

Point of Sale.pdf

Table of Contents

GETTING STARTED	1
Technical Support	1
Point-of-Sale Overview	2
Point-of-Sale Devices.....	3
Receipt Printer	3
Cash Drawer	4
Verifone MX830 Payment device	5
Signature Pad	6
Customer Display	6
Weight Scale.....	6
Card Scanner.....	6
Barcode Scanner	6
TOUCH SCREEN POS SYSTEM	11
Overview	11
Configure POS Profiles	12
Programmable Buttons	15
Using the POS station.....	18
BAR CODES	21
Entering Bar Codes within EBMS	21
Bar codes for inventory items	21
Scanning Bar Codes	23
PAYMENT CARD PROCESSING	25
Processing Credit Cards using a Credit Card Gateway	25
For PAYware PC Administrators.....	28
ADVANCED TOOLS	33
Sync Tool Overview	33
On-Screen Keyboard	34

Getting Started

Technical Support

Welcome to the instructional manual for the E-Commerce module within EBMS. In the sections following, explanations and examples of the available features within the E-Commerce Module will be explained. If you need to reach our staff for further help, contact us using the information below:



Eagle Software

5351 Lincoln Highway, Suite 9

Gap, PA 17527

(717) 442-3247 x2

(717)-442-1096 fax

www.EagleBusinessSoftware.com

Email: Support@EagleBusinessSoftware.com

Point-of-Sale Overview

The Eagle Business Software (EBMS) contains many powerful Point-of-Sale (POS) tools. These options are used to create invoices or sales receipts at the time of sale. Payment options such as cash, credit card, or gift card payments are processed within the POS window. The EBMS software contains three primary windows to process POS transactions:

1. The standard EBMS Invoice and SO Window: This option is documented within the main documentation (volume 1).

Review the [Sales > Sales Orders](#) section for more details on creating sales orders

Review the [Sales > Invoices](#) section for more details on creating and processing sales invoices

Review the [Sales > Customer Payments](#) Section for more details on processing payments

2. The Touch Screen POS System: This POS option is used primarily as a cash register replacement. This option can be used for a remote location, a multi-lane store, or any store that requires quick checkout options.

Review the following [Touch Screen POS System > Overview](#) section of this manual for more details.

3. The Online E-commerce web: This powerful browser based option can be used for retail sales or online ordering for distributors and wholesale sales.

Review the [E-commerce documentation](#) for more details on creating the POS option for the web.

Credit cards, Debit cards, and other specialty cards can be used as payments within each one of these POS options. The system uses the Verifone Payware PC software so the user can interface to a variety of merchant accounts and card programs. Review the [Processing Credit Cards using a Credit Card Gateway](#) section for more details on Payware PC service and setup.

Point-of-Sale Devices

Technology such as barcode scanners, cash drawers, and receipt printers can be interfaced within the EBMS software to create a powerful point-of-sale solution. Product and bin labels containing barcodes can be printed directly from the EBMS software. Electronic signature pads, credit card processing, customer pole displays, and weigh scales are some additional devices supported by EBMS.

EBMS does interface with a Touch Screen point-of-sale station. This POS station is an excellent cash register replacement. The combination of touch screen hardware and the easy-to-use POS software makes the system easy to operate for non-technical users. Review the separate [Point-Of-Sale for Touch Screen software](#) section for details on the setup instructions and user details for this option.

Receipt Printer

Install the receipt printer driver within MS Windows before configuring the report. Select **Sales > Options** from the main EBMS menu and click on the **Reports** tab.

The screenshot shows the 'Options' dialog box with the 'Reports' tab selected. The dialog is organized into three main sections for different report types:

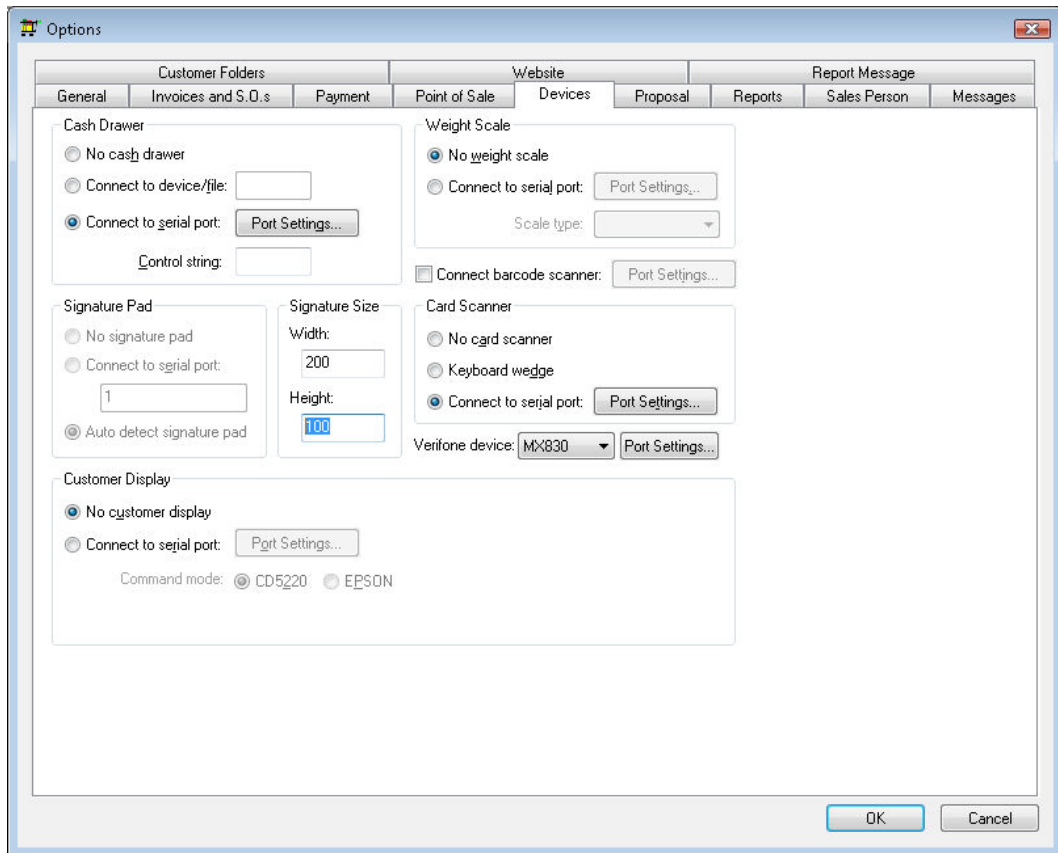
- Report to Print when Processing Sale:**
 - Use this report: INVOICE (PLAIN PAPER) [Browse]
 - Choose report when processing
 - User Specific: INVOICE RECEIPT (CONDENSED) (EP) [Browse]
 - Use secondary report when processing a charge sale.
- Report to Print when Processing Charge Sale:**
 - Use this report: INVOICE (PLAIN PAPER) [Browse]
 - Choose report when processing
 - User Specific: [Browse]
 - Show the print dialog when processing an invoice.
- Report to Print as a Payment Receipt:**
 - Use this report: PAYMENT RECEIPT (PLAIN PAPER) [Browse]
 - User Specific: PAYMENT RECEIPT (EPSON) [Browse]
 - Show the print dialog when processing a payment
 - Print payment receipt report when processing invoice with credit card payment.

At the bottom, there is an 'Edit System Folders' button and a note: 'Press this button to modify which reports show up on the print button menus by dragging the proper reports into the corresponding folders.' The 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

Set receipt settings as shown above. Review the [Sales > Invoices > Printing a Sales Invoice or Payment Receipt](#) section for more details on these settings.

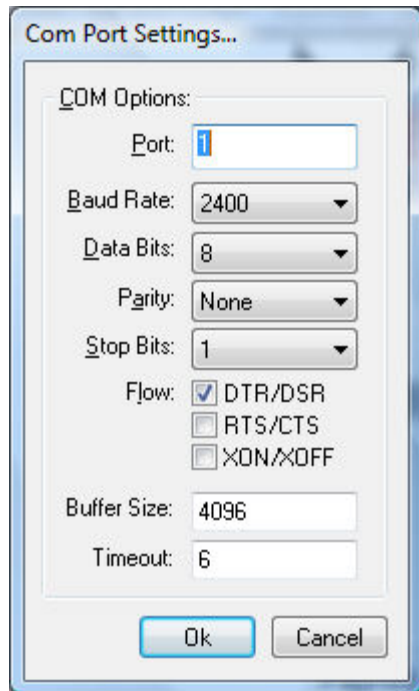
Cash Drawer

The EBMS system supports serial cash drawers, USB cash drawers, and cash drawers connected to a receipt printer. The recommended configuration is the serial cash drawer. Open the following EBMS **Devices** tab within the computer that is attached to a cash drawer. Select **Sales > Options** from the main EBMS menu and click on the **Device** tab as shown below:



Select the **Connect to device / file** option when the cash drawer is connected to a printer or other device. Enter the device id. For example: LPT1 for printers connected to the primary printer port.

