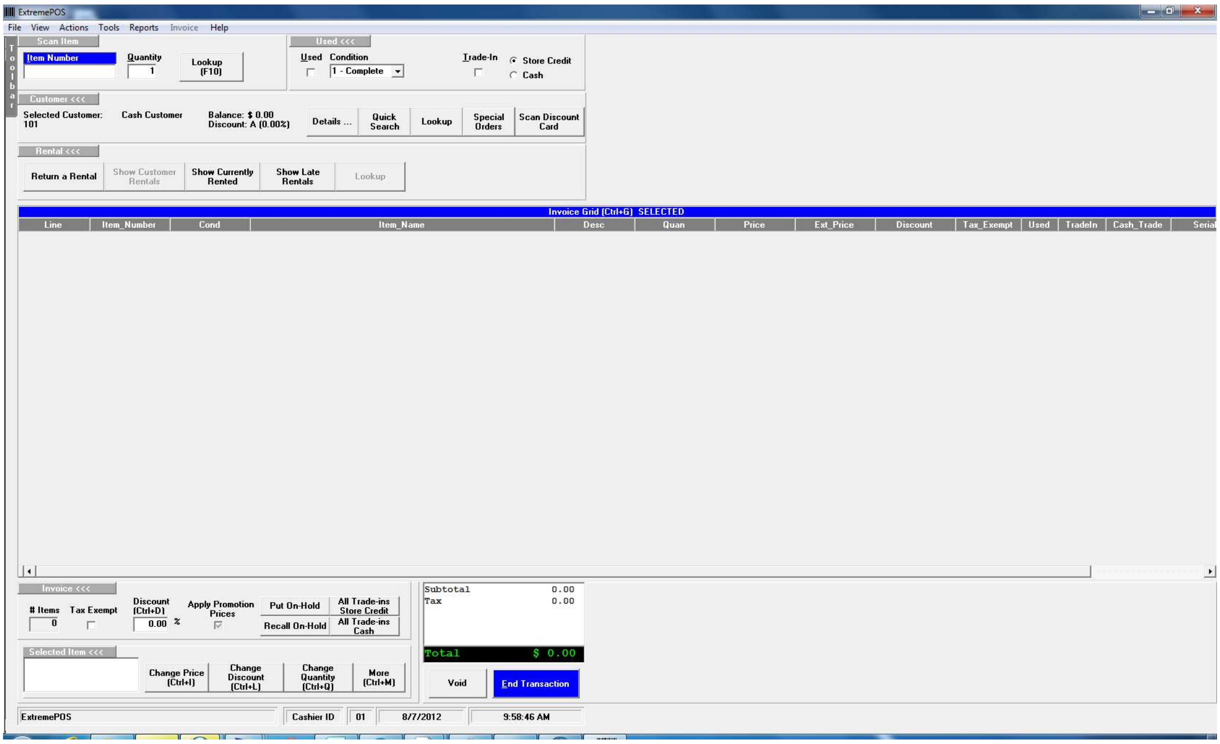
Extreme
SOFTWARE CORPORATION

Point of Sale and Inventory Control System

User's Manual



praiz pos

Extreme POS

Version 2 for Windows® 2000/XP

Extreme Software Corporation
1001-204 Pemberton Hill Road
Apex, NC 27502

Phone: 877-410-0003
Internet: http://www.extremepos.com
Technical Support: 919-387-7597
support@extremepos.com

Table of Contents

Chapter 1:

Initializing ExtremePOS / Praiz / Musicware

Why computerize?

3 Essential Questions for Independent Retailers

A cash register replacement.

Reduce theft.

Reduce inventory shrinkage.

Reduce "bad" inventory.

Increase "good" inventory.

Watch your margins.

Speed customer checkout.

Greater accuracy.

Keep track of your customers.

1. Why Computerize Your Store?

A Cash Register Replacement. A Computerized Cash Register system replaces your old fashioned cash register. A Cash Register has a single purpose. It tells you how much money your business has taken in during the day. It can tell you that you took in $350, but it can't tell you how much of that money is profit. It can't tell you how much inventory you have on the shelf. It can't tell you how many bottles of soda your business sold today. A computerized cash register can instantly tell you that you have $350 in your cash drawer. It will tell you that $225 of that $350 is profit. It can tell you that you sold 12 copies of a certain compact disc today and that you still have 8 copies on the shelf. It can also tell you what items you should order today because your stock is low.

Reduce Theft. By computerizing you can reduce theft in your business by an average of 2 ½%. An average small business doing $500,000 per year can reduce in-store theft by an average of $12,500. How? Your employees become more involved in watching the store inventory if they know that every piece of inventory in your business is being monitored.

Reduce Inventory Shrinkage. By watching your inventory and comparing on shelf inventory to your computerized reports, as well as taking regular physical inventories, both you and your employees are much more careful about giving away inventory, retaining obsolete inventory, monitoring breakage and non-theft inventory that "walks" out of your business, as well as checking inventory as the items enter your store. You can reduce inventory shrinkage by up to another 2 ½% by computerizing.

Reduce Your Inventory. By watching your inventory reports, you can make sure that you order more wisely. You don't need 750 Christmas CDs on the shelf in the summer.

Increase Your Inventory. You don't need 750 Christmas CDs in the summer, but you may need more portable CD players for your store during the month of August. Many stores order products based on what they think they sell. If you check your inventory reports and see that you sold 100 portable CD players last August, it gives you a good clue to help make sure that you don't run out of portable CD players this August. Watching your inventory reports increases your efficiency.

Watch Your Margins. By analyzing your inventory better, you may determine that certain genres of music produce higher profit margins than others. Our POS software will help you to stock more products that give you greater profits and fewer products that give you the least amount of profit.

On average, computerizing will save you 5% of your sales.

A business doing $500,000 per year in sales will save $25,000 per year by computerizing.

A typical single user station computer system with printer, cash drawer, computer, barcode scanner and barcode printer costs less than $5,000.

The typical computer system above will save you $20,000 in the first year alone!!

Speed Customer Checkout. Computerizing speeds up your customer checkout. With a barcode scanner you can checkout a customer much faster than the time required with a manual cash register.
Accuracy. Every item in your store has a price and barcode number associated with it. Never again will you have to figure out how much or how many you have in stock. Your clerks will have instant stock information at their finger tips.

Keep Track of Your Customers. Your best customers are your present customers. No matter what type of store you have, you should try to obtain the name and address of every one of your customers. Keeping a customer list is an obvious asset for a music store. You want your customers to keep coming back, especially when you have a sale. Mailing to your customers periodically keeps them coming back. Your vendors may even help you pay for the cost of the mailing. Mailing to your customers is the best form of advertising, even if it is just a quick postcard listing a few new sale items. Every mailing to your customer list will always be a positive to your cash flow.

2. Why Choose Musicware POS, Praiz POS or ExtremePOS?

We know music stores! Musicware POS software has been servicing record stores for almost 20 years. Our dedication, knowledge, experience and commitment to the industry is unmatched. Our software is 32-bit Windows based and is extremely intuitive and feature packed. We have uniquely designed software for stores buying and selling both "new" and "used" inventory. Because of this unique business requirement, independent music stores need software specifically designed to handle new and used items.

We know bookstores! Praiz POS software has been servicing bookstores for almost 10 years. Our dedication, knowledge, experience and commitment to the industry is unmatched. Our software is 32-bit Windows based and is extremely intuitive and feature packed. We have uniquely designed software for bookstores buying and selling both "new" and "used" inventory. Because of this unique business requirement, independent bookstores need software specifically designed to handle new and used items.

3. Why Now?

Why wait any longer! Start benefiting from technologies that can save you money and make you more efficient now. Give your store the same advantages that larger chain stores enjoy at a fraction of the price!

Installation Notes

Important Note: Musicware for Windows, Praiz for Windows and eXtremePOS versions have different naming conventions but the installation procedures are virtually the same.

1. Make sure you have the necessary computer hardware to run ExtremePOS:

   Suggested Setup:

   - PC with 2 GHz processor or better, 1GB of RAM or better
   - CD-RW for archiving of backup files
   - Removable media, such as USB drive, Zip drive, or USB memory stick may be used for backups and other activities.
   - Microsoft®Windows XP or higher

2. **Network Installation:** The database server used by ExtremePOS is Microsoft SQL Server 2008 Express, which is essentially a scaled-down version of the full Microsoft SQL Server product. It is recommended that you designate the most powerful computer on your network to run the database server. Obviously, if you have a server computer you currently use for other applications, this will probably be the best choice to also host your database server.

3. **Receipt Printer Driver:** To use a receipt printer with ExtremePOS you will need a driver for your printer. To install a driver, go to the Windows Control panel and choose **Printers**. When your list of installed printers is shown, choose the first item, **Add Printer**. During the process, select **Generic** as the manufacturer, and then choose **Generic / Text Only**. Finish the printer installation. You are now ready to print to your receipt printer. *Exception:* When using a Star receipt printer on COM 1, just choose **NONE** as your receipt printer under default printers. It is not necessary to install a printer driver when your Star printer is on COM 1.

4. **Barcode Printer Driver:** To use the 2" or 4" Advantage printer with eXtremePOS, please install its appropriate driver. The 2" only model uses the **Advantage BD 2** driver, while the 4" uses the **Advantage BD 4** driver. The Bixolon printer uses the Samsung/Bixolon driver. The driver is included on the CD-ROM, which ships with the printer. You can also download the driver from the manufacturer's website. Please refer to the unit's user manual.

   A Note on USB Barcode Printing:
   In order to use a USB Barcode printer, you will need to set it up using the net use command. In order to do this, install the driver for your printer twice, once on the usb port and once on an unused lpt port. Make certain you note the number of the port you use. Share the usb driver. Click on the run window, and type cmd into it and run it. In the shell that opens, use the following command:
   net use lpt1: \\{your computer name}\{printer share name} /p:yes
   Replace lpt1: with the appropriate port number. When setting up printers in ExtremePOS, you will need to select the printer driver for the lpt port driver. Contact support if you need assistance with these instructions. As of version 3.0, this is not necessary for Zebra or Bixolon label printers.

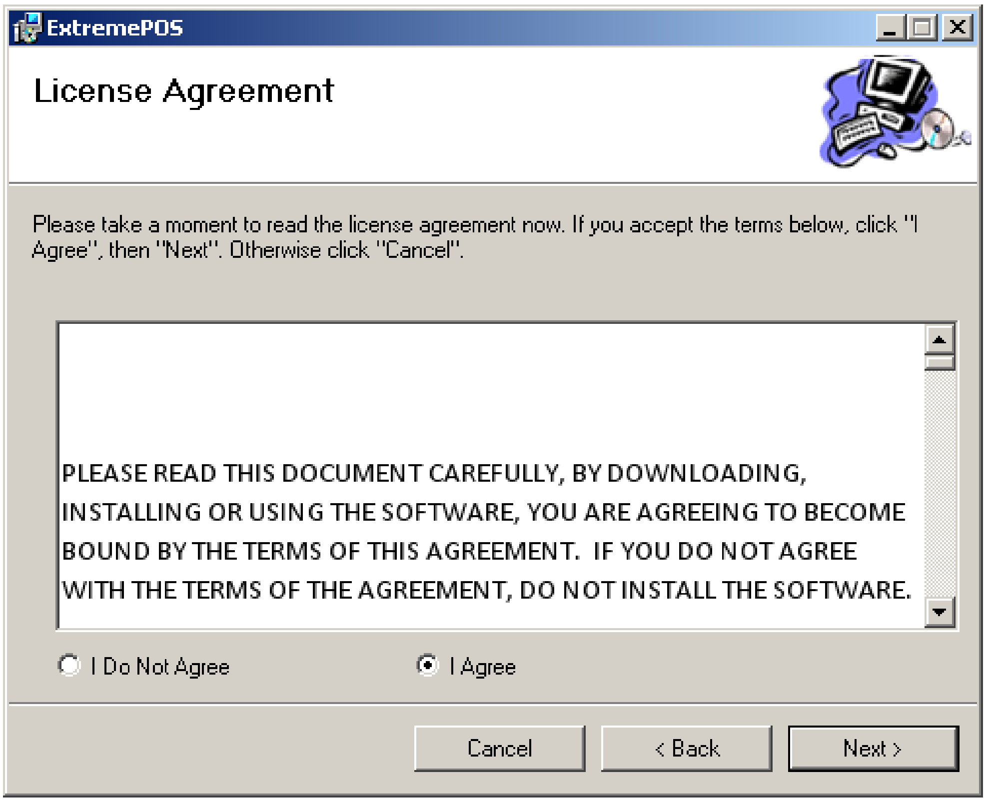
Installation Procedures

Important Note: The installation instructions below will refer to ExtremePOS, but they also apply to Musicware and Praiz.

These instructions apply to those installing ExtremePOS 2.9 to a system that has not previously had a copy of ExtremePOS version 2 on it. For those who are doing an upgrade, please see the document “Upgrade Instructions for ExtremePOS 2.6 to 2.9”

YOU SHOULD INSTALL ON THE STATION YOU INTEND TO USE AS A SERVER FIRST.

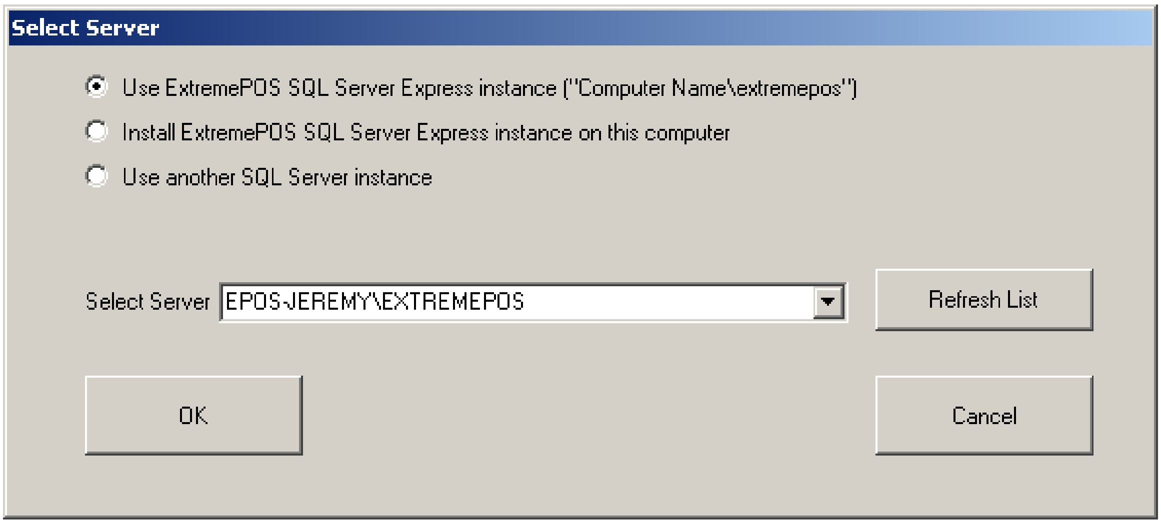
To do the installation, you will need to run setup.exe. Follow through the prompted screens. Make certain you install for All Users if you are planning on having multiple Windows accounts access the computer. Once the EPOS Core has finished installing, you will need to go back to the ExtremePOS Install and run it. Depending on your version of Windows and other installed programs, you may be prompted to install additional programs upon running the “setup.exe” located in this directory; if so, allow them to install.



You will be required to agree to terms and conditions of the license for each program at time of install.

Once again, follow through the prompts of the installation program. You will be required to agree to the license agreement to perform the installation.

On your desktop, you will now find a shortcut for ExtremePOS, with a barcode logo. Run it.

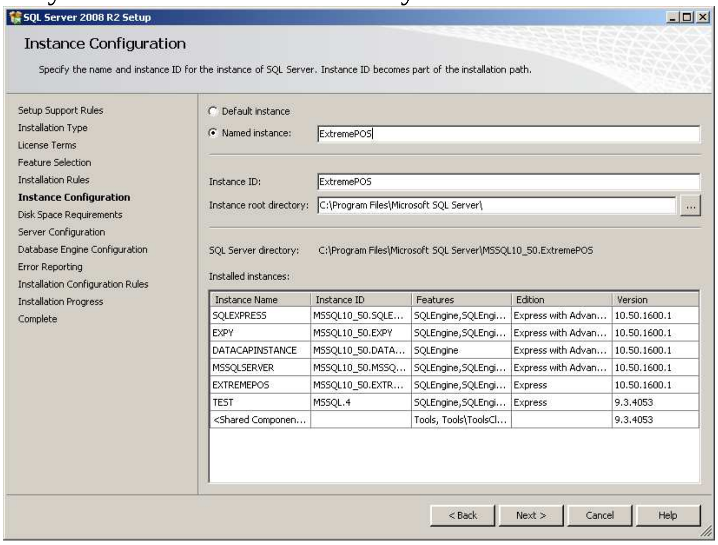


You will be prompted to select a database server. If this is the station you intend to use as your server, then select "Install ExtremePOS SQL Server Express instance on this computer". Otherwise, select your server instance from the list of computers on the dropdown box. If your instance is NOT named Extremepos then you will need to select "Use another SQL Server Instance". Make certain you use the same instance on all PCs.

THE FOLLOWING SECTION APPLIES ONLY IF THIS IS THE SERVER STATION. OTHERWISE, SKIP THESE STEPS UNTIL THE NEXT BOLD INSTRUCTION.

If you select to install a SQL Server instance, the software will be automatically downloaded and the installation process will be launched. You may accept the default settings for the server, including accepting the license agreement.

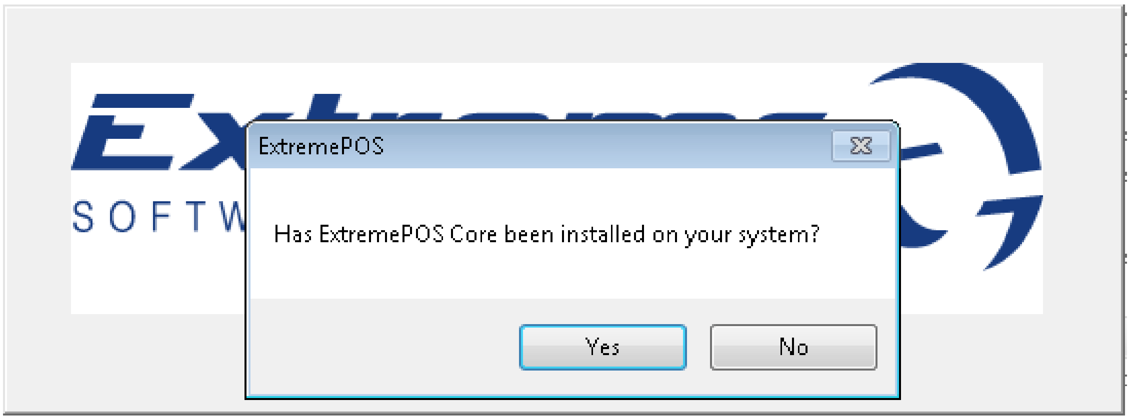
By default, the server instance name is "ExtremePOS". If necessary, you may name it something else, but you will need to know what you call it.



Instance Name	Instance ID	Features	Edition	Version
SQLEXPRESS	MSSQL10_50.SQLE...	SQLEngine,SQLEngi...	Express with Advan...	10.50.1600.1
EXPY	MSSQL10_50.EXPY	SQLEngine,SQLEngi...	Express with Advan...	10.50.1600.1
DATACAPINSTANCE	MSSQL10_50.DATA...	SQLEngine	Express with Advan...	10.50.1600.1
MSSQLSERVER	MSSQL10_50.MSSQ...	SQLEngine,SQLEngi...	Express with Advan...	10.50.1600.1
EXTREMEPOS	MSSQL10_50.EXTR...	SQLEngine,SQLEngi...	Express	10.50.1600.1
TEST	MSSQL.4	SQLEngine,SQLEngi...	Express	9.3.4053
<Shared Componen...		Tools, Tools\ToolsCl...		9.3.4053

ONCE YOUR SERVER IS INSTALLED OR IF YOU ARE NOT ON THE SERVER, FOLLOW BELOW:

You will be asked if you have installed the ExtremePOS Core files. You should say "No" the first time you get this screen, and the ExtremePOS Core files will be downloaded and installed.



Select the EPOSCore file when prompted. If you installed to a non-default directory, you will need to browse to the install path that you had selected. Finally, you will be asked to register.

Fill in the Serial Number and your Customer number from ExtremePOS, or select demo if you are installing a demonstration copy. If this is successful, then the program is ready to use!

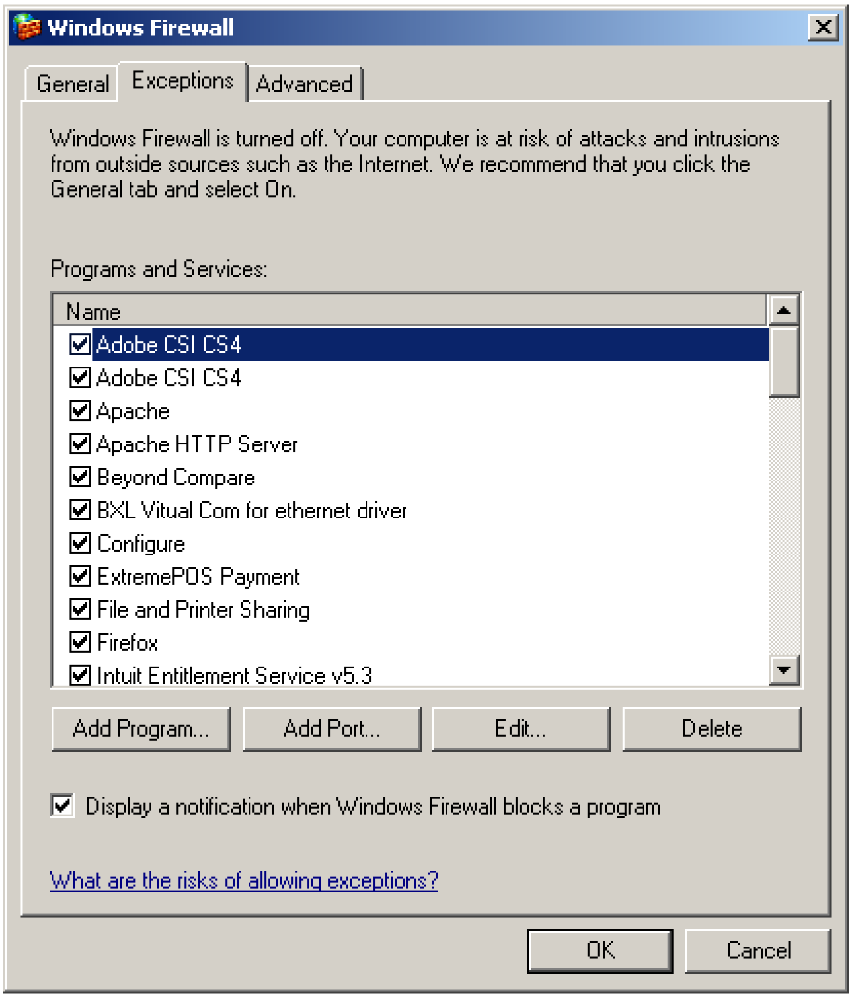

ExtremePOS
Login to POS
Vendor Databases
License and Updates Management
Backup Database
Exit

SETTINGS IN WINDOWS FOR MULTISTATION INSTALLS:

If you are setting up a multistation system, you will need to make certain that you have certain settings correct. Primarily, you will need to make certain that your firewall is correctly configured.

By default, in whatever firewall program you use TCP and UDP ports 1433 and 1434 should be opened. However, this can vary from system to system and from program to program.

For the default windows firewall, these exceptions may be set by going to **START -> CONTROL PANEL -> WINDOWS FIREWALL. Go to the EXCEPTIONS tab and click ADD PORT. You will need to separately add the TCP and UDP Port.**



Should you need help with this, please contact Extreme Point of Sale, Inc, Support at 919-387-7595x101.

Backing Up Your Data

You should perform frequent backups of your database to protect yourself against data loss due to computer hard drive failures or other catastrophic events. At a minimum, you should back up daily, but you may also want to back up periodically throughout the day. Database backups can be performed from the Launchpad by pressing the backup database button. There are a few important points to consider when backing up your data.

CHOOSING A BACKUP LOCATION.

The following are some options you may choose for your backup location.

