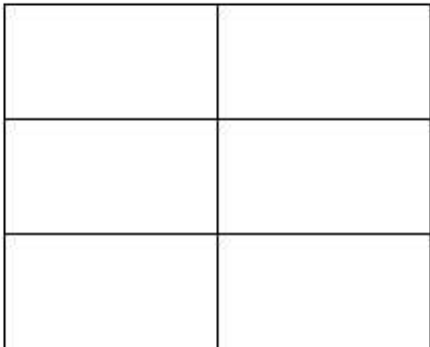
Print Options
Left Margin
.50
Right Margin
.50
Top Margin
.25
Margin Between Labels
0
Bottom Margin
.25
Sample Card: Click on text to change font options



Sallys Salon & Supply
Identification Card
Crook

Michelle

test
test
test
test
test

Print Preview


How Many Cards To Print? 6

You are able to print your own photo cards. These can be used in conjunction with MPOS or separately. To activate this feature click on the menu labeled “Card Options” then select “Photo Card”. You can now select the properties you wish to use including the barcode type font as well as the field that will be used to generate the barcode. Also you can choose the font to be used for the whole card. You can manipulate the margins in order to fit the media you are printing on. You can print on standard paper or business card paper. Cards can be used as is or laminated for card protection. You can print as many cards as needed by selecting the option labeled “How Many Cards to Print”. To navigate from one record to another click on the navigation buttons at the bottom. You can also print and select the printer you will print to.

Card Options
Options
Photo Card
Key Card

Use card options to create photo cards & key cards.

Membership cards allow you to track your client history and create instant cash statements based on their sales history. Printing membership cards is as easy as printing business cards. You can use standard paper and cut out the card or key card for lamination. Or you can use standard business cards 2" x 3 1/2".

You must remove the edges before placing the card paper into your printer.
Once the edge is removed simply print the cards individually.

By selecting client options and clicking on “**Marketing & Mailing**” tabs you can select the time period and create a list of clients that match your specific search. I.e. you can search for every one that has a birthday in the next three months, or who may have visited you in the last 30 days you can then export these files so that you can export them into any of the partner programs for marketing and mailing. Or process them directly in MPOS.

- Date Chart

☐ Anniversary
 ☐ Birthday
 ☐ First Visit
 ☐ Last Visit
 ☒ All


☐ Sort By Month Only
 1
 Start Date
 Ending Date


	FirstName	LastName	Address	City	State	PostalCod
	Michelle	Crook	2330 Stone	medford	OR	97501
	Jill	Gresham	2711 Cluckl	Jenson	CA	96097
	Roseanna	Jones				
	Cindy	Rohl	P.O. Box 20	Montague	CA	96064
	Terrence	Sabastion-T	1704 A Valle	Boston	MA	30909
	Cindy	Weiss	233 4th Stre	Ashland	OR	97520
	Heather	Williams		Redmond	OR	97756

Export

Print List

Print Mailing Labels

 **Email Customer**

 **Exit**


After you have generated a list of clients. You can email them using a pre made template. See *Customer Templates* discussed later in this chapter.

You must enter your email address. Your company name and a subject for the emails. You must also select your out going email server. i.e. mail.yourdomain.com

You can now begin the mail process by clicking the button labeled “**Email Customers**”

Select Paper Size

Avery 8160 (1" x 2-5/8")



Print () Labels

After you have generated a list of clients. You can now print their labels directly to address labels.

You can use:

Avery 8160 1" x 2-5/8"

Avery 8167 1/2" x 1-3/4"

Once you have selected the label size click the button labeled **"Print Labels"** This will begin printing your labels to your desktop printer.

Select Paper Size

Select Template

From your Email address:
fromemail@here.co


From your name:
Your Name

Subject

Email Server

Your outgoing serve

Preview Email **Edit Template**



Email () Customers

You can add and remove client profiles by using client profile screen. To learn more about navigating the program see navigation. Sorting profiles you can sort your profiles by several fields to do this simply select the "client list" button. You can now select from first name, home phone number or a field you have defined.

Client Reports

Client Profile Client List Client Report User Define Client History Client Date Charts CI						
Hide Reports Sort by Date Show all clients Sort by Services Print Sort by Amount						
Date	Invoice	Amount	Client Name	Serviced By	Product Nar	Sales Type
7/27/01	1	\$15.00			1.25R Rage	inventory
7/27/01	14	\$15.00			1.25R Rage	inventory
7/27/01	14	\$15.00			1.25R Rage	inventory
7/27/01	15	\$15.00				
7/27/01	15	\$15.00				
7/27/01	15	\$15.00				
7/27/01	1	\$15.00				
7/27/01	19	\$15.00				
7/27/01	15	\$15.00				
7/27/01	15	\$15.00				

Client Profile | Client List | Client Report | User Define | Client History | Client Date Charts | CI

Hide Reports | Sort by Date | Show all clients | Sort by Services | Print | Sort by Amount

Invoice #4
Date 7/14/01
Employee Client Name

Product Qty	Price		
164KHTAZ	1	12	
164GORDON PEPSI		1	10
AC002	1	50	

Taxes Collected \$0.00
Amount Due \$25.00
Form of Payment Cash
Amount Tendered \$26.00
Change Returned (\$1.00)

Hide Invoice

Click on invoice numbers to view each sale receipt. Click on the date to see just those days' sales.

Client reports are available for client tracking and client history to select a report, simply click on the report option you wish to view. This option is only available if the manager has enabled it for all users

to access, otherwise only manager access will have privileges with client data & reports. Click on the report "Sort by Date" to get totals broken down by date and sub totaled by years.

Finding Clients

Search By First Name

Search By Last Name FI

Search By Phone Number

Search By Zip Code

Search by cc1 ←

Search by cc2

Search by cc3

Search by cc4

Search by cc5

Search by cc6

Search by cc8

Search by cc7

Search by cc10

Search by cc9

Search by cc12

Search by cc11

Search by cc14

Search by cc13

Search by cc16

Search by cc15

Use this option to find client quickly. Find, using major fields or any of the 16 fields you define.

If you wish to find a client quickly you can do this by selecting the find option, you can then search for the client using the listed criteria's.

Defining labels

Client Option View

Client Formulas

Define Labels ←

Date Charts

Use Define Labels to customize fields.

If you have a specific information you would like to record this can be specified in the definable fields you can define up to 16 fields and do search's and sorts on the first.

Client Profile | Client List | Client Report | User Define | Client History | Client Date Charts | CL

User Defined Data

Define Labels

Undefined	Undefined	Undefined	Undefined
Undefined	Undefined	Undefined	Undefined
Undefined	Undefined	Undefined	Undefined
Undefined	Undefined	Undefined	Undefined

Client Formulas

Client Option

View

Client Formulas

Define Labels

Date Charts

Use this option to create client formulas.

Formulas


Services: color/highlight


Formula name: Fusion Instructions:


Base color plus partial bleach highlight with 20 volume


product 1:	Fusion	desc 1:	7NN	qty 1:	1.5	Meas Unit 1:	oz
product 2:	Fusion	desc 2:	6Ro	qty 2:	.25	Meas Unit 2:	oz
product 3:	Fusion	desc 3:	8Ro	qty 3:	.5	Meas Unit 3:	oz
product 4:	Fusion	desc 4:	6NN	qty 4:	.25	Meas Unit 4:	oz
product 5:	Developer	desc 5:	40 volume	qty 5:	2.5	Meas Unit 5:	oz

Crook

Print

Refresh

Update

Close

You can create and print client formulas for your specific client listing chemicals with all of the instructions. Pressing client options and selecting client formulas accesses this option.