Select the **Connect to serial port** option when cash drawer is connected to a serial port. Set the appropriate serial port settings:



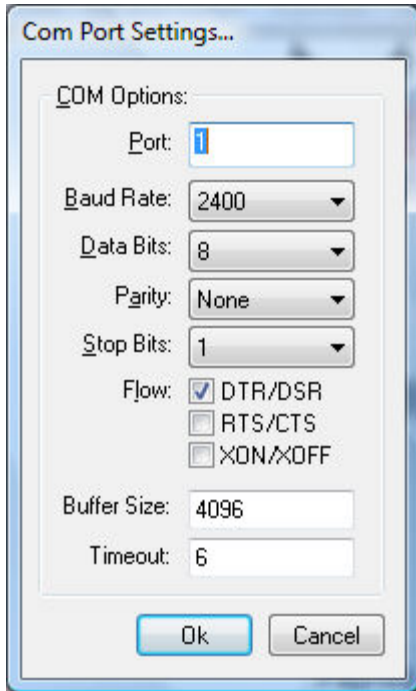
Click OK to save the serial settings.

Set the appropriate **Control string** that is used to open the cash drawer. This is the control string that is sent to the device or serial port to open the cash drawer. Use a backward slash (\) and a 3 digit ASCII number. For example: \027P\000\025\250 will open the cash drawer for Epson printers.

Verifone MX830 Payment device

The Verifone MX830 payment device is a secure method of processing credit card and debit card payments. The device is a combination of a credit card swipe device, Debit card keypad, and signature pad.

Select MX830 from the Verifone device drop down options and click on the **Port Settings** button. Set the following settings:



The **Signature Pad** selection will be disabled when the MX830 **Verifone device** is selected.

Set the appropriate **Signature Size** for the MX830 device.

Signature Pad

The only **Signature Pad** option at the time of this documentation was the MX830. Note that some legacy pads are supported. Contact your EBMS support technician for details on the signature pad settings.

Customer Display

Weight Scale

Card Scanner

Barcode Scanner

The EBMS software can support a variety of bar codes and bar code scanners. Keyboard wedge scanners and serial port scanners are both support. The Serial port scanner is recommended because of reliability and speed. All bar code scanners must be properly programmed to interface with the EBMS software. Contact an EBMS support technician for programming details for each scanner.

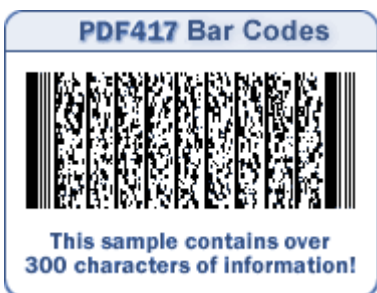
Barcode Fonts

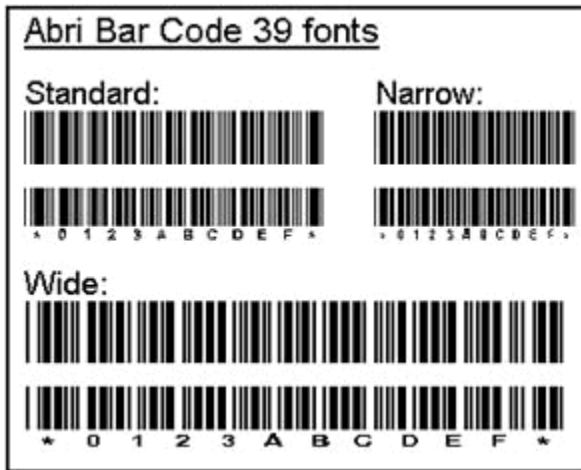
Bar code technology can greatly enhance the efficiency and accuracy of data entry. Receiving, shipping, and point-of-sale processes can be greatly improved by using existing bar codes on products or by printing new bar codes for individual items, cases, or skids.

The EBMS Bar Code Controls, Reports, and Fonts kit gives the user the ability to print bar codes onto packing lists, work orders, and other forms. Product labels can be generated containing a bar code, pricing, and/or other product information. A variety of existing bar codes can be associated with inventory products or printed directly from a label or laser printer. A bar code can be associated with each unit-of-measure setting for an inventory item. This feature allows the user to scan the bar code on each individual piece or to scan the bar code on the box for the entire case.

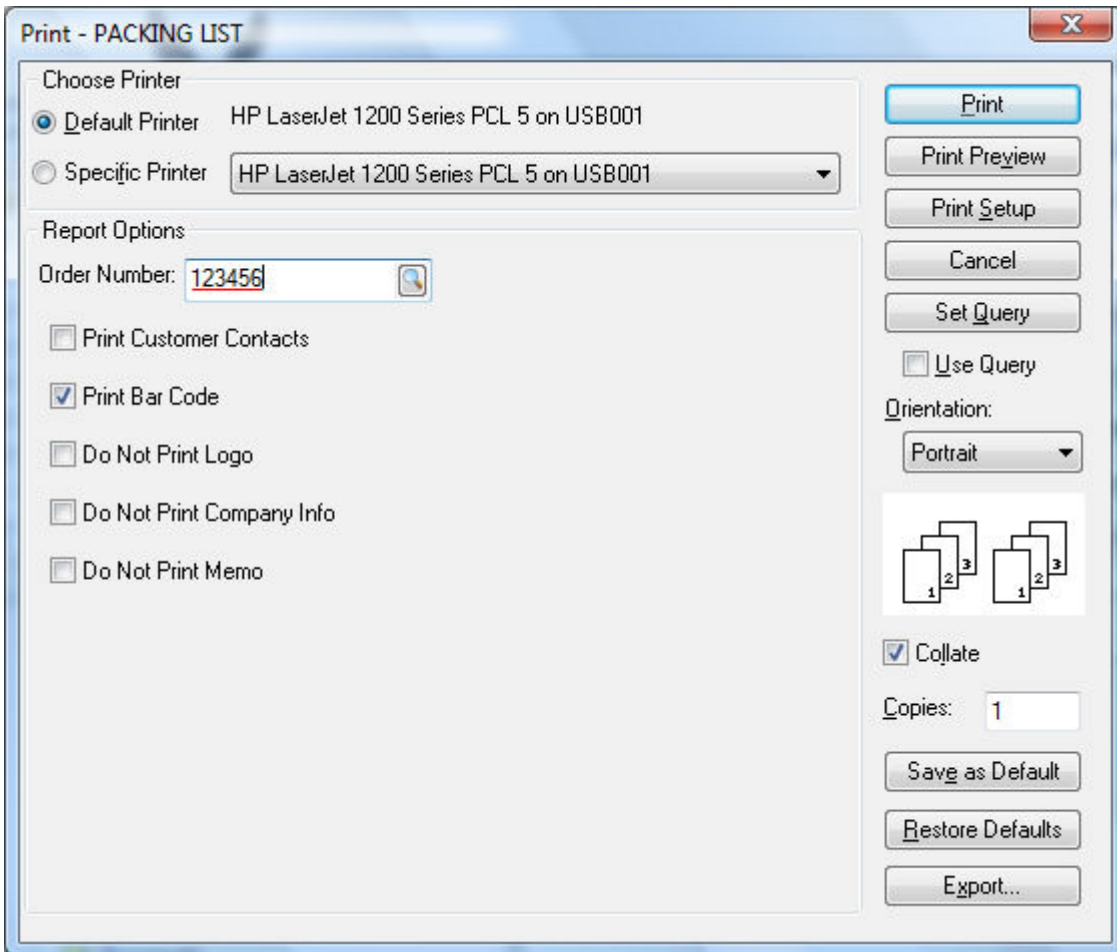


The bar code technology that has been used by large companies for years is now affordable for a small business. EBMS incorporates this technology so you can run your business efficiently.





The EBMS system contains many reports that contain barcode fonts. Enable the **Print Bar Code** option on the print dialog of the report if the optional EBMS bar code font option is installed. Note that there are many bar code labels included in the reports menu. Go to **File > Reports** dialog for a complete list of reports.



Touch Screen POS System

Overview

A good point-of-sale (POS) system requires a solution that is quick, easy-to-use, and flexible to meet the needs of today's retail environment. A retail system must be reliable and fail safe to offer a customer friendly service.

