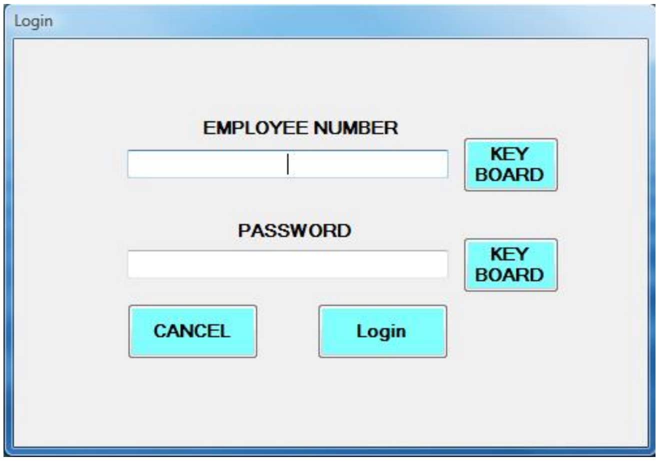
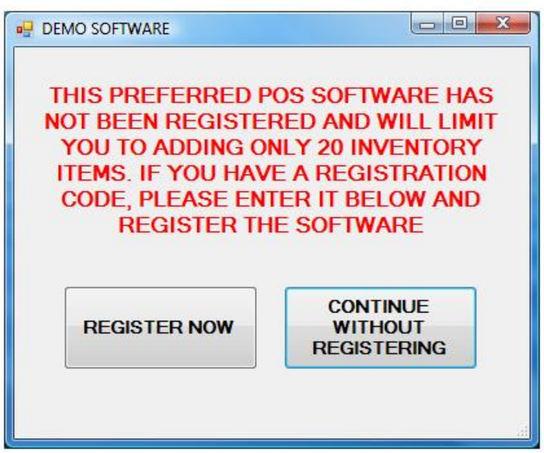
Version 1.2.1

LOG IN

The first thing you will need to do with Preferred POS is set up all your information. Log into the software using your Employee Number and Password. Your login information will be e-mailed to you when you purchase the software.



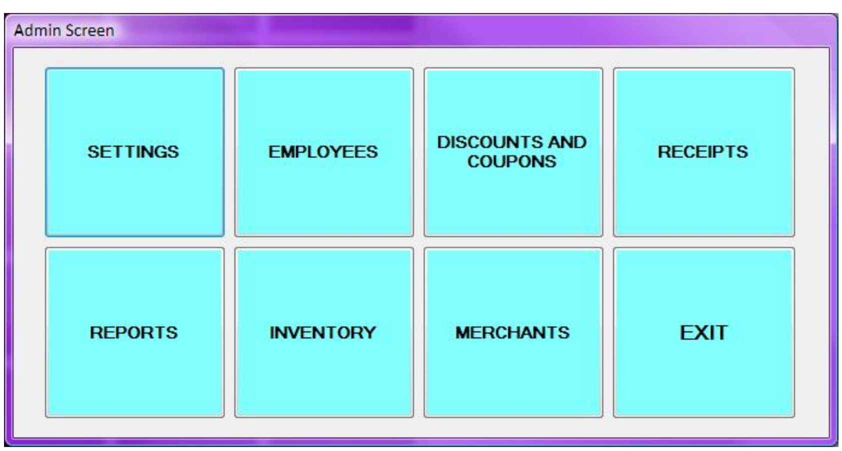
If you are using a demo version of the software you will not need to log in. You will just need to click "CONTINUE WITHOUT REGISTERING".



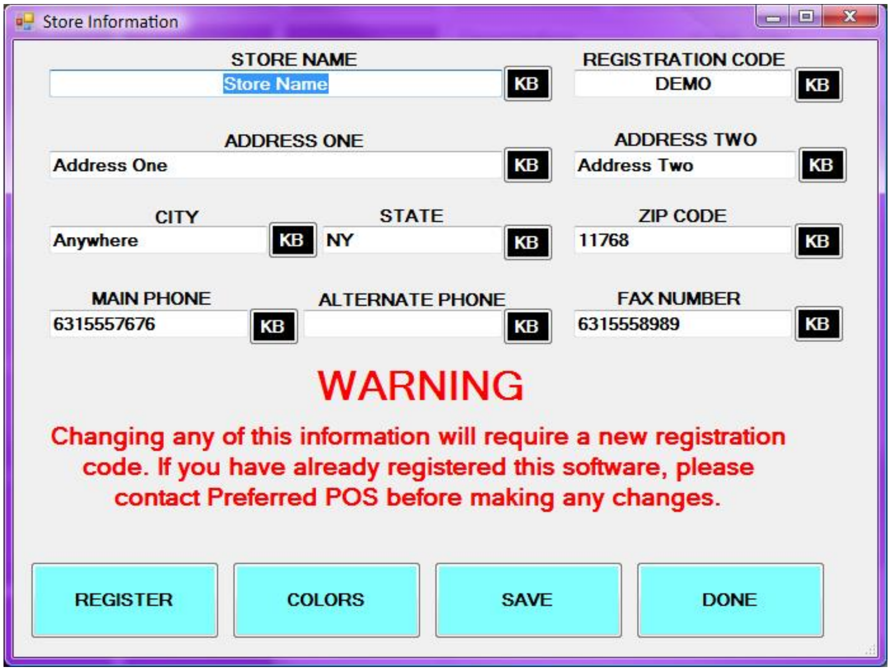
Once you have opened the software you will see the sales screen. But first you must set up everything you need before you start making sales. This is the default screen that will always appear when you open the software, so you're always ready to make a sale!

SETTINGS

To begin using your software click on ADMIN TOOLS or hit the F8 key. Here you will change your settings, enter employees, change security settings, add discounts and coupons, receipt settings, print reports, add and edit inventory, and edit merchant information.



First click on SETTINGS and enter your business information. If you are using a touch screen computer, with no keyboard, click on KB button next to the text boxes.

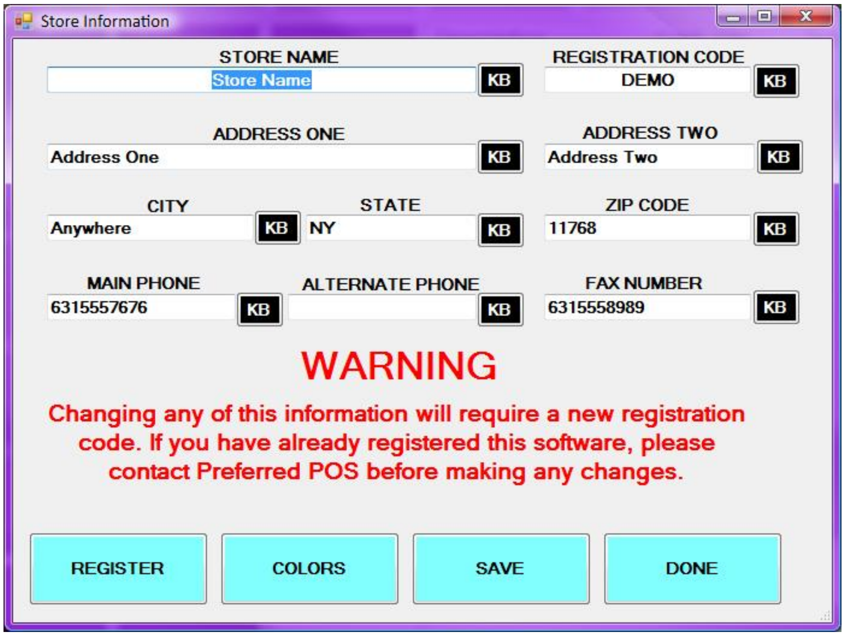


When you have entered your information click SAVE.

REGISTRATION

Once you have purchased the software, you will receive an e-mail on how to continue with your registration process. Once you receive your registration code via e-mail you can then register your version of Preferred POS. You can enter your registration code two ways. When you are finished entering the registration code or changing other settings, click DONE.

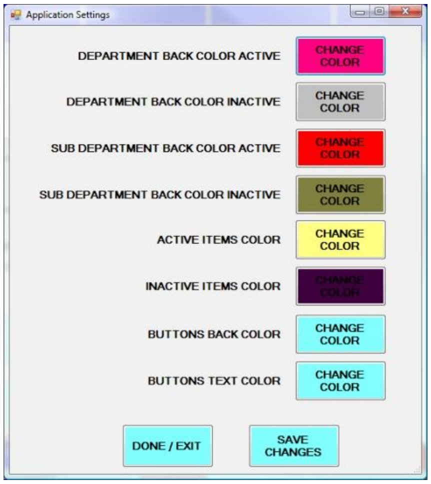
1) When the software is already open click on ADMIN TOOLS (F8) and click on SETTINGS. Enter your registration information, such as the store name and address and registration code. When you are finished entering this information click SAVE then REGISTER.
2) When you start up Preferred POS when using the demo version, you will have a window that will ask you if you want to register now, or continue without registering. Click on REGISER NOW, to enter your registration information. You will now be on the screen pictured below. Enter your information and registration code. When finished, click SAVE then REGISTER. Now you are registered and ready to start using Preferred POS.