1. Keep the default location on your server computer. There are some disadvantages to keeping this location. If you keep this location, both your database file and your backup files will reside on the same physical hard drive. Therefore, you put yourself at risk of losing both your data and backups in the event of a hard drive crash on your server. If you do choose to keep this as your backup location, you should copy your backup files frequently to another media, such as a CD, and keep them in offsite storage.
2. A removable media on your database server. Some examples are a USB drive, ZIP drive or a USB memory sticks. USB memory sticks have the advantage or being small, portable, capable of storing large amounts of data (up to 1GByte or greater) and have become inexpensive. One benefit of removable media is that you can physically take your backups with you, protecting yourself against data loss in the case of fire or theft. You will want to periodically archive your backups to a permanent media, such as CD, for added security and to keep your removable media from filling up.
3. Another computer on your network. This option will protect you from data loss in the event of a hard drive crash on your server. If you select this option, you should also periodically copy your backup files from the backup location to another media, such as a CD, for offsite storage. There are some rules you need to be aware of when backing up to a network computer.
   - You will need to create a Network Share on the computer that you wish to use for backups. SQL Server does NOT recognize “Mapped Network Drives”. If you specify a mapped drive as the backup location, the backup will fail.
   - The network share name and the directory path cannot currently contain any spaces. ExtremePOS will prevent you from selecting any paths containing spaces.

A backup file will maintain snapshots of the original full backup and all appended differential backups. In the event that you need to restore your database, ExtremePOS will allow you to restore to any of these points in time.

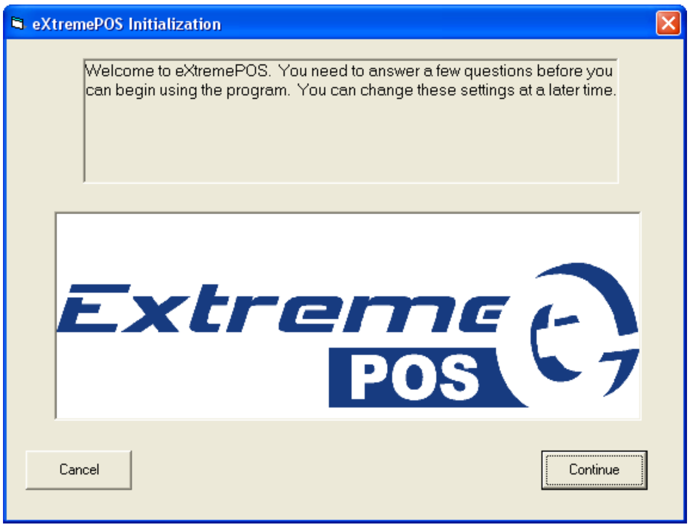
ExtremePOS, Musicware and Praiz

The first time you start ExtremePOS, Musicware or Praiz you will need to provide the program with some initialization information. The following section will guide you through the initialization steps.

NOTES:

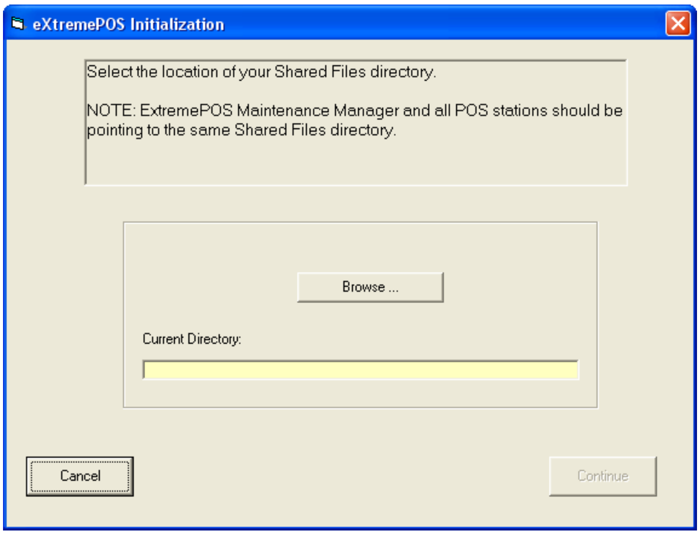
- ExtremePOS is depicted in this section; however the steps below also apply to Musicware and Praiz.

1. You will now see the welcome screen, as shown below. Select **Continue** to proceed. Selecting Cancel will exit the initialization procedure.



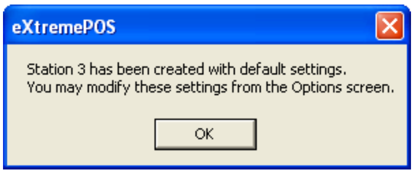
2. You will now need to select your Shared Files directory. The Shared Files Directory is the location that ExtremePOS Maintenance Manager and all ExtremePOS, Musicware or Praiz POS stations keep common files, such as reports, vendor database files and program updates. Whatever Shared Files directory you have already selected for ExtremePOS Maintenance Manager, you should point to the same directory when initializing your POS stations.
   Select "**Browse**" to choose a directory. Once you have selected your Shared Files directory, select "**Continue**" to proceed. Selecting Cancel will exit the initialization procedure.

   NOTES:
   If you are installing ExtremePOS on multiple stations, you will need to make sure your Shared Files directory is enabled for Network Sharing in Windows. Network users will require full access (Read, Write and Modify) to this directory. See Windows documentation for information on sharing directories.
   If you are an existing Version 1 user upgrading to Version 2, you will not need to select a Shared Files directory, and you will not be shown the select screen. By default, the Shared Files directory will be set to your Version 1 "Store Data directory".



3. You will now be asked to select a Station ID for this station. Select the desired Station ID and hit OK to continue.

   You should now see the confirmation screen below indicating that the new station has been created in your store database. Select OK to continue.
   NOTE: If you are an existing ExtremePOS, Musicware for Windows or Praiz for Windows Version 1 user, the Station will probably already exist in your database. In this case, you will not see the confirmation screen.



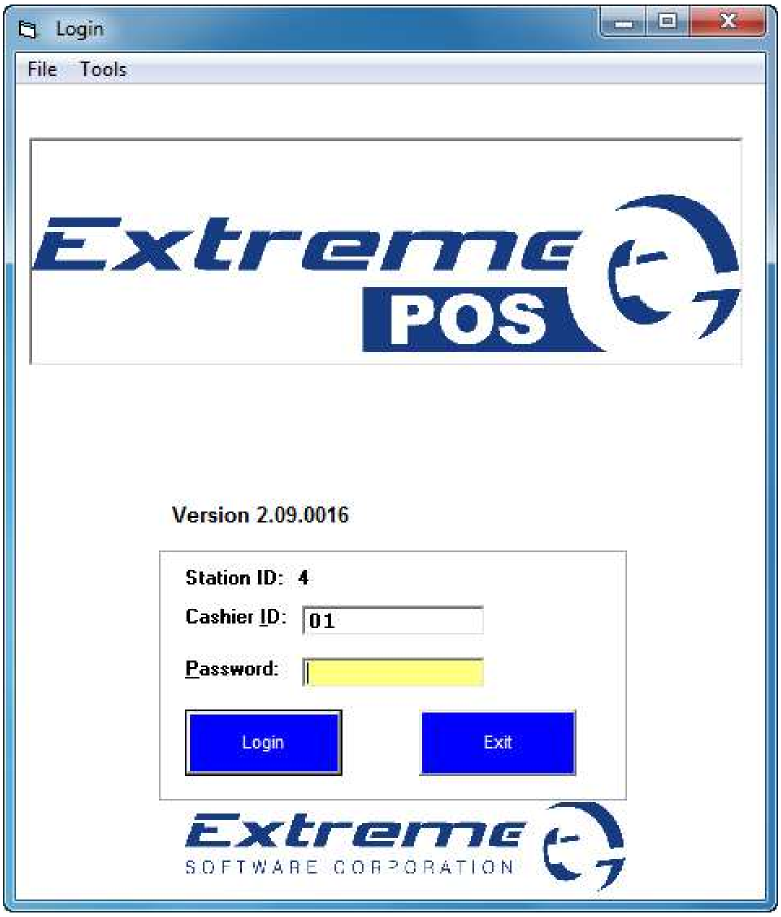
4. You will now see the ExtremePOS login screen. You have now successfully completed initialization of ExtremePOS.

Chapter 2:

Getting Started

Log-in Screen

Note: Musicware and ExtremePOS users will see slightly different screens.



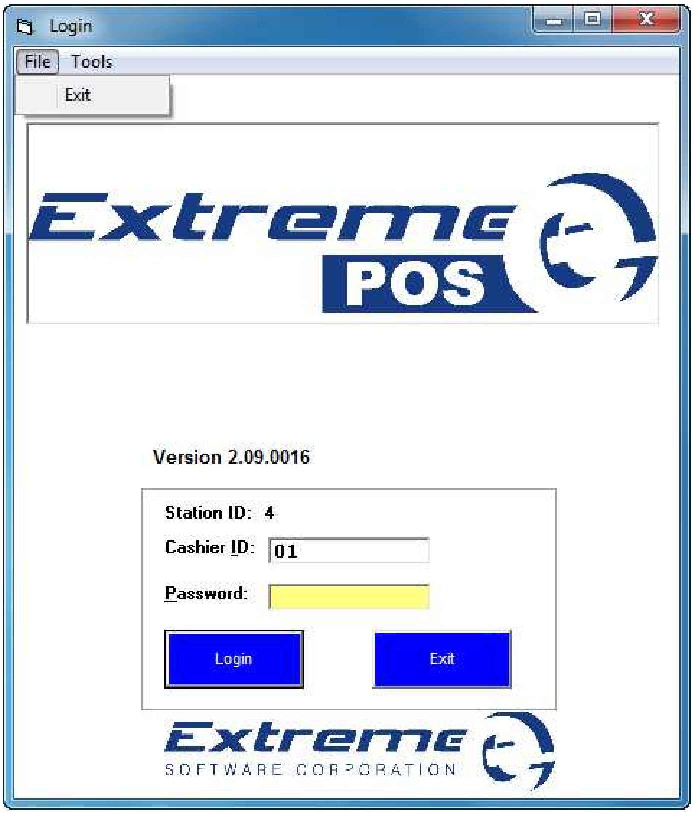
The first screen that appears when you run PRAIZ® is the Log-in Screen. To log in, type in the password for the shown cashier ID, then press **<ENTER>** or click on **Login**. To log in as the administrator, type in the administrator password under any Cashier ID. To log in as a cashier under a different cashier ID, type in the desired ID in the **Cashier ID** field, then enter that cashier's password. You may only change Cashier IDs if you have manually added in the ID through the **Tools** menu. This option is enabled in both the single and multi-user versions.

The default Administrator Password is: admin

The default Cashier Password is: cashier

File and Tools Menu

File Menu

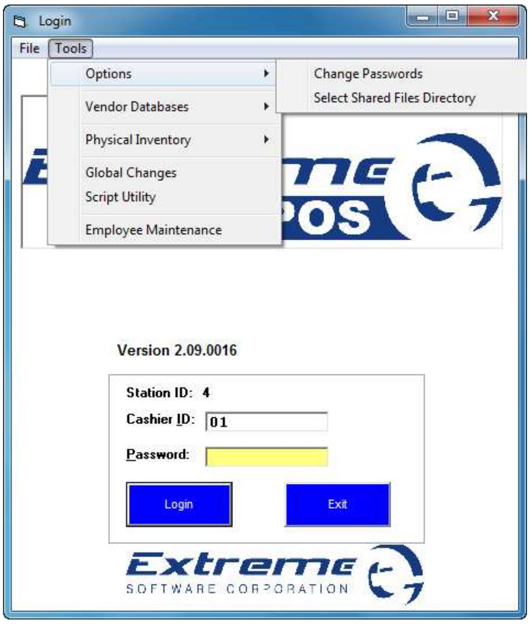


The File menu on the Log-in screen contains a choice for exiting the program. To access the File menu, click on **File** or press **<ALT+F>.**

Tools Menu

The Tools menu on the Log-in Screen allows you to redefine your original specifications such as industry selection, the location of your store directories and database server. You can also change cashier and administrator passwords. To access the Tool menu, click on **Tools** or press **<ALT+T>**.

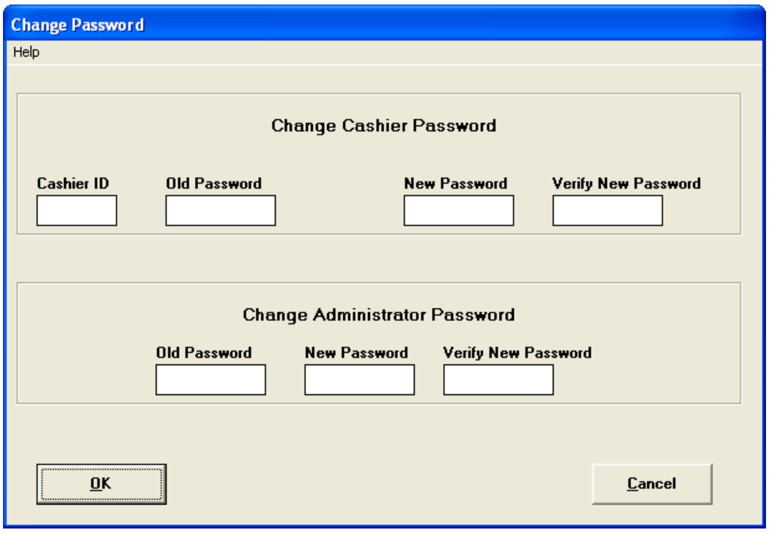
Tools>Options Menu



Change Passwords

The default Administrator Password is: admin
The default Cashier Password is: cashier

This section allows you to change a password for a cashier or the administrator. To access this screen, select **Change Passwords** from the Log-in Screen **Tools** menu.



To change a Cashier Password

- Type the Cashier ID for which the password will be changed in the **Cashier ID** field.
- Type the old cashier password in the **Old Password** field.

- Type the new password to be used by this cashier in the **New Password** field.

- Re-enter the new password in the **Verify New Password** field to ensure no errors in typing.

- Click on **OK** to store the new password.

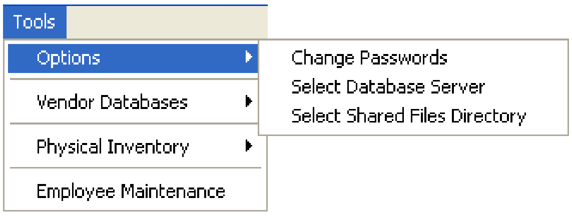
To change the Administrator Password:

- Type the current administrator password in the **Old Password** field (If you forget the administrator password, contact ExtremePOS).

- Type the new password in the **New Password** field.

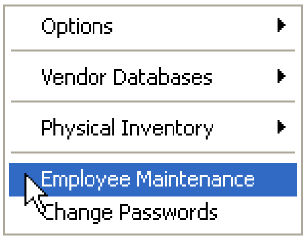
- Re-enter the new password in the **Verify New Password** field to ensure no errors were made in typing, and then click on **OK** to store the new password.

Select Shared Files Directory

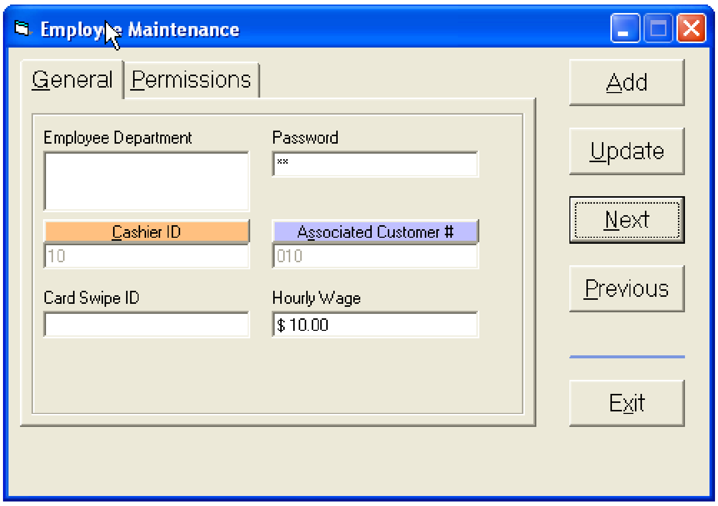


This option allows you to change the current Shared Files directory. The Shared Files directory is initially selected during program initialization. For more information and rules/guidelines on selecting your Shared Files directory, see step 4 in the ExtremePOS Initialization documentation in Chapter 1.

Tools>Employee Maintenance Menu



This screen allows you to create or update a cashier ID. To use this function, select **Employee Maintenance** from the **Tools** menu.



The following fields are displayed for each Cashier ID:

Employee Department: Use this list of departments to classify your employees. To select a department, click on its name. For more information on creating employee departments, see **Chapter2: Inventory Control: Departments**.

CashierID: This is the current Cashier ID. To select a different Cashier ID, use the **Next** and **Previous** buttons or click on the **Cashier ID** button, enter the desired two digit ID, then press **<ENTER>** or click on **OK**.

Password: This is the password for the displayed employee. The default password for new cashiers is **Cashier**. You may also change this password by selecting **Change Passwords** in the **File** menu. For more information, see **Change Passwords**.

Card Swipe ID: This is the value encoded on the employee's ID card. Use this for quick logon/logout.

Associated Customer #: If the employee has a customer number, enter it here by clicking on the **Associated Customer #** button, finding the correct Customer Number, then clicking **Add**. The default Customer Number is 101.

Hourly Wage: This is how much the employee is paid per hour.

To add a Cashier ID:

- Click on **Tools** or press **<ALT+T>,** then select **Employee Maintenance**. You will be prompted to enter the administrator's password.

- Click on **Add** or press **<ALT+A>**.

- Enter the new Cashier ID and the employee's information. When you are finished, click on **Done** or press **<ALT+D>**. To quit without adding a Cashier ID, click on **Cancel** or press **<ALT+C>**.

NOTE: Cashier IDs must be two characters long.

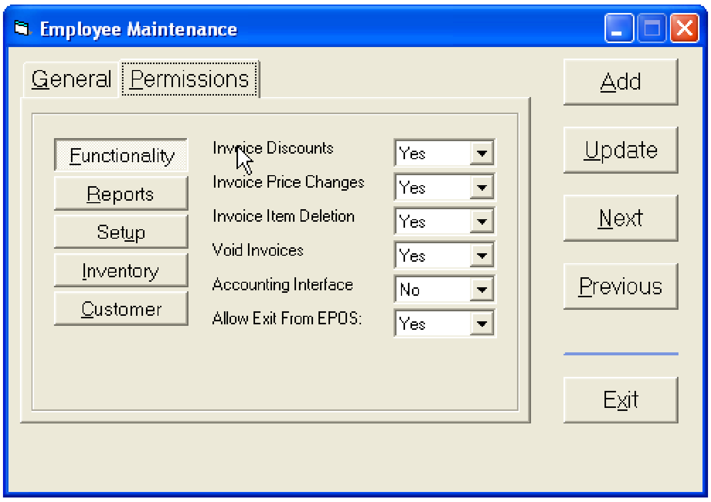
To update a Cashier ID:

- Click on **Tools** or press **<ALT+T>,** then select **Employee Maintenance**. You will be prompted to enter the administrator's password.

- Change the desired fields, then click on **Update** or press **<ALT+U>** to save your changes. Click on **Exit** or press **<ALT+X>** to quit without saving.

Permissions

This screen allows you to specify which functions a certain cashier can use. To access this screen, select the **Permissions** tab:



To change the functions allowed for a cashier:

- Press **<TAB>** to move through the different functions. If you want a function to be allowed, choose **Yes** from the drop down list box. Choose **No** if you do not want a function to be allowed. Choose **Prompt** if you want to be prompted for the administrator's password or another cashier with override permission's id and password. Choose **Override** if you want to allow the cashier to enable other cashier's Prompts. If you make a mistake press **<SHIFT>** and **<TAB>** to move back to the previous field.

- Click on **Update** to store any changes or click on **Cancel** to ignore any changes made.

- To modify settings for another Cashier ID, click on **Next** or press **<ALT+N>**, or enter the desired Cashier ID, then press **<ENTER>** or click on **OK**.

To change a Cashier Password

- Type the Cashier ID for which the password will be changed in the **Cashier ID** field.

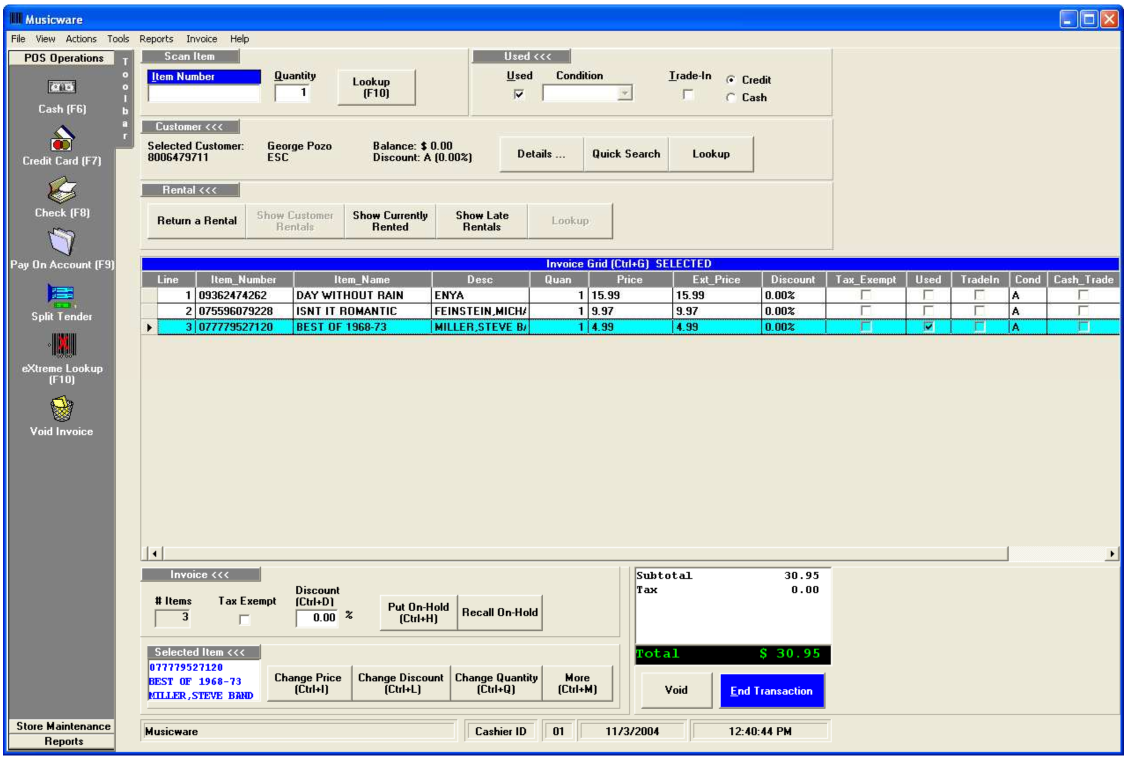
- Type the old cashier password in the **Old Password** field.

- Type the new password to be used by this cashier in the **New Password** field.

- Re-enter the new password in the **Verify New Password** field to ensure no errors in typing.

- Click on **OK** to store the new password.

The Invoice Screen



ExtremePOS works with or without a mouse. You can access most features of ExtremePOS using an ordinary keyboard.

After successfully entering your password, you will enter the Invoice Screen. Everything you will need to do in EXTREMEPOS works from this one screen. Most features in ExtremePOS works with or without a mouse. You can move around the entire screen using either **<TAB>** or any of the numerous **<ALT>** shortcut keys. You can bring up additional ExtremePOS screens using the **<CTRL>** shortcut keys.

Any underlined letters on the screen are **<ALT>** shortcut keys. For example, look at the word **Tools** in the menu bar. You can access **Tools** either by clicking your mouse on the word **Tools** or by pressing the **<ALT+T>** shortcut keys (press **<ALT>** and **T** simultaneously).

You can also use **<TAB>** to go from one section of the screen to another. Press **<SHIFT>** and **<TAB>** simultaneously to go backwards. For details on the Invoice Screen, see **Chapter 4: Creating Invoices**.

The Menu Bar

Access the Menu Bar by using the <ALT> keys or a mouse.