Client History

You can track update and keep a running log of all client history this includes:

- All Phone calls logged using Caller ID
- All Appointments scheduled for this client
- All Products sold to this client
- All Services rendered to this client
- All notes made by any employee

Items Sold Qty Price 5/2/2006 2:37:05 PM Employee Burkus
ABBA Creme Mask 1 \$14.4

Items Sold Qty Price 5/2/2006 2:36:54 PM Employee Burkus
ABBA Air Frame Sm 1 \$6.6
Michelle Crook Checked into Bed 2 at 1:21:55 PM on 5/2/2006 using a session package for 5 minutes processed by Burkus
Michelle Crook Checked into Bed 2 at 1:21:45 PM on 5/2/2006 using a session package for 5 minutes processed by Burkus
Michelle Crook Checked into Bed 2 at 1:21:35 PM on 5/2/2006 using a session package for 5 minutes processed by Burkus

Total Sale \$17.00
Form of Payment Cash
Invoice Number 8
















Items Sold Qty Price 5/2/2006 1:21:15 PM Employee Burkus
3 Tans 3 \$17.00
Michelle Crook used AC Daily Poo at 12:37:36 PM on 5/2/2006 processed by Burkus

Total Sale \$101.00
Form of Payment Cash
Invoice Number 6

Items Sold Qty Price 5/2/2006 12:36:23 PM Employee Burkus
Tan Session 2 \$101.00

Customer Filters











Type in the box below to change the name of the Client Flag








				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Customer filters is another feature that can be used to help filter clients. This feature is also called client flags. Use this feature to set up unique flag or labels for clients. You can then set these flags for each client or customer. These flags will show up each time a client is pulled up in the system. This is helpful in identifying certain types of clients or filtering a particular type of client. To create a customer filter click on the tab labeled customer filters. You can now click on each field and enter the label for each filter. On certain screen you can set whether filters are visible or not.

Customer Templates

Client Report | User Define | Client History | Marketing & Mailing | Client Formulas | Customer Filters | **Customer Templates**

									
Template #1	Template #2	Template #3	Template #4	Template #5	Template #6	Template #7	Template #8	Template #9	Template #10

    **B** *I* U   

We would just like to confirm your appointment that was made earlier. You do not have to reply to this email. If you feel you will not be able to make your appointment please contact us at **706-228-4616** to reschedule this appointment.

Thank you again for your business

Renata's Full Service Salon
2711 Culverton Dr
Augusta GA 30909


Customer templates are used to create custom text documents that can be used to email, print or save with a client record. When using customer templates you can create a template for different criteria's such as confirming an appointment, wishing happy birthday or anniversary. Or sending holiday wishes, as well as informing customers of specials. You can create up to 10 templates that can be saved and used at any time. To create a template you must first click on the template number.

This is done by clicking on the buttons labeled Template 1 through 10. You can then begin typing into the text area. Once you have completed your document click on the icon to save. Repeat this step for each Template saving each document using a different name. Once you have completed all the documents you are now ready to use the customer templates within MPOS. When sending emails you can now click on the options to select a template from a list you have created.



Managing Business Services

Find Item


Find Item

Primary Description:

Retail Price:

Scan Service Code: or Service Word:


Wedding Updo

\$32.00

001


* Optional Tax Level

* Optional GST



0.01

Tax Level



Less Details...

Description:


Airbrush Tanning

Insert Picture

Clear Image

Insert pictures

Copy barcode into clipboard


001 **

Click this option to activate this service to be billed as a timed service.

Sales Account:

Class:

Notes:

* Dept Number:

Hot Keys Category:

☐ Service Keys (Turn this item into a button)

☐ Will this item be billed by time periods (Timer Billing)

Multiple Pricing

Price Levels

Service Colors

Employee Override

BackBar %:

Approx Service Time:

(Double-Book Time)

15

30

Use this screen to setup any services that you will be selling. If you are a service business each item should be setup in the system. **Important the service ID box is the code that is used to ring up the service in cash register mode.**

To **add a record** simply press the Button labeled 'Add' then begin typing your items in the appropriate boxes when you have reached the last box labeled Department either click the tab button on your keyboard to move to the 'Add' button or press the 'Add' button to save your record and add another.

To **delete a record** select the records you wish to delete by either using the find button located on the inventory menu or use the 'Select Product' drop down box. You can also use the arrows located at the bottom to move to the first record, the previous record, the next record or the last record. Once you have selected the record click on the delete button or hold down the alt key + D to delete the current record.

To **Close & Exit Inventory** select the button labeled close or hold down the alt key + C.

To **Print Product ID Sheet** click on the button labeled print product ID sheet or hold the alt key + P. This allows you to print out all your products key data on paper so you can either train your employees or have a printed backup of your current inventory configuration.

To setup a product for **Timer Billing** select the check box located in the middle of the inventory screen adjacent to the barcode box. By checking this option you can bill this item on timer intervals. This is ideal for business that rent equipment entertainment or products and then bill their customers based on the time period they have used the product for. (Whatever you select in your retail price section will be the per hour / minute rate that will be calculated. The system uses the standard 60-minute cycle to calculate hourly or minute rates).

Pictures can be inserted into the system. If you wish to insert an image into the touch screen buttons you must first check the option labeled "Service Keys" then click on the button labeled **Insert Pictures**. To make sure that the image fits properly into the screen make sure it is in a windows bmp format and that it is resized to 35 x 30.



Tanning

Tanning Room Control

To process Tanning transaction you have two views to choose from the Single View and Multiple View. Single view allows you to process all of your transaction from a single screen. With multiple views you have the choice of moving from screen to screen in order to view your customer's packages and history.

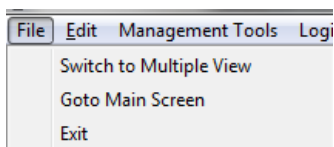
Single View

Type Client Name Scan Package Card Scan Finger Print John Smith

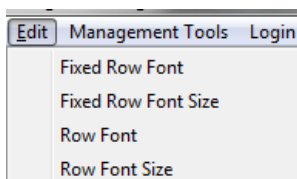
Enter Customer

FirstName	LastName	Address	City	State	Postal	MobilePhone	Email	UserD	notes	Fir	Save	Edit	Delete
John	Smith												

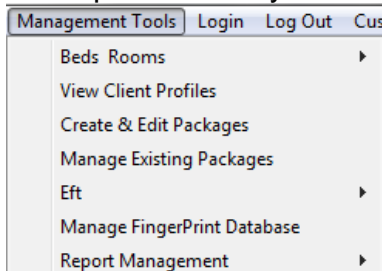
With single view you begin every transaction by finding your customer you can do this by typing the first few letters of your customers name and select the **"Find Customer"** button once you have located your customer you can then sell them a package, sell them a product or services, put them into a bed or device, or schedule them into the scheduling books. After selecting any of these options the system will automatically bring you back to this view.



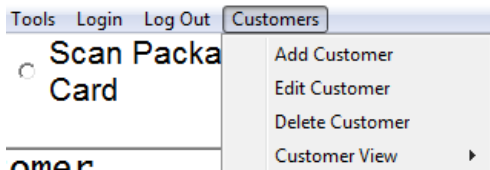
This option allows you to switch to multiple views, you can also navigate to the main screen or exit the screen.



This option allows you to change the font type and font size for any of the grids that appear.



This allows you to manage some of the screens you will need to manage the system. The Beds Rooms option allows you to setup your beds and manage them. You can also navigate to your client profiles, create & edit packages, manage existing packages, manage eft, manage fingerprint database, and view report management from this menu.



This option allows you to add customers from the menu, edit customers, delete customers, and define what customer information will be viewed.

Type Client Name

When this option is selected you can search for a customer by typing a few letters of their name then select the find button or hit enter on your keyboard.

Scan Package Card

When this option is selected you can select a customer by scanning their package card.

Scan Finger Print

When this option is selected you can select a customer by scanning their finger print.

Add New Customer

When you click on this option you are able to create a new customer. After clicking on the button you

FirstName

can then enter the customers information in the text box then hit the enter button on your keyboard or if you are using the on screen keyboard select the done button. You will repeat this step for each field when you are done click on the field labeled "Save"

Sell Product or Service

You can use this option to sell a product or service to a customer simply find your customer and click on this option to sell a product or service.