Please note the warning on this page. If you change the store name or address at any time without contacting us your registration code will become inactive and the software will revert back to a demo version. If you are changing the store name or the address you will need to purchase a license transfer to receive a new registration code for the new information.

CHANGE COLORS

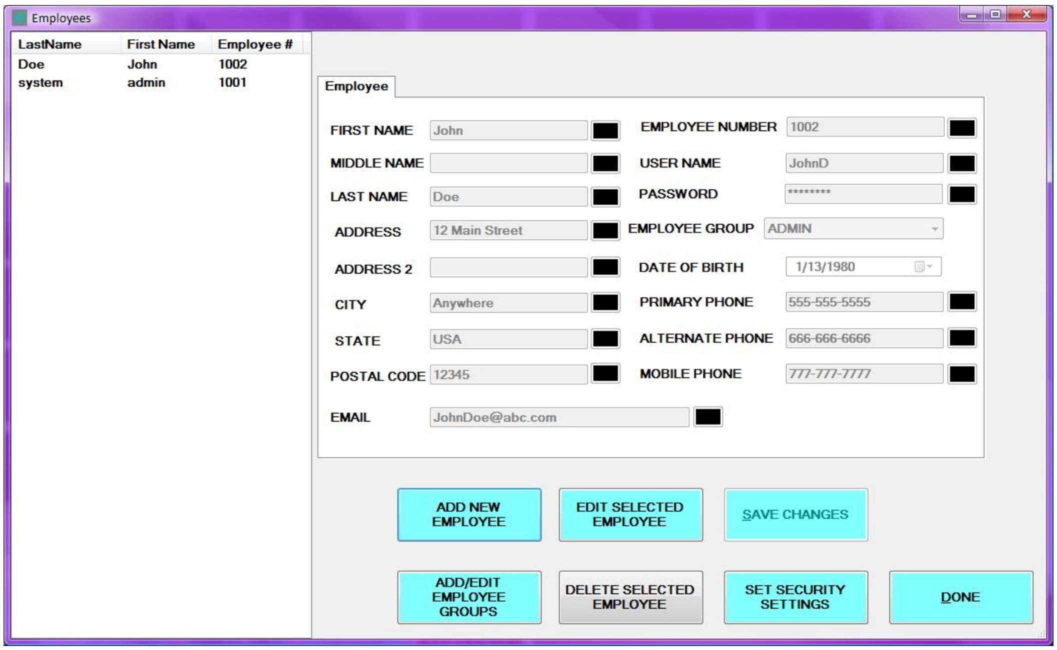
You can also customize the look of the software by changing some of the colors. To do this, go to ADMIN TOOLS (F8) on the top of the application and then click on SETTINGS. On the new window click on COLORS. From this new window you can change the colors of the buttons in Preferred POS.



To change the color of an item, click on CHANGE COLOR on the box on the right. A color window will come up where you can select the new color. When you are done selecting your colors, click SAVE CHANGES, and then DONE/EXIT to leave this window, you will need to restart the software for the new colors to show up.

ADD/EDIT EMPLOYEES

To add employees go to ADMIN TOOLS or hit the F8 key, and click on EMPLOYEES.



Here is a list of your employees. When you first register the software you will have two default names. You can edit these names to your real employee names.

ADD A NEW EMPLOYEE

To add a new employee click on ADD NEW EMPLOYEE. The area will now clear and you are able to enter your employees information.

The EMPLOYEE NUMBER is used for when your employees clock in and out, it is used like a user name. This can be numbers or letters or a combination of both.

The EMPLOYEE GROUP is used for security purposes. You can set different security settings in Preferred POS to what you want your employees to be able to do.

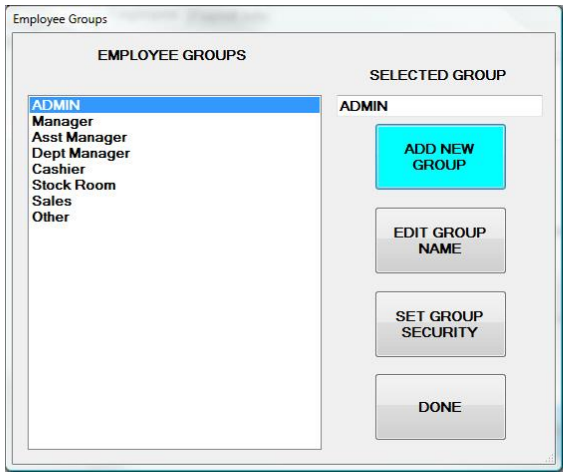
Click SAVE CHANGES when you are finished entering the employees information.

EDIT AN EMPLOYEE

Select a pre-existing employee and click EDIT SELECTED EMPLOYEE. Now you can edit or change the information. Click SAVE CHANGES when you are finished. You will get an alert saying "Employee Update complete".

ADD/EDIT EMPLOYEE GROUP

Employee groups are used with security settings. You may not want some of your employees to access certain features. By default some groups are included for you.



ADD NEW GROUP

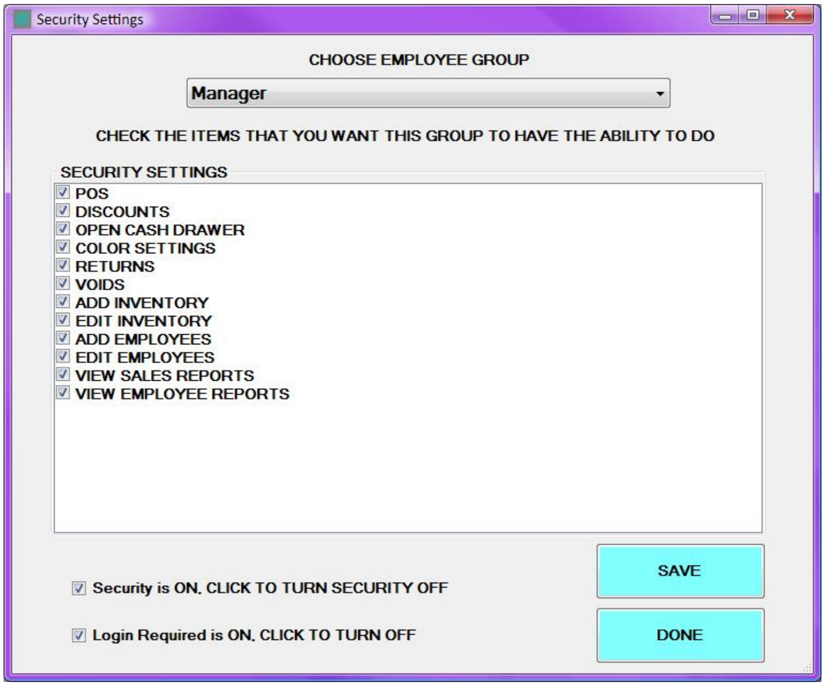
To add new employee groups click on ADD NEW GROUP. You can then type the name of the new group in the text box to the right. Click SAVE CHANGES when you are done typing in the name of the new employee group. Click DONE when you are finished adding your employee groups to exit this screen.

EDIT GROUP NAME

To edit an employee group, select the group you want to edit on the left and click on EDIT GROUP NAME. Enter the new group name in the text box to the upper right. Click SAVE CHANGES when you are done.

SECURITY

To change the security for your employees click on ADMIN TOOLS or hit the F8 key, click on EMPLOYEES and on the employee screen click on SET SECURITY SETTINGS



On this screen you will select an employee group from the drop down box. In the middle part of this screen you will choose what abilities you want your employee groups to have. When you have selected which abilities you want your employee groups to have click on SAVE.

Check the abilities that you want the employee group to have access to.