For example:

<ALT+T> = Tools

<ALT+V> = View

<ALT+R> = Reports

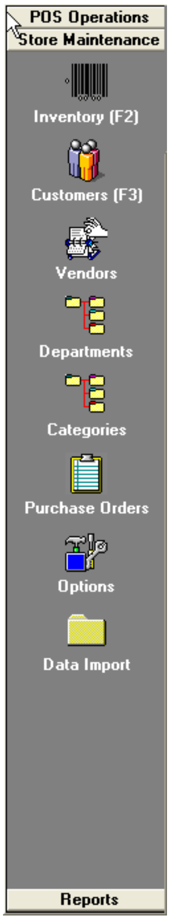
You may use lower or upper case letters.

<ALT+T> = <ALT+t>

You can access the **Menu Bar** by using a mouse or your **<ALT>** key. You can access each menu listed on the menu bar by simultaneously pressing **<ALT>** and the underlined letter in the menu title. To leave the menu bar, press **<ESC>** twice or press another **<ALT>** key to reach another part of the main screen.

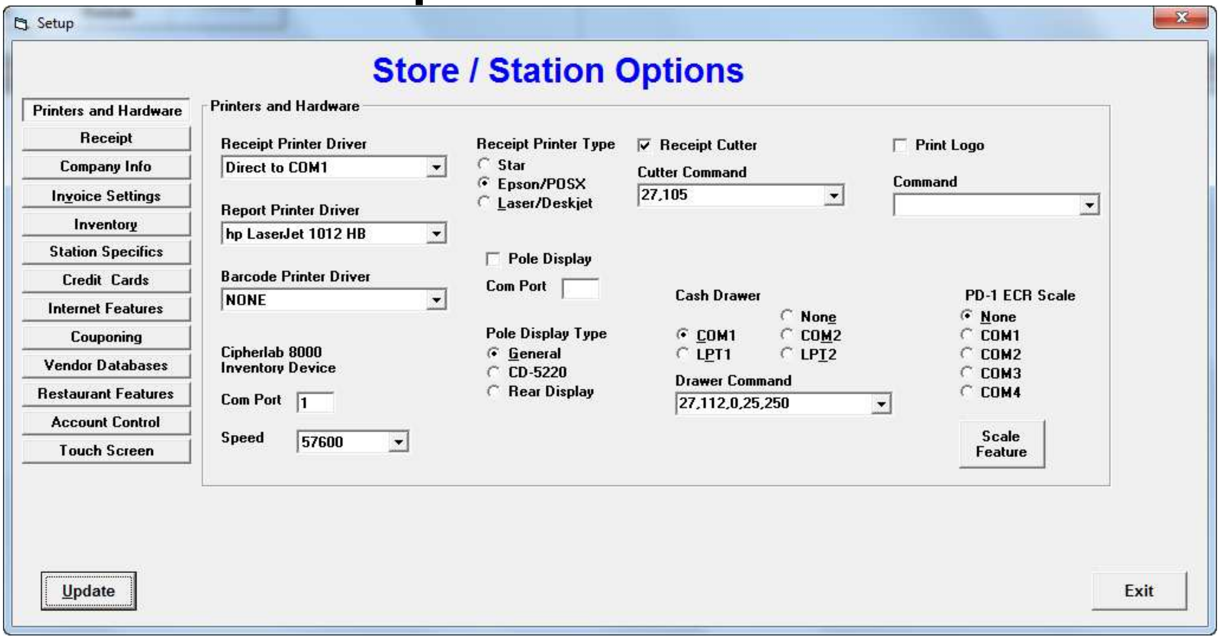
You can also press **<ALT>** to access the menu bar and then use the left and right arrow keys (**<←>** and **<→>)** to move from one menu to another. Press <↓> to display the highlighted menu.

The eXtreme Toolbar



The **eXtreme Toolbar** is a navigation control that brings the look of Microsoft® Oulook™ to eXtremePOS. It incorporates a system of sliding groups, each of which is identified by its header. Clicking a group's header causes the group to become active, slide into view, and diplay the items it contains. The eXtreme Toolbar gives the user an easy way to access the most commonly used ExtremePOS features. For example, the **Store Maintenance** group contains shortcuts to inventory, customers, vendors, departments, categories, purchase orders and setup options.

Options Screen



Click on the appropriate tab to select which settings to change.

The Options Screen allows you to customize the features you use in ExtremePOS. To view the Options Screen, select **Options Screen** from the Invoice Screen **Tools** menu. Each of the different settings is fully explained in the following paragraphs. Click on **Update** to save your changes or click on **Exit** to ignore all changes.

Printers and Hardware

Use this option to specify the settings for your printers, cash drawer, pole display, and PD-1 ECR Scale. To change any of these settings, click on the **Hardware** tab in the Options Screen, and then click on the appropriate port setting.

Receipt Printer Driver: ExtremePOS will print receipts to the printer listed here. For most users, those who are using a printer plugged in to the serial port COM1, drivers for the receipt printer are not needed. Instead, use Direct to COM1. For those using USB receipt printers, you must install the drivers in Windows and select the correct one here.

Report Printer Driver: If you have a printer for your reports, you must install the drivers for it in Windows before using it in ExtremePOS. After the drivers have been installed, select the printer you wish to use here.

Barcode Printer Driver: If you have purchased a barcode label printer, you must install the drivers into Windows before you may use the printer here. The drivers come either from the printer's manufacturer's web site or from the driver CD sent with the device. Make certain you select the correct model.

Receipt Printer Type: Select the type of receipt printer you have. Other than Star, most receipt printers emulate Epson style printing.

Pole Display Port: ExtremePOS will display invoice items, associated prices, and a running total on a pole display as items are added to an invoice. **Pole Display** should be turned off if you do not have a display. If you do have a display, you must specify the COM port to which it is attached.

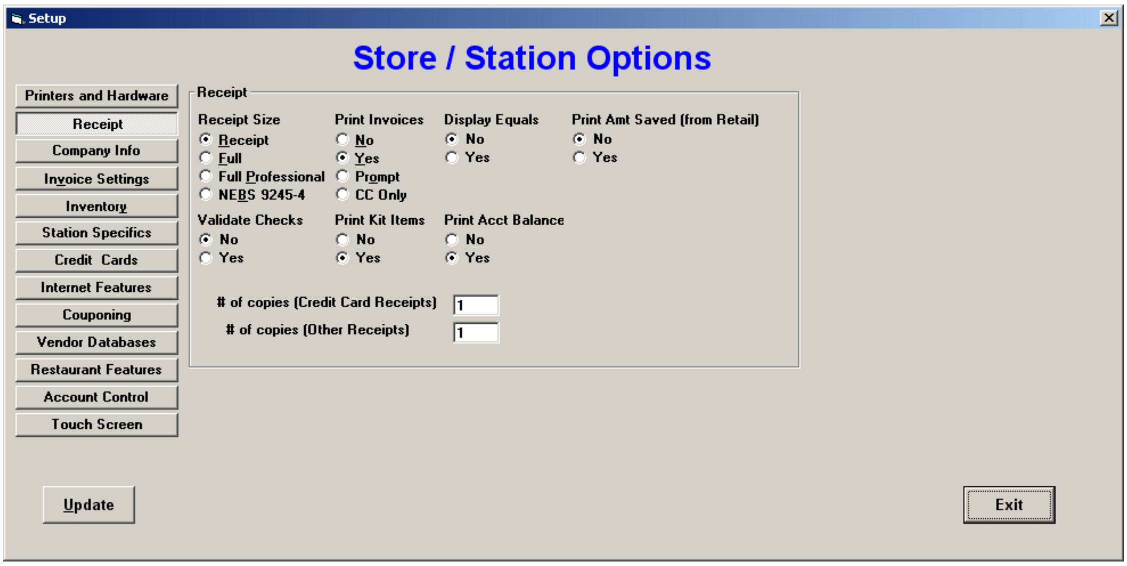
Pole Display Type: Use this option to select what type of Pole Display you are using. If you are using the Extreme Customer Display application, you may select that. You need not specify a com port for that program,

Cash Drawer Port: Use this option to specify the location of your cash drawer. **Cash Drawer Port** should be set to "None" if you do not have a cash drawer. If you do have a cash drawer, you must specify its location - COM1, COM2, LPT1, or LPT2. If your cash drawer receives its power from the receipt printer, you should set your cash drawer port to the same port as the receipt printer.

Receipt Cutter: This option allows you to set up an autocutter used with your receipt printer. If your printer has one and you wish to use it, set the radio button to 'yes' and the appropriate commands in the box below. The drop down menu includes the two most common by default; the first listed is for most Star printers and the second is for most Epson compatibles.

Print Logo: This option may allow you to print a store logo on your receipts; for further information, consult your printer's documentation.

Cipherlab Device: This allows you to set the port and speed for the Cipherlab 8000.



Receipt

Receipt Size: Use this option to select the paper size to be used for invoice receipts from the following selections: **Receipt, Full, Full Professional,** or **NEBS 9245-4**. To change your receipt paper size, click on the **Receipt** tab in the **Options Screen**. **Full Professional** is designed to print on a standard laser printer.

If you select Full Professional, the **Prof Logo** option is displayed. You may choose to include a picture, company info, or both a picture and company info on the receipt. **NOTE: The selected picture must be a .jpg or .gif file.**

*If you select **Receipt*** and your receipt printer is defined as Generic under Windows, use the Windows printer setup option to indicate **No Page Breaks** to ensure that the printer will not eject a full page when each receipt is printed. EXTREMEPOS automatically prints a few blank lines to allow tearing between receipts.

If you select NEBS 9245-4, you must set the paper size as **User Defined** in the Windows printer setting.
Print Invoices: Use this option to indicate whether invoices should be printed automatically or if you should be prompted to print each invoice. To change your Print Invoice settings, click on the **Receipt** tab in the **Options Screen**. Select **YES** to automatically print out an invoice upon completion of a transaction. Select **NO** if you don't want invoices to print at all. Select **PROMPT** if you only want invoices to be printed at certain times. You will be prompted to print an invoice each time you end a transaction. Select **CC Only** to only print a receipt for credit card invoices.

Display Equals: If you select **Yes** for this feature, the line of equal signs separating the items from the rest of the receipt will print.

Print Amount Saved: Enable this option to print the total difference between your selling price and the retail price for the invoice. This is for non-NEBS receipts.

Validate Checks: When this function is enabled, the invoice number, date and grand total will print on the back of checks. You can only use this function if you have an Ithaca slip printer.

Print Kit Items: Disabling this option means that the individual items in a kit will not print on receipts but will still appear on the invoice screen.

Print Account Balance: When this option is enabled, the account balance will print on receipts for "on account" customer.

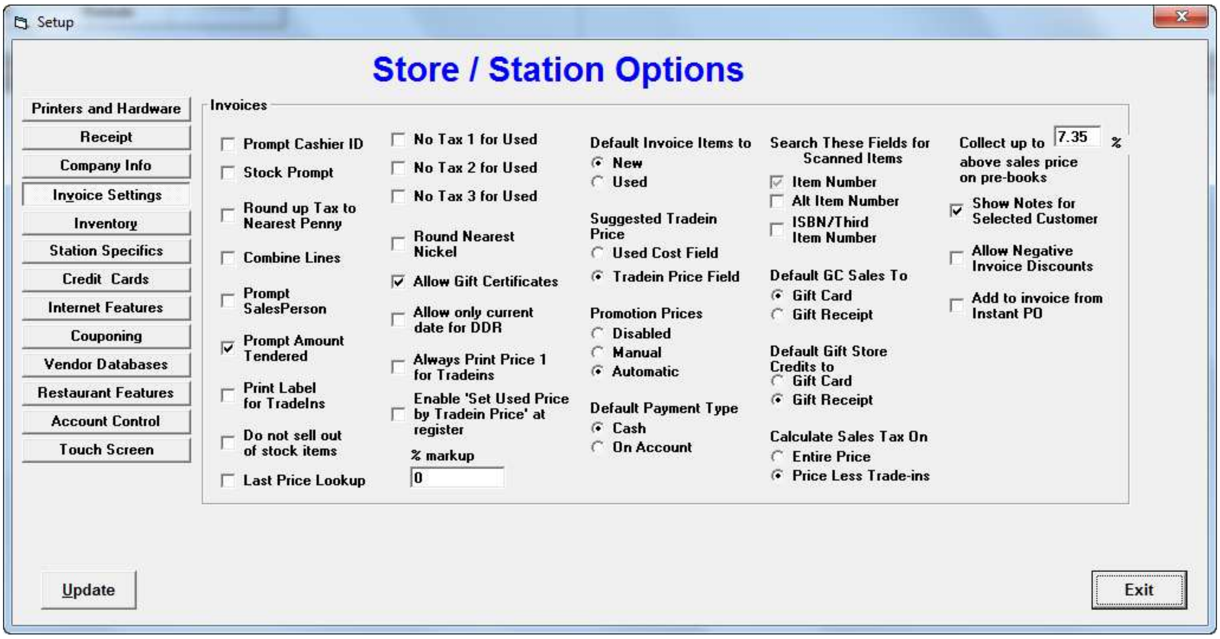
Company Information

This is the name, address, and telephone number that will appear on every invoice, receipt, report, or statement. ExtremePOS's company information is the default company name, address, and phone number. To enter your own company information, click on the **Company Info** tab in the Options Screen. Use **<TAB>** to move from field to field, then replace the old company information with the desired company information. Click on **Update** to store the new company information. You must enter information on all four lines.

Musicware Users Only: If you are a SoundScan reporter, please enter your reporter number, user name and password in the appropriate fields, as provided to you by SoundScan.

NOTE: You may only enter four digits for a Store ID number. Please do not change your Store ID from the default value.

Invoice Settings



Prompt Cashier ID - When this feature is enabled, the cashier is prompted to enter his Cashier ID upon completion of a transaction. This option may be useful if numerous cashiers are ringing up people on the same machine. To change your settings for this feature, click on the **Invoice Settings** tab in the Options Screen.

Stock Prompt: When this option is disabled, EXTREMEPOS will no longer prompt for special orders if an item is not in stock.

Do not sell out of stock items: If this box is checked, then you will be unable to sell items for which your in stock number is zero or lower.

Round Nearest Nickel: If this option is enabled, all extended line totals will be rounded to the nearest nickel. This is useful if your tax is built into your price so you won't have to deal with pennies.

Round Up Tax to Nearest Penny: If this option is enabled, the sales tax will always be rounded up rather than down.

Combine Lines – When this function is enabled, multiple entries for the same item will be combined on one line. For example, if CD, DVD, then CD are entered, the screen and receipt will show CD 2 @ Price, DVD 1 @ Price instead of CD 1 @ Price, DVD 1 @ Price, CD 1 @ Price. This option is not compatible with Promotions.

Prompt Salesperson: When this option is enabled, you will be prompted to enter a salesperson ID at the end of an invoice. This allows you to track one person getting credit for a sale and another ringing it up on the register. **NOTE: Salespeople must be set up as cashiers for this option. When prompted, enter the salesperson's Cashier ID.**

Prompt Amount Tendered: Disable this option if you don't want EXTREMEPOS to prompt you to enter the amount tendered. This is useful if you want to eliminate a few keystrokes by doing the math in your head.

Print Labels for Trade-Ins: Use this feature to instantly print barcode labels for trade-ins at the time of invoicing.

Always Print Price 1 for Trade-Ins: Use this feature to print the completed price regardless of whether the item is complete or incomplete.

Default Payment Type: This option allows you to automatically set the default payment type to "on account" when you select a customer.

Last Price Lookup: When this option is enabled, a customer will automatically be rung up at the last price they paid for an item. For example, if an item is normally priced at $10.00 but you sell it to a customer for $9.00, the customer will be rung up automatically at $9.00 the next time they purchase that item.

Calculate Sales Tax On: This option allows you to charge sales tax on just the balance of a transaction involving sales and trade-ins (purchasing used product from you customers). Some states may require this option to be set. This is rare so DO NOT change from the default setting of charging sales tax on the "Entire Price" unless you know for sure that your state requires this choice.

Default Invoice Items to: Determine whether the used box on the invoice is checked or left off by default.

Enable 'Set Used Price by Trade-in Price' at Register: Check and enter the percentage markup that you want if you want to dynamically generate your prices from your trade-in values.

Promotion Prices: Set to manual if you want to manually add promotions to the invoice, automatic if you want your set up promotions automatically applied, and disabled if you do not wish to do promotions.

Suggested Tradein Price: Select whether you want the trade-in price to be the Used Cost field or the Trade-in Price field.

Allow Gift Certificates: Disable this if you do not want to accept gift certificates and cards.

Search These Fields for Scanned Items: Select the fields you want to check item numbers against.

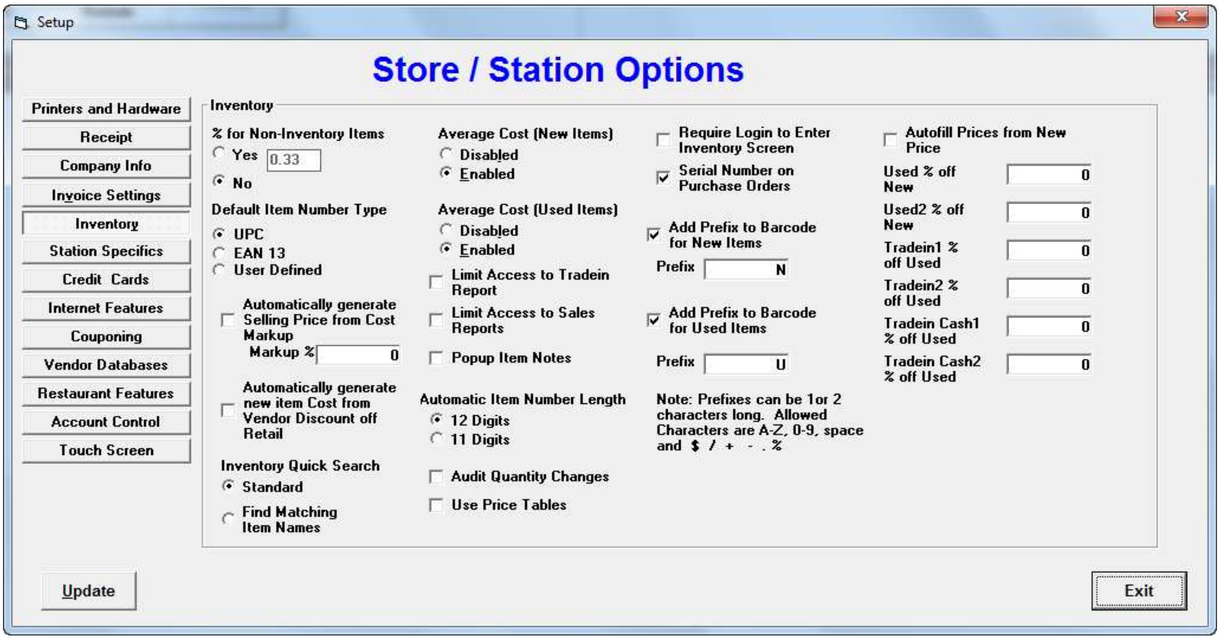
Default GC Sales to: Select whether to do gift cards or gift receipts by default when selling a gift card.

Default Gift Store Credits to: Select whether to do gift cards or gift receipts by default when having a remaining balance on a trade-in.

Collect up to X% Above Sales Price on Pre-Books: This allows you to take a deposit for a percentage above the base retail price on special orders and preorders.

Add to Invoice from Instant PO: This allows you to place items into invoices after instant POing from the invoice screen

Inventory



Auto Cost Percentage for Non-Inventory Items - This feature automatically calculates the cost of a non-inventory item based on the price entered in the **Non-Inventory Item** screen. For example, suppose the cost percentage is set for YES and 33%. If you add a non-inventory item to the invoice and enter a price of $5.00, EXTREMEPOS will automatically calculate the cost as $1.65. If you set this option to NO, the cost will be whatever you enter it as. To change your settings for Auto Cost Percentage, click on the **Inventory** tab in the Options Screen.

Default Item Number Type – This option allows EXTREMEPOS to force an item number to be a certain type of barcode, **UPC** or **EAN 13**, when creating an inventory item. If you do not wish EXTREMEPOS to force a barcode type then choose **User Defined**.

Automatically generate Selling Price from Cost Markup: If this is checked, your price will be defaulted to the cost plus the markup, set in the box to the right.

Automatically generate new item Cost from Vendor Discount off Retail: If this is checked, your item cost will be the retail of the item, minus the discount listed with the vendor you purchased from.

Average Cost Method (New Items): If you receive an item into stock at a new cost, EXTREMEPOS will automatically change the cost of this item to the average cost you have paid for the items currently in stock if this feature is enabled. This method is used when receiving stock from purchase orders through the Purchase Orders screen. To enable the Average Cost Method, click on the circle next to **Enabled** on the **Invoice** Tab of the **Options Screen**.

Average Cost Method (Used Items): If you receive an item into stock at a new cost, EXTREMEPOS will automatically change the cost of this item to the average cost you have paid for the items currently in stock if this feature is enabled. This method is used when using the “Trade-ins” feature when invoicing a customer. To enable the Average Cost Method, click on the circle next to **Enabled** on the **Invoice** Tab of the **Options Screen**.

Use Price Tables: If enabled, allows for the use of price tables for setting the price from the cost or the retail price.

Automatic Item Number Length: Chooses whether, when auto generating numbers, to have them be 11 or 12 digits.

Audit Quantity changes: If enabled, records the id of anyone directly changing the in stock number in inventory maintenance

Require Login to enter Inventory Screen: If checked, you will need to enter an authorized username and password each time you enter the inventory maintenance screen.

Add Prefix to Barcodes for New Items: Indicates that new items will have a prefix appended to their barcodes to indicate their newness.

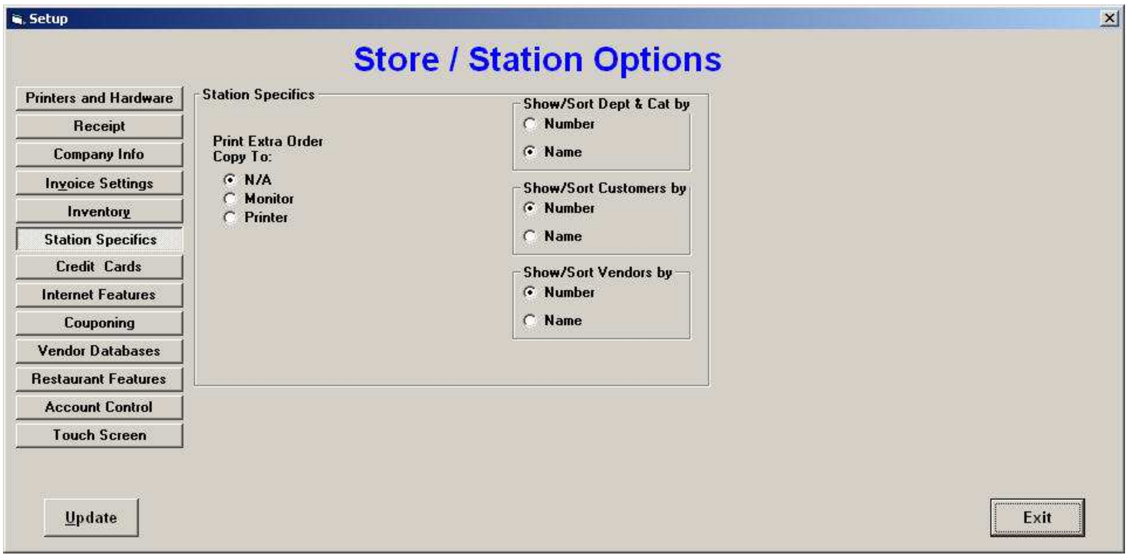
Add Prefix to Barcodes for Used Items: Indicates that used items will have a prefix appended to their barcodes to indicate their used state.

Serial Number on Purchase Orders: Serial numbers applied on purchase ordering

Popup Item Notes: If turned on, any notes set on items will pop up when that item is placed on an invoice.

Autofill Used Prices: If this is enabled, individual items with this feature enabled will generate used pricing and tradein pricing from the percentages in this grid.