The Touch Screen POS System is an easy-to-use cash register replacement. The combination of the touch screen and the simple-to-use POS software makes the system easy to operate for non-technical users.

The Touch Screen POS system in conjunction with the optional Sync tool allows the system to run independently of the main computer network or the EBMS system database. The Sync option removes the dependance of the POS system to the speed or down time of the network. This Sync technology can also be used to poll POS systems in remote sales locations. This document labels clients that are not directly connected to the EBMS data but are connected to data using the Sync tool as *remote clients*.

The Touch Screen system uses a combination of bar code scanning technology and programmable buttons to enhance both the usability and speed of the check out process. The programmable buttons can be configured to identify popular items, groups of items, discounts, and other processes that are commonly used. Review the [Programmable Buttons](#) section for details on configuring these user defined buttons.

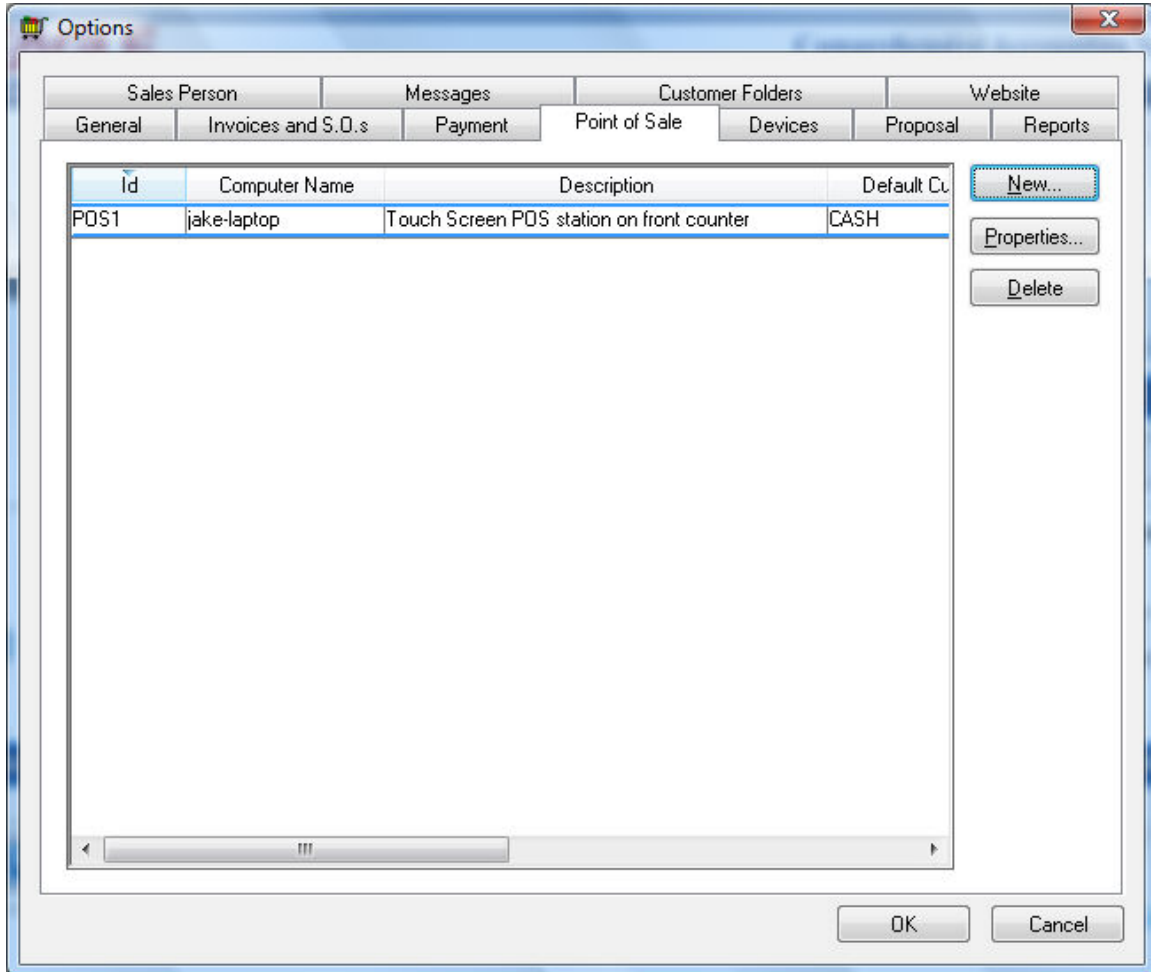
The Touch Screen system is driven by the inventory management system within EBMS. Grouping products and properly identifying bar code options require proper inventory planning.

Review the [Inventory Items > Adding and Deleting Inventory Folders](#) section for more details on grouping products.

Review the [Bar Code Technology > Entering Bar Codes within EBMS](#) section for more details on assigning bar codes to inventory items.

Configure POS Profiles

The point-of-sale (POS) configuration is done within the main EBMS program. Go to **Sales > Options** and click on the **Point of Sale** tab to view the POS Profile list:



A separate profile needs to be created for each POS station. Click on the **New** button to create a new POS profile or the **Properties** button to change an existing profile.

Enter a unique Point of Sale Station **Id**.

Enter the **Computer Name** or IP address of the POS station. The Computer Name can be found by right clicking on the **Computer** menu option on the Windows start menu and selecting **Properties**.

Enter the **Default Customer** Id code that is loaded when the POS station is launched. This default customer code can be kept blank to prompt the user to enter a customer code each time the POS station is started. Review the [Using the POS station](#) section for more details on setting the customer id within the POS station window.

Enter an **Invoice Prefix**. The invoice number will be appended to the required **Invoice Prefix** to create a unique transaction number. This prefix should be unique if multiple POS stations are being used within the same EBMS company.

The **Next Invoice Number** is incremented each time a new sales transaction is created. This number should be set to the first transaction (invoice) number when the POS profile is initially setup.

Disable the **Allow credit payment on this POS** option to restrict the user to only positive total transaction. When this option is disabled the user can not complete a sales transaction with a total that is less than zero. This option allows management to force the cashier to log into EBMS with proper security rights to process any credits or returns.

Point of Sale.pdf

The **Warehouse** option will not appear unless the optional Multiple Warehouse Module is installed. The inventory that is sold on this POS station will be deducted from the specified warehouse. Review the [Inventory > Warehousing > Warehouse Overview](#) section of the inventory documentation for more details .