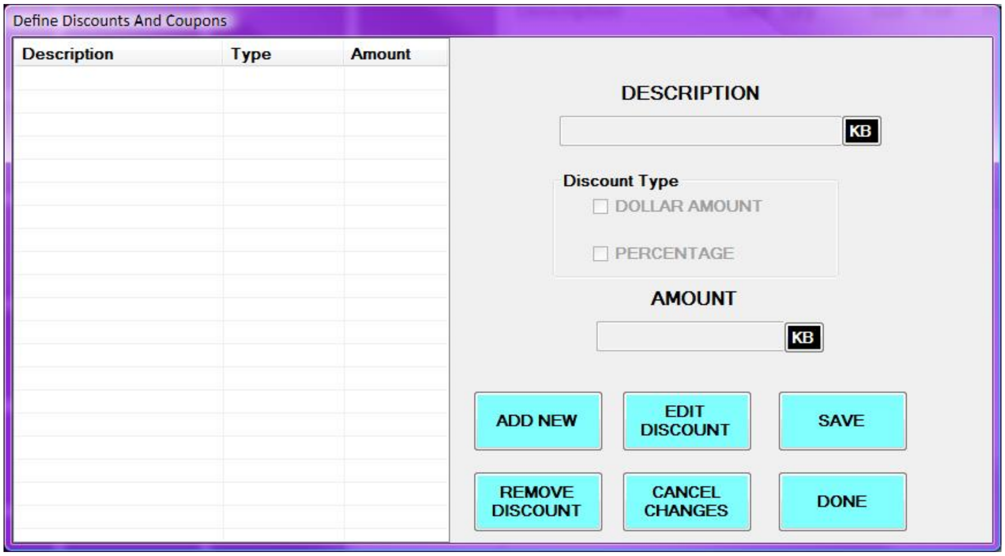
Also on this screen you can turn the security off completely. All employees will then have the same security settings and will be allowed to access everything. Check the box on the bottom if you want the security function turned off.

You can also turn the login function of from this screen. When this option is turned off, you will not have to log into the software when opening it. Check the box on the bottom if you want this function turned off.

When you are done making any changes click SAVE then DONE to exit this screen.

DISCOUNTS AND COUPONS

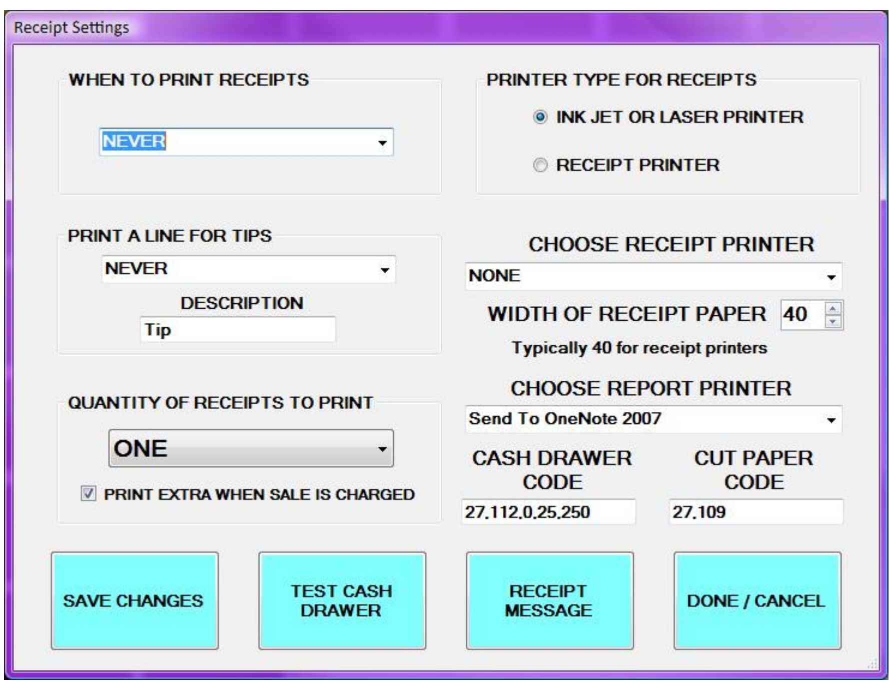
To set up discounts and coupons in the software click on ADMIN TOOLS or hit the F8 Key. then click on DISCOUTNS AND COUPONS. Currently this section is still being worked on.



RECEIPTS

To change printer and receipt settings click on ADMIN TOOLS or hit the F8 Key. On the next screen click on RECEIPTS

Here you will select which kind of printer you are using to print your receipts, when to print receipts and other details.



First you will need to select what kind of printer you are using to print your receipts. A receipt printer or a printer that prints on 8 ½ x 11 paper (Ink jet or Laser).

Then on the right bottom hand side you will need to select the printer that will print your receipts and one that will print your reports.

The cash drawer code and cut paper code can be found at the link below. On this webpage find the model printer you have in and copy the code exactly how it is written on the website.

http://pages.prodigy.net/daleharris/popopen.htm

You can also select when you want receipts to print and how many to print. You have the option to Never print, prompt to print receipt or always print.

You also can add a tip line to your receipts.

When you are done selecting your printers, selecting receipt settings and adding the codes click SAVE CHANGES.

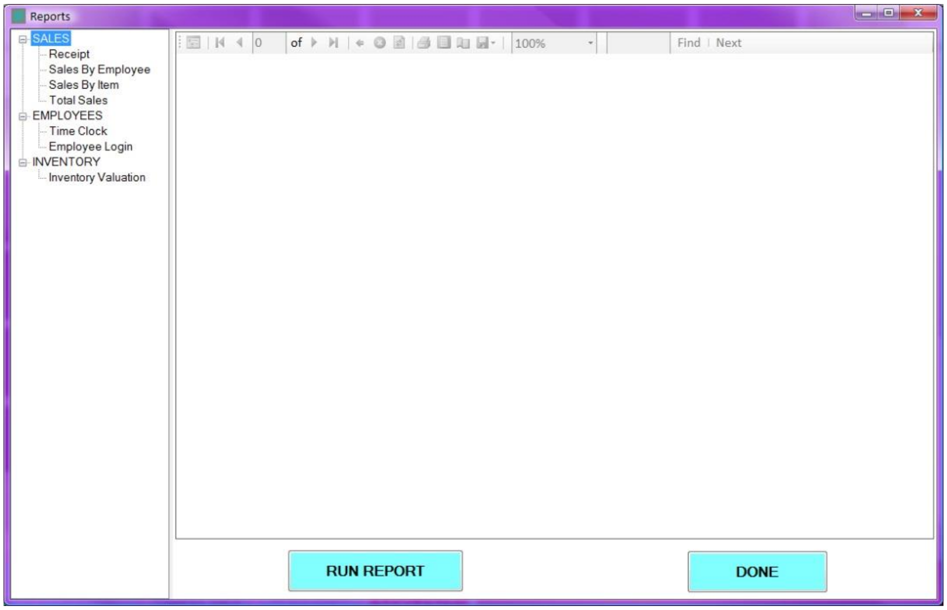
RECEIPT MESSAGE

With Preferred POS you are able to personalize the message that will display on your receipts. To change this message go to ADMIN TOOLS (F8) and click on RECEIPTS. On the next screen click RECEIPT MESSAGE.

Here you can type the message that you want to appear at the end of your receipts. If you want different messages to appear at different workstations, select the workstation from the drop down box and enter your message. When you are done entering your message click SAVE then DONE/CANCEL to exit.

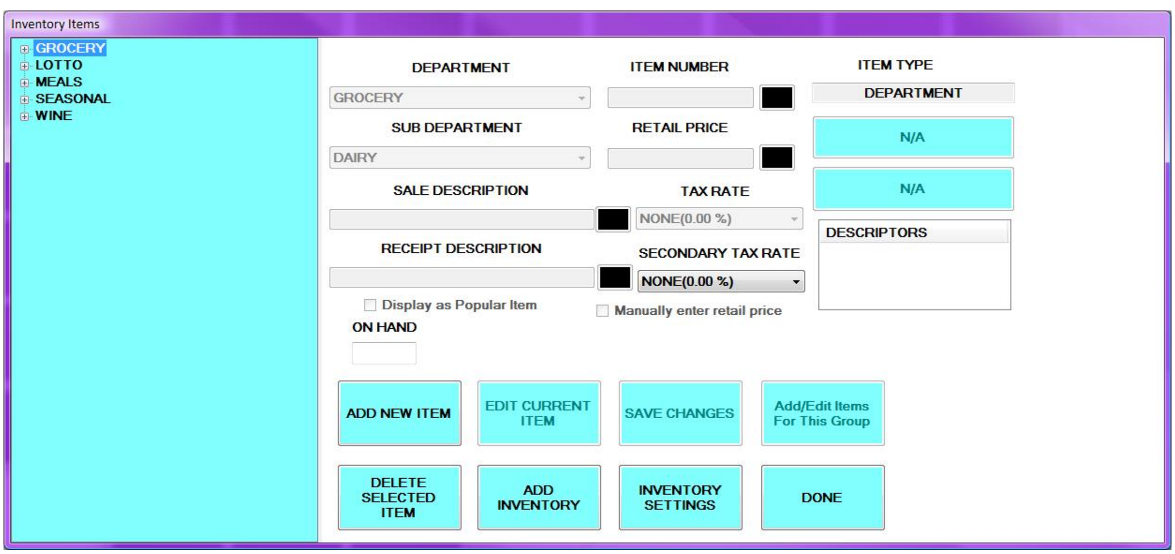
REPORTS

With Preferred POS you can print some reports to gather your daily sales totals, and pull employee time records. To print reports you can either, click on REPORTS F9 on the top of Preferred POS or go into ADMIN SETTINGS F8 then click on REPORTS. To run a report click on the + next to a category, then select the report you wish to run, then click on RUN REPORT on the bottom of the screen.