Station Specifics



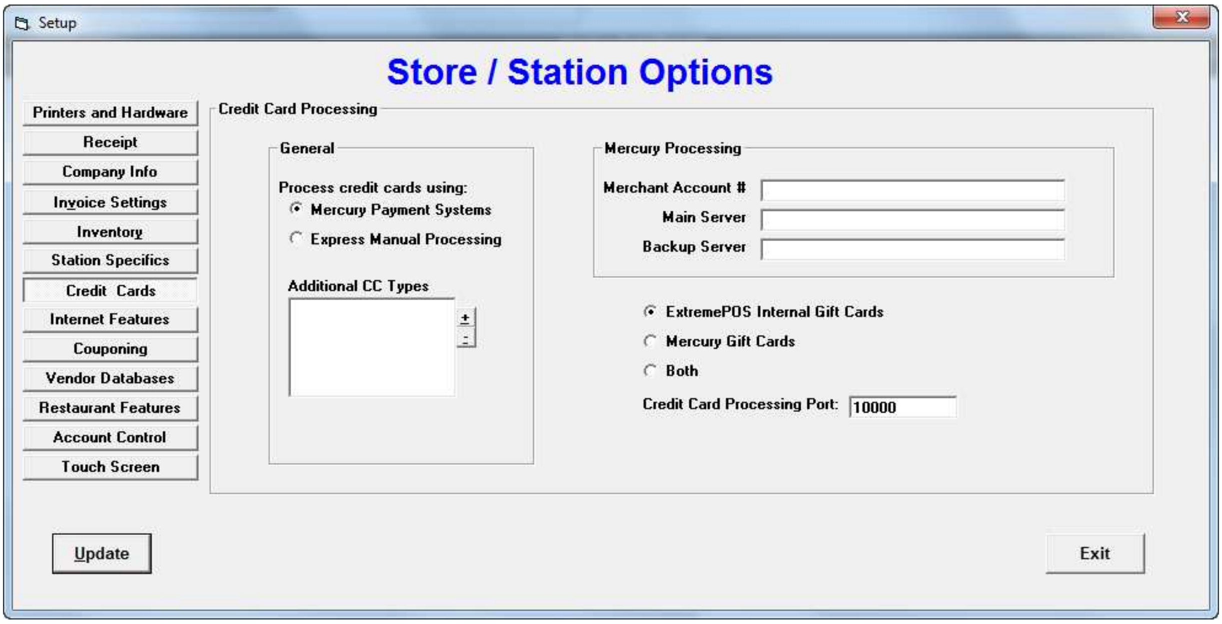
Print Extra Order Copy: When this option is enabled, an extra copy of the receipt will print to the specified location or the **Order Filling Screen**. For example, a restaurant station dedicated to deliveries might want to print an entire receipt to the kitchen so it can be attached to deliveries.

Show/Sort Dept. & Cat. By: This will allow you to display either the Number OR the Name field to display in the drop down list boxes within the Inventory Maintenance section of the software.

Show/Sort Customers By: This will allow you to display either the Number OR the Name field to display in the drop down list boxes within the Customer Maintenance section of the software.

Show/Sort Vendors By: This will allow you to display either the Number OR the Name field to display in the drop down list boxes within the Inventory Maintenance section of the software.

Credit Card Processing



ExtremePOS allows you to process credit card transactions either manually or via the Mercury Payment Systems credit card processing software system. **Express Manual Processing** allows you to record an invoice as a credit card purchase without having to enter the credit card information. The credit card type will be recorded as "None". To change how you process your credit card transactions, click on the **CC Processing** tab in the Options Screen, then select the option you wish to use for credit card processing.

Additionally, ExtremePOS now features integrated support with Mercury Payment Systems; you may check that mark and then enter your Mercury account information to the right.

Additional CC Types: This feature allows you to define your own credit card types in EXTREMEPOS. The credit ID may only have four characters. These credit card types can only be used in manual processing.

Mercury Gift Cards: This allows you to set whether you are using internal gift cards (covered in that chapter) or gift cards through Mercury.

Internet Features

Ingram: You must obtain this information from Ingram in order to use the Electronic Ordering features within the Purchase Order section of the software.

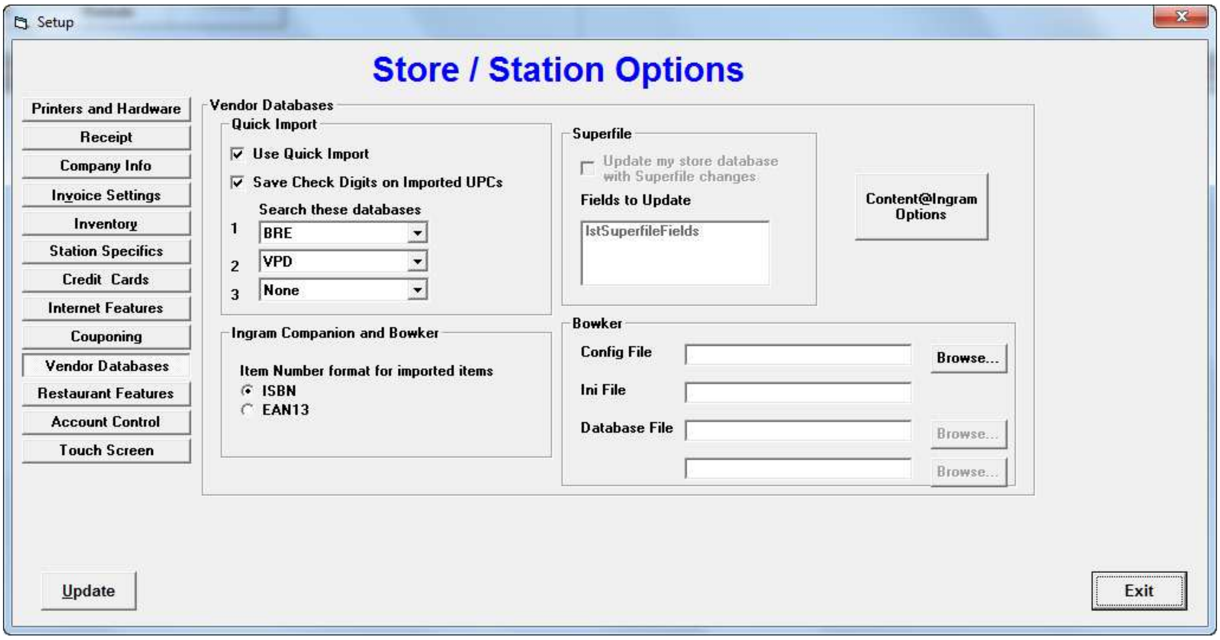
AEC EDI: Input your **Customer Number** and **Ship To Number** assigned to you from AEC in order to use the electronic ordering capabilities of Musicware when ordering from AEC.

VPD Database: Input your username and password in order to use the database from VPD.

Couponing

This function allows you to enter text to appear as a coupon on the bottom of each receipt. In order to use this function, you must be using an Epson TMT-88 printer.

Vendor Databases

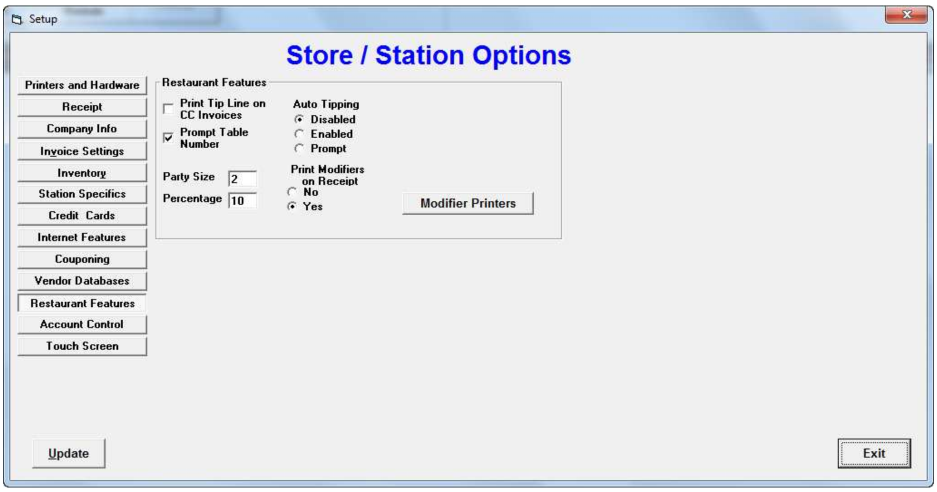


Quick Import: This special feature of ExtremePOS is used to automatically import items from Vendor databases from within the POS Register invoicing screen. This can greatly reduce inventory title data input by using data already provided by your Vendor. Selecting search these databases chooses which databases in which order to look for an item.

Superfile: This option allows **Musicware** users to update and overwrite certain store inventory data to match the Superfile vendor database.

Ingram Companion and Bowker: This option allows Praiz users to select which format to import code numbers in.

Restaurant Features



Print Tip Line on Credit Card Invoices: When this function is enabled, a line to enter a tip amount will print on credit card invoices. This option allows customers to put the tip on their credit card as well as the entire invoice. To change your settings for this feature, click on the **Restaurant Features** tab in the Options Screen. Click on **YES** to enable this feature or click on **NO** to disable it.

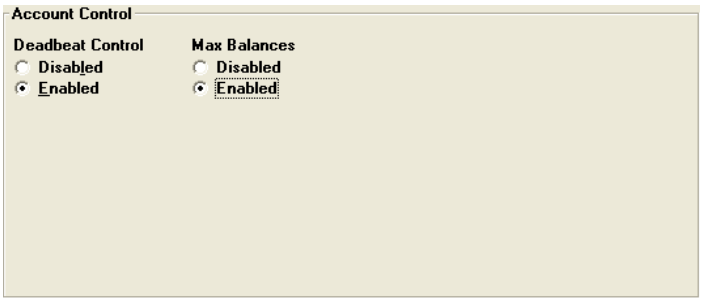
Auto Tipping: This feature will automatically apply a tip to parties over a specified size if you are using touch screen invoicing. When you choose **"$$$"** from the touch screen for a party larger than the set limit, you will be asked if you want to add the specified percentage to the order as a tip. To change your settings for this feature, click on the **Restaurant Features** tab in the **Options Screen**. **NOTE: Enter the percentage as a decimal. For example, enter .15 for 15%.**

Prompt Table #: If this option is enabled and prompt Cashier ID is disabled, you will only be prompted to enter the table number. This allows for faster invoicing in instances where cashier tracking is not necessary.

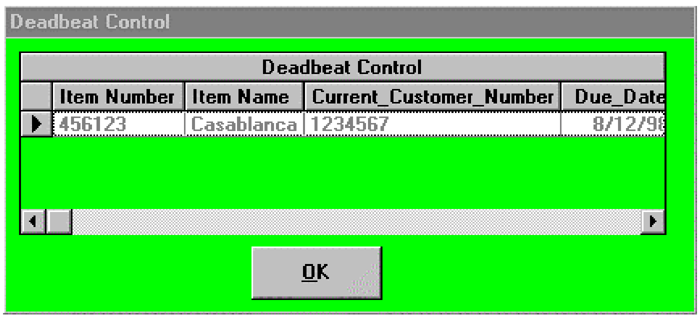
Print Modifiers on Receipt: Enable this option to print modifiers for an item on the receipt.

Account Control

Deadbeat Control:

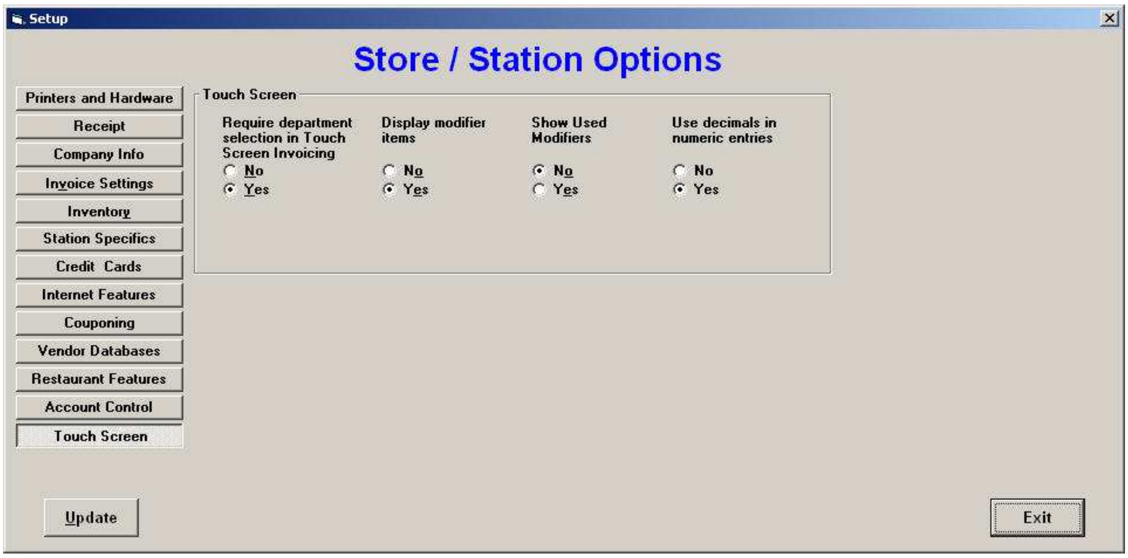


When this feature is enabled, a screen will appear listing all the items that are currently rented by the customer when you pull up his account. To change the settings for deadbeat control, click on the **Account Control** tab in the **Options Screen**, then click on **Enabled** or **Disabled**.



Max Balances: This feature allows you to set a maximum balance for on account customers. When enabled, customers will not be able to charge any amount on their account greater than their maximum balance.

Touch Screen



Department Selection: When this option is enabled, only the departments will be displayed in Touch Screen Invoicing, not the entire inventory. To display all the items under a certain department, touch the corresponding button. When department selection is disabled, the entire inventory will be displayed. Displaying only departments helps keep your Touch Screen more organized. To change your settings for this feature, click on the **Touch Screen** tab in the Options Screen, and then click on **YES** to enable department selection or **NO** to disable it.

Display Modifier Items: When this is option enabled, all of the different modifiers for preparing an item are displayed in Touch Screen invoicing. You may wish to disable this option if you want to minimize the number of items displayed in Touch Screen invoicing. To change your settings for this feature, click on the **Touch Screen** tab in the Options Screen, then click on **YES** to display modifier items or **NO** to only show the regular inventory.

Use Decimals in Numeric Entries: Disable this option if you do not want to hit the decimal button for numeric amounts. For example, 1 2 5 will register as $1.25, not $125.

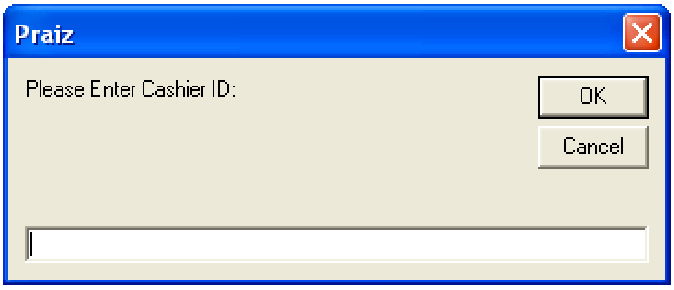
Update

This button saves or “updates” any changes you make to your current settings.

Exit

Click this button to exit the **Options Screen**.

Change Cashier ID



This screen allows you to change the ID of the current cashier without exiting the program and logging in again. Invoices are tracked by Cashier ID, and any settings saved for the Cashier ID will be automatically recalled. The administrator may enter the administrator password to override any functions that are locked out to the cashier.

To change the current Cashier ID:

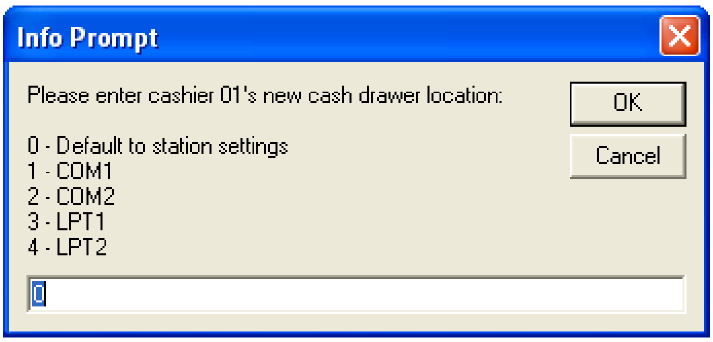
- Select **Change Cashier ID** from the **Actions/Cashier Functions** menu.
- Type in the new Cashier ID, then click on **OK** or press **<ENTER>**.
- Enter the password for the specified Cashier ID.

Change Cashier Cash Drawer Location

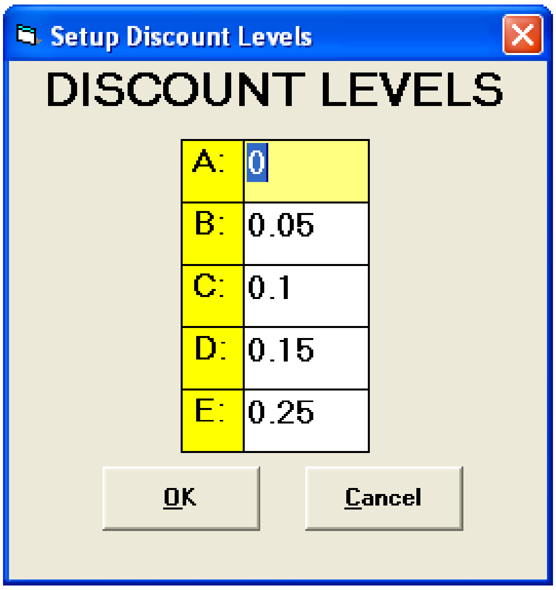
This feature allows you to change the location of the cash drawer for the current cashier.

To change the location of the Cashier Cash Drawer:

- Select **Change Cashier Cash Drawer Location** from the **Actions/Cashier Functions** menu.
- Type in the Administrator's password, then click on **OK** or press **<ENTER>**.
- Type in the number corresponding to the desired location of the cash drawer.



Discount Levels



This feature allows you to set up discount levels for customers. To choose a discount level for a customer, type the letter corresponding to the desired discount level - A, B, C, D, or E - in the **Discount Level** field of the **Customer Maintenance** screen (See **Chapter 3: Customer Control**). The default customer discount level is **A**. The selected discount is automatically applied for each new inventory item added. You will be able to customize the discount levels on particular items (See **Chapter 2: Inventory Control**).

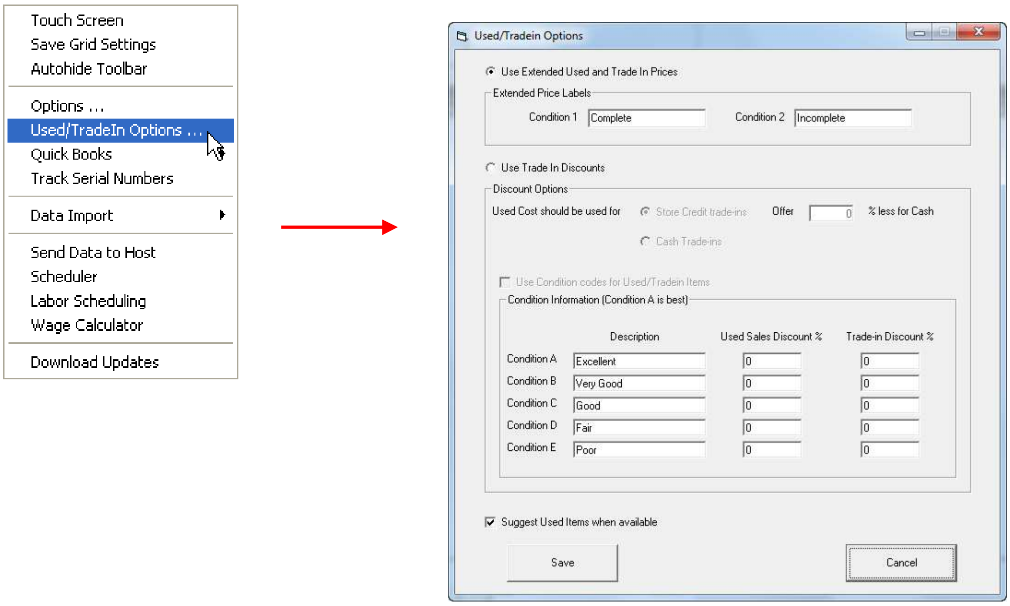
NOTE: Inventory Level overrides will take precedence over customer discount levels.

To change the value of a discount level:

- Select **Discount Levels** from the **View** menu.
- Use **<TAB>** or the mouse to move to the desired field.
- Enter in the new discount percentage level.
- Click on **OK** to save the new values or click on **Cancel** to ignore any changes.

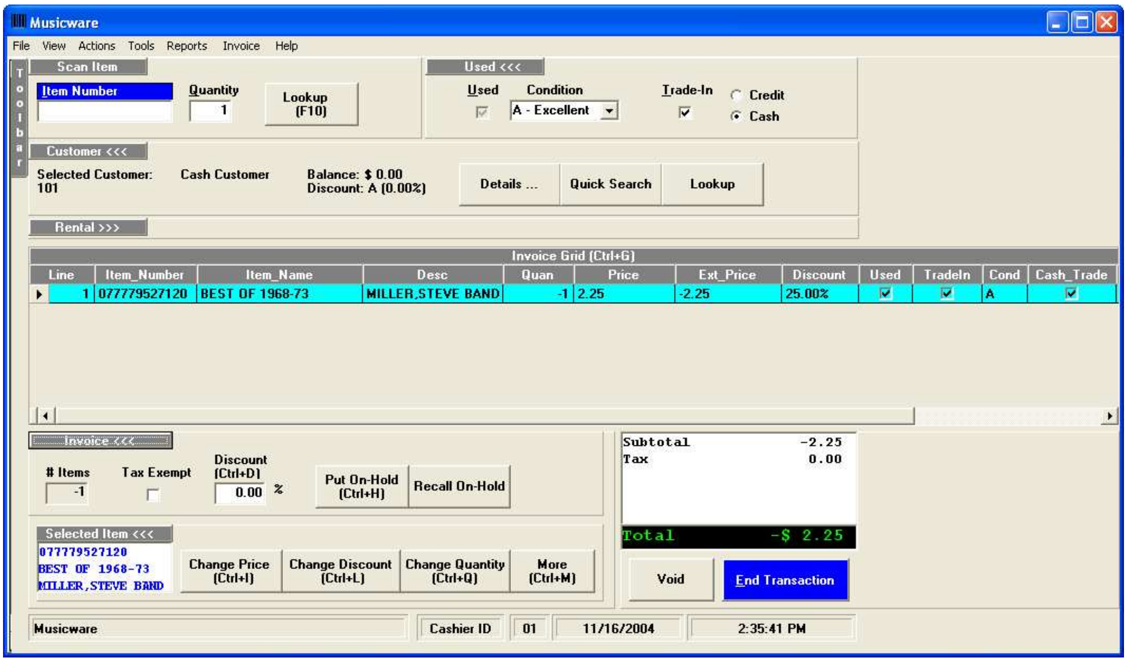
NOTE: Each discount level MUST have a value.

Used/Trade-In Options

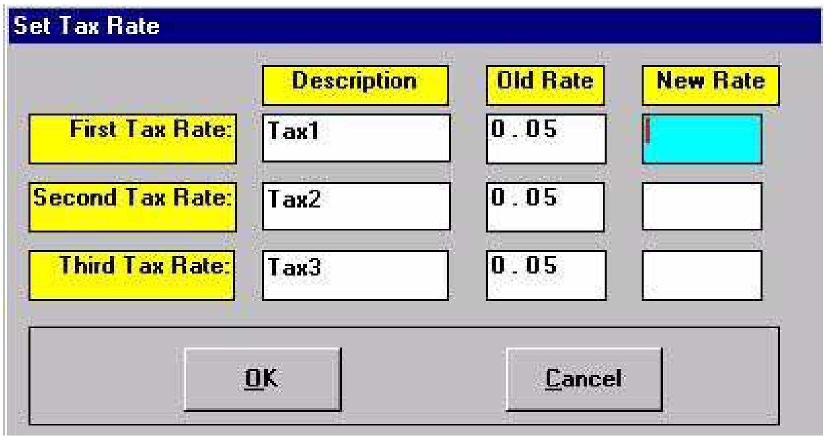


From the menu **Tools** choose **Used/TradeIn Options** so the above screen is displayed. Here you can set user defined descriptions for selling and buying used items based on various “conditions” of the item. There are two ways to do this – conditions 1 and 2, defaulted to complete and incomplete and used by BRE’s database among others, and a five-level A-E condition code system.