Sell Package



You can use this option to sell a package to a customer. You must first select the name of the package you wish to sell this is done by clicking on the package on screen or selecting it from the drop down menu. You then can click on the button labeled "**Check Out Now**" it will then send you to the register where you can optionally add products and services to the ticket then tender it out.

Schedule

You can use this option to schedule your appointment by clicking on the service then select the date and time period you wish to schedule.



Bed 3	Bed 4	StandUp 1	Spray Room
Joe Smoe ~11 Minutes tanning~			

Process Visit

You can process a visit by first finding your customer and the active package it will be displayed in green. Simply click on the package and it will bring you into the process a visit screen.

Package Name	Item ID	Purchase L
10 Minutes tanning~Joe Smoe	3239482935	1/15/
Package Description		
10 Minutes tanning Service Package for Joe Smoe		

Bed 1

Bed 2

Bed 3

Bed 4

StandUp 1

☐ Energize Lamps (No)

☒ Energize Lamps (Yes)

☐ Unit Package

☒ Minute Package

1

Points

1234

567890

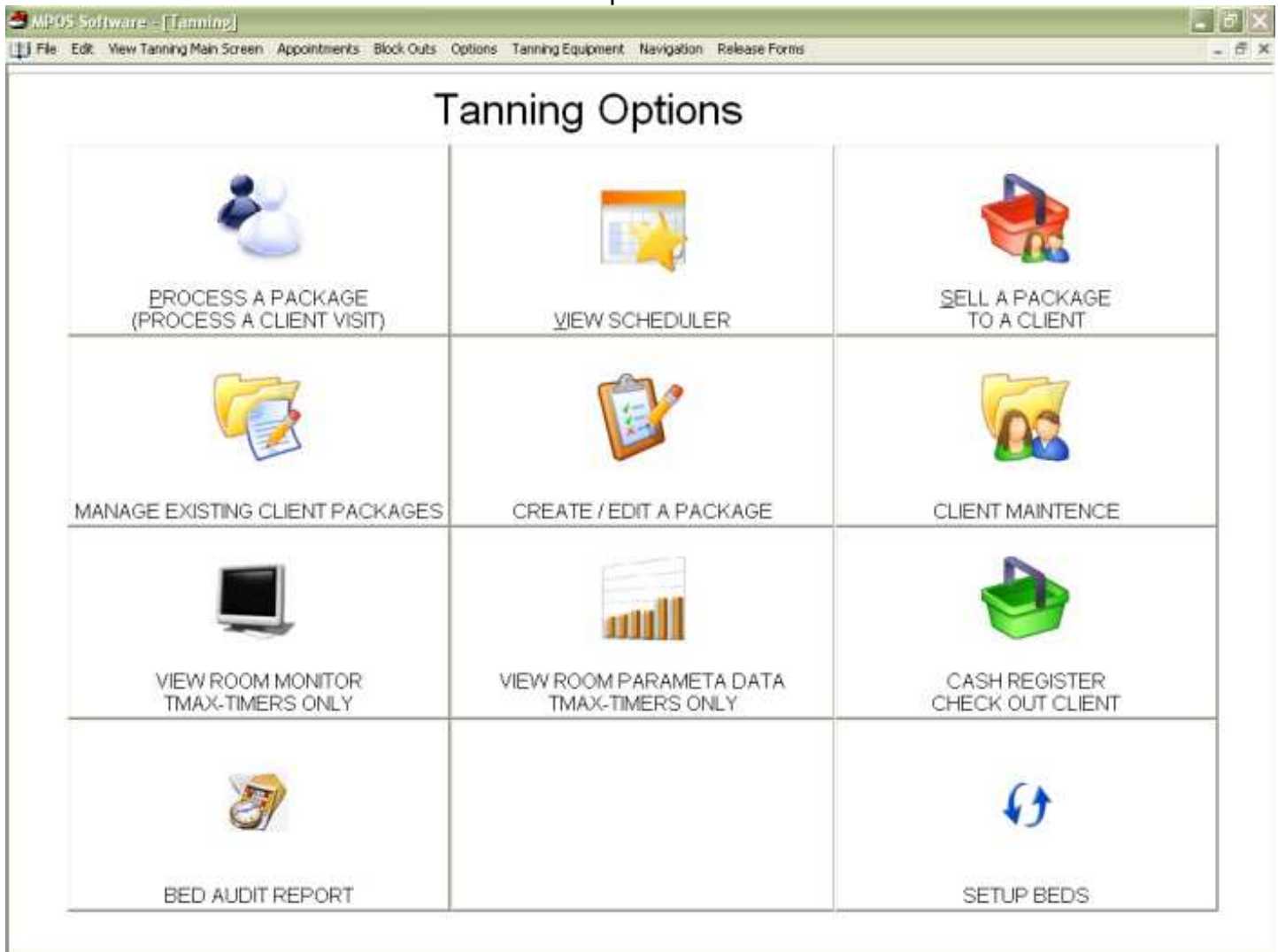
BackExit

Start Timer

Stop Timer

Select your bed time and click the button labeled **“Start Timer”**

Multiple Views



This chapter will deal primarily with:

- Monitoring Tanning Rooms
- Controlling Tanning Rooms
- Processing Packages for Tanning Rooms

The details on scheduling are similar to that of the standard scheduler. *Please refer to the chapter on scheduling for more information on scheduling appointments for your clients using tanning mode.*

The system uses the scheduling system as its basis for controlling, monitoring and processing all membership packages. There are several ways to activate a session depending on what options have been activated by the manager.

Process a Package

Process A Package

Type Client Name Scan Package Card


Package Name: 3 Tans~Michelle Cro
Item ID: 2976413984

Client Name: Cindy Rohl, Michelle Crook, Michelle Crook, Michelle Crook

Package Description: 3 Tans Service Package for Michelle Crook

Purchase Date: 5/2/2006 Number of Units Left: 0

View History



Not a Valid Package

Package expired would you like to remove (delete) from your list?

Delete 3 Tans~Michelle Crook

Status: No valid package has been located

☐ Automatically Schedule Session into Bed

You can process a package in two ways.

1. Click on the tab **"Type Client Name"**. Then type the name of the client. Or select the client from the list of available sold packages.
2. If you are using the Package and membership cards you can click on the tab labeled **"Scan Package Card"**.

If a valid package does not exist the icon of a lock will be displayed. You can optionally delete the package from this screen if you wish to remove it from your list. This can be automatically deleted if you have selected that option in the "Create & Edit Package screen."

If a valid package is found you will now be able to process their visit. You can now click on the bed or room you will put the client into. Next you will set the bed information such as minutes. You then should click the **"Start"**

Process A Package

Type Client Name Scan Package Card

Package Name: Billy Pickett P
Item ID: 2

Client Name: Jeri Ricord, Jerri Smith, Lisa Pauler, Parris Greggs, Robert Brown, Roger Floyd, Steve Simms, Thomas Roman, Wendy Smith

Package Description: Billy Service Package for Pickett P

Purchase Date: 1/17/2004 Number of Units Left: 16

VIEW BOOK

Bed #1: Big Ben, SunRise

0

1 2 3
4 5 6
7 8 9
0

☐ Energize Lamps (No)
☒ Energize Lamps (Yes)

Unit Package: 5 10 15 20 25
Minute Package: 1

Start Stop

Status: A valid package has been located

☐ Automatically Schedule Session into Bed

If you select the **"Automatically Schedule Session into Bed"** option the client will automatically be scheduled into the scheduling system. Using the current time and the selected bed. This option is helpful, as it will automatically block out the current time in your scheduling system.