INVENTORY

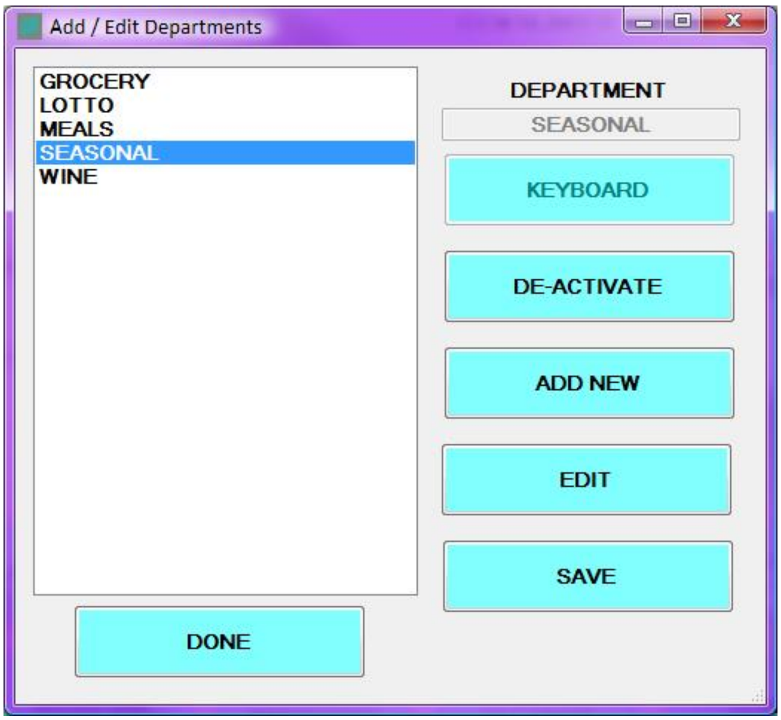
To start entering your inventory items go to ADMIN TOOLS F8 and click on INVENTORY on the next screen.



On this screen you will be able to add new inventory items, edit inventory items, add/edit departments, add/edit sub departments, and add/edit taxes. The first thing you will need to do is enter your Departments. Every item you put into the software will need a department and sub department, so these should be set up first.

ADD/EDIT DEPARTMENTS

To start adding Departments click on INVENTORY SETTINGS then on ADD/EDIT DEPARTMENTS. You can add a maximum of 10 Departments.



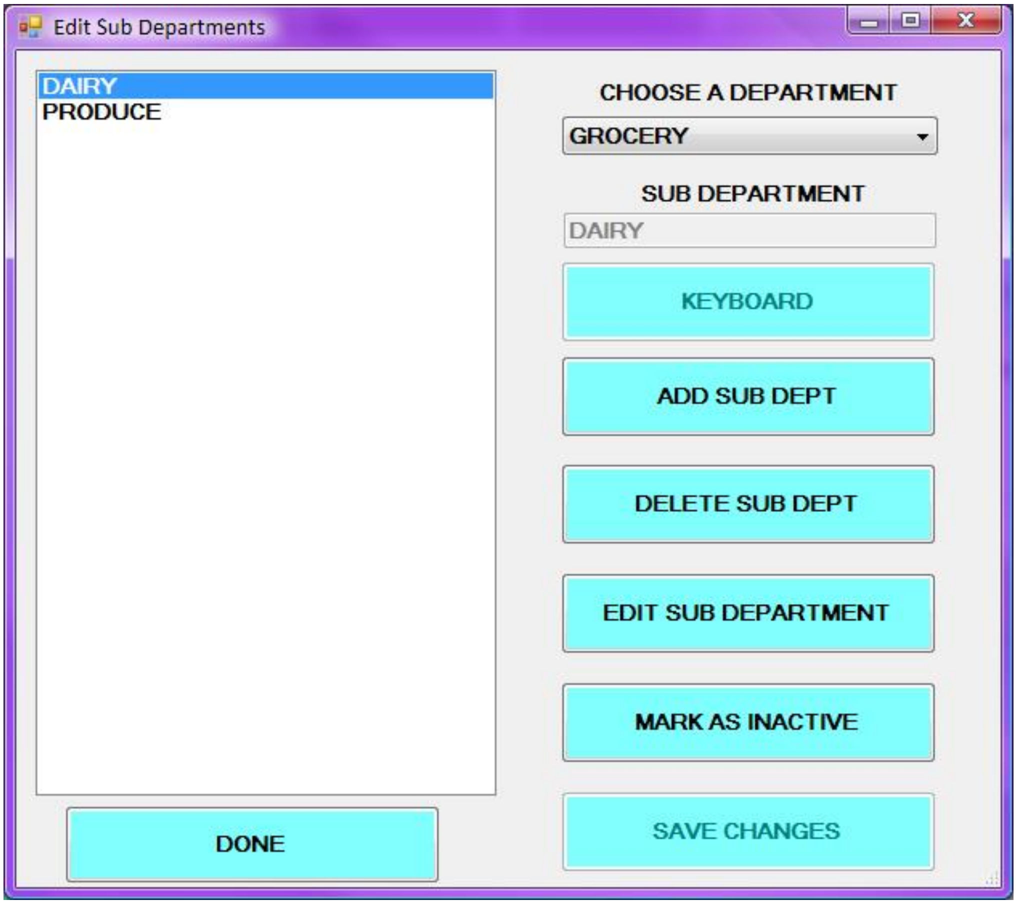
You can edit the demo departments to what you want them to say. To edit a department name, select the name on the left hand side and click EDIT, now enter the name you want that department to be. When you are finished click SAVE.

To add a new department click ADD NEW, and enter the name of the department in the text box, click SAVE when you are done.

When you are done adding and editing your departments click DONE to exit this screen. You will need to restart the software for the changes to take place.

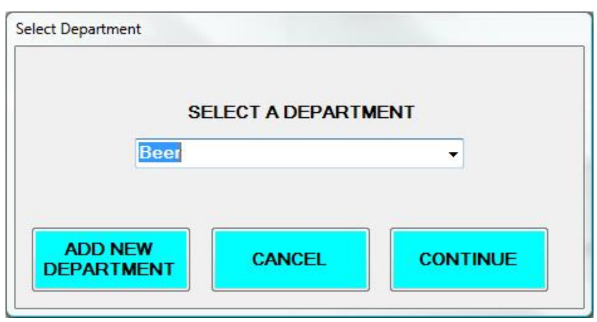
ADD/EDIT SUB DEPARTMENTS

After you have added departments you can now add sub departments. To start adding sub departments click on ADD/EDIT SUB DEPARTMENTS.

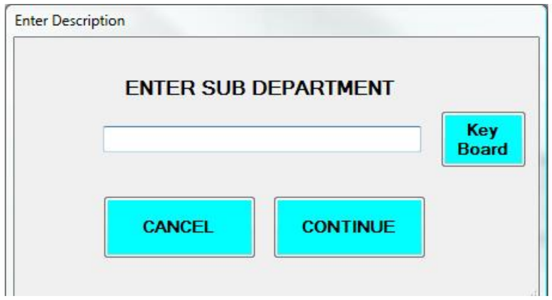


To add a sub department, click on ADD SUB DEPT

First select a department the sub department will be under, and click CONTINUE.

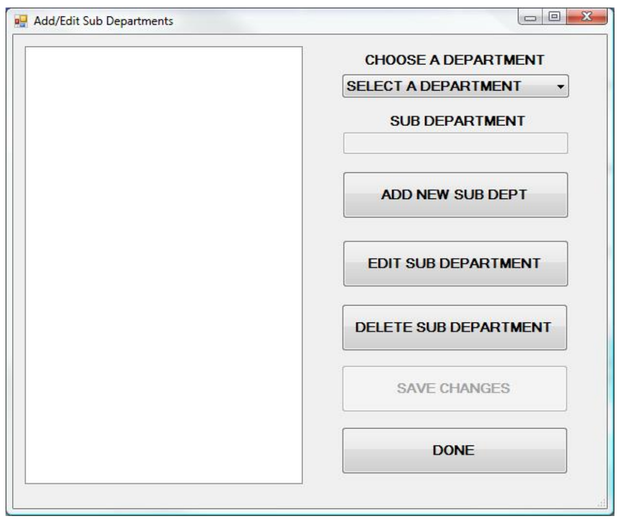


Now you will enter the name of your sub department, if using a touch screen click on Keyboard, to pull up a keyboard on the screen. When finished entering a sub department, click CONTINUE.