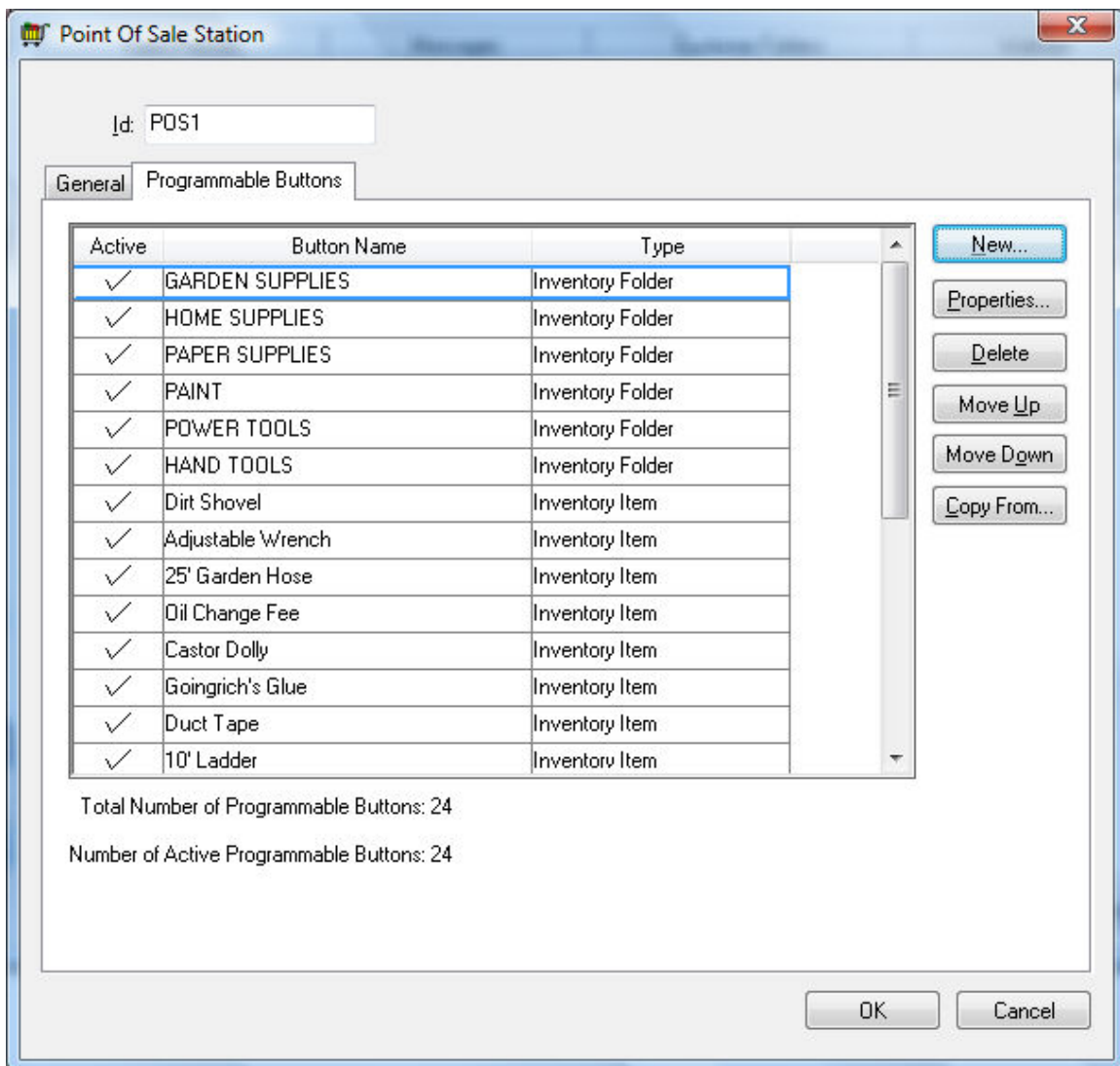
Click OK to continue

Programmable Buttons

A common method used to increase the efficiency of a POS station is to program quick key buttons on the right side of the window. These programmable buttons can indicate an individual inventory item or a group of items. Subgroups (folders within EBMS) can also be attached to a programmable button. Programmable buttons can also launch programs, J-scripts for custom processes, utilities, or a series of short cut keys. Each POS station contains it's own set of programmable buttons although the **Copy From** button can be used to copy programmable button settings from one POS station to another.

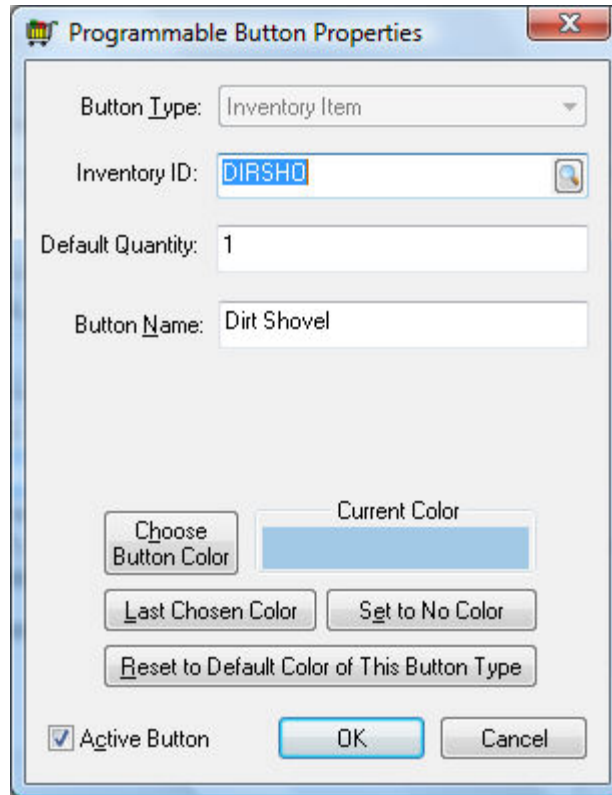
Programmable buttons are setup within the POS Setup dialog within EBMS. Go to **Sales > Options** and click on the **Point Of Sale** tab. Highlight the appropriate POS profile and click on the **Properties** button. Review the [Configure POS Profiles](#) section for details on creating multiple POS profiles.

Click on the **Programmable Buttons** tab to open the button list as shown in the example below:



Click the **New** button to add a button to the list. The following List explains how to create some of the most common programmable buttons:

- Button for fast moving items: The following example is a programmable button that is attached to a fast moving item - *DIRSHO - Dirt Shovel*.



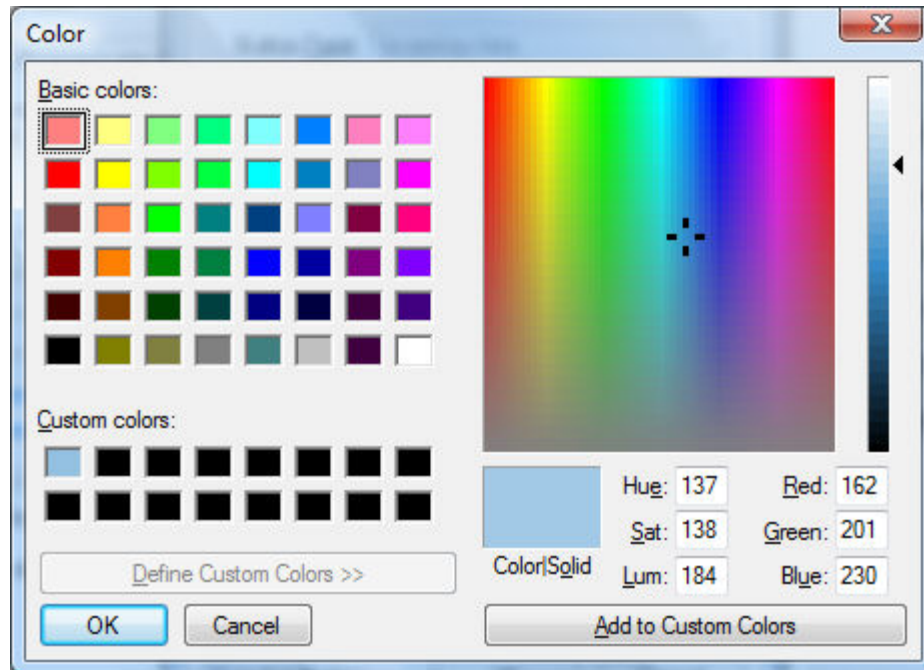
Select the **Inventory Item** button type.

Enter the specific **Inventory ID**.

Normally the **Default Quantity** should equal 1. This value is copied to the **Quantity** column when this button is selected.

Enter the **Button Name**. This button must be labeled with a unique description.

The button color will default to the color associated with the **Button** type. Click on the **Choose Button Color** and select the desired color from the color dialog as shown below:



This dialog allows the user to select from the standard color list or to create custom colors. Click **OK** to choose a button color.

The **Undo**, **Set to No Color**, or **Reset to Default Color of This Button Type** buttons are useful to restore color values or set the color to the POS station's background (No Color).

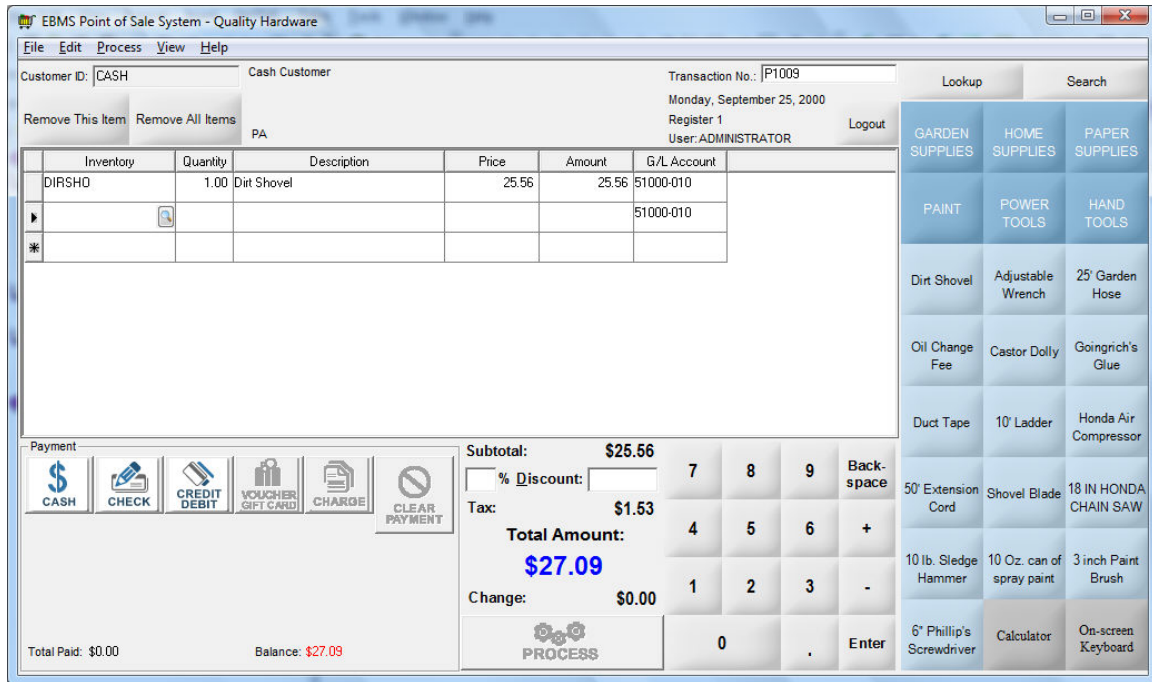
Disable the **Active Button** option to remove the button from the POS Station without deleting the button.