Point System:

By selecting the point option in the “Setup Wizard” “Tanning Options” screen. You can setup the points that will be deducted for each bed or room in your system. Points can be used with either session packages or minute packages. When this option is filled in and you process a package either the session or the minutes will be subtracted by the amount of points i.e. (A client using 10 minutes on a bed or room with 4 points will equal 40 minutes 10×4) This will allow you to subtract more points or minutes based on the bed or room that is used.

DeviceName

Bed 1

Bed 2

Delay / Undress Time Minutes

Maximum Tanning Time Minutes

Device Number Device Name

Com Port Setting Point Level

☐ Allow Clients to Use this Room without a package

☐ Control Beds With T-Max Timers

1

2

3

4

Bed 2

5

1 2 3

4 5 6

7 8 9

0

☐ Energize Lamps (No)

☒ Energize Lamps (Yes)

Unit Package 5 10 15 20 25

Minute Package 20

Start Stop

Points

Series Tracking:

MPOS allows for series tracking this is the ability to sell a package allowing the employee that sold the package to receive commission on the package that is sold. Then the employee that renders the service can also be tracked and given the proper commission.

☐ Services ☐ Inventory ☒ Package or Series

Item	Commissic	Retail
Tan Session	.30	25

Commission overrides located in the setup wizard under commission options should be used in conjunction with series tracking you will need to set the commission rate for the series in each of the employee's commission profile. Series packages when they are redeemed carry a 0 values so you must override the amount in order to properly calculate the commission for the package.

Service Packages:

If you select a package that was sold as a service package then you will be given the choice to select the item or product that will be removed from the package. You should now click on the service or item from the list displayed. The item will be removed from the list. This will create a sale receipt for the amount of 0. This receipt will be used for tracking commissions for this item. Because the sales receipts is set to 0 you will need to use commission overrides in order to properly calculate commission for any items processed on a service package.

Process A Package

Type Client Name Scan Package Card

Package Name Item ID

Tan Session~Michell 4554233466

Client Name

Cindy Rohl

▶ Michelle Crook

Michelle Crook

Package Description

30 Tan Sessions Sample Data Service Package for Michelle Crook

Purchase Date Number of Units Left

5/2/2006 2

View History

ABBA Creme Mask

AC Daily Poo

If you have pictures associated with your customer profile. The customer picture will be available during your process a package screen. If no picture is associated with the customer profile the picture box will be invisible.

Process A Package

Type Client Name Scan Package Card

Package Name Item ID

Tan Session~Michell 9444435814

Client Name

Cindy Rohl

▶ Michelle Crook

Package Description

30 Tan Sessions Sample Data Service Package for Michelle Crook

Sell a Package

Sell Package or Session

Find Client

Status

Waiting For Client Information.

Exit Sell Package


Void Package

Use this option to sell a package to a new or existing client. The first step in sell a package is clicking on the button labeled **“Find Client”**. The client info box will be displayed. *See Client Profile (POS) in the Tools You Will Use Chapter, for more information on finding clients.*

Use the **“Exit Sell Package”** button to cancel and exit the sell package feature.

Use the **“Void Package”** button to void an existing package.



Sell Package or Session





Find Client

Status:

Package ready to be checked out. Waiting for you to select the 'Check Out Now' or 'Put On Hold' button....

Client Name : ID

Record

2782221367

Unlimited

Package Description

Unlimited

Unit Amount

800

Retail Price

\$250.00

Once you have selected a client you must then select the package that you will sell to your client. This list comes from the packages you have created in the **“Manage Packages”** section. When you select a package it will automatically fill in the information such as package description, unit amount and retail price. After you have selected your package you are now ready to check out your client. You can do this by either selecting the **“Check out Now Button”** or the **“Put on Hold”** button.

If the account number or customer name already exists you will be given the choice to either add to the account number. Delete the account number or create another package. This feature will help you manage duplicate packages for customers.

Package already exist what would you like to do?



Add to Account Number 4617539552 for Rohl	Delete Account Number 4617539552 for Rohl
Create New Package for 4617539552 for Rohl	

The Check out now button will send the current package to the cash register system. And allow you to ring out the transaction. After the transaction is completed you will be returned to the main tanning screen. If you decide to put the package on hold, the item will be sent to a ticket but placed on hold. *See the documentation in the chapter “Using the Cash Register” for more information on putting and taking items of hold.*



Managing Service's & Membership Packages

Creating Managing & Selling

You can activate this function by selecting the tanning option and selecting "Create and Manage Packages".

Create & Manage Service Packages

Tan Session

Package Name

30 Tan Sessions Sample Data

Description:

* Select the Package Type

☒ Quantity ☐ Time Period ☐ Service Package

Manage This Packages as:

☐ Sessions ☐ Minutes

1

Select the Amounts of Units for this package

\$101.00

* Retail Price For Services Rendered Or Total amount for period packages


Optional Tax Level

Tax Level

Additional Surcharge

* Fields necessary for cash register checkout

Use this screen to create packages that will be sold.



☐ Use Membership Package Cards or Account number assignment. If you do not select this option the system will create and manage random account numbers for each package

☐ Automatically remove and delete expired packages after last usage.

Select the Beds or Rooms That Can Be Used With This Package. Hold The shift button down to select multiple selections.

Bed 1

Bed 2

You can automatically remove expired packages by clicking the box labeled "Automatically remove and delete expired packages after last usage" This will delete the package from your list after the last session is used.

Service packages are any service or package deal that consists of purchasing a bulk quantity at discount for future use.

MPOS gives you the ability to manage, track and report packages such as tanning spa or frequent user packages. In this area you will enter a **package name** this will be used in your reports and also will print on your receipts.

Description is used to describe the package or service.

Quantity and time period are used to manage your package amount field, used to describe the amount of usages for this package.

The **time period** denotes an amount of days that this package is valid for. Retail price is the price this service is sold for initially. You can optionally create a package that is used with a certain amount and an expiration date. I.e. 10 tanning sessions that expire in 30 days. If you are creating a package that also charges a surcharge such as a fee that is paid each time the package is used this can be done by entering an amount in the additional surcharge field.

Packages are maintain either using bar coded plastic membership cards that are available from your dealer or by assigning an account number during the ring up session. You can optionally use their phone number or any account number you assign to them.



Use service cards from your dealer Resources, fully compatible with barcode scanning. Contact your sales rep for pricing on cards.

When the item or service has been depleted it will inform the user and either remove the expired account or place in on hold until used again. Managing the packages is done using several reports. The first is "Package Report", this report is located on the main screen in the report section also available is the "Package Details" Report. You can also run daily sold packages by running a daily department report. Each package that is sold and created is assigned to department "packages" therefore allowing it to be tracked and reported separately from other services.

Restricting Access to Beds:

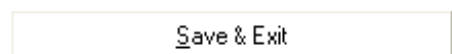
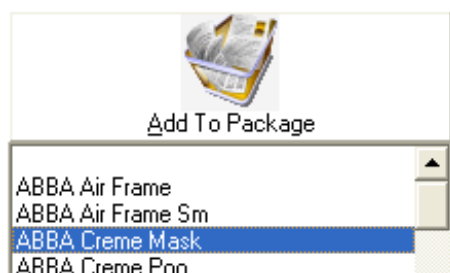
By selecting the beds you wish to be used with each package you can restrict certain packages so that they only can be used with the beds you have chosen. This is done by clicking on the beds or rooms of your choice. You can click several beds or rooms by clicking one at a time. Those that are highlighted are the ones that can be used with this package all others will not be made available during package processing.



☒ Service Package

By clicking on the button labeled "Service Package" you can sell and manage packages that are a mixture of services and products i.e. (1 manicure, 1 pedicure, 1 bottle of shampoo).

To add items to the service package click on the button labeled “Add to Package”. Once you have added all the items you wish you can now click on the “Save & Exit” button to save your choices.



You can also manage package that have been sold to clients. To enter this section click on the button labeled “**Manager Packages**”. This will activate the manage packages option.