EDIT A SUB DEPARTMENT

To edit a sub department go to ADMIN TOOLS (F8) and click on INVENTORY – INVENTORY SETTINGSthen click ADD/EDIT SUB DEPARTMENTS.



First select the department from the drop down box that contains the sub department you want to edit. Then select the sub department from the left hand side and click EDIT SUB DEPARTMENT. Now type the name of the sub department in the text box or click the Keyboard button if you do not have a keyboard. When you are done making changes click SAVE CHANGES.

DELETE A SUB DEPARTMENT

To delete a sub department, select a department from the drop down box then highlight the sub department you want to delete on the left hand side. Then click DELETE SUB DEPARTMENT.

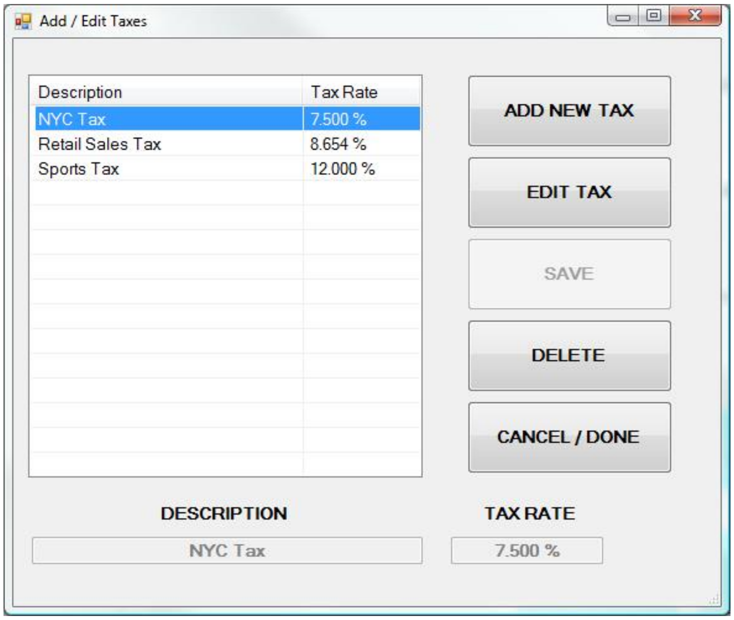
When done making changes to sub departments click DONE to exit this screen.

ADD A GROUP

This section is currently being worked on.

ADD/EDIT TAXES

To add or edit taxes click on ADD/EDIT TAXES.



Here you can add the taxes that need to be applied to your items.

ADD A NEW TAX

To add a new tax, select ADD NEW TAX. In the text box below enter the name for the tax under "description" and the tax rate under "tax rate". Click SAVE when done.

EDIT A TAX

To edit a tax, highlight the tax on the left side and click EDIT TAX. Change the description or the tax rate on the bottom and click SAVE when done.

DELETE A TAX

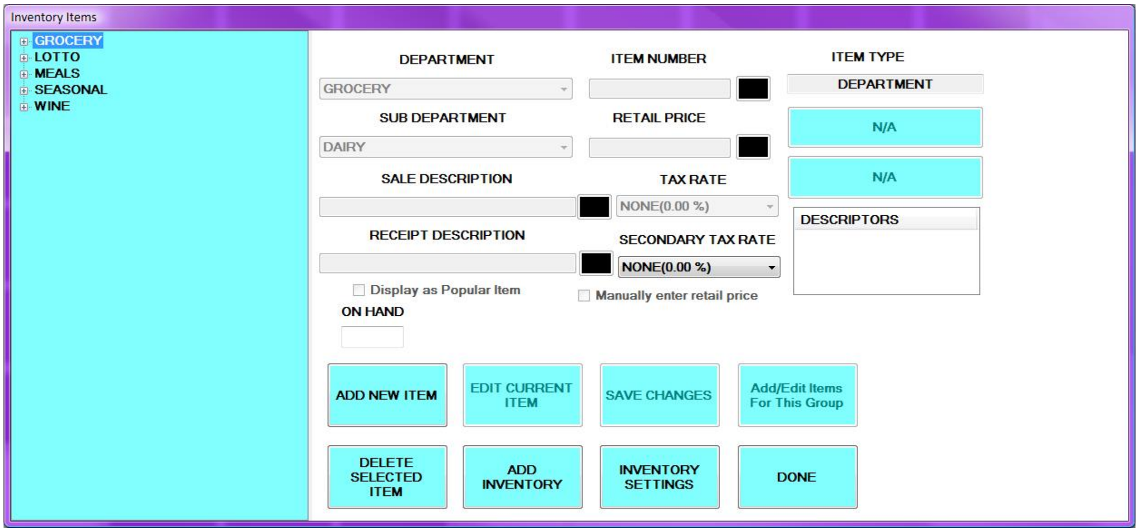
To delete a tax, highlight the tax on the left side and click DELETE. You tax will then be removed and deleted from the software.

When you are done editing and adding taxes click CANCEL/DONE to exit this screen

ADDING INVENTORY

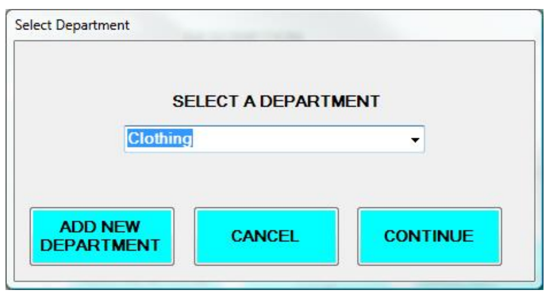
Once you have set up all of your departments, sub departments and taxes you can then begin adding inventory items to the system.

To add an inventory item go to ADMIN TOOLS (F8) then INVENTORY.

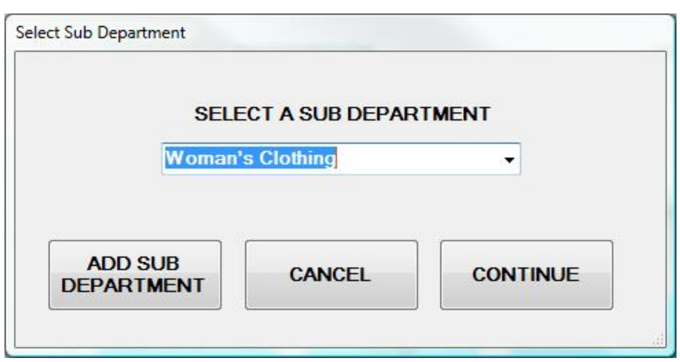


To begin click on ADD NEW ITEM. You will now be brought through a series of windows to add your inventory item.

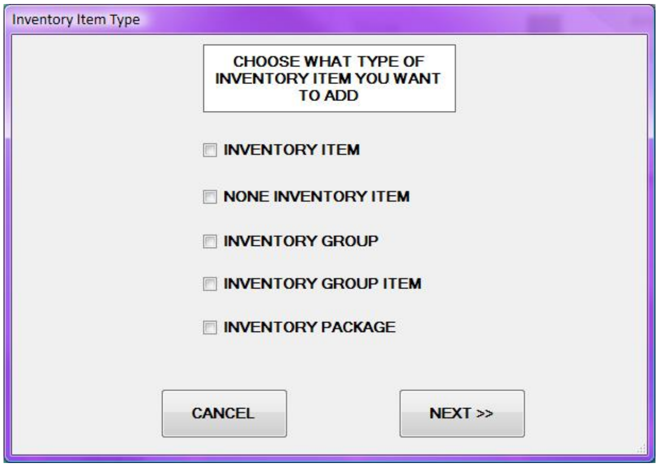
The first thing you will select is the Department where this item will be under. Select the department from the drop down box and click CONTINUE. You can also add the department from this screen (see ADD/EDIT DEPARTMENTS to see how to add a department).



Next you will need to select a sub department to which this item belongs. Select the sub department from the drop down box and click CONTINUE. You can also add the sub department from this screen (see ADD/EDIT SUB DEPARTMENTS to see how to add a sub department).