Another useful feature for stores handling used items is the ability to offer your customers a lower “trade-in” value if the customer decides to receive cash versus a store credit for future merchandise. If you process a trade-in and select **Cash** instead of the default **Credit** option at the invoicing screen, the value offered will be discounted by the percentage entered. The invoice screen below is an example implementation of the feature:


Musicware
File View Actions Tools Reports Invoice Help
Scan Item
Item Number
Quantity
1
Lookup (F10)
Used <<<
Used
Condition
A - Excellent
Trade-In
Credit
Cash
Customer <<<
Selected Customer: 101
Cash Customer
Balance: $ 0.00
Discount: A (0.00%)
Details ...
Quick Search
Lookup
Rental >>>
Invoice Grid (Ctrl+G)
Line Item_Number Item_Name Desc Quan Price Ext_Price Discount Used TradeIn Cond Cash_Trade
1 077779527120 BEST OF 1968-73 MILLER,STEVE BAND -1 2.25 -2.25 25.00% A
Invoice <<<
Items -1
Tax Exempt
Discount (Ctrl+D) 0.00 %
Put On-Hold (Ctrl+H)
Recall On-Hold
Subtotal -2.25
Tax 0.00
Total -$ 2.25
Selected Item <<<
077779527120
BEST OF 1968-73
MILLER,STEVE BAND
Change Price (Ctrl+I)
Change Discount (Ctrl+L)
Change Quantity (Ctrl+Q)
More (Ctrl+M)
Void
End Transaction
Musicware
Cashier ID 01
11/16/2004
2:35:41 PM

Set Tax Rate



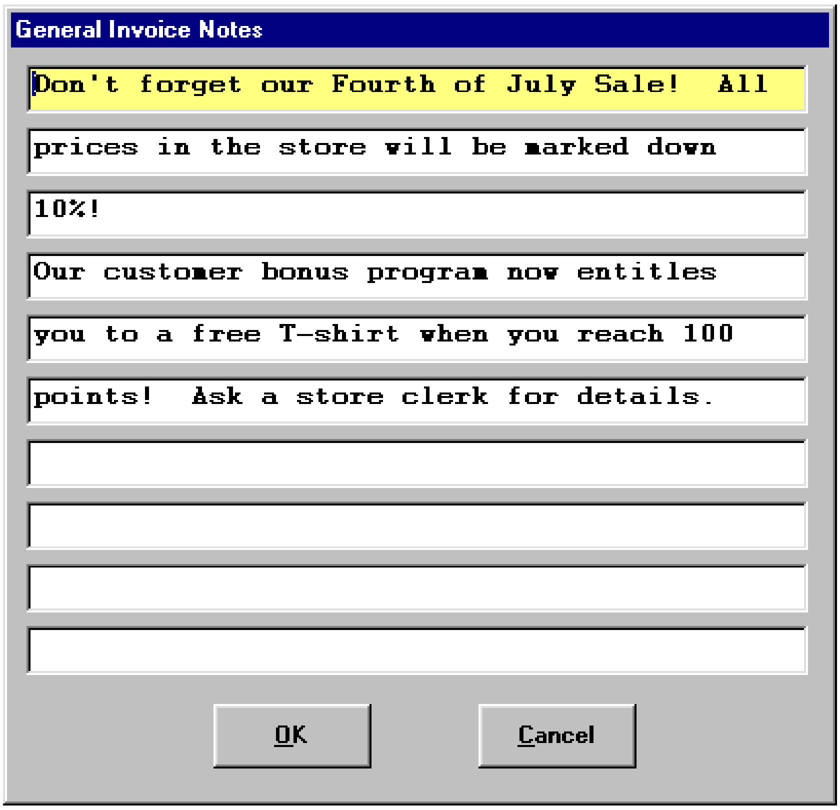
This screen allows you to change the tax rate and the descriptions of each tax rate. To access this screen, select **Tax Rates** from the **View** menu.

To change the tax rate:

- Use **<TAB>** or the mouse to move to the desired field, then type in the new information.
- Click on **OK** to save the changes or click on **Cancel** to ignore any changes.

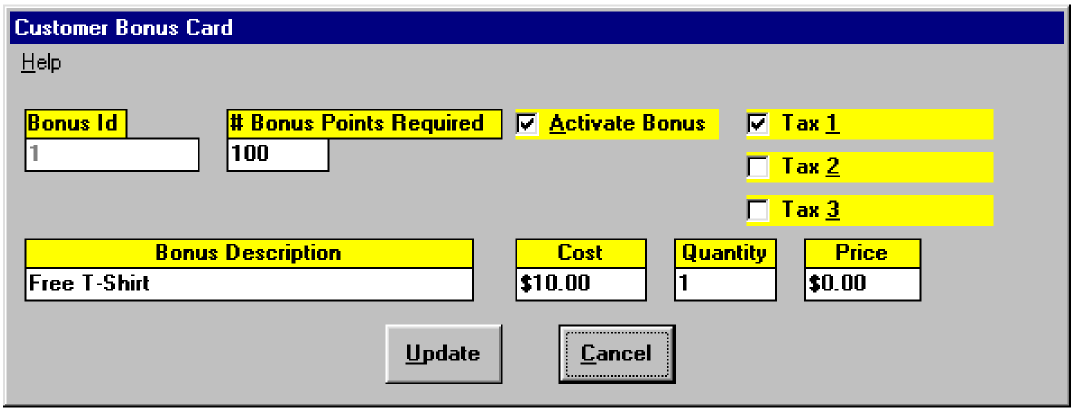
NOTE: Any changes in the descriptions of a tax rate are reflected on the printed receipts, and you must enter rates for all three tax levels. Example: Canadian users may wish to label the first tax rate as GST and the second tax rate as PST, or liquor storeowners may want to designate the second tax as Liquor Tax.

General Invoice Notes



This function allows you to add notes that will appear on the bottom of every receipt. These notes could be a notice or a reminder about a sale date or a special offer. You may enter up to ten lines of up to 42 characters each. To access this screen, click on **General Invoice Notes** in the **View** menu. Use **<TAB>** or the mouse to move to each line. Click on **OK** to save any changes in the text or click on **Cancel.**

Customer Bonus



The **Customer Bonus** screen allows you to define a bonus that a customer will receive once a specified number of bonus points have been accumulated. The Activate Bonus field must be checked in order for EXTREMEPOS to award bonus points and determine if a customer has accumulated enough bonus points to qualify for the bonus described. To access the Customer Bonus screen, select **Customer Bonus** from the **View** menu. Use **<TAB>** or the mouse to move to the desired field, then type in the desired information. Click on **Update** to save any changes made or click on **Cancel** to ignore any changes.

NOTE: Bonus descriptions, cost, quantity, price, and taxable status may be overridden prior to adding the bonus item to the invoice. Also, the customer may select not to take the bonus item at the time it is offered.

Bonus ID: This is the default ID assigned by EXTREMEPOS. It cannot be changed.

 # Bonus Points Required: This indicates the number of bonus points that a customer must accumulate to receive the bonus described. Once the specified number of points has been accumulated, the bonus is added to the customer's invoice - the cashier will be asked to accept (**Add to Invoice**) or reject the bonus (**Cancel**). If accepted, the customer's bonus points will be decreased accordingly.

Activate Bonus: If this box is checked, bonus card information will be reviewed and applied by EXTREMEPOS for customers who are Bonus Plan Members.

Tax: This indicates which tax is to be charged when the price of the bonus item is greater than 0.

Bonus Description: This is the description that will appear on the invoice for the bonus item.

Cost: This is the actual cost of the bonus item. Bonus items are tracked under a Non-Inventory number.

Quantity: This is the number of bonus items to be given.

Price: This is the price to be charged for the bonus item. You can enter a price or 0 for no charge.

Open Cash Drawer

This function lets you open the cash drawer with the administrator password. You can also use this function to verify that your cash drawer is functioning properly. To open the cash drawer, select **Open Cash Drawer** from the **Actions** menu, type in the administrator password, and then click on **OK**.

Chapter 3:

Inventory Control

Bar Code Overview

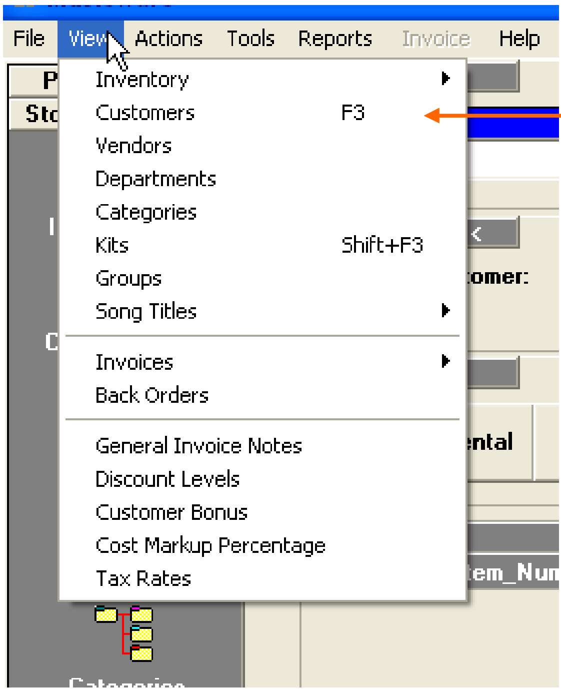
ExtremePOS works with any type of keyboard wedge barcode device. A keyboard wedge barcode device plugs into a “Y” type connector that allows the simultaneous use of a keyboard and barcode device using a single keyboard port. ExtremePOS will also work with USB barcode scanners, which have become the most common interface type.

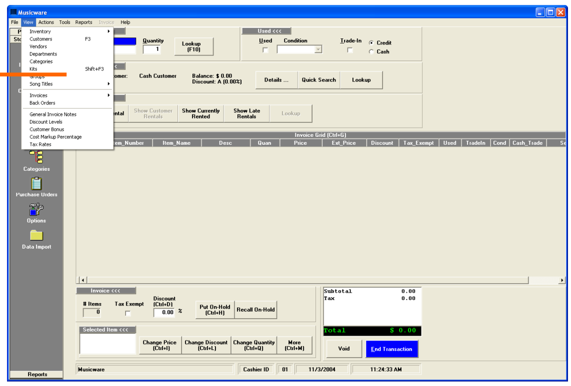
The best type of barcode device to use is a Laser scanner that can read barcodes at a distance of up to 1 foot away without touching the barcode. A laser scanner costs about $200.

A barcode device is a simple instrument to use with **ExtremePOS** and it makes invoicing much easier. For example, a 16-ounce bottle of Diet Coke has the barcode number 049660. With ExtremePOS, you can either enter 049660 manually, or you can very quickly scan the number, just like in the supermarket.

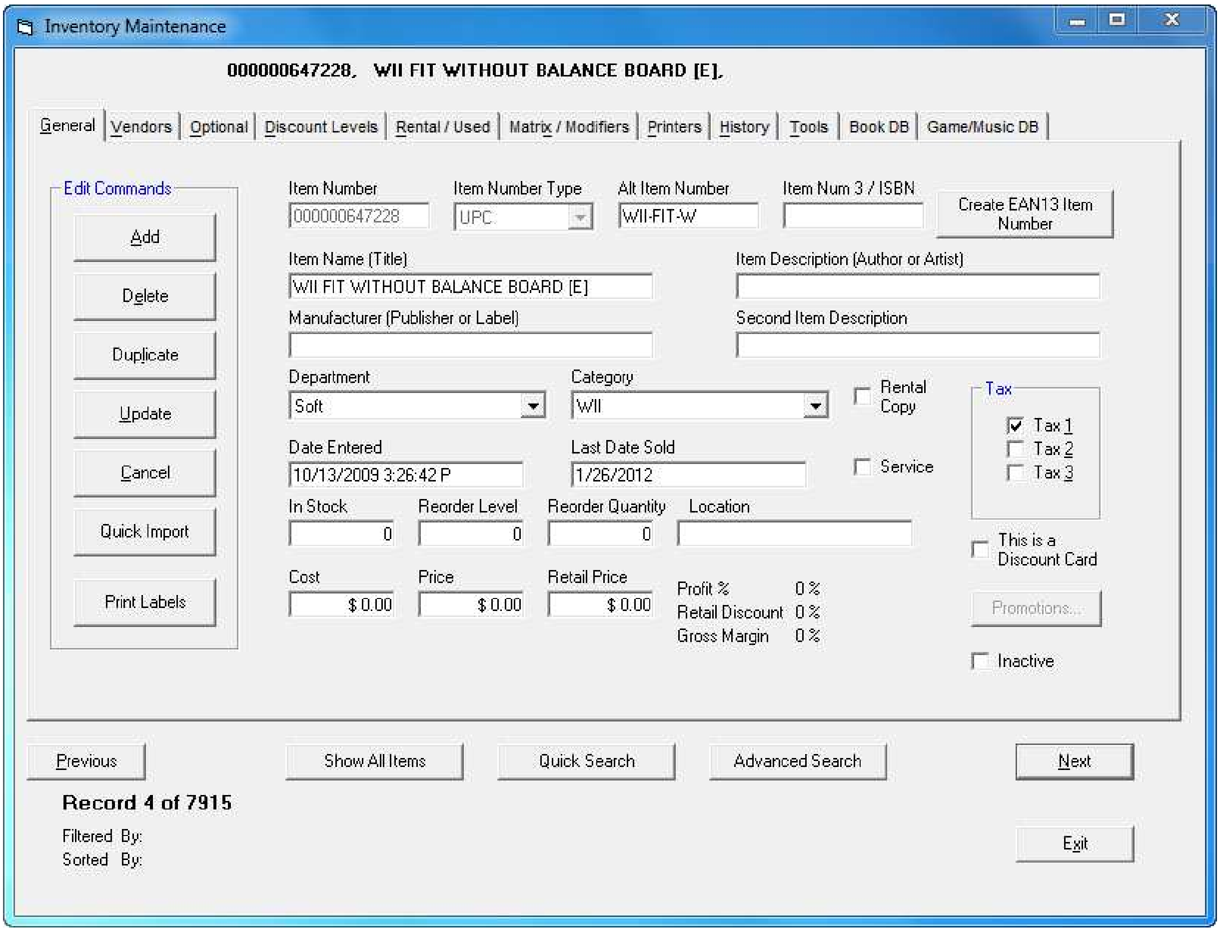
Inventory Functions

Most Inventory functions are performed from the **View** Menu.





Inventory Maintenance



The **Inventory Maintenance** screen allows you to add items to your inventory as well as edit existing inventory items. To access this screen, select **Inventory Maintenance** from **View** menu or press **<F2>** in the Invoice Screen.

Once you have accessed the **Inventory Maintenance** screen, you can use **<TAB>** or the mouse to move from one field to another. To add an item, click on **Add** or press **<ALT+A>**. Enter the desired information, then click on **Save** or press **<ALT+S>** to save the new item. To update a selected item, change the desired information then click on **Update** or press **<ALT+U>**. To exit without making any changes, click on **Exit** or press **<ALT+X>**. To quick import from a vendor database set up in the options menu, click on the **Quick Import** button.

NOTE: Item Number and Item Name are required fields. You MUST enter an item number and description for each item.

General Info

To access the General Info page, click on the **General Info** tab or press **<ALT+G>**.

Item Number: This is where you enter the unique identifier for an item. It can be up to 18 characters long and consist of any combination of letters and numbers. However, if you are using barcodes, as is recommended, you may only use numbers in the item number. This is the field to store your “barcode” number in order to scan an item at the invoicing/POS screen quickly. **NOTE: Do not use any punctuation or spaces, except for the underscore (_), as part of the item number.**

Item Type: Here you can force consistency and select a “type” of item number from the drop down list. The options are **UPC**, **EAN13** and **User Defined**.

Alternate Item Number: This field can store a second number to search against in various lookup fields when searching your inventory.

Item Number 3: This is yet another number to describe and search your inventory against.

Item Name (Title): This is the description of the item that will appear on invoices and reports. It is best to use the title of the item for this description field. It can be up to 30 characters long and consist of any upper and lower case letters, numbers, punctuation, or spaces. **NOTE: Do not use the asterisk or apostrophe (* or ‘) as part of the item name.**

Item Description: This is another description field used to further describe the item. As an example, let’s say you’re describing a compact disc, so you would use this field for the artist of the piece for example “Enya”. In the case of describing a book, this should be your “Author” field.

Second Item Description: Yet another description field for identifying inventory. Again using the CD example, this would be a useful field for the “Composer” description.

Manufacturer (Publisher or Label): Here you can track the manufacturer of the item you are selling. CD Stores can use this field to track the record label. Bookstores should use this field to track the publisher.

Department: This allows you to select a department for the inventory item. Scroll through the Department list by using the cursor keys **(<←>, <↑>, <→>, <↓>)** or by clicking on the up and down arrows with your mouse. **NOTE:** The Department must first be added through **Department Maintenance** under **Departments** in the **View** menu. For more information on creating departments, see **Chapter 2: Inventory Control – Inventory Menu – Departments.**

Category: This allows you to select a category for the inventory item. Scroll through the category list by using the cursor keys **(<←>, <↑>, <→>, <↓>)** or by clicking on the up and down arrows with your mouse. **NOTE:** The category must first be added through **Category Maintenance** under **Category** in the **View** menu. For more information on creating categories, see **Chapter 2: Inventory Control – Inventory Menu – Categories.**

Date Entered: This field will be entered automatically when adding and saving an item.

Last Date Sold: This field will be automatically updated by selling this item.

In Stock: This displays the current number of this item that is in stock. It is automatically updated after an invoice and can be changed manually at any time.

Reorder Level: This is the quantity at which you will be alerted to re-order the item. It can be up to 5 digits long.

Reorder Quantity: This is the default quantity that will be placed on a purchase order for this item. This quantity can be modified at any time.

Location: This allows the user to specify a location on the sales floor where this item is found.

Cost: This is how much you paid for the item.

Price: This is how much you are selling the item for.

Retail Price: This is the manufacturer (or vendor's) suggested retail price. This field is for informational purposes only.

Set Price from Price Table: This button will only appear if the **Use Price Tables** option is set. It will set a price from your price table, established under View and then Price Tables in the main screen, from either your cost or your retail price.

Tax: This indicates which tax(es) should be charged to this item. Click on the box next to the desired tax level(s) to choose the type of tax to be applied to this item.

Profit %: This displays the profit percentage for the displayed item.

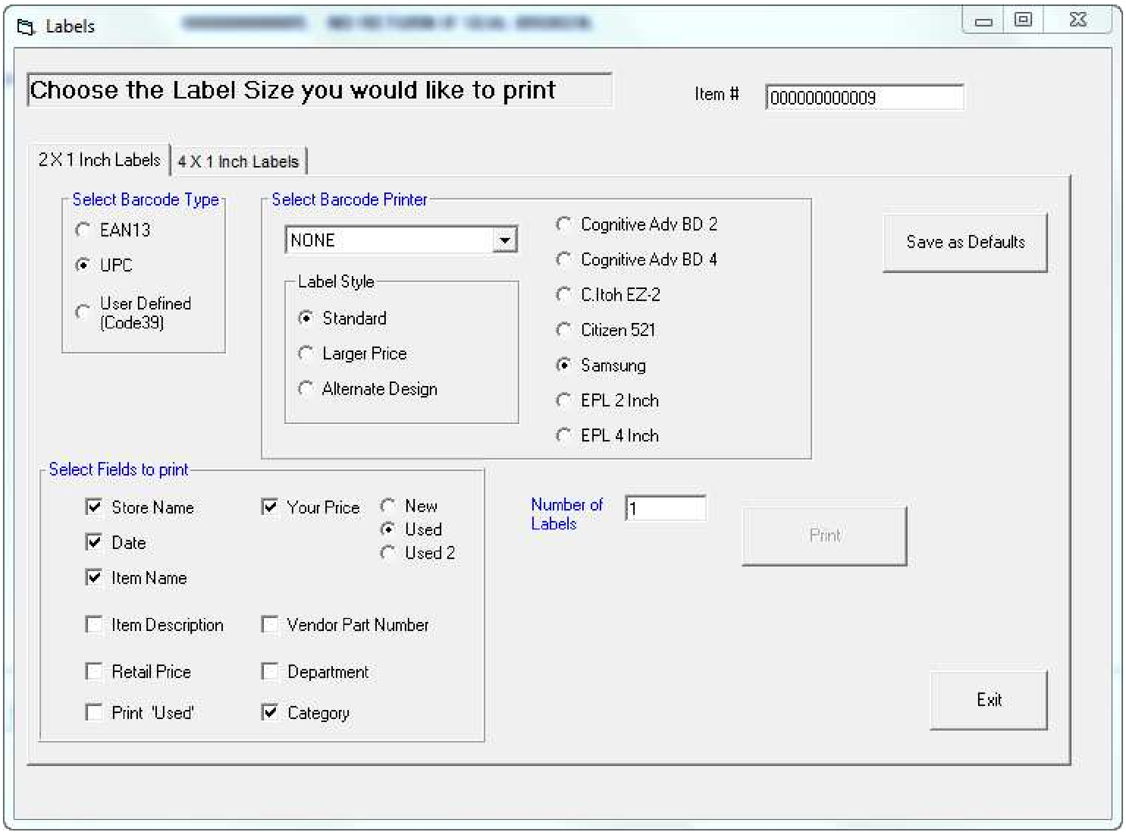
Retail Discount: This displays the retail discount percentage for the displayed item.

Gross Margin: This is the percentage of the selling price that is profit.

This Is A Discount Card: This marks the item as a discount card; the in stock number of a discount card is permanently set to 0. When selling one, it is assigned an individual number and assigned to a customer.

Promotions: For Discount Cards only, this allows you to associate promotions with this card. They must already be set up as discount card promotions from within the promotions menu.

Print Labels: This button allows you to print barcodes "on demand" to the system barcode printer.



EXTREMEPOS offers two sizes of "barcode" labels to print, 2 X 1 inch and 4 X 1 inch labels.

Select Fields to print: This function allows you to include or exclude various fields on the barcode you want to print. Simply check or uncheck the various choices.

Select Barcode Printer: This allows you to select your barcode printer, e.g. the Cognitive Barcode Blaster.

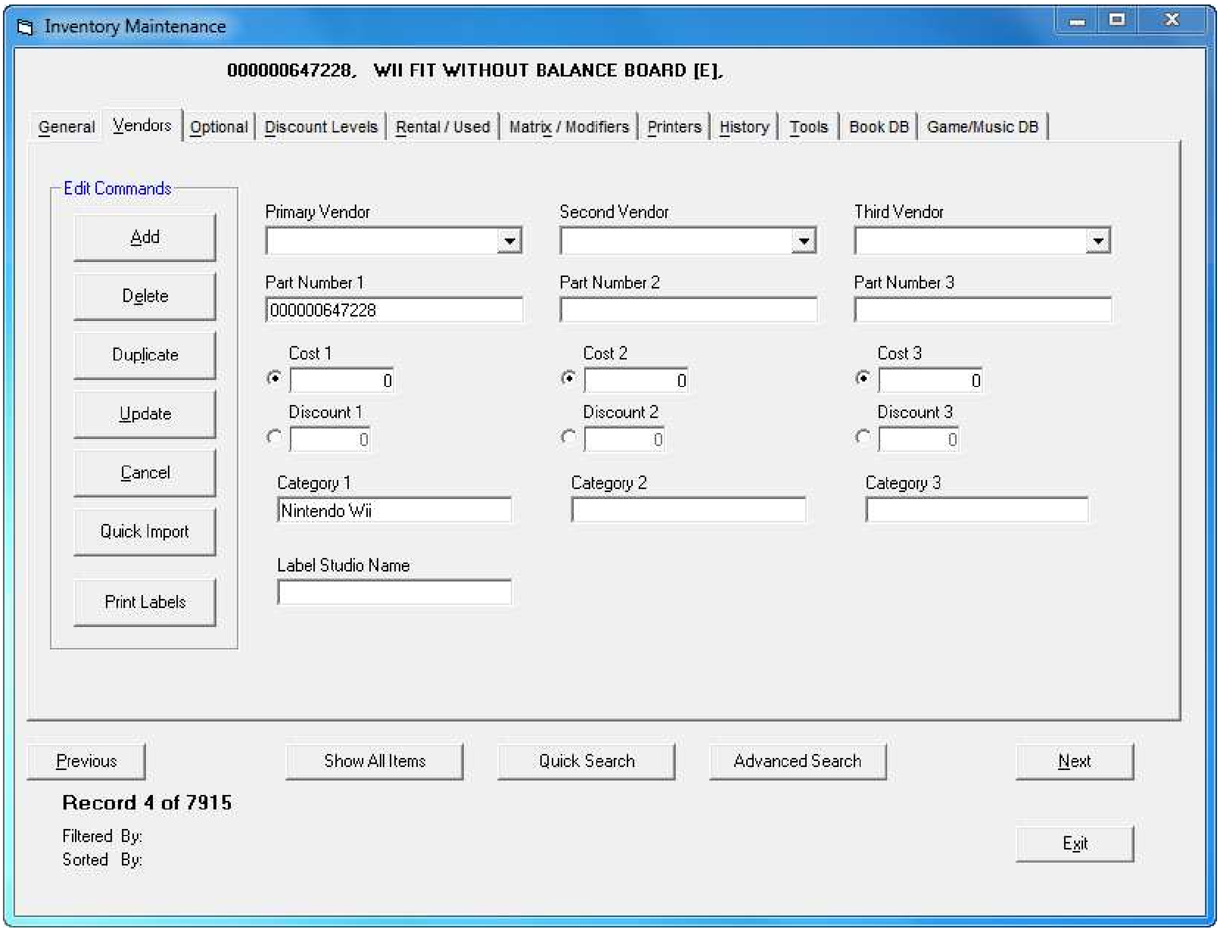
Select Number of Labels: This allows you to enter the number of barcodes you wish to print for the inventory item.