Manage Existing Client Packages

Double Click On Columns to Sort By Column.			
	Item Name	Account Number	Description
▶	Billy Pickett-P	2	Billy Service Package for Pickett-P
	Tan Session Floyd-C	1	30 Tan Sessions Sample Data Service Pac
	Tan Session Jeri Ri	4525473216	30 Tan Sessions Sample Data Service Pac

From this section you can optionally edit, preview or print any information regarding packages that have been sold to any client. You can edit information in this section by clicking on the cell and typing over the information.

Client Maintenance

See the Chapter Client Profile Management.

View Room Monitor

Used with T-max Timers Only



Before activating this feature make sure your timer is connected correctly to the pc. Refer to the T-Max Series Timers User Guide on setting up your timer with a computer.

- **View Room Monitor (F5)** Use this option to view Room Monitor
- **View Room Parameter Data (F6)** Use this option to view timer and bed information.

You will only see these options if you have selected in the setup wizard under **General Features** the option of scheduling. You can choose the default mode in this screen if you choose tanning mode you will have full access to these options.

Monitoring Tanning Rooms

View Room Monitor (F5)

	Bed1	bed2	bed3	Bed4	Bed5	Bed 6
READY	0 Minutes	0 Minutes	0 Minutes	0 Minutes	0 Minutes	0 Minutes
DELAY						
TIMING, LAMPS OFF						
TIMING, LAMPS ON						
DIRTY BED						
Data Error						
EEProm Data Error						
Current Off						

Use this option to view a snapshot of your entire bed network. This will show you the status of each bed including the time on each bed. Status mode includes if it is in delay mode / undress time. Timing with Lamps off or on. Or if it needs cleaning (Dirty Bed). You can refresh at any time by clicking **F5** on your keyboard.

View Room Parameter Data

Used with T-max Timers Only

View Room Parameter Data (F6)

	Bed1	bed2	bed3	Bed4	Bed5
Session Count	61	0	0	0	0
Lamp Hours	23	0	0	0	0
Bed Hours	9	0	0	0	0
Manual Sessions	0	0	0	0	0

Use this option to view a snapshot of your bed parameter data as reported by the t-max timers for each room on your network. This will show you the status of each bed this includes session counts for each bed, lamp hours, bed hours and manual sessions. You can refresh at any time by clicking **F6** on your keyboard.

Cash Register Check Out Client

See the Chapter Using your Cash Register

Bed Audit Report

This option will direct you to the report system and activate the report the Bed Audit Report.

Setup Beds

See the Chapter Setting Up Your System (Tanning Options)



(ADVANCED FEATURES)

These features are advanced options of the tanning system. They have already been discussed earlier in this chapter. These features are functions that were available in older version and have now been automated into this version. These features have been retained for those who wish to continue processing their tanning options the old fashion way. If you are a new user you do not need to cover this material unless you would like to look at alternative ways of processing tanning options.

Controlling Tanning Rooms

1. If the manager has activated "**Allow open tanning**" (In the setup wizard under *Tanning Equipment*) then you can activate a session by simply clicking on any open or used spot on the scheduling grid.

Then select the option to **Activate Room Controller**

```
Schedule With Helper
Activate Room Controller
Edit Johnson-M (BDIC) Appointment
Ring Up Johnson-M (BDIC) Appointment #10
Add New Client
View Johnson-M Client Profile & History
Delete Appointment
Look Up Existing Package
```

2. If the manager has not activated "**Allow open tanning**" then you must schedule an appointment in order to activate the room controller. Follow the instructions in the chapter *Appointment Scheduling*. After you have scheduled the appointment. The option will be enabled to allow you to **Activate Room Controller**.

```
Schedule With Helper
Activate Room Controller
Edit Johnson-M (BDIC) Appointment
Ring Up Johnson-M (BDIC) Appointment #10
Add New Client
View Johnson-M Client Profile & History
Delete Appointment
Look Up Existing Package
```

3. If the manager has selected that this room can only be used with a membership package then you must select the option **Activate package Lookup (Room Requires A Package)**. Also with release 9 (5.0.9) you can optionally click on any appointment then select the lookup packages option this will automatically find any client that has an existing package within the system. And you can automatically schedule your client into the time slot you select using the package information. To do this first select the time period then when the menu above appears select the option "Look up Existing Package". The lookup package screen shown below will appear. Select the package or client that will be scheduled and press the option labeled "Process This Visit". The appointment will automatically schedule into the time slot you have selected and the package will be sent to the cash register.

```

Schedule With Helper
Activate Package Lookup (Room Requires A Package)
Edit Johnson-M (ServiceTest2) Appointment
Ring Up Johnson-M (ServiceTest2) Appointment $55
Add New Client
View Johnson-M Client Profile & History
Delete Appointment
Look Up Existing Package

```

This will activate the Package Lookup feature. Use this feature to find the client's package. Once you have found the clients package and it is valid click on the button labeled **Activate Room Controller**.

Use any of these 3 options to activate the room controller.

Once you have activated the room controller you can now set the time and lamp options. You can also set the options to energize lamps here. If you have activated room controller from the scheduler system, then the minutes should automatically be shown for the package. If it is an "Open Tanning Session" then you must select the amount of minutes. Once you have selected the minutes you can now start the bed by clicking on the button labeled **"Start"**

You can optionally stop a session by clicking the button labeled **"Stop"**. You can also view the time that is reflected on the t-max timer by pressing the button labeled **"View Current Time on Timer"**.

Once you have activated the bed or room. The **Activate Bed Controller** will minimize but will remain on the top of the screen. This will allow you to check on the room's current time. It will also allow you to stop a room's bed at any time. Keep in mind that if the options in the setup wizard are flagged to

force employees to log in. Then employees will be required to log into the system before they will be able to control a bed. Also all activity will be logged into a printable report labeled Bed Audit Report. This report is viewed by entering the **Report Management** section.

Schedule For <u>E</u> mployee	F3
Schedule For <u>T</u> anning Beds	F4
<u>V</u> iew Room Monitor	F5
View Room <u>P</u> arameter Data	F6
<u>P</u> rint	F2
Exit	

Listed under the file menu of the scheduler is the scheduling option.

- **Schedule for Employee (F3)** Use this to switch modes or modules from employee to tanning modes.
- **Schedule for Tanning Beds (F4)** Use this to switch from Employee mode to Tanning Bed Mode.

Error Codes Defined

(T1) Unable to receive confirmation from T-Max Manager, either the serial cable is not plugged in or there is no power to the t-max manager. You may also receive this error if your Com port settings are set at a higher receive and transmit rate. To adjust these settings enter your control panel and view the port settings under the systems option. You can optionally change the timer error settings inside of MPOS. This is located in the scheduler under the file menu. Try changing the error time to a number larger than the default 1000 this will make the software wait longer for the response message from the t-max timers.

(T2) Information missing in the setup wizard. The system cannot find the device name or related data such as port settings. You must enter the setup wizard and make the appropriate changes.

(T3) Could not find the device so could not log the minutes in the bed audit report.



Caution should be used when changing the time interval from the default 15-minute scheduling block. By changing the fields to a lower value you may lesson the amount of time that can be scheduled. The system has physical restraints of 255 fields that can be used on a certain scheduling period. So if you change your default time to 5 minutes you may only be able to schedule for a certain amount of hours depending on what time you open. If you receive error messages or you are unable to save certain time periods try increasing the time intervals to a higher number.



Time Clock

Time Clock



☒ Clocking In ☐ Returning From Break



Logged Status

Type Scan or Swipe Log in ID:

1	2	3
4	5	6
7	8	9
	0	.

☒ Leaving For the Day ☐ Break



Use the time clock feature to track employee time sheets. This feature can track the time an employee clocks in, clocks out for a break and leaves for the day. To use this feature you must first setup each employee in the system. This is done in the setup wizard under employees. Each employee will be assigned an employee number. This number will be used to log in and out of the system. It can be typed into the appropriate box or scanned in with a barcode scanner. Once your employees access this screen they can optionally choose to clock in.