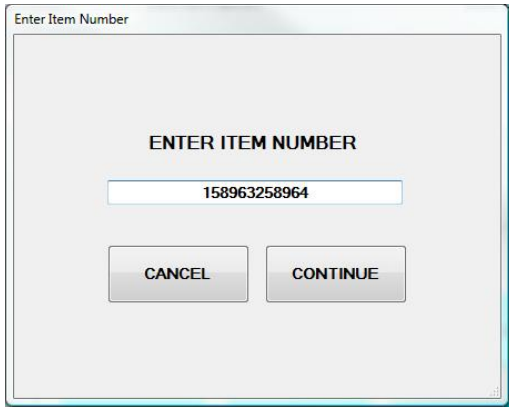
Now you will need to choose what type of inventory item it is. Select the type of inventory item it is from the list and click NEXT >>



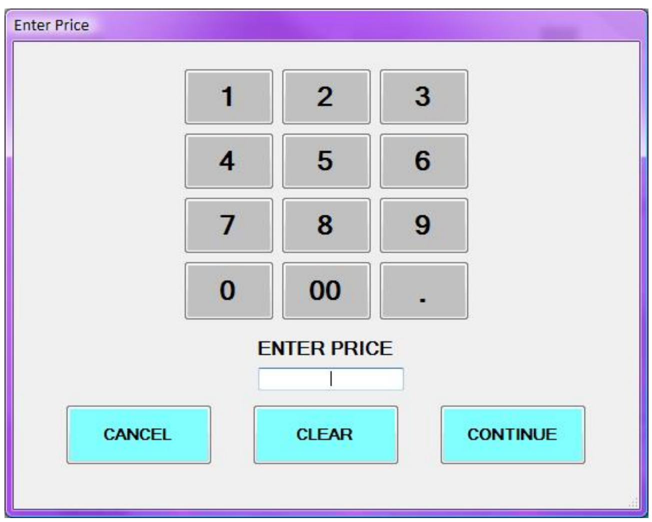
Now you will be able to enter the description of your item. Type in the text box or use the keyboard button to enter your items description. Click CONTINUE when finished entering the item description.

Next you will be able to enter how that item will show up on the receipt. Enter the receipt description, then hit CONTINUE.

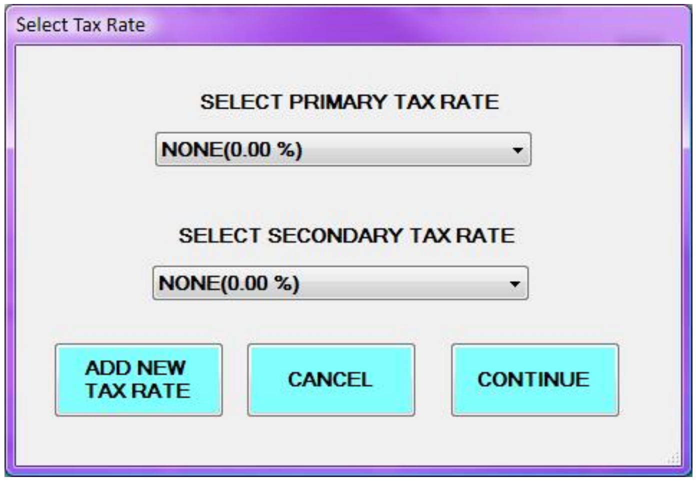
Now you will need to enter an item number for you item. Enter the number in the text box and click CONTINUE when finished.



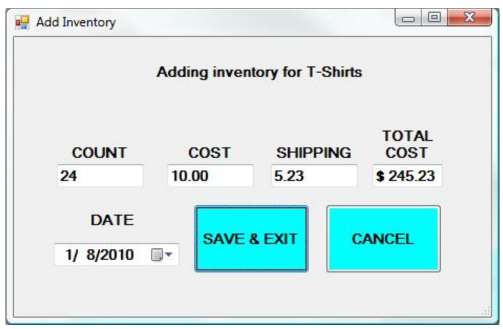
Next you will need to enter a price for your item. Enter the price of your item in the text box and click CONTINUE when finished.



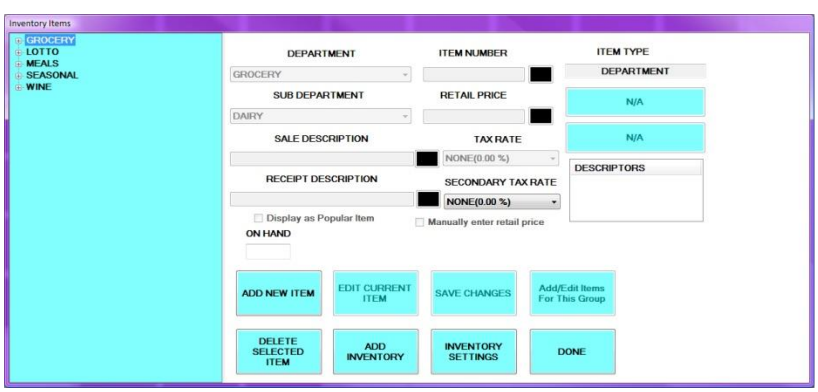
Next you will enter the tax rate that will be applied to this item, or a secondary tax rate. Select the tax rates from the drop down box. If you have not set up your tax rates, you can add them here (See ADD/EDIT TAXES to see how to add tax rates). When finished selecting the tax rates click CONTINUE.



Next you will enter the amount you have on hand of this item. If you do not have any inventory of the item yet you can click SAVE & EXIT, you can add inventory later. Enter the amount on hand in the first box. How much it was purchased for in the second box. How much shipping charges were, if any. And select a date. When finished click SAVE & EXIT.



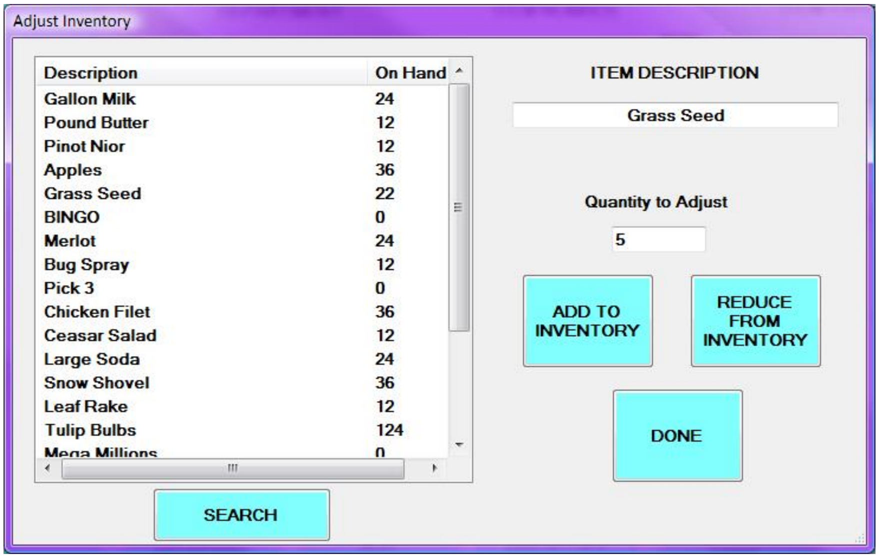
Now you have entered your inventory item. You can do a quick check of your item details by selecting it from the left. Use the plus signs (+) to open a department and use the minus signs (-) to collapse a section.



If you need to edit this item click EDIT CURRENT ITEM. You will be able to edit the item directly on this screen. Make sure to click SAVE CHANGES when you are done.

ADJUST INVENTORY

To add/edit inventory click on ADMIN TOOLS – INVENTORY- INVENTORY SETTINGS – ADJUST INVENTORY. On the next screen you can select an item you currently have in your inventory. The items description will show up in the text box to the right. Enter the quantity to adjust and click ADD TO INVENTORY. If you need to take away from an item, select the item so it shows up in the item description box, put in the amount to take away from the on hand and click REDUCE FROM INVENTORY.



When you are finished click DONE.

ADD/EDIT DESCRIPTORS

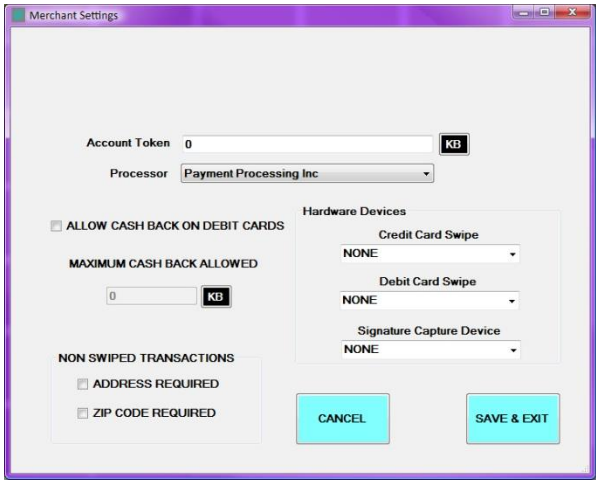
Coming soon!