Using the POS station

The POS station dialog is launched as a separate program file rather than from the main EBMS menu. The POS station program should be configured to launch when the PC or POS station is powered up. Review the MS Windows OS manual for details on launching programs on start up.

The user should login with a specific user name and password to properly record totals and sales for specific cashiers or users. Note that a person can logout quick and prompt a new log in my clicking on the **Logout** button on the top of the POS window as shown below.

The following POS window is opened when the POS station is launched:



The **Customer ID** will need to be entered if a default Customer ID is not set within the POS Station properties. Review the [Configure POS Profiles](#) section for details on entering a default customer. The **Search** button located on the upper right corner of the dialog, will open the standard customer lookup dialog if the **Customer ID** entry is highlighted. Click on the **Customer ID** entry to highlight the customer code.

Click on the programmable keys to add products to the sales list or scan items with the POS bar code scanner. Review the [Bar Codes > Scanning Bar Codes](#) section for more details on scanning items.

Inventory items can also be typed into the system using a traditional keyboard or using the digital keyboard that is distributed with the MS Windows OS. Review the [Advanced Tools > On-Screen Keyboard](#) section for more details.

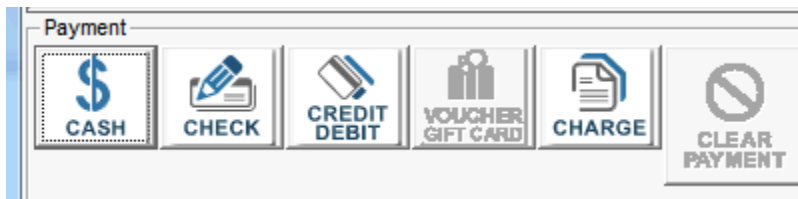
The **Inventory** item record can be opened by clicking on **Lookup** button located above the programmable button list. A standard search dialog can be opened by click on the **Search** button.

You can change the quantity of the items that were scanned or selected from a product button using the following methods:

- Increase or decrease the quantity by clicking on the '+' or '-' button on the Window's numeric keypad. The +/- keys can be used immediately after the item is selected or by highlighting a specific product and then clicking the +/- keys.
- Click on the **Quantity** entry and key the quantity using the numeric keypad on the screen or on a standard keyboard. Note that selecting the +/- key options will move highlight the **Quantity** column.
- Set the **Default Quantity** within the programmable button dialog to default the **Quantity** when the programmable button is selected. The **Quantity** column will be highlighted within the POS window if the **Default Quantity** within the programmable button properties is set to zero.
- The **Quantity** is incremented each time the same product bar code is scanned using a bar code scanner

An item can be removed from the sales list by highlighting the item and clicking the **Remove This Item** button. Click on the **Remove All Items** to clear the entire list.

Click on the appropriate **Payment** method using one of the payment buttons shown below:



Note that only the applicable payment buttons will be enabled. The **Charge** button may be disabled for cash customers. Review the [Sales > Invoices > Payment Methods and Terms](#) section within the main documentation for details on the payment options including split tender details.

Click the **Clear Payment** button to clear a payment and choose a new payment.

Click the **Process** button to complete the transaction.

Bar Codes

Entering Bar Codes within EBMS

Bar code technology can greatly enhance the efficiency and accuracy of data entry. Receiving, shipping, and point-of-sale processes can be greatly improved by using existing bar codes on products or by printing new bar codes for individual items, cases, or skids.

The EBMS Bar Code Controls, Reports, and Fonts kit gives the user the ability to print bar codes onto packing lists, work orders, and other forms. Product labels can be generated containing a bar code, pricing, and/or other product information. A variety of existing bar codes can be associated with inventory products or printed directly from a label or laser printer. A bar code can be associated with each unit-of-measure setting for an inventory item. This feature allows the user to scan

Bar codes for inventory items

Bar codes can be associated within individual inventory items using 2 different methods:

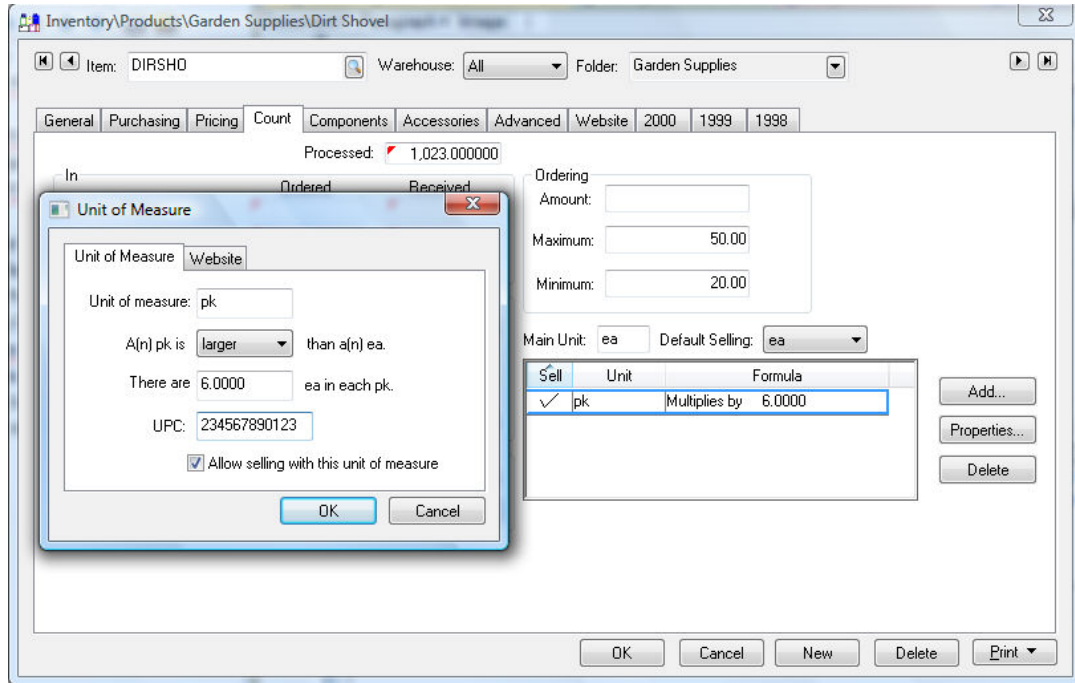
1. A bar code such as a UPC code can be entered within the inventory item record. Open an inventory item and click on the **General** tab.

The screenshot shows the 'Inventory\Products\Garden Supplies\Dir Shovel' window. The 'General' tab is active. The 'UPC Code' field is highlighted with a red box and contains the value '123456789012'. Other fields include 'Description' (Dirt Shovel), 'Entry Date' (08/20/1998 Thu), 'Gross Weight' (6.50), 'Manufacturer' (QUABUI), and 'Part No.'. A table for 'Substitute Item' is also visible.

Substitute Item	Description
*	

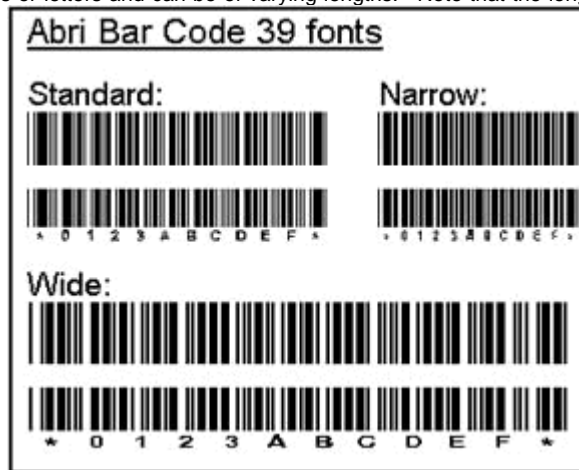
Enter the **UPC Code** into the upper right hand corner as shown above. Note that any valid bar code (non UPC code) can be entered within this entry. This bar code identifies the **Default Selling** unit of measure recorded within the **Count** tab. Review the [Inventory Items > Changing Inventory items](#) section of the inventory documentation for more details on creating or changing general inventory details.