Select Barcode Type: This allows you to select a type of barcode to print. The choices are EAN13, UPC and Code39 (User Defined). The label will print with the check digit included for both EAN13 and UPC, even if the check digit is not saved in your item number.

Select New or Used Price: This allows you to select which selling price to include on the label.

Print: Click **Print** when you are ready to print the labels or press **Cancel** if you change your mind.

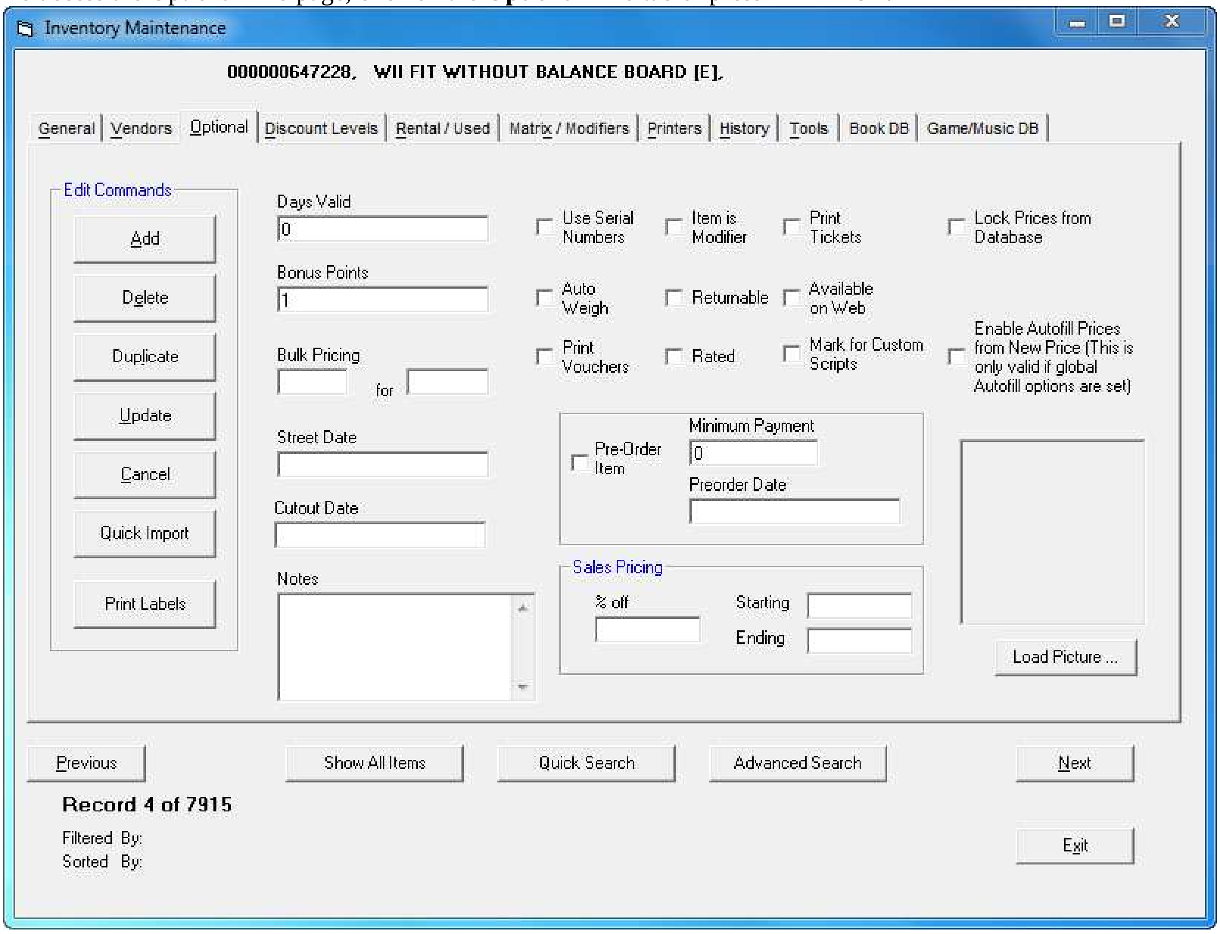
Vendor Info



Primary (preferred) Vendor: This allows you to select a preferred vendor for an item. Scroll through the vendor list by using the cursor keys **(<←>, <↑>, <→>, <↓>)** or by clicking on the up and down arrows with your mouse, then highlight the desired department. This vendor will be the default vendor for purchase orders of this item. **NOTE:** The vendor must first be added through **Vendor Maintenance** under **Vendors** in the **Inventory** menu. For more information on adding vendors, see **Chapter 2: Inventory Control – Inventory Menu – Vendors**. You may also choose a second and third vendor. **Note:** Musicware and Praiz users may assign unique part numbers and vendor costs (either by cost or discount).

Optional Info

To access the Optional Info page, click on the **Optional Info** tab or press **<ALT+O>**.



Days Valid: This is for how many days an item is valid. It is usually used for tickets and vouchers and is for informational purposes only.

Bonus Points: This specifies how many bonus points a bonus plan member will receive when purchasing this item.

Bulk Pricing: This function allows you to sell items in bulk for a price different than selling the same amount of items individually. Type the number of items in bulk in the first field and the special price in the second field.

Sale Pricing: This function allows you to place an item on sale for certain dates. Enter the percent you want the item to be marked down in the **% off** field. Enter the beginning date in the **Starting** field and the ending date in the **Ending** field. **NOTE: To place an item on sale for only one day, enter the same date in both date fields.**

Street Date: This field allows the user to establish a street date when the item is available for sale. Preorders made will not be able to be picked up until this date.

Pre-Order Item: Check this box if the item is for sale as a preorder.

Minimum Payment: The minimum payment to reserve a preorder of the item

Preorder Date: The date on which the item may first be preordered.

Serial Numbers: Select **Yes** if you want to have serial numbers for this inventory item. At the time of sale, you will be prompted to enter a serial number. The maximum is 20 characters and it may contain both letters and numbers.

Print Tickets: When this function is activated for an item, a ticket will print when the transaction is completed. Tickets can only be printed using a Monarch 9820 printer.

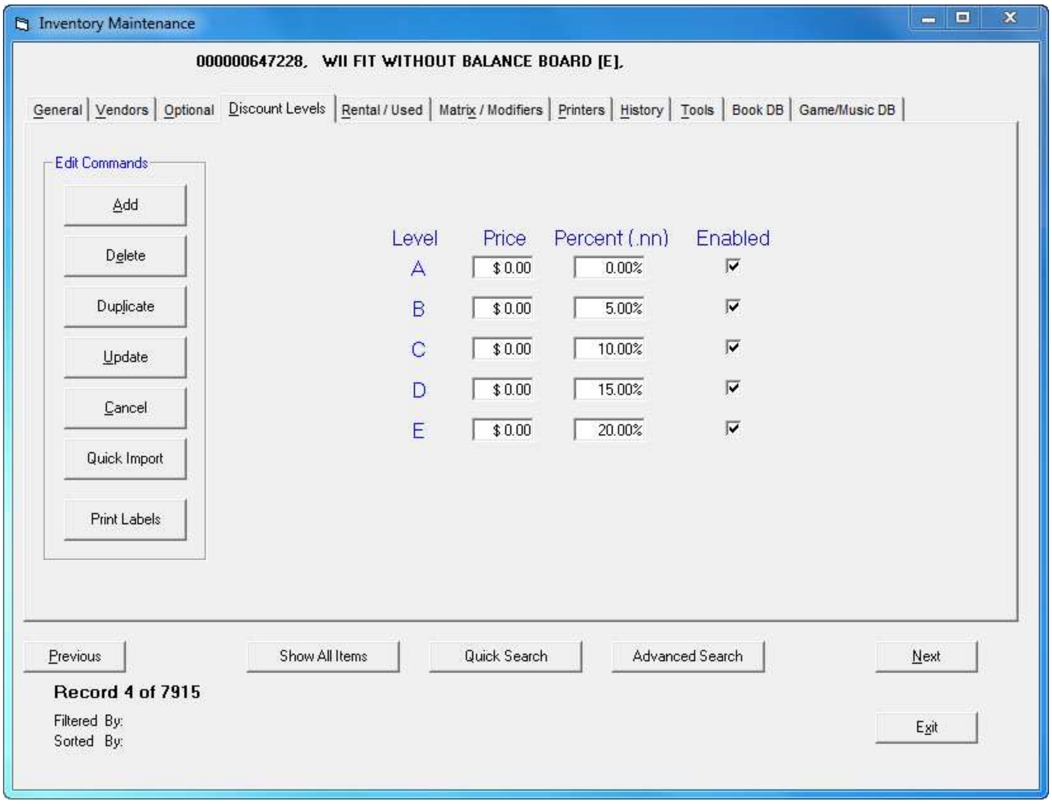
Auto Weigh: When this option is enabled for an item, EXTREMEPOS automatically takes the weight from the ECR Loc scale when the item is added to the invoice.

Modifier Item: A modifier item is an item that accents another inventory item. For example, if you ordered a hamburger, ketchup would be considered a modifier item. To mark an item as a Modifier Item, select **Yes**.

Print Vouchers: When this function is activated for an item, a voucher will print when the transaction is completed. Vouchers can only be printed using a Monarch 9820 printer.

Discount Levels

To access the Discount Levels page, click on the **Discount Levels** tab or press **<ALT+D>**.

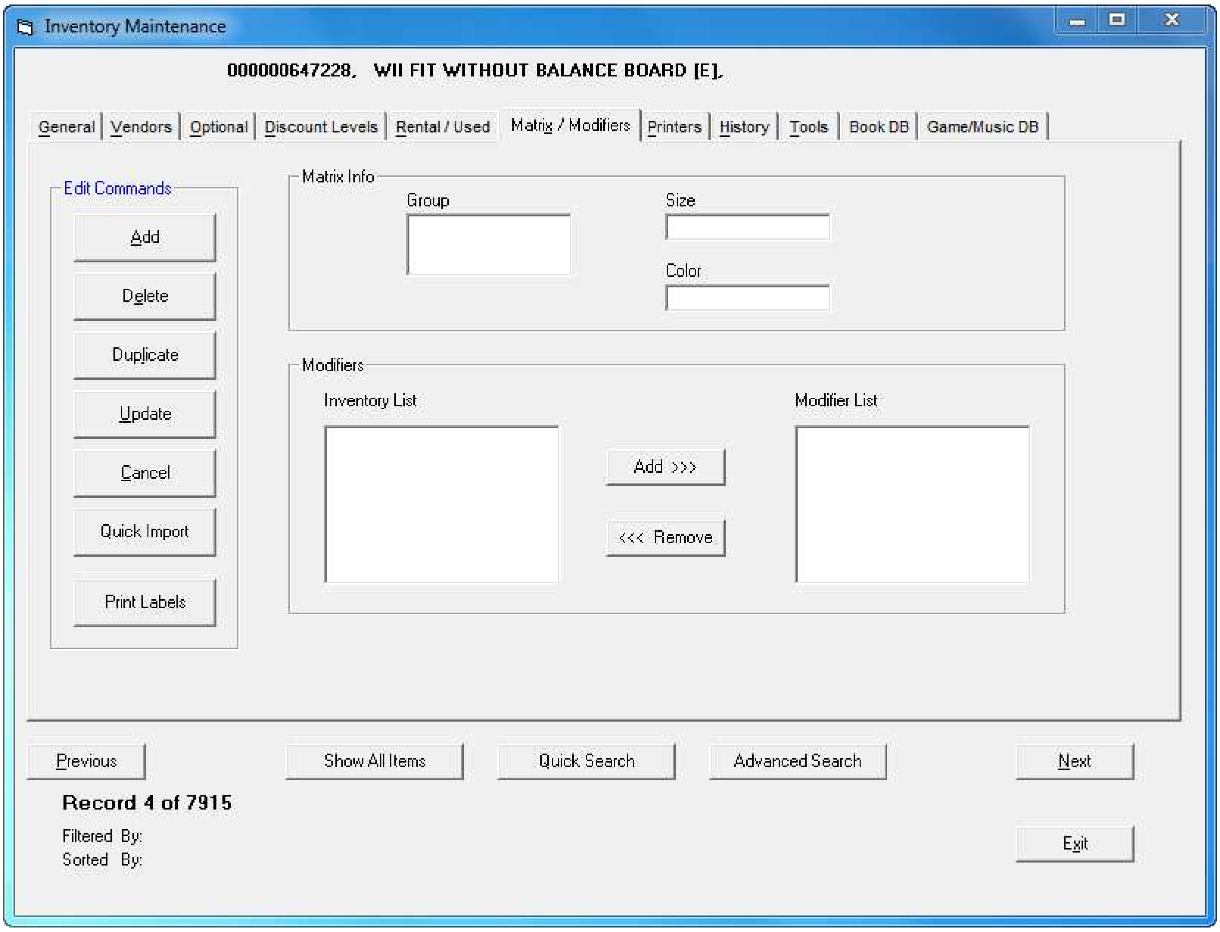


Discount Levels: These are the discount percentages and the respective discount price for an item. The discount prices are displayed once a price has been entered for an inventory item. When the price is changed, the discount information is updated to reflect the change. If the discounted price or percent is different than those from **Setup** discount levels, the inventory levels will take precedence. If you enter a discount price, the percent will be updated. If you enter a percent, the discount price will be updated. **NOTE: The levels will default to the Setup discount levels, but these may be changed at any time.**

For an item to be discounted for one or more customer discount levels (A-E), the level must be enabled for the item. To enable a discount level, click on the box under **Enabled** in that discount level's row. If a discount level is not enabled, customers with that level will be charged full price.

Matrix and Modifiers

To access the Matrix and Modifiers page, click on the **Matrix/Modifiers** tab or press **<ALT+X>**. This tab will only appear if no department has been selected or if the selected department is not a rental department.



Group: This function allows you to select a group for the inventory item. A **group** is a way to classify an item that has different styles. For example, you may have a long skirt that comes in four colors (white, blue, black, and purple) and three sizes (Small, Medium, and Large). In order to keep track of how many of each color and size you have, you need to use a group, such as Long Skirt. Each size in each color can have its own item number, and you can keep track of how many ribbed shirts you have. Scroll through the Group Name list by using the cursor keys (<←>, <↑>, <→>, <↓>) or by clicking on the up and down arrows with your mouse. Once the desired group name is highlighted, select it by either pressing **<TAB>** or clicking on the next field with the mouse. **NOTE:** The group name must first be added through **Group Maintenance** in the **Inventory** menu. For more information on adding group names, see **Chapter 2: Inventory Control – Inventory Menu – Group Maintenance.**

Size: This is the size of the item. If you have an item that comes in different sizes (such as Small, Medium, and Large), you can use this field along with a group name to create a different item number for each size.

Color: This is the color of the item. If you have an item that comes in several colors (such as Black, White, and Blue), you can use this field along with a group name to create a different item number for each color.

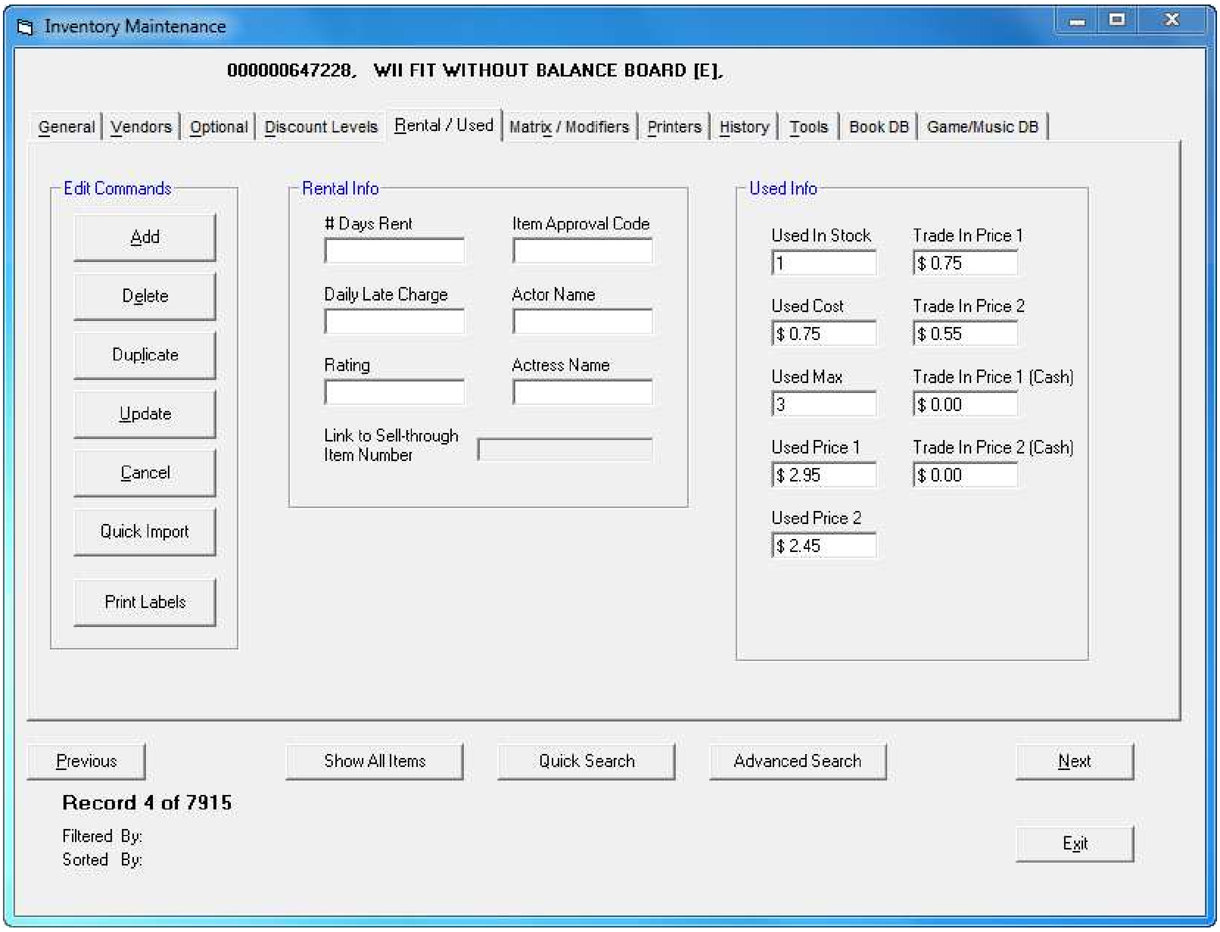
This function also allows you to select which modifiers will be displayed when the item is added to an invoice.

To select an item as a modifier for another inventory item:

- Use **<TAB>** or the mouse to move the cursor to the **Inventory List**, then use <↑> and <↓> or the mouse to highlight the modifier item you wish to add to the **Modifier List**.
- Once the item is highlighted, click on **Add** to add the item to the **Modifier List**. Repeat this for every item you want to add as a modifier.
- To remove an item from the **Modifier List**, use **<TAB>** or the mouse to move the cursor to the **Modifier List**, then use <↑> and <↓> or the mouse to highlight the modifier item you wish to remove. Once the item is highlighted, click on **Remove**.

Rental/Used

To access the Rental and Used page, click on the **Rental/Used** tab or press **<ALT+R>**. **If setting up rental products, we recommend using the Rental Manager.**



 # Days Rent: This is the number of days the item can be rented for without incurring any late charges. The maximum number of digits is two.

Daily Late Charge: This is how much the customer will be charged per day once the item is overdue.

Rating: This is the rating of the movie (Example: G, PG, PG-13, R, or NC-17).

Item Approval Code: This field is for informational purposes only. You may enter an item approval code for a rental item in this field.

Actor Name: If the rental item is a movie, you may enter the leading actor's name in this field.

Actress Name: If the rental item is a movie, you may enter the leading actress' name in this field.

Link to Sell-Through Item Number: If you have set up an item in inventory maintenance as rental and now wish to switch to the rental maintenance system, then you may link your old items by putting the sellthrough number here.

Used in Stock: The quantity for this item that you have in stock, used.

Used Cost: This field may be used either as the trade in value or to get the average amount that the used items in stock have cost you. This is set in options.

Used Max: Attempting to go above the quantity set in this field will prompt the cashier that there may be too many in stock already.

Used Price 1: Amount to charge for this item used in condition 1. (Complete)

Used Price 2: Amount to charge for this item used in condition 2. (Incomplete)

Trade In Price 1: Amount to offer in store credit for this item in condition 1. (Complete)

Trade In Price 2: Amount to offer in store credit for this item in condition 2. (Incomplete)

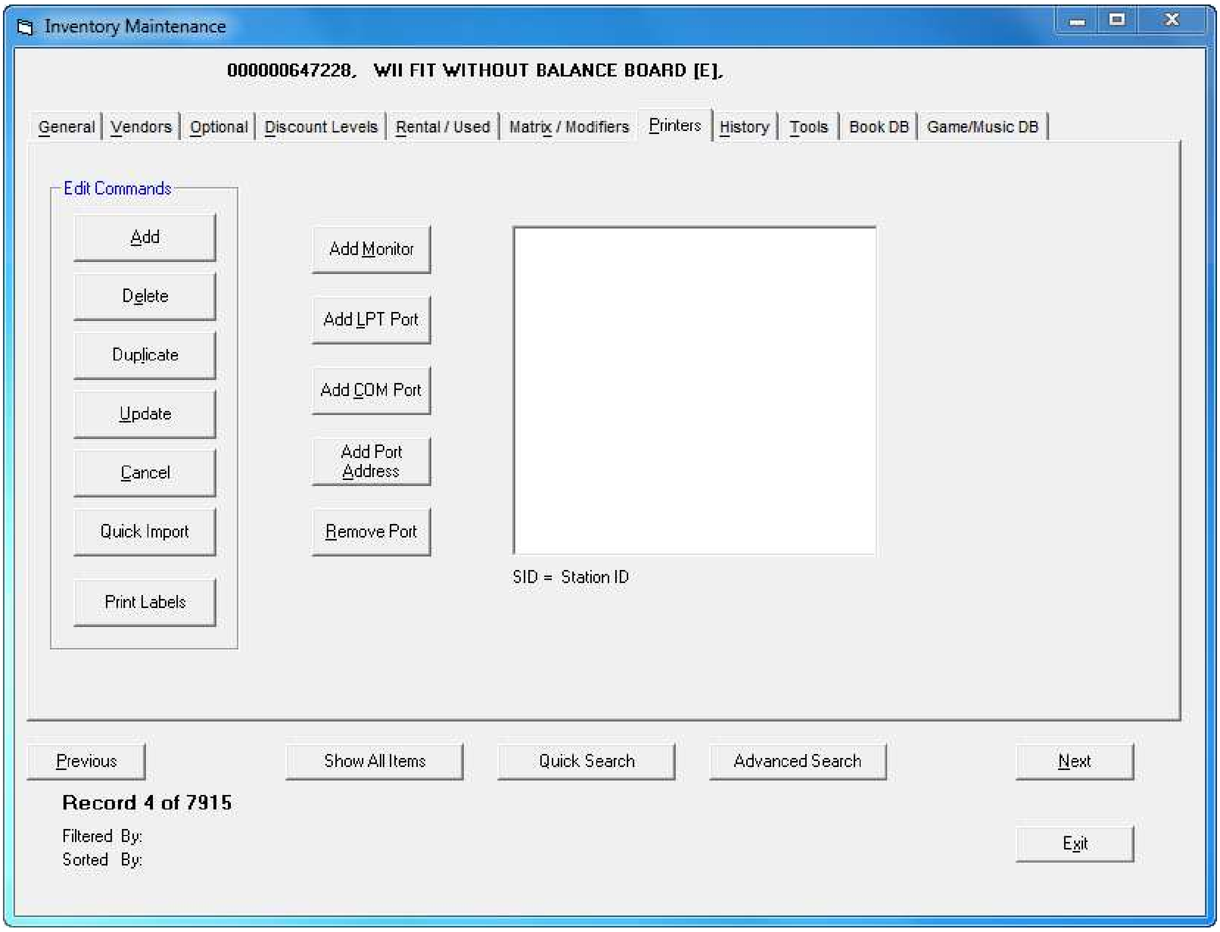
Trade In Price 1 (Cash): Amount to offer in cash for this item in condition 1. (Complete)

Trade In Price 2 (Cash): Amount to offer in cash for this item in condition 2. (Incomplete)

Whether to use Trade In Price fields or the Used Cost field is set in the Used/Trade In Options menu.