ADD/EDIT PACKAGES

Coming soon!

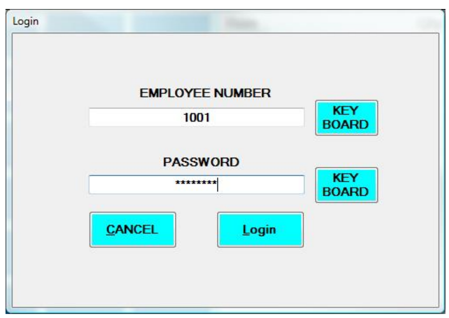
MERCHANTS

To add your merchant info go to ADMIN TOOLS (F8) then to MERCHANT. With this screen you will enter your merchant information, which will be given to you when you open your merchant account. When you are done making changes click SAVE & EXIT.



LOG IN/OUT

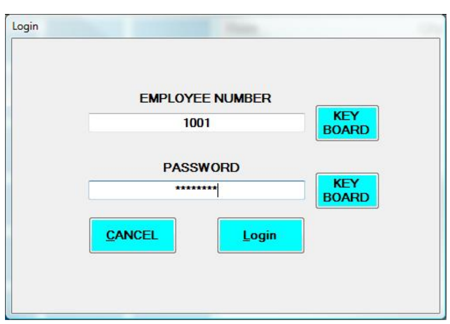
To log in and out of the software select LOG IN/OUT (F2) on the main screen. Then enter your user id and password to log in, select LOGIN when finished entering your information. This feature is mainly used for security purposes. If you restrict your employees to only a few actions, then you would want them logged in under their own user id while using the software.



You can also log out of the software by selecting the button on the main screen at the bottom that says LOG OUT.

CLOCK IN/OUT

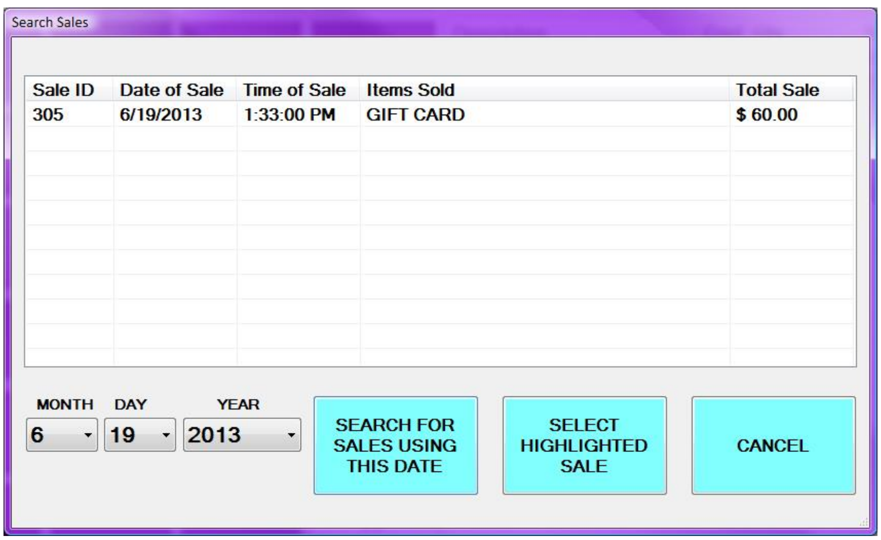
To clock in and out of the software select CLOCK IN/OUT (F3) on the main screen. Enter your employee number and password and select CHECK IN.



VOID

If at any time you need to void a sale that was completed click on VOID or hit F7 to start the voiding process. You will need to have the sale ID handy, or you could search for the sale.

When you search for the sale you can choose a date to search for. Then select the sale from the search results so it is highlighted and click SELECT HIGHLIGHTED SALE.

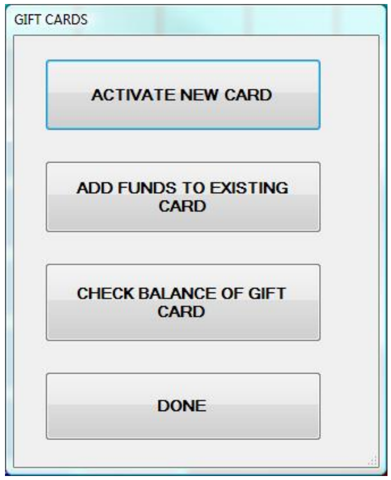


You will then get an alert if the sale was voided properly.

GIFT CARDS

ACTIVATE A NEW GIFT CARD

To activate or check a balance of a gift card select GIFT CARDS (F10) on the main screen.

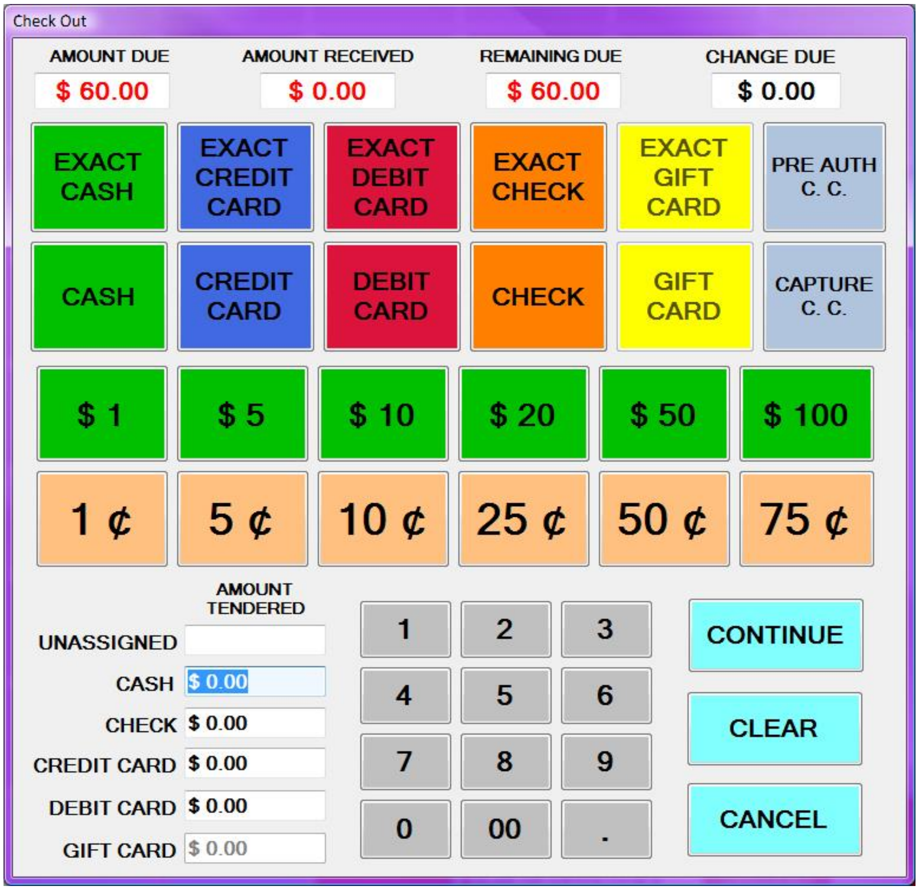


To activate a new card select ACTIVATE NEW CARD. You will then need to swipe or enter the gift card number, and how much to be added. First scan or type in the gift card number in the first text box. Then type the amount that will be added to the third text box, labeled AMOUNT TO BE ADDED. You can also use the number pad displayed on this screen

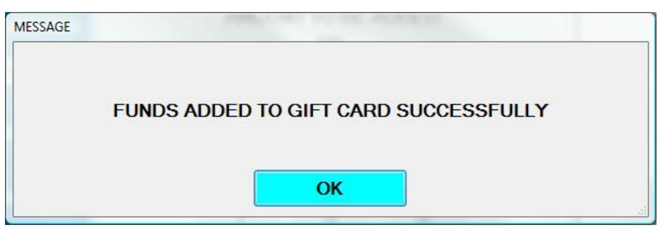
Select CONTINUE when finished.

You will then have a confirmation screen for the amount being applied to the card. Click OK if the total is correct or CANCEL to correct the amount.

Next you will be brought to the check out screen for the order. Put in the amount that the person is giving you then select the payment type. Click CONTINUE when you have entered the payment amount and method.



You will receive a message that the funds have been added to the gift card.