The bar code values for other units of measure are set within the UOM dialog. Click on the **Count** tab, select a unit-of-measure from the list, and click the **Properties** button to open the following dialog:



Enter the specific **Unit of measure** bar code within the **UPC** entry and press **OK** to save.

2. The Inventory ID can be printed in a bar code 39 format as shown below. Unlike the UPC code, the bar code 39 can consist of numbers or letters and can be of varying lengths. Note that the longer the inventory item ID



the longer the bar code.

A inventory ID must consist of numbers and letters. Most symbols do not properly convert into bar codes. Note that IDs that contain spaces can not be scanned using the bar code 39 font.

Scanning Bar Codes

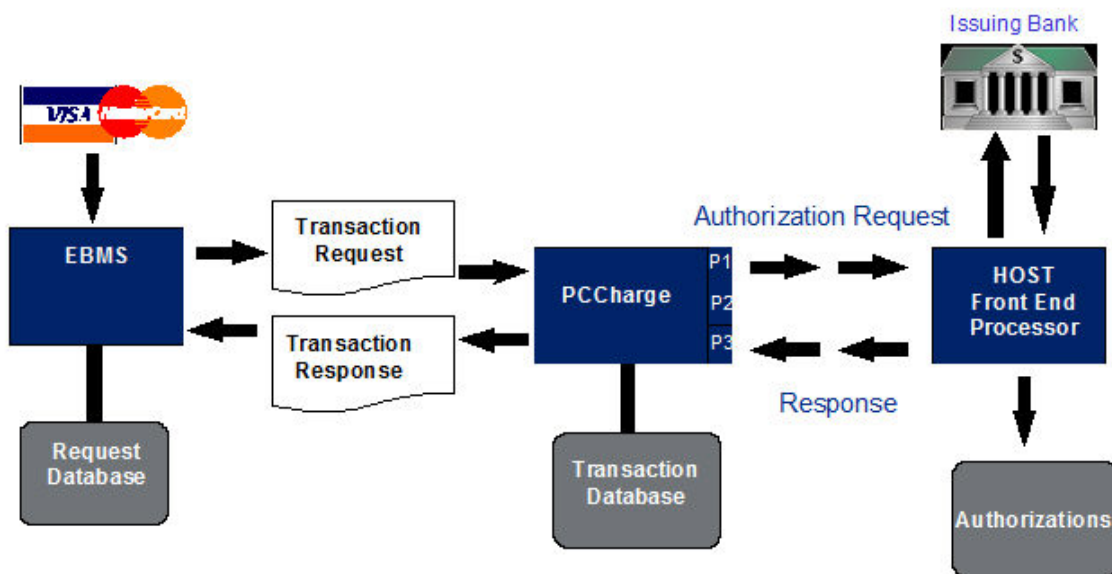
Type topic text here.

Payment Card Processing

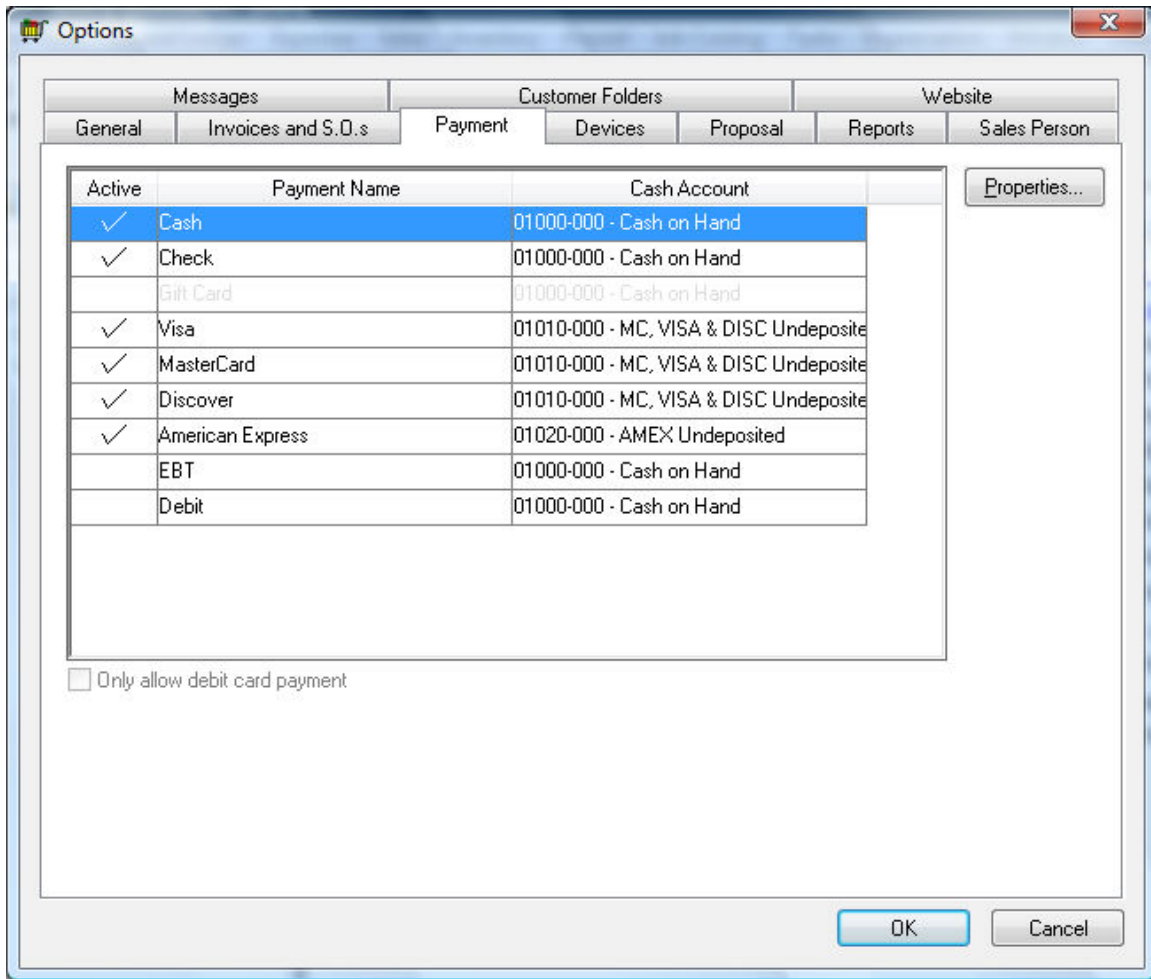
Processing Credit Cards using a Credit Card Gateway

The optional credit card gateway used by EBMS is PC Charge Payment Server. This gateway allows a user to record and process a credit card within the EBMS software. The user can choose one of the many merchant accounts that interface with PC Charge. Verify that the credit card merchant account is compatible to the PC Charge payment server.

Contact a EBMS customer Service Rep to properly install the payment server.



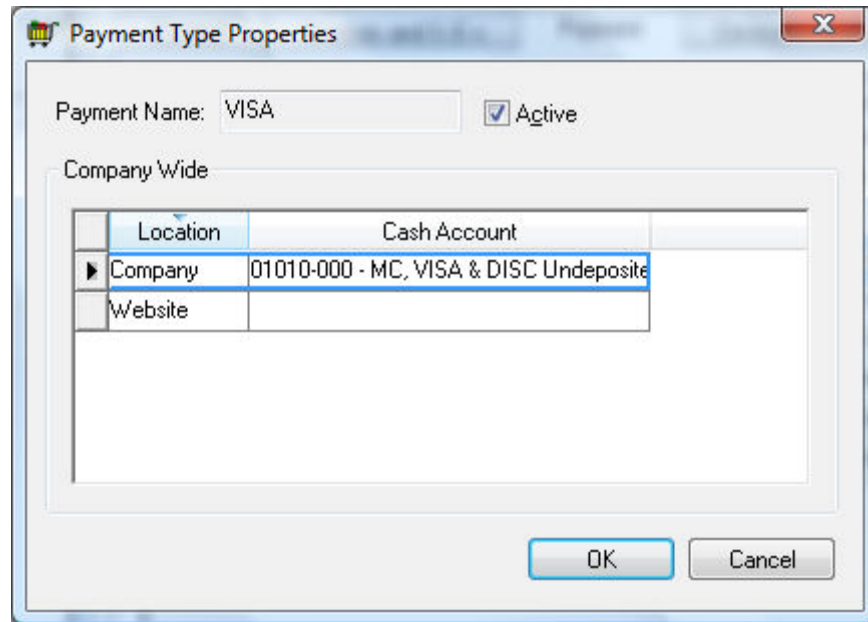
The credit card gateway settings are entered within the Payment records. The **Payment** options are accessed by selecting **Sales > Options** from the main EBMS menu and clicking on the **Payment** tab as shown below:



Configure the following PC Charge settings:

1. Enter the name of the computer where PCCharge payment server is installed into the **PCCharge machine name / IP** entry.
2. Enter the PCCharge user number as configured in PCCharge software into the **User #** entry.
3. Enter the **PCCharge proxy source port**:. This port to be used by EBMS PCCharge proxy program (this port must equal the SourcePort registry value in hkey_local_machine\software\pcchargeproxy in PCCharge machine).
4. Set the **PCCharge report path**. This path must equal a fixed shared directory where PCCharge creates reports to. Note: EBMS will tell PCCharge to create report after settlement process.