Or clock out, this is done by clicking on the button labeled “**Clock Off**”. It is important before you press this button that you select the reason for clocking in. You will have two options, clocking in for the day, or returning from a break. Once you have selected the reason for clocking in and have clicked on the clock in button you will then be prompted to leave the time clock.

Clocking off is done the same way as Clocking in. You must first enter your employee number into the system. Then select the reason for clocking off. Either leaving for the day, or taking a break. Once you have selected the reason for clocking off you can now click on the button labeled “**Clock Off**”. You will now be prompted to leave the time clock system.

Time Clock Manager

Week Starting

2/20/2004



Week Ending

2/27/2004



Florida
Greggs
Woods



To make changes or delete a row click on the cell that you wish to change.

Date	Employee Name	Time In	Time In Purpose	Time Out	Time Out Purpose	Total Hours
Totals Hours Work						0:0

As a manager you can view time clock reports by accessing the Time Clock Manager. This feature allows you to run detail reports on employee time sheets. You can do this by clicking on the starting date, then selecting the ending date. Once you have selected your date range you must select the employee. A detail report will be displayed on the grid. This will include the employee name, the time they clocked in and out, as well as any breaks that were taken. The report will display for each date the hours worked then give you a total of all hours worked for the time period you have selected. Clicking on the button labeled "Print" can print this report.

To make changes add or delete a row click on the cell that you wish to change.

Date	Employee Name	Time In	Time In Purpose	Time Out	Time Out Purpose	Total Hours
5/5/2006	Burkus	2:42:07 PM	Clocking In			
Totals Hours Work						0:0

Add


Edit ()

Delete ()

If your row displays in red this means the record was not completed the employee failed to clock out. The totals will not be added to the hours worked. You can edit this by clicking on the row then type in your changes. You can optionally add a punch in record or delete an entire record using the menu shown above. You can exit the screen by clicking the button labeled **"Finished"**.



Backup Utilities



 **Successfully Connected**

\$35.00 (1) Backup expires (30 Days)

\$15.00 (5) Services expires in (Days)
\$20.00 (5) Services expires in (Days)
\$25.00 (5) Services expires in (Days)
\$30.00 (5) Services expires in (Days)
\$35.00 (5) Services expires in (Days)
\$40.00 (5) Services expires in (Days)
\$45.00 (5) Services expires in (Days)
\$50.00 (5) Services expires in (Days)
\$55.00 (5) Services expires in (Days)

Select Payment Type
☐ Credit Card ☐ Bank Draft

this package allows you to backup one time on our server. This option is good if you want to create a master backup file.

Account Number:

Steps to setup an account

1. Connect to the Internet.
2. Select the service you wish to sign up for.
3. Select your payment type.
4. Click the Send Request Now Button.
5. Within 72 Hours return to this screen and click the Check Status Button.

Backup Utilities is a function used to manually or automatically back up your MPOS system data. You can use this feature to backup, restore or manage remote backup functions. You can use the standard backup features to backup the data to your existing computer or a removable devices. You can also sign up for online backups this can be done by clicking on the online backup application. Before entering the screen should be connected to the Internet.

Once the screen is activated it will list all the existing backup packages. You must then click on the package of your choice and then select payment type. Once you have selected the package and Payment type you are ready to send your request. This is done by clicking on the button labeled **"Send Request Now"**. This will send a request to your dealer to review create and activate and account.

Accounts usually take 48 to 72 hours to process. You can return to this screen at anytime. You should connect to the Internet and check the status of your request by clicking on the button labeled **"Check Status"**. Once your account has been activated this option will activate your account.

If your computer has a high-speed connection to the Internet such as DSL or broadband. You can select the schedule backup button. This option will allow you to schedule how often and at what time the system should be backed up. You can select everyday, week, two weeks or month. You can also tell the system how many times to attempt to back up before quitting the backup process for the day. You can also activate the option to automatically backup without prompting. This option is used when you have an existing connection to the Internet at all times and you wish to system to backup your data automatically without asking or prompting you.

Backup Every

☐ Day

☒ Week


☐ 2 Weeks

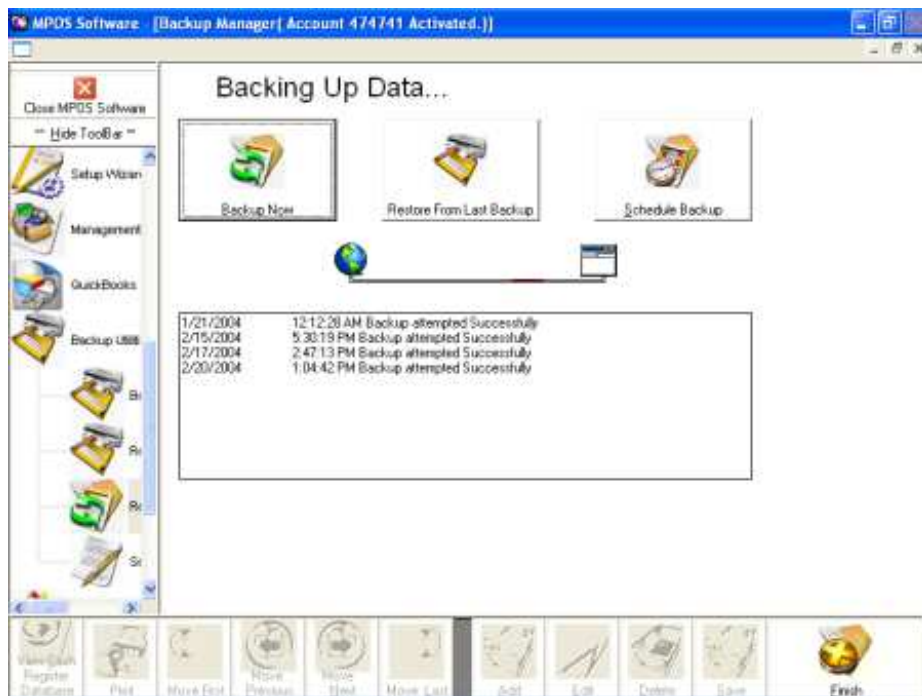
☐ Month

Backup at what time

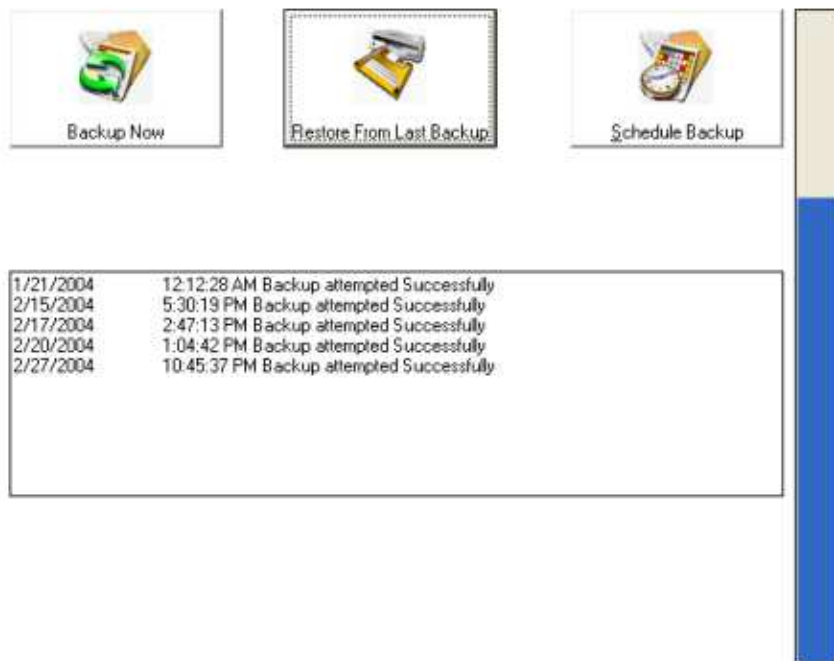
How many times should we try before quitting?