Printers

To access the Printers page, click on the **Printers** tab or press **<ALT+P>**.



This function allows you to select which printer(s) an item will print on and/or which monitor(s) an item will be displayed on. For example, if a customer orders a Coke and a hamburger, you can print the soda order at the bar at COM1 and the hamburger at the grill at COM2.

Add Monitor: Use this button to send an item to a monitor at a specified Station ID instead of (or in addition to) a printer. The order can then be displayed on the selected station by choosing **Order Filling** from the **File** menu on the Restaurant ExtremePOS Login Screen.

Add LPT Port: Use this button to select an LPT port for the item.

Add COM Port: Use this button to select a COM port for the item.

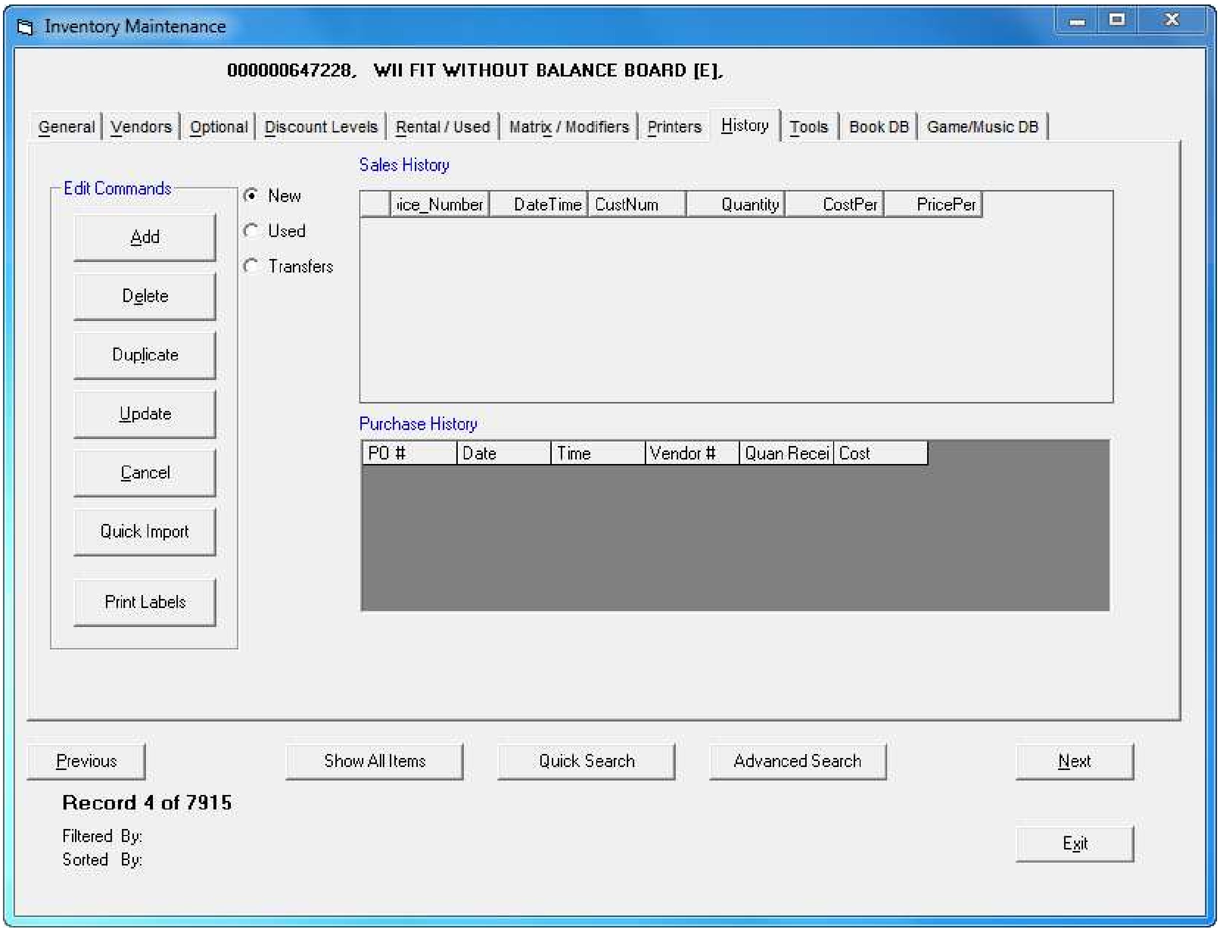
Add Port Address: Use this button to specify a networked port address (ex: //server/hp4000) for an item. This allows for much greater flexibility in printer placement and setup for restaurant environments.

Remove Port: Use this button to remove a networked port address from the list of printers.

NOTE: You can choose to print to any printer that is setup on your system, including local and network printers. Even if you don't choose a printer, a receipt will print to the default printer if **Print Invoices** is set to **YES** in the **Options** screen.

Sales History

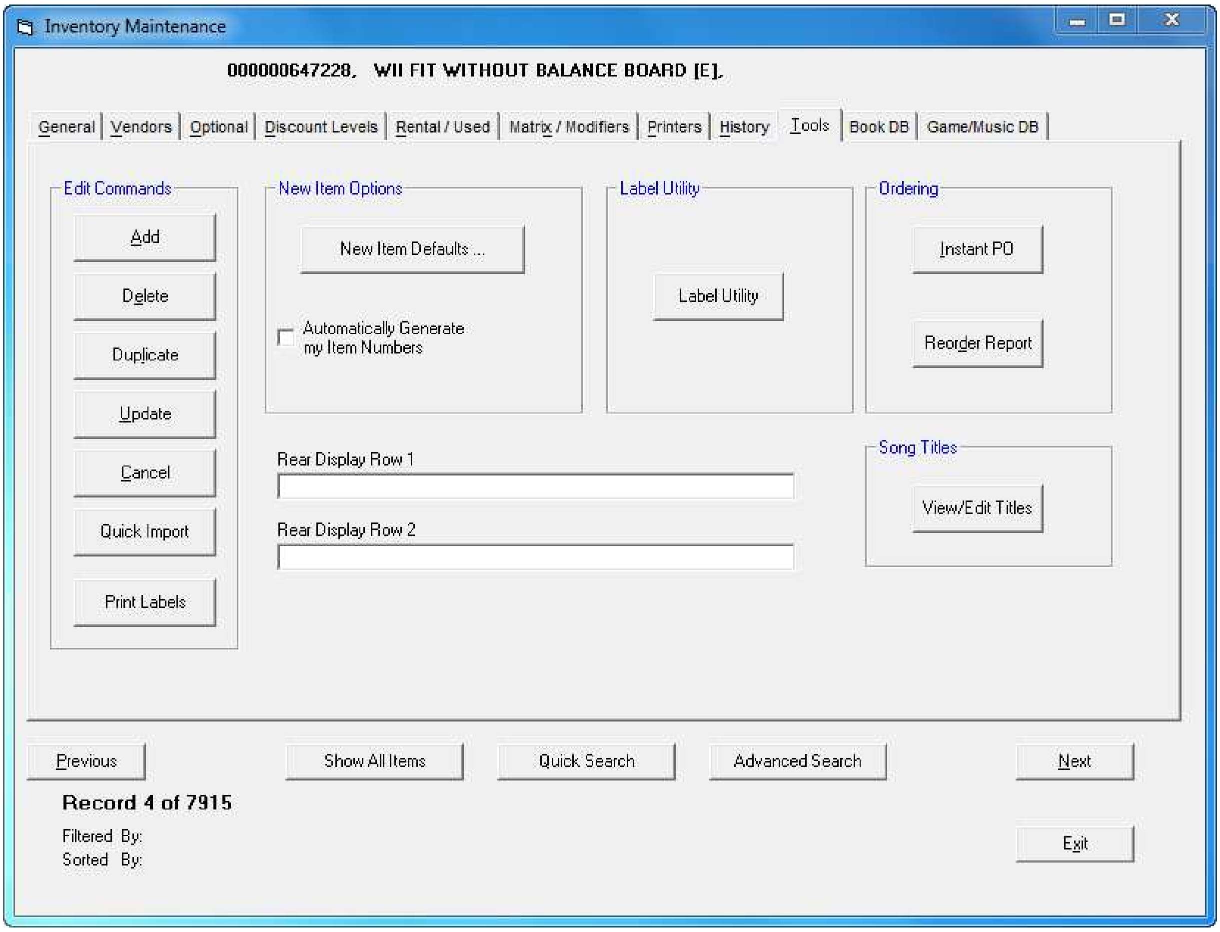
To access the Sales History page, click on the **Sales History** tab or press **<ALT+H>**.



This screen displays all of the invoices on which the selected item was sold. It displays the Invoice Number, Date, Time, Customer Number, Quantity, Cost, and Price. You may select new or used to view the history of to the left.

Inventory Tools

To access the Inventory Tools page, click on the **Inventory Tools** tab or press <**ALT+T**>.

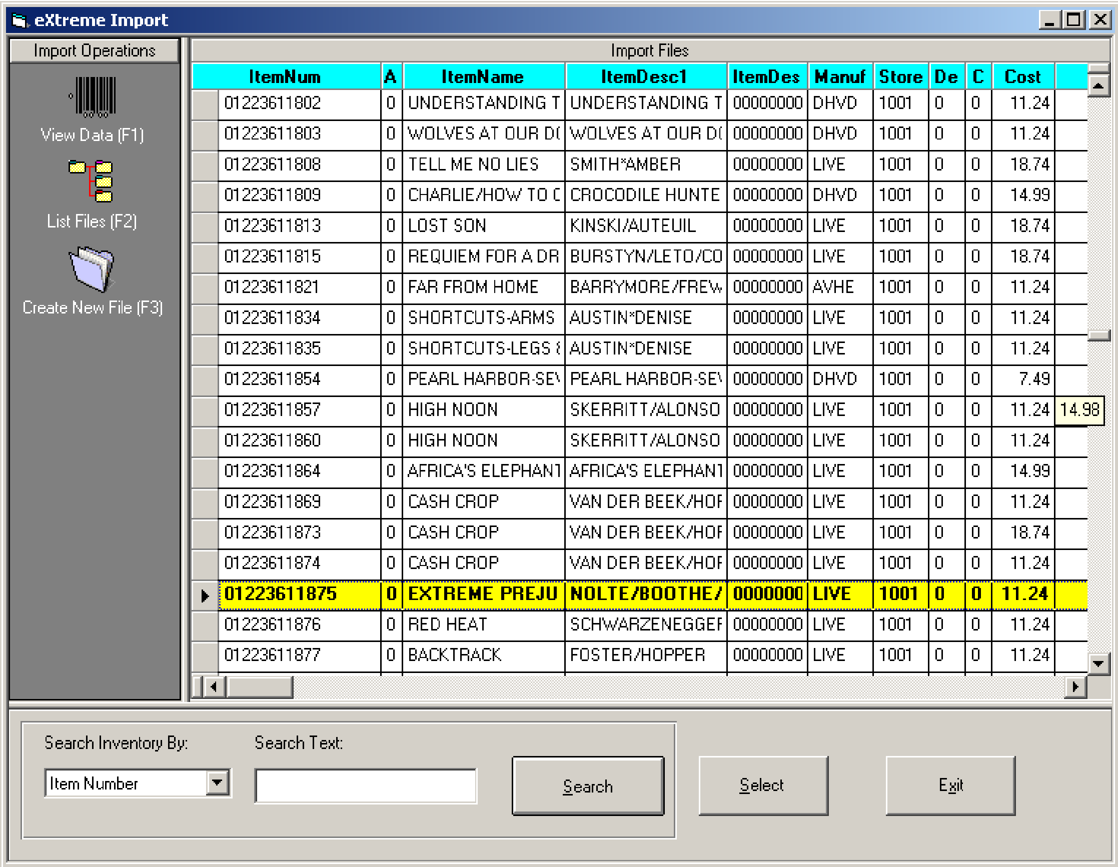


Instant PO: This allows you to generate an instant purchase order for the item.

Reorder Report: This report displays a list of inventory items that have fallen below their respective reorder levels, separated by department. The report contains the following information about each item: Item Number, Item Name, Department Number, Vendor Number, Vendor Name, Part Number, Cost, In Stock, Value, Price, Reorder Level, and Reorder Quantity.

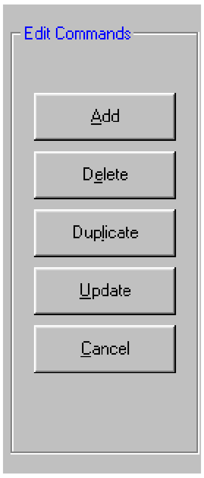
View Defaults: This allows you to view your station defaults when setting up new items. It allows you to save time when entering repetitive fields for similar items.

Extreme Import from Vendor Data: This allows you to import vendor database records to view and ultimately assist in setting up inventory records in your database file.



ItemNum	A	ItemName	ItemDesc1	ItemDes	Manuf	Store	De	C	Cost
01223611802	0	UNDERSTANDING T	UNDERSTANDING T	00000000	DHVD	1001	0	0	11.24
01223611803	0	WOLVES AT OUR D(	WOLVES AT OUR D(	00000000	DHVD	1001	0	0	11.24
01223611808	0	TELL ME NO LIES	SMITH*AMBER	00000000	LIVE	1001	0	0	18.74
01223611809	0	CHARLIE/HOW TO C	CROCODILE HUNTE	00000000	DHVD	1001	0	0	14.99
01223611813	0	LOST SON	KINSKI/AUTEUIL	00000000	LIVE	1001	0	0	18.74
01223611815	0	REQUIEM FOR A DR	BURSTYN/LETO/CO	00000000	LIVE	1001	0	0	18.74
01223611821	0	FAR FROM HOME	BARRYMORE/FREW	00000000	AVHE	1001	0	0	11.24
01223611834	0	SHORTCUTS-ARMS	AUSTIN*DENISE	00000000	LIVE	1001	0	0	11.24
01223611835	0	SHORTCUTS-LEGS &	AUSTIN*DENISE	00000000	LIVE	1001	0	0	11.24
01223611854	0	PEARL HARBOR-SE\	PEARL HARBOR-SE\	00000000	DHVD	1001	0	0	7.49
01223611857	0	HIGH NOON	SKERRITT/ALONSO	00000000	LIVE	1001	0	0	11.24
01223611860	0	HIGH NOON	SKERRITT/ALONSO	00000000	LIVE	1001	0	0	11.24
01223611864	0	AFRICA'S ELEPHANT	AFRICA'S ELEPHANT	00000000	LIVE	1001	0	0	14.99
01223611869	0	CASH CROP	VAN DER BEEK/HOF	00000000	LIVE	1001	0	0	11.24
01223611873	0	CASH CROP	VAN DER BEEK/HOF	00000000	LIVE	1001	0	0	18.74
01223611874	0	CASH CROP	VAN DER BEEK/HOF	00000000	LIVE	1001	0	0	11.24
01223611875	0	EXTREME PREJU	NOLTE/BOOTHE/	0000000	LIVE	1001	0	0	11.24
01223611876	0	RED HEAT	SCHWARZENEGGEF	00000000	LIVE	1001	0	0	11.24
01223611877	0	BACKTRACK	FOSTER/HOPPER	00000000	LIVE	1001	0	0	11.24

Control Buttons



Add: This will add the item to your inventory. **NOTE: Once an item has been added to your inventory, you cannot change the item number and it can only be deleted if it hasn't been used in a previous invoice. However, you can edit the item name.**

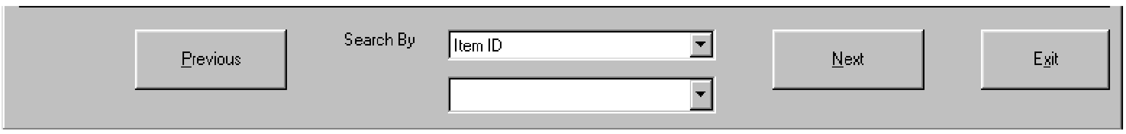
Update: This will save any changes made to the current item.

Duplicate: If you have more than one of a particular rental item, you can use **Duplicate** to copy all of the information from one item number to a new item number. This allows you to have the same information on more than one rental item without manually entering the information for each one.

Delete: This will delete the current item from your inventory. **NOTE: An item can only be deleted if it hasn't been used in a previous invoice.**

Cancel: Click on this button to cancel the current data entry.

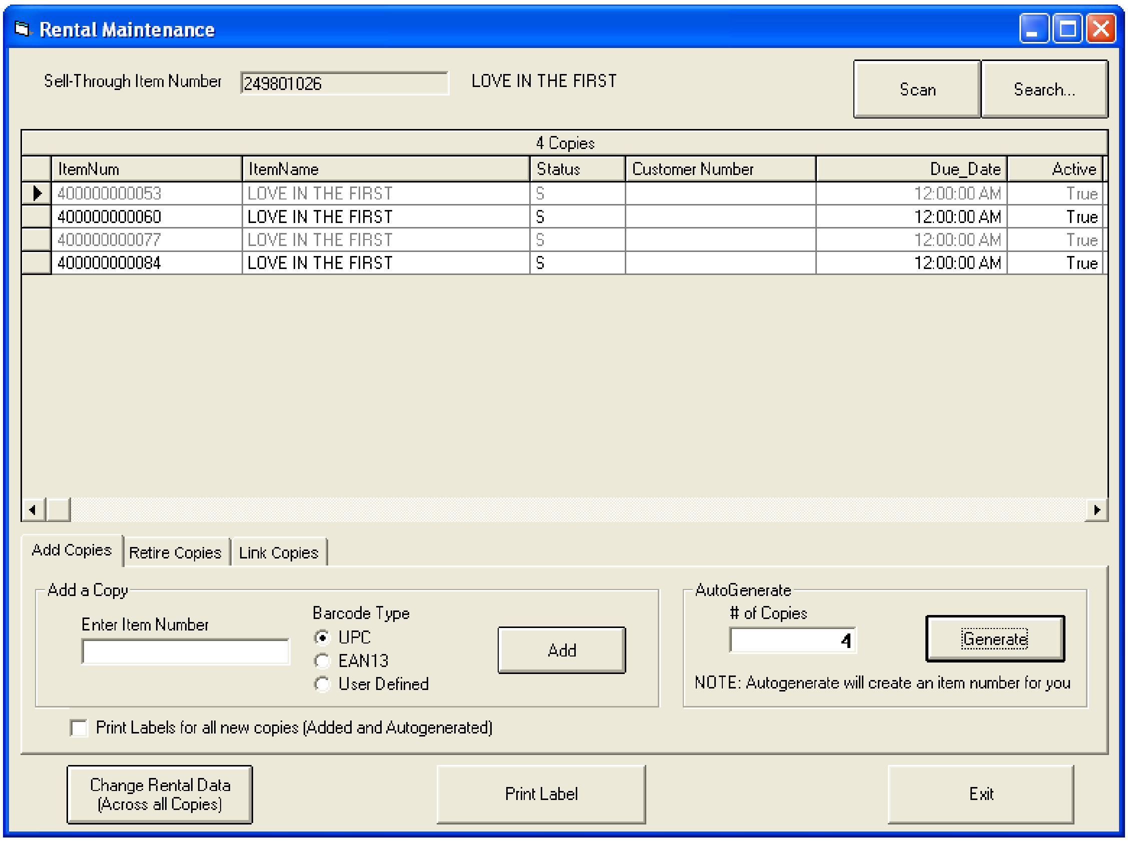
Exit: Click on this button to exit the Inventory Maintenance Screen.



Use the arrow **Previous** and **Next** buttons to scroll through your inventory item. The **Previous** button will display the previous item and the **Next** button will display the next item.

To search for an item, type the item number or item name in the **Search by Item Number** or **Search by Item Name** field, or click on the down arrow to display a list of all the inventory items. You can also use the up and down arrows, <↑> and <↓>, to scroll through the inventory when that field is highlighted.

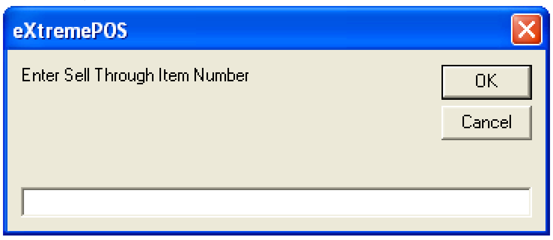
Rental Maintenance



The Rental Maintenance screen provides an interface for quickly creating and managing rental pieces. Rental Maintenance can be accessed by selecting View -> Rentals from the menu on the Invoice screen. There are 3 tabs on the Rental Maintenance screen which provide the capability to add, retire and link rental copies to a sell through item number.

There are some common components to the Rental Maintenance screen which we'll discuss first.

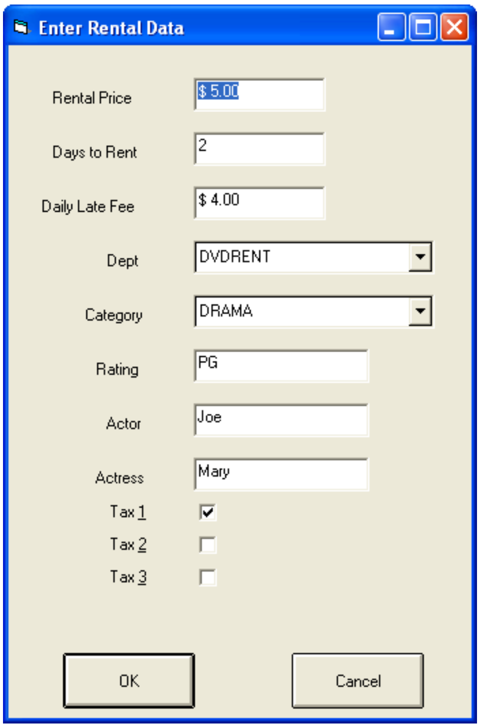
1. **Sell Through Item Number**. This box displays the currently selected sell through item number. The title for the selected item is displayed to the right of the box. A valid sell through item must be selected before you can Add, Retire or Link rental copies. You can select a sell through item by either scanning or searching for the item as described below.
2. **Scan Button**. Hitting the Scan Button will display an input window as shown below. Scan in (or type) the desired sell through item number in the text box and hit OK. Selecting Cancel from the input window will return you to the rental maintenance screen without selecting a sell through item number.



3. **Search Button**. Selecting the Search Button will bring up the Extreme Lookup screen where you can search for the desired sell through item. After you find and select the item within the Extreme

Lookup screen, you will be returned to the Rental Maintenance screen. Please refer to the Extreme Lookup screen section in this manual for more information on searching for and selecting items.