Click on a **Payment Name** that reflects a credit card type processed using PC Charge. Click on the **Properties** button to open the properties button.



The **Payment Name** identifies the payment type.

Enable the **Active** option.

Enter the following PC Charge settings. Enter the settings for each department or warehouse if multiple records show as displayed above.

1. Set the appropriate **Cash Account**. Review the [Sales > Customer payments > Cash Accounts, Deposits, and Reconciling Cash](#) section for more details on setting the cash accounts.
2. Enter the four-digits payment **Processor ID**.
3. Enter the correct **Merchant No**.
4. Enter the Host\Termina **Processor Type**.
5. Enter the **Settlement URL**: This setting is used if your processor is host based. This URL identifies the processor's website that is used to access the processor's credit card settlement process.

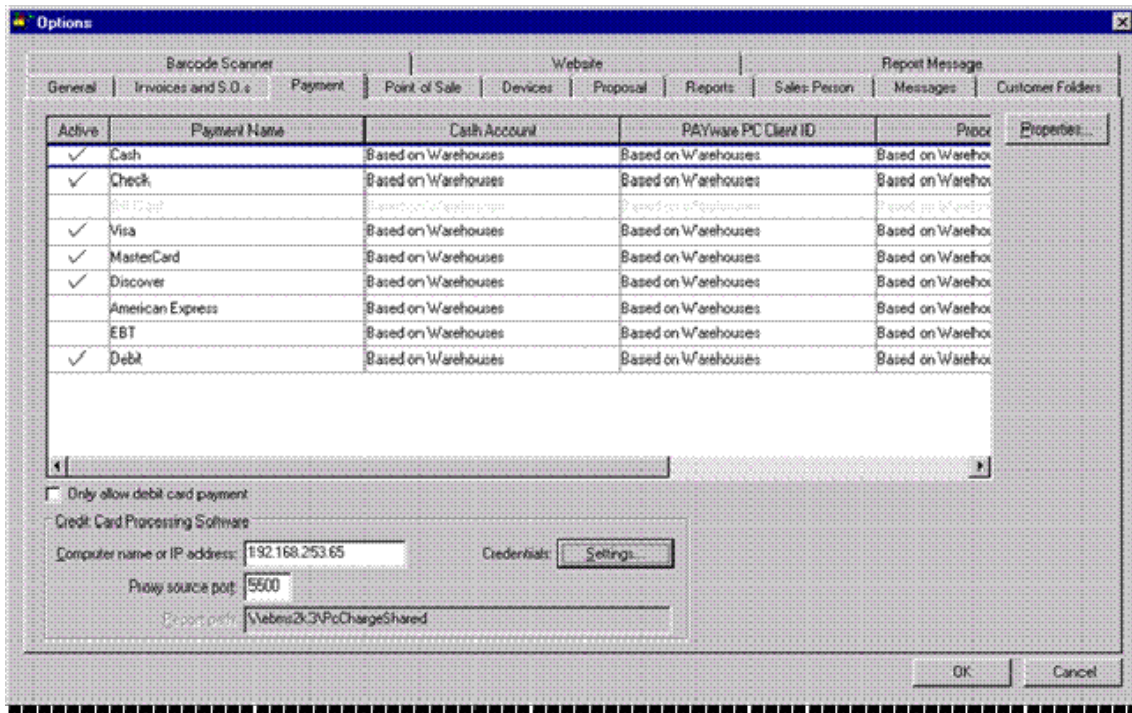
Refer to the detailed PC Charge documentation for details on installing PC Charge, configuring merchant accounts, and other details.

For PAYware PC Administrators

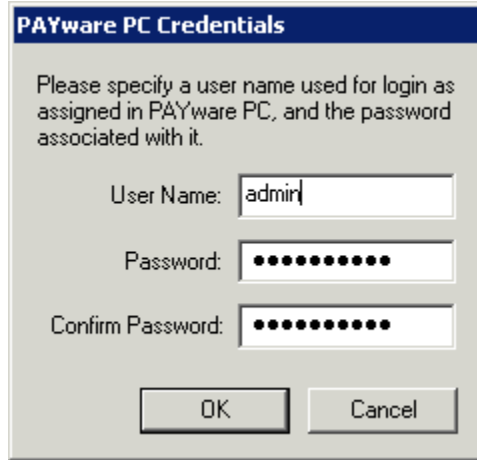
Please Note: Due to PCI DSS Requirements, Verifone's Payware PC's password will expire every 2 months. This will effect EBMS as you will not be able to do credit card transactions until the Password has been changed in Payware PC.

When the password for PAYware PC expires, open the PAYware PC Management Client and you will be prompted for the old password and asked to enter a new one. The default password must have at least 7 characters including 1 uppercase character, 1 number and 1 special character.

After the password is changed in the PAYware PC Management Client, you are now required change the password in EBMS under the **Sales > Options > Payments** tab. Go to **Sales > Options > Payments** tab and click on the **Credentials: Settings** button:



The **PAYware PC Credentials** must be updated to allow it to connect to the Payware PC Management Client. Change and confirm the **Password** to the new password that was entered in the Payware PC Management Client.



PAYware PC Credentials

Please specify a user name used for login as assigned in PAYware PC, and the password associated with it.

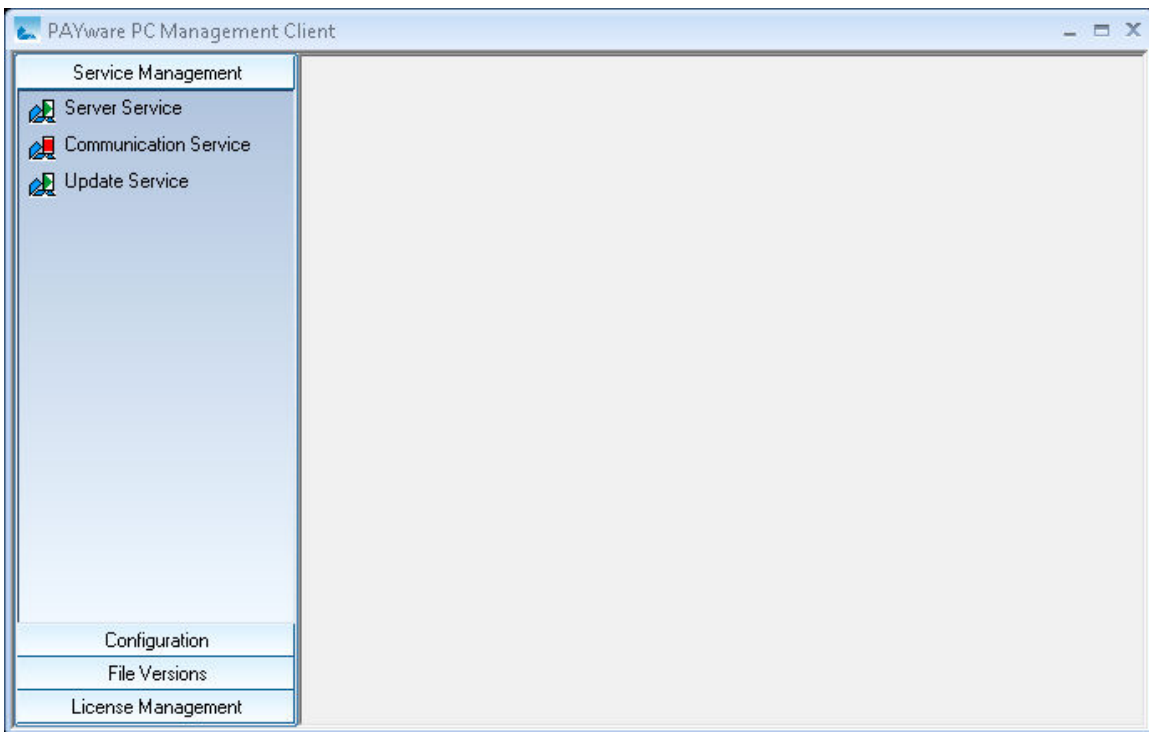
User Name:

Password:

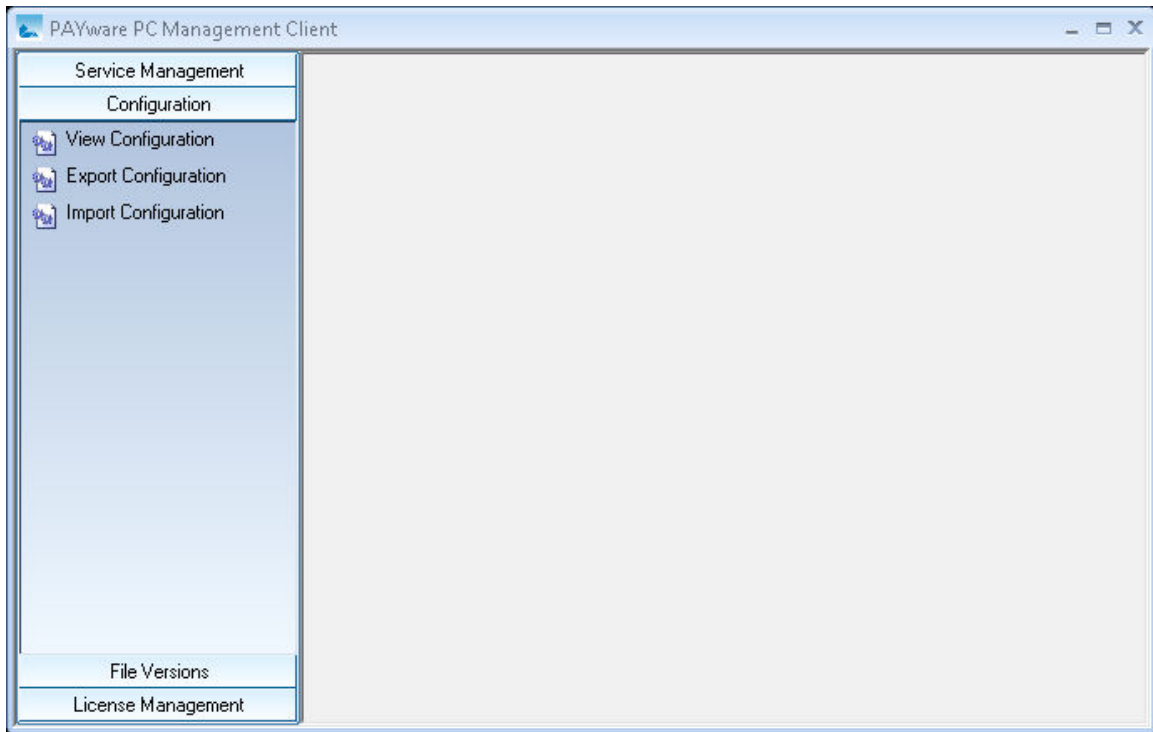
Confirm Password:

Changing the Password before it expires (recommended)

To change the password before it expires, open the **Payware PC Management Client**. Click the **Configuration** button.

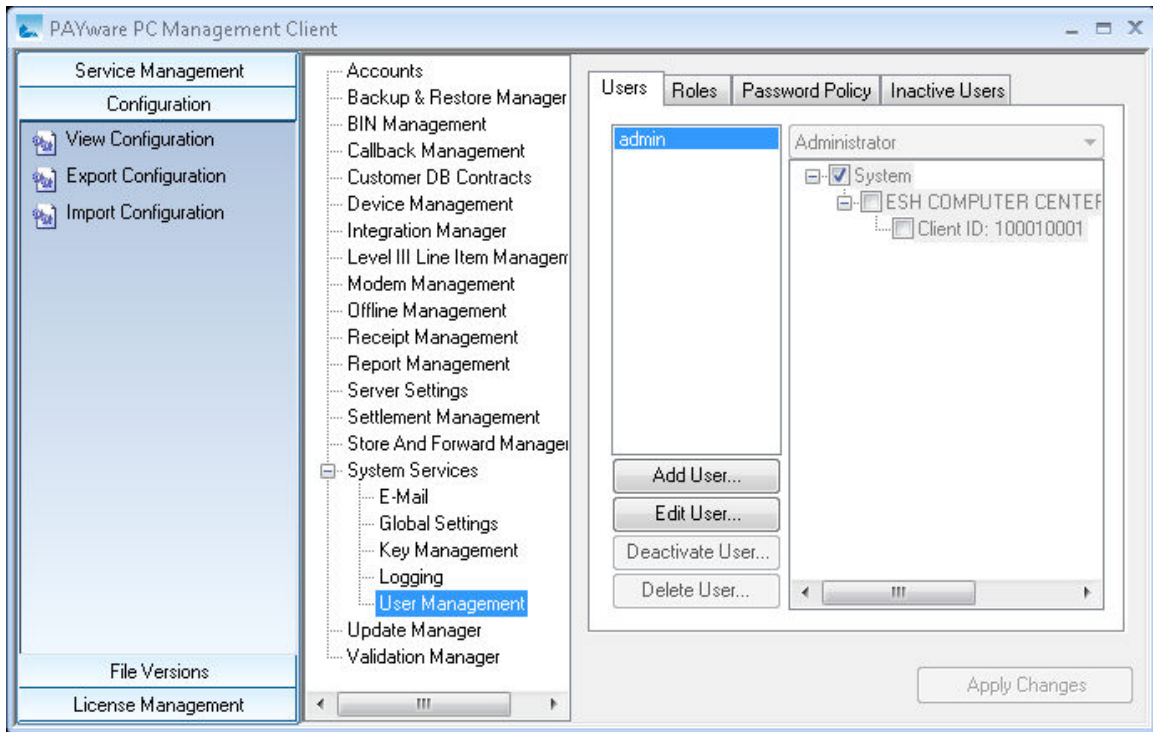


Click on the **View Configuration** button

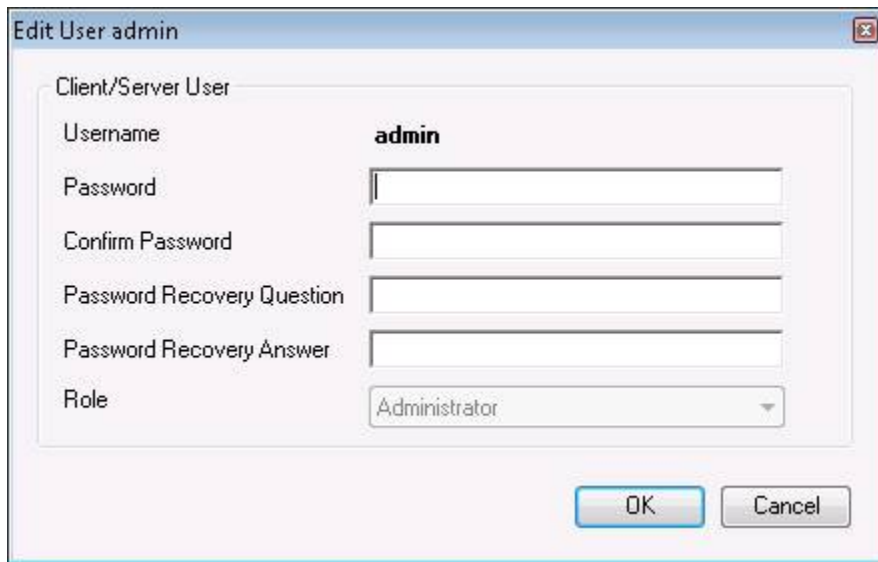


Shown below is a list of options used to manage the PAYware PC Management Client.

Expand the **System Services** menu and click on **User Management** to view the **User** settings.



Select a user and click on the **Edit User** button on the bottom. You will now have the option of changing your password.



******Please Note: Whenever the Administrator Password is changed in Payware PC, the password must be changed in EBMS as shown above.**

Advanced Tools

Sync Tool Overview

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On-Screen Keyboard

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