☐ Automatically Backup Without prompting



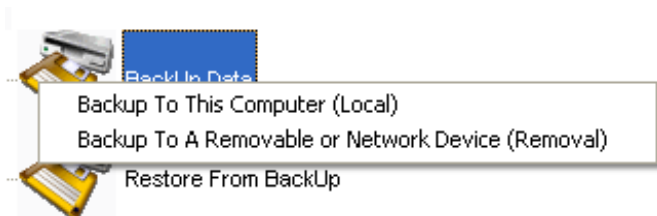


Once your account has been created you can now enter the remote backup and restore screen. To backup your data simply click on the button labeled **"Backup now"**. The system will use your Internet connection and login to the remote server it will compress your data and back it up to a secure remote location. This process can take several seconds to several minutes depending on the speed of your Internet connection and the size of your database. A running log is also generated showing you the last time you attempted to backup and whether it was successful or not.

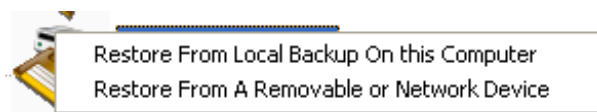


Restoring from a backup is done in the same location as backing up your data. After clicking on the remote backup and restore button. Click on the button labeled **"Restore From Last Backup"**. Make sure you are connected to the Internet; the system will then find your last backup and download it to your computer. The status bar will show the progress of the download. After the system has fully downloaded your backup file. It will then prompt you to restore the data now.

By responding yes, the system will copy over your existing database and restore from your last backup. Any data that was entered after the backup will be lost, so caution should be used when restoring from any backup.



Those wishing to backup their system but do not wish to create an online backup account. Can do this using the local or removable backup feature. To do this simply click on the button labeled backup data, you'll be given the choice to backup from a local or from a removable or network drive. If you select local the system will backup to your existing installation directory. If you choose to back up to a removable or a network drive you be given the choice to browse to the path of that removal device. This can be a "zip" or "usb" drive, or a CD-ROM Path. Simply browse to the path and click the save button to backup your data to a different location.



You can optionally restore from either a local computer or from removable or network device. If you are restoring from a local backup click on the button labeled "**Restore From Backup**". The system will scan your local installation directory and restore from the last backup stored in that directory. If your backup is on a removable or on a network device you can insert that device and click on the button labeled "**Restore From Removable or Network Device**". The system will then prompt you to browse to the path of your backup. Once you have located the path of your backup click on the button labeled restore and the system will restore from the backup you have selected.



Those having problems with this feature will want to check to make sure that when they are backing up or restoring that only one computer is currently running the MPOS software. If you are on a network and other computers are running the software you will not be able to restore the data until all other computers have released the database or have shutdown MPOS software. In most cases simply restarting the computers will fix this problem.

Multi Store Documents



The enclosed document is provided to help setup and manage the new multi store option available in MPOS PRO and MPOS GIFT CARD. This document will handle the following:

- Setup TCP option
- Testing the TCP option
- Trouble Shooting your TCP connection

Setting up TCP Options for the Host Computer

Before installing or configuring MPOS on any workstation you must first identify which location will be **Host** (The computer that all other computers will connect to.) or **Client** (The computer that will connect to the host computer.) The same files will be used in both instances for the host and the client machine so you will not need to install any other modules other than the main installation files.

To setup your host computer enter the setup wizard and select the “**Feature Setup**” option. You can then add “**Multiple Store Management**”. This option is only available in Pro and Multi store options. If you are using the basic version contact your dealer for upgrade options. Once you have added this feature you can then begin to setup your system as Host. From your main login screen select the button labeled “**Management Tools**” if you do not see this option make sure the password you are using has access to this feature. Then select the button labeled “**Multiple Store Management**”. You will then be given the option to select what type of interface you wish to work with.

Select the computer type:

☒ Client / Remote Computer ☐ Server / Main Computer

Connect Using: Your IP is 192.168.0.100

☒ Internet ☐ Phone Line
Connect to another computer when processing:

☐ Gift Cards
☐ Scheduling
☐ Report Data
☐ Inventory Data
☐ Tanning Packages

Main Computers IP Address:

Main Computers Port: Host Port:

For setting up your host machine you simply need to select the radio button labeled “**Internet**”. Then select the “**Host Port**” this is the port that this computer will open and listen. If another computer needs to contact this computer it will have to send it to this port if it is sent to any other port it will be ignored. You do not need to select any other options for the host, as this machine is the computer that will host the connections from all other computers. Your IP address will also be shown here.

After saving your settings exit MPOS and then reopen the application. You will notice two things. First MPOS startup screen will read:

 MPOS Software - [Startup Screen MPOS Software Version 6.0.6 (Listening)]

Also in your windows taskbar you will find an icon:



This icon represents MPOS as listening to the open port. If MPOS is unable to open you will receive the following icon



This means MPOS tried to open the port specified but the port could not be opened either it is unavailable or it is being used by another application or process. You will need to resolve this before continuing.

MPOS is now running in host mode other computers can now access this systems data via the internet using the IP address of this computer and the port that MPOS is currently listening to.

Setting up TCP Options for the Client Computer

To setup the client computer follow the same options you would for the host machine. You would need to select the options you wish to apply to this computers setup

Select Gift Card if you wish this computer to connect to the host computer to activate, check and redeem gift cards.

Select Scheduling if you wish this computer to connect to the host computer to view and edit appointments.

Select Report Data if you wish to connect to the host computer to check reports

Select Inventory Data if you wish to connect to another computers inventory database.

Select Tanning Packages if you wish to connect to another computers tanning packages.

You will need to enter the host computers IP address if you host is behind a firewall or router see the section on *troubleshooting your TCP connection*

You can now setup your store connection this is done by clicking on the button labeled “Setup Store”.



Store Setup	
STORE #	Store Location
▶ Augusta,GA	Augusta,GA
▶ Athens,GA	
▶ Atlanta,GA	Phone Number
▶ Macon,GA	2284616
◀	
Add	Delete
Setup Modem	Exit Setup Store

To set up a store you must click on the button labeled **Add**. Then you will be able to type in the store location and phone number or IP Address that the client computer is plugged into. You can optionally edit or delete a record by either typing over an existing record, or clicking on the **Delete** button to remove a record permanently. Once you have made your adjustments or added store locations you can click the **Exit Setup Store** button to return to the main screen.

Reports & Inventory

Once you have configured each location that the main computer will connect to you are now ready to connect. To access a location click on the store account located on the top right corner. Then click the connect button. You can now use the drop down box to select the report you wish to view. Depending on the speed and quality of connection the request will be sent to the remote computer. The remote computer will assimilate the data and send the data back to your computer. Your computer will then decrypt the information and display it on the grid of your screen. From here you can view or print any information. You can also query a report using date ranges based on the report specification. Certain reports are not available due to its complexity or availability.

Select the computer type:
☐ Client / Remote Computer ☒ Server / Main Computer

Connect

Augusta, GA/2284616
Athens, GA/275-2289
Atlanta, GA/275-2289
Macon, GA/275-2289

Setup Modem Setup Store

Manage Data
Reports Stock Inventory

Select Report
Daily Card Types
Daily Cash Totals
Daily Check Totals
Daily Client Totals
Daily Credit Card Bal
Daily Credit Card Tot
Daily Department Id
Daily Details

Reports Stock Inventory

By clicking the stock inventory button you are sending a request to the client machine to assemble a list of stock inventory items. The system will send a request for the full inventory list. Then you can select the view button, which will bring up that items detail. From here you can edit or delete any information listed.