ADDING FUNDS TO AN EXISTING CARD

To add funds to an existing card select ADD FUNDS TO EXISTING CARD. You will see the same screen as when you activated a card. Simply put in the card number of the existing card and select the amount to be added. The rest of the steps you can view under ACTIVATING A NEW GIFT CARD.

MAKING A SALE

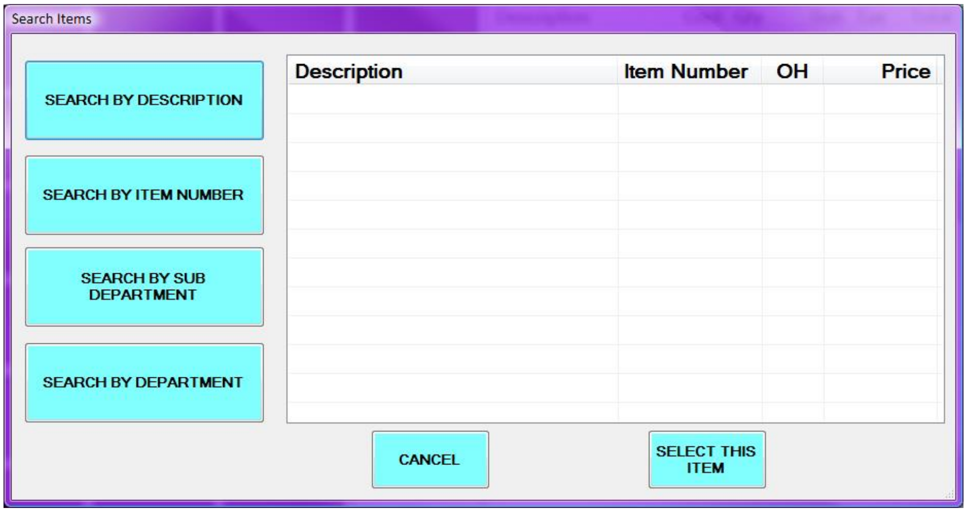
To start selling you will need to be on the main screen

Start adding items to the sale by selecting the department then sub department. The items in those departments will show up to the left of the white screen. Select an item to add it to the sale.

SEARCH FOR ITEM

Or if you prefer you can scan the items into the sales screen that have a barcode. You can choose this option my selecting SCAN ITEMS (F5) on the top of the screen, or by selecting the button SCAN ITEMS at the bottom of the screen.

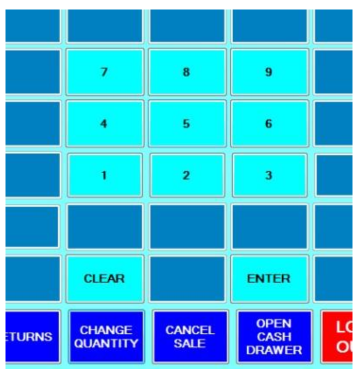
You may also choose to search for an item. You can do this by selecting SEARCH ITEMS (F6) at the top of the screen or by selecting ITEM LOOKUP at the bottom of the screen.



Select one of the searching criteria to search for an item. You will now have a text box to enter the description of an item. When you are done typing select continue.

CHANGE QUANTITY

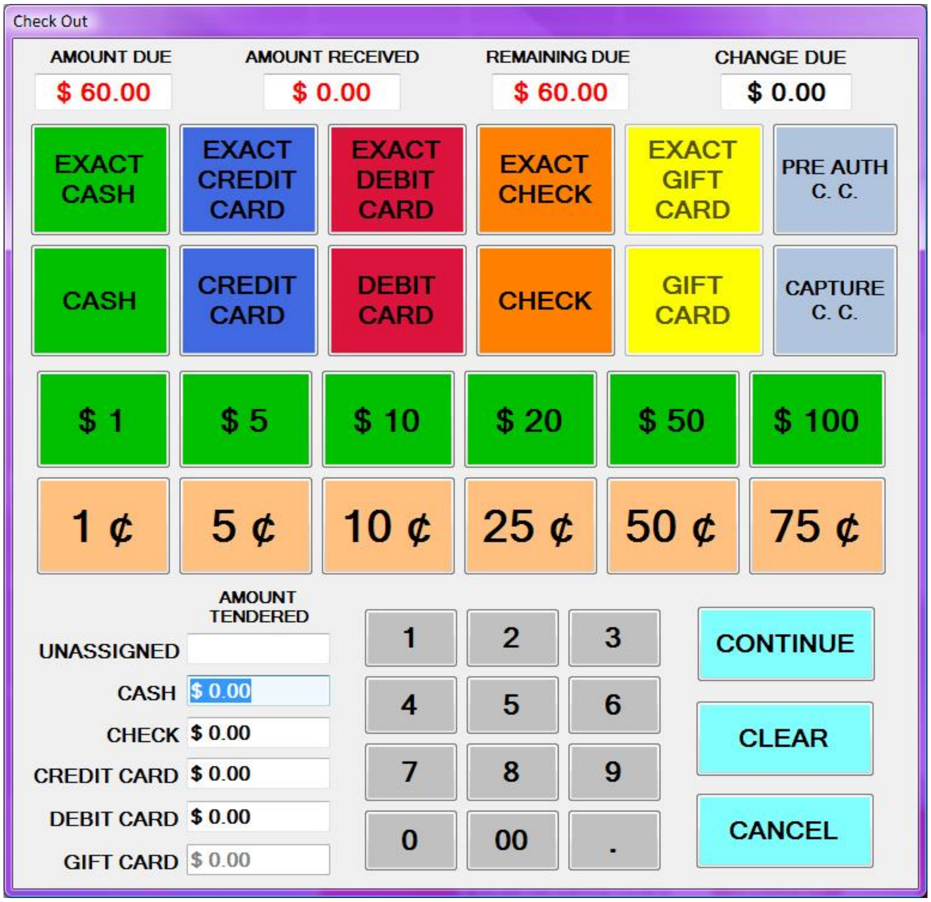
If you need to change the quantity of an item by highlighting it on the right hand side of the screen and selecting CHANGE QUANTITY on the action buttons on the bottom of the screen. The right hand side of the screen will now turn to a number pad so you can type in the quantity.



Select the total quantity and hit CONTINUE

COMPLETEING A SALE

After all the items have been added to the sale you can now check out. To continue the check out process select CHECK OUT on the bottom right of the screen. You will now be brought to the currency screen.



Enter the amount you are receiving then select the method of payment. You can use the quick add dollar amounts or the number pad near the bottom. Once you have added the right amount click CONTINUE.

REMOVE AN ITEM FROM A SALE

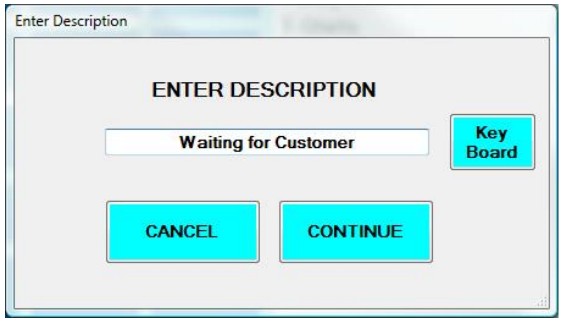
To remove an item from the sale, select the item on the right side and click REMOVE ITEM at the bottom of the sales screen. The item will then be removed from the sale.

CANCEL A SALE

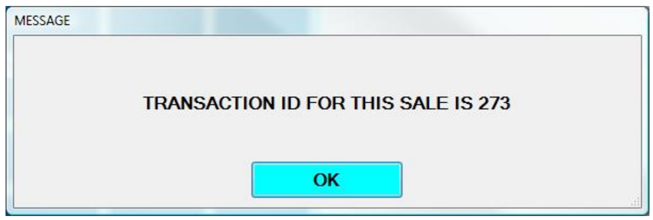
If you need to cancel the sale when it has not been completed (meaning you did not check out)click CANCEL SALE at the bottom of the screen.

SAVE A SALE

If you need to save a sale that has not been checked out click on SAVE THIS SALE. You will need to enter a description for the sale.



You will then get a message that will tell you the transaction number so you can look it up later.



OPEN CASH DRAW

If there is ever a time you need to open the cash draw select OPEN CASH DRAW from the main screen.

APPLY DISCOUNT

Coming soon!

PRINT RECEIPT

If you ever need to print a double of a receipt select PRINT RECEIPT at the bottom of the main screen. You will then need to put in a transaction ID or search for the receipt you would like to print.

EXITING THE SOFTWARE

You can exit the software from the main screen by selecting EXIT, or by clicking the X in the top right corner of the software, or by clicking EXIT (F4).