ItemName	BarcodeID	View
2 in 1 Cleanser	4011396921110	View
A Peel	4011396923113	View
Acne Serum Gel	ACN02	View
Action	07010	View

Once you have found a record and you wish to see, click on the inventory item. This will send a request to the client machine to send the full inventory data for the record you specified.

Processing Gift Cards

When processing Gift Cards in MPOS see the documentation on setting up and processing gift cards in the MPOS manual for detail information on using this feature. Some notes to consider when you activate this feature with multi store capabilities.

- When this option is activated on client machines MPOS will connect to your host machine to check the value of the gift card that was selected. Also when checking value and redeeming a card MPOS will always connect to the host machines gift card stock.

- When selling a gift card MPOS will pull a list of gift cards from its local database. Therefore if you are going to sell and activate gift cards you will need to enter MPOS Gift Card Management change your mode from remote to local then add your stock with their full value (*With multi store you are not allowed to enter a gift card with a 0 balance they must have a balance when they are created*) into your local database. Then return to the gift card management screen and reactivate the system to manage by remote. This will enable you to sell from your local stock. When you sell a gift card this gift card will be activated then uploaded to the host machine so that any client computer connected to the host system can use it.

Processing Tanning Packages

When processing Tanning packages you can now select packages from any location that is connected via the multi store option. To do this simply click on the radio button labeled **“Check another Locations Packages”** Once this is selected you will be given an option to select the location by its name and IP address.

☐ Type Client Name
 ☐ Scan Package Card
 ☒ Check Another Locations Packages

	Package Name	Item ID
Augusta GA /68.47.23.231		
Atlanta GA/127.0.0.1		

Package Description

Once you select the location you will then be given a list of customers with valid packages. You can click on any customer and this will bring up the package details. You can then process the package as normal. MPOS will automatically update the package count on the host machine.

Testing the TCP Options

MPOS uses Windows Winsock for its Internet communication this tool allows you to test the configuration in a local setting. This is helpful in testing the functionality and also testing the features before you go live.

You should setup both machines to use the IP address “127.0.0.1” and use port “100” for local and host ports settings. To test MPOS on a single computer you will need to create 2 instances of MPOS. Or run the application 2 times. Because of security features MPOS will not allow you to start 2 instances on the same computer to override this you will need to make a copy of your mrcash.exe file (located c:/Program Files/Point of Sale) and rename the copy to mrcash2.exe. (Any name can be used) Now launch mrcash.exe this instance will launch with the listening mode activated. You can now launch the 2nd instance by launching mrcash2.exe. Because the first instance is using your port the second instance will open with the port closed therefore your windows tray should show both icons as displayed below.



This means you can now connect the two-application mrcash.exe and mrcash2.exe using the local host connection. You should be able to use any of the features of multi store the same as if you were connecting multiple computers over a standard Internet connection.

Trouble Shooting

Q. I am using a pos printer that supports the Windows Generic / Text only driver. When I try to use MPOS with the printer it will not print or tells me my printer is not configured correctly.

A. You have the print logo option checked in the setup wizard. Uncheck this options as Windows generic / text only drivers does not support printing images.

Q. When I start MPOS PRO it allows me to put in my password but halfway through loading in starts generating errors and will not let me in.

A. Your database has been deleted or damaged. If you have used the utility supplied to backup your database simply restore your last backup. If you can not find the directory MPOS PRO is located in, the default is c:\Program files\Point of Sale\ find the file named smp.mdb this is your database file delete this file and reinstall MPOS PRO in the same directory.

Q. When I try to run MPOS PRO I receive the error “Unexpected error 50003”

A. This is a fatal error caused by insufficient system requirements or software conflicts. You should contact your distributor for details on this error.

Q. I set my passwords in the setup wizard but I can't get in the system.

A. Keep in mind pass codes are case sensitive and even space sensitive so if you have used spaces or capitals they must be typed exactly as you have initially set them. Also if you are still unable to enter the system or have forgotten your pass code, refer to the password override card that was shipped with your product or contact technical support for an override pass code.

Q. When adding data into certain fields I keep getting errors.

A. Because Manager Pro runs reports some fields are date sensitive, meaning you must supply a valid date in 1/1/2000 format if you fail to input the information correctly your record will cancel.

Q. My pole display does not work or the messages that are being sent are unreadable.

A. You have not setup your hardware correctly MPOS software supports most standard pole displays that support either Emax mode or Aedex modes. You must consult your hardware documentation to change the dipswitches to reflect the mode your pole display is running in.

Q. The same product of different size & color usually come with the same product code. Is there any problem on this issue?

A. You can use several products with the same product ID or barcode ID. For details instructions on how this feature is accommodated please see *"Using your Cash Register "*.

Q. Can this system poll several stores or can it work connecting several locations?

A. This can be done if you are running a WAN or a LAN or using Internet or dialup connections. You must be running multi store version to use these capabilities.

Q. Is there a way to import items from another database to the pos system?

A. Yes see the chapter on *"QuickBooks Features"* The import feature listed here works for any standard CSV or txt file database.

Q. Is there a way to Use the Epson TM drivers instead of the OPOS drivers supplied?

A. When setting up your printer instead of choosing the Epson TM Pos printer select and windows pos printer. Then select the check boxed labeled use Windows Epson TM drivers instead of OPOS. You must install the latest version of the TM drivers for this option to work. A copy should be located on the CD you installed this program from.

Q. I am using a Star Micronics printer will it work with MPOS software?

A. In order to use a star printer or any printer using star emulation. You must install the windows star driver. *See the chapter setting up your system (Receipt Printer Setup)*

Trouble shooting your TCP connection

These are things you will need to take into consideration when setting up and using the multi store options or the QuickBooks Connector.

- Dialup connections can be used but there are certain factors to remember. Never use a dial up connection for the host. When you use dial up you are assigned a new IP address every time you connect therefore the client work stations will need the new IP address each time they wish to connect to the host this information is not available until after the host machine has established a connection. If you must use a dialup connection only use it on non-critical client machines. The IP address of the client machine is not relevant when the client is connecting to the host, only if the host needs to connect to the client.
- Be sure to update any firewall software. Make sure that MPOS can connect to the Internet and also listen on the port you have specified. MPOS will be designated as an application connecting as a server. You must give MPOS full server rights in order to receive request and respond to them.
- MPOS at times will respond with error messages such as “Connection Forcefully Refused” This message means a firewall has blocked the request from either a client or host machine. This must be addressed within the firewall or application that is blocking either the host machine from listening or the client from connecting to the Internet.
- MPOS at times will respond with an error message stating “Operation Timed Out” This message means that MPOS has sent the request to the host machine and there were no responses either the host MPOS software is not running or it is listening on another port.

You may also receive the Operation Timed Out” message when you attempt to connect to an IP address that is behind a router or firewall. If the computer that you are using shares its Internet connection with other computers then most likely it is sharing the connection through a router. When this is done all IP addresses are consolidated into one address so that the Internet connection can be shared. This produces a problem for host and client communication, as MPOS does not know which computer sent the request or which computer to answer to. This issue cannot be resolved in MPOS it must be resolved using the router software. You must: Either setup your router to do “Port Forwarding” This forwards the message to the correct computer behind the router. (Contact your network administrator for details) or use (DMZ *Demilitarized Zone*) enabling your IP to be exposed to the Internet.

MPOS for Windows®,

Basic & Professional Edition Command Reference

Cash Register

(Ctrl + C)	Price Check
(Ctrl + I)	Client Info
(F2)	Void
(F3)	Fast Cash Mode
(F4)	Discount
(F5)	Clear Ticket (Use with caution this clears your ticket but will not return your items to inventory)
(F6)	Quick Totals
(F7)	Ring up Sale
(F8)	Open Cash Drawer
Control (F8)	Cash Paid Out & Open Cash Drawer
(Shift + F2)	Ring up Packages
(Shift + F3)	Void Packages
(Ctrl + F)	Full Refund
(Ctrl + R)	Partial Refund