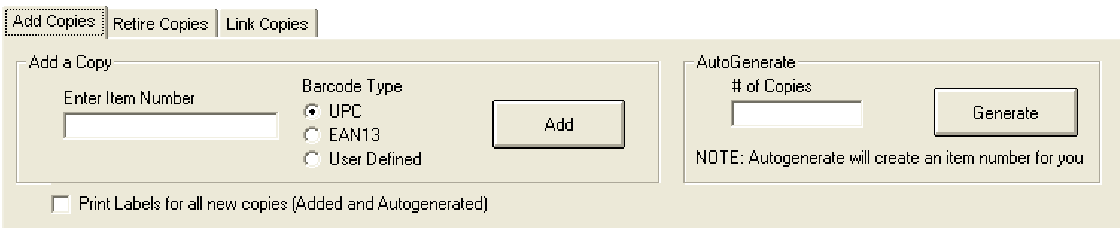
4. **Copies Grid**. The Copies Grid contains information about all rental copies associated with the selected sell through item. This includes the barcode number of each copy, item name, rental status, customer (if rented), due date (if rented), days rented, dept, category, etc.
5. **Change Rental Data Button**. Selecting this button brings up the Rental Data Entry screen shown below. If copies already exist for this sell through item, the initial values for the rental data will default to the existing data. Modify any of the fields as desired and select OK to make the changes to all copies of the selected sell through item. Selecting Cancel will return you to the Rental Maintenance Screen without changing the data.



6. **Exit Button**. Selecting this button closes the Rental Maintenance Screen.
7. **Print Label Button**. Selecting this button will print a barcode label for the rental copy currently selected in the Copies Grid.

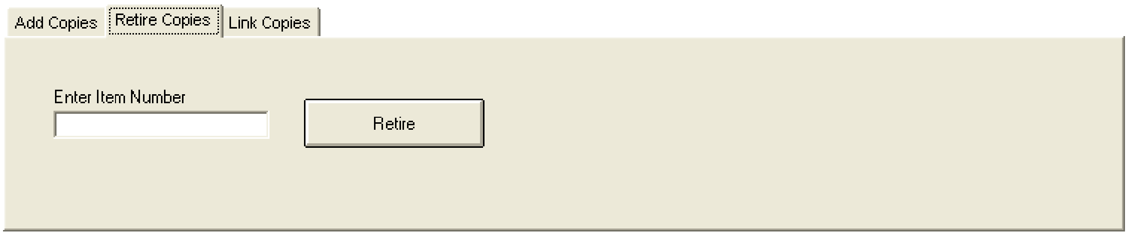
The 3 tabs located beneath the Copies Grid provide the capability to create and manage your rental copies. Each tab is discussed in more detail below:

1. **Add Copies Tab –** This tab allows you to create copies of the selected Sell Through Item Number.



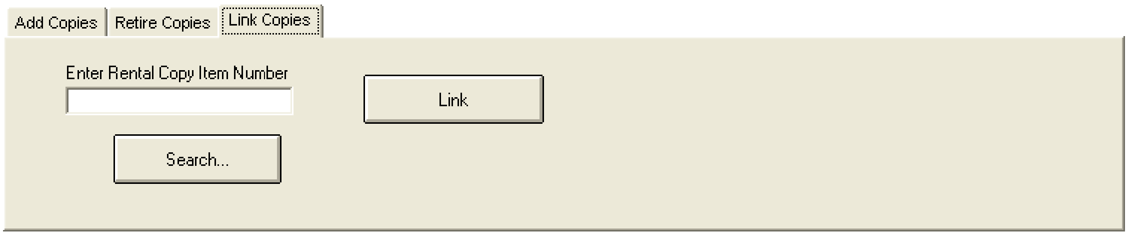
There are two ways to create copies, add them manually or autogenerate them. If you want control over the item numbers for your copies, you will probably want to add them manually. To add a copy, enter the item number in the Item Number box , select the desired barcode type and hit the Add Button. To autogenerate copies, enter the number of copies to be generated in the # of Copies box and hit the Generate button. In both cases, the new copy (or copies) will be added to the Copies Grid. If you need to print barcode labels for the new rental copies, select the Print Labels check box prior to adding or autogenerating copies..

2. **Retire Copies Tab –** This tab allows you to retire (inactivate) rental copies when they are no longer needed.



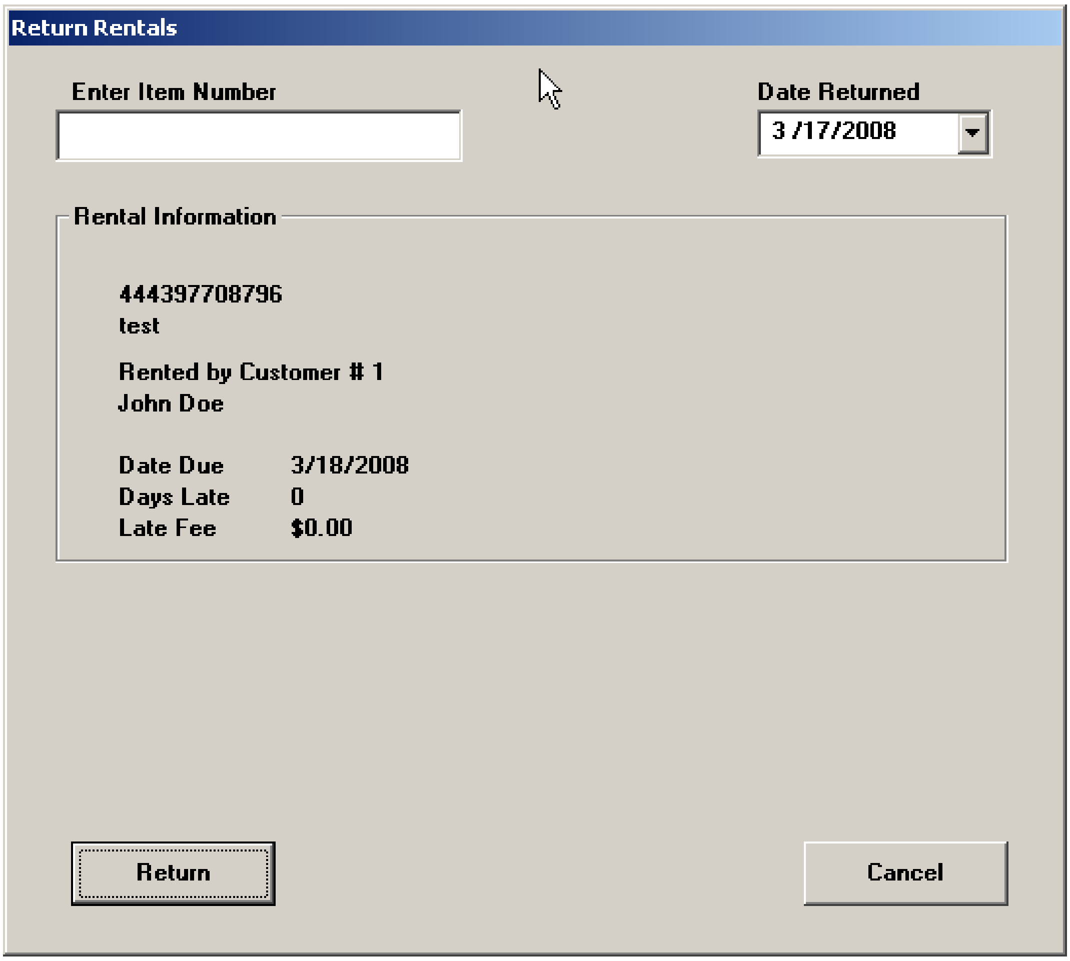
In order to retire a copy, you should enter the item number of the copy in the Item Number box, then select the Retire Button

3. **Link Copies Tab –** This tab allows you to establish a link between an existing rental item and a sell through item.



This function is primarily included for customers who have already created rental items through the inventory maintenance screen and wish to convert over to use the new rental management features. To link a rental item, first select the desired sell through item as described earlier in this section. Then enter or scan the item number of the rental item in the Rental Copy box and click on the Link Button to complete the link. Selecting the Search Button will bring up the Extreme Lookup Screen so you can search for the rental item.

Return Rentals

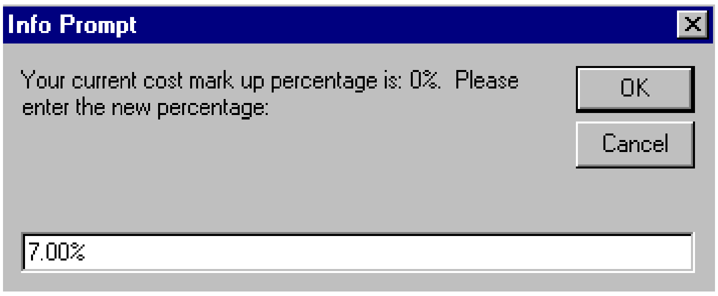


When a customer returns an item that has been rented, select **Return Rentals** from the **Actions** menu to return the item to the store.

To return a rented item:

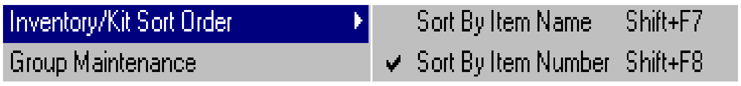
- Select **Return Rentals** from the **Actions** menu or press **<CTRL+F1>**.
- Type in the item number of the item being returned, then press **<ENTER>**.
- EXTREMEPOS will display the Department, Item Number, Item Name, and Status of the returned item that was just entered.
- Click on **Exit** or press **<ALT+X>** to exit.

Cost Markup Percentage



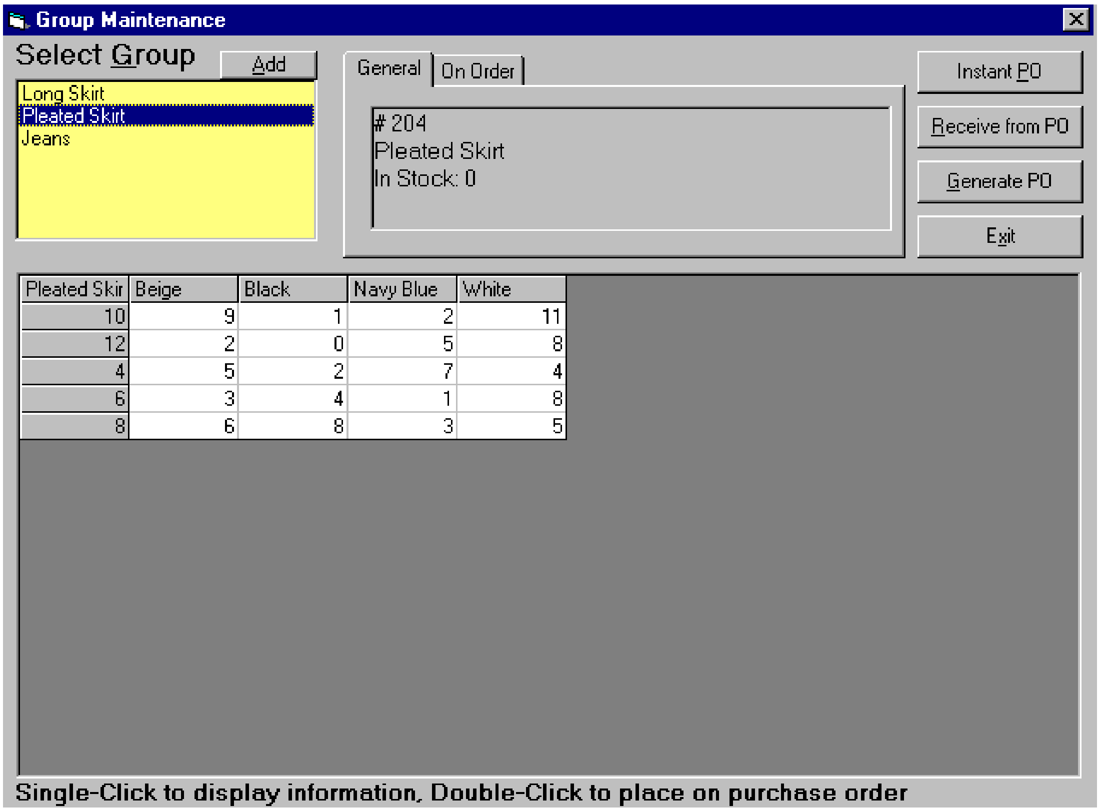
This feature allows you to set the default price for an item as a certain percentage more than the cost of the item. When adding the item to the inventory, the price will default to the cost markup percentage. The default price may be changed at any time. To set a value for the **Cost Markup Percentage**, select **Cost Markup Percentage** from the **View** menu. Type in the desired percentage then click on **OK** or press **<ENTER>**. For example, if you want to set the cost markup percentage at 50%, you should type 50, not .5. Click on **Cancel** to quit without selecting a percentage.

Inventory/Kit Sort Order



This function allows you to sort your inventory items and kits by either item name or by item number. To sort your inventory by item name, click on **Inventory/Kit Sort Order** in the **Inventory** menu then select **Sort by Item Name**, or press **<SHIFT+F7>** in the Invoice Screen. To sort your inventory by item number, click on **Inventory/Sort Order** in the **Inventory** menu then select **Sort by Item Number**, or press **<SHIFT+F8>** in the Invoice Screen. A check will appear next to the current manner of sorting inventory.

Group Maintenance



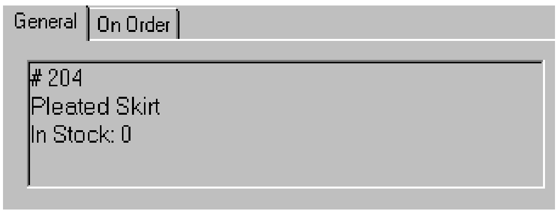
A **group** is a way to classify an item that has different styles. **Group Maintenance** allows you to create groups for inventory items.

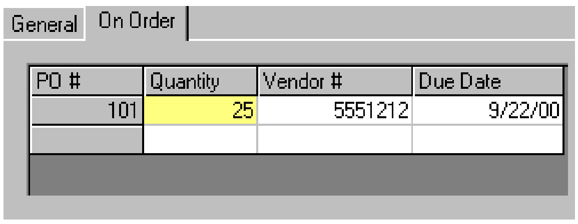
To create a new group:

- Select **Groups** from the **View** menu.

- Click on **Add** or press **<ALT+A>**. Type in the new group name. The group name can can contain any alphanumeric characters. Click on **OK** or press **<ENTER>** to create the group. Click on **Cancel** to quit without creating a group.

When you highlight a group in the **Select Group** list, all of the sizes and colors available for the group will be displayed in the grid. Click on a cell in the grid to display information about that item. The item number, description, and current quantity in stock will appear in the **General Tab**. The **On Order** tab displays any open purchase orders for the selected item.

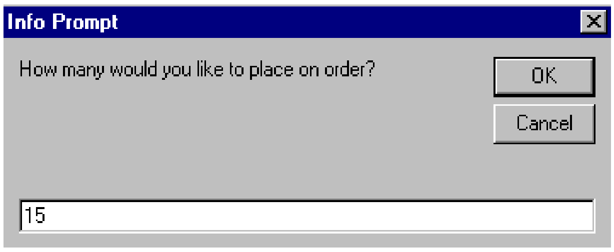




Group Maintenance also allows you to generate and receive purchase orders for group items.

To generate a purchase order for an item:

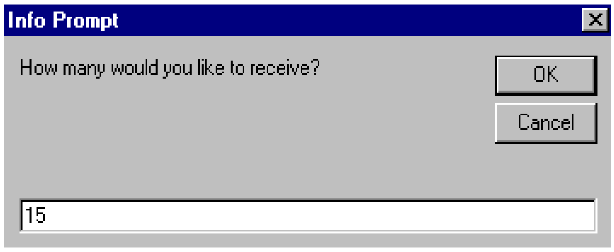
- Double-click on the desired item. Enter the amount that you would like to place on order then click on **OK** or press **<ENTER>**.



- Click on **Generate PO** or press **<ALT+G>**. The item will appear on the Purchase Order grid with the entered quantity. Modify any fields that may need to be changed, then click on **Create**.

To receive an item from an existing purchase order:

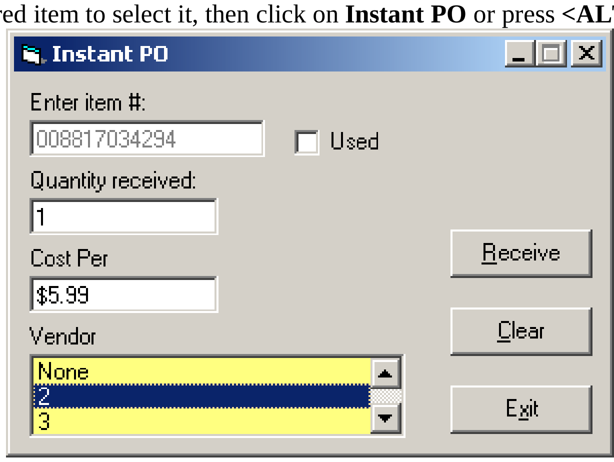
- Click on the desired item to select it, then click on **Receive from PO** or press **<ALT+R>**.



- Enter the quanity received, then click on **OK** or press **<ENTER>**. Your inventory will be updated.

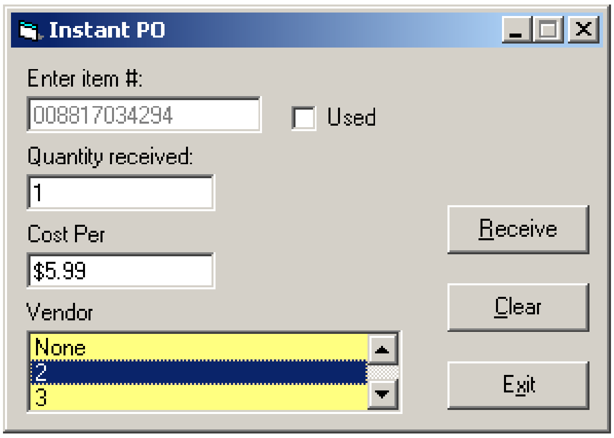
To receive an item that does not have an existing purchase order:

- Click on the desired item to select it, then click on **Instant PO** or press **<ALT+P>**.



- Enter the amount received and select a vendor (if any), then click on **Receive** or press **<ALT+R>**. Click on **Exit** or press **<ALT+X>** to quit without receiving any items.

Instant PO's



This feature allows you to generate an instant purchase order for an item. You can use this function to add additional stock at a new cost and EXTREMEPOS will automatically calculate the average cost of this item if **Average Cost Method** is enabled in the **Options Screen**. To generate an instant purchase order, select **Instant PO's** from the **Actions** menu. Enter the purchase order information then click on **Receive** or press **<ALT+R>** to receive the purchase order. Your inventory will automatically be updated. Click on **Clear** or press **<ALT+C>** to clear the entered information. To quit without receiving the purchase order, click on **Exit** or press **<ALT+X>**.

Enter Item #: Enter the item number of the item being received here.

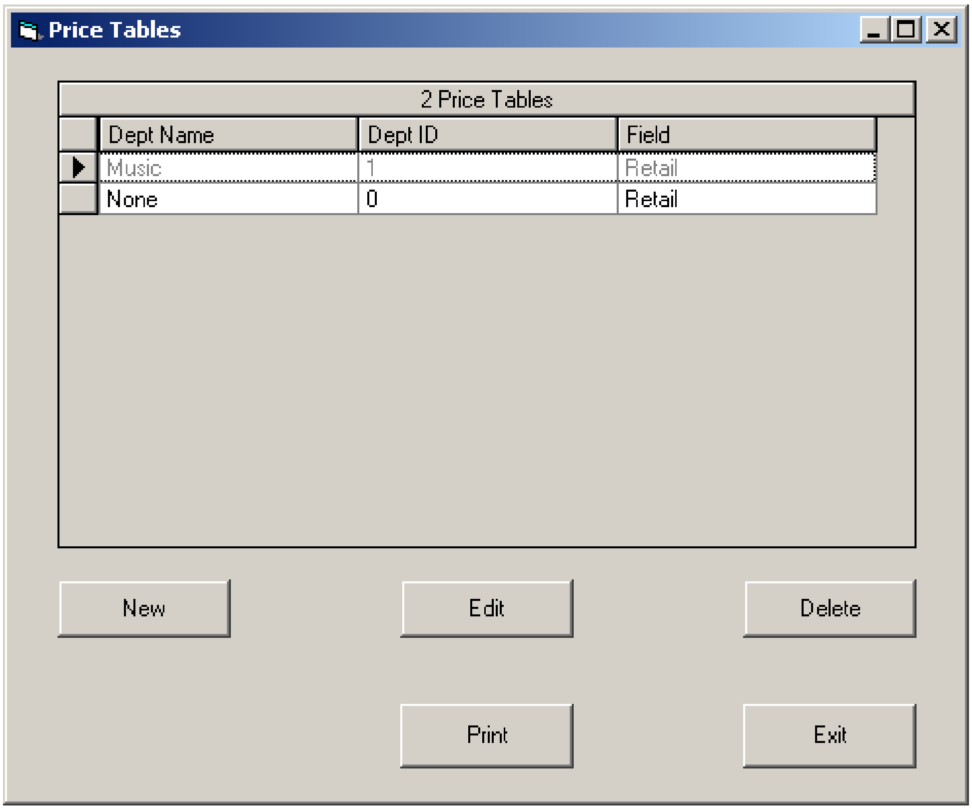
Quanity Received: Enter the received quantity of the item here.

Cost Per: Enter the cost per item in this field.

Vendor: You may select a vendor for the purchase order here. Select **None** if there is no preferred vendor for this item.

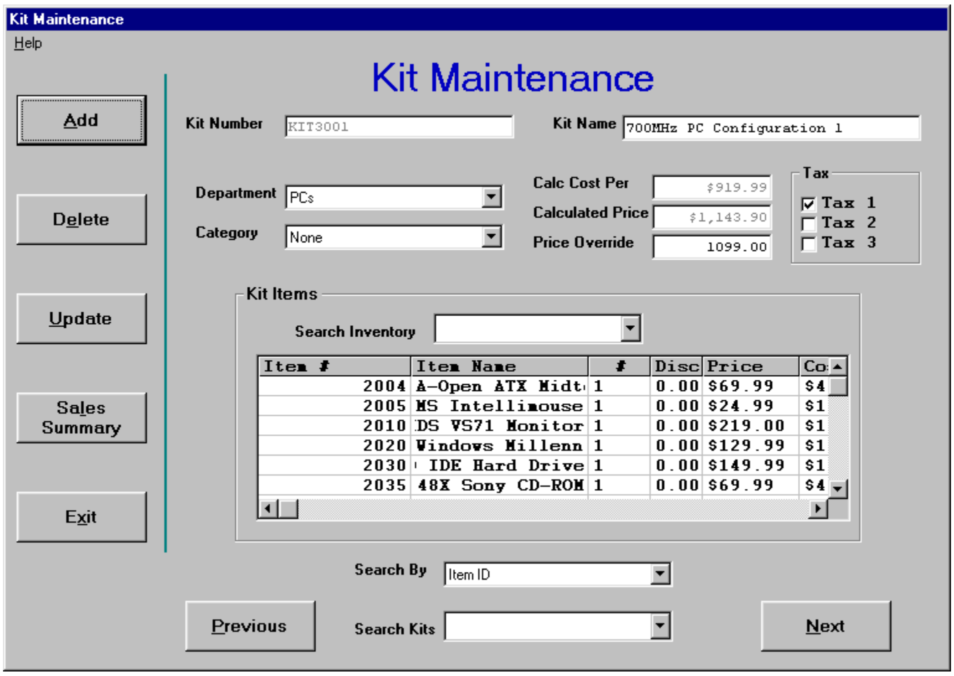
Used: Check this box if you are receiving a quantity of used items.

Price Tables



The price tables feature allows for you to set prices from a range of retail prices for different departments. For instance, you may set it up so that all items in the DVD department that retail from 12.99 to 14.99 are set at a price of 11.99 in your store. Each department requires its own price table. To set up a new table, hit **New.** To edit an existing table, hit **Edit.** To delete a table, hit **Delete.**

Kit Maintenance



A **kit** is a group of inventory items that is sold as one item. Each kit will have its own unique kit number, but it is considered a group of inventory items. Kits are a faster method of adding individual items of a group to an invoice. When a kit is added to an invoice, all of the inventory items associated with that kit number will be automatically placed on the invoice. You may also specify a price for the kit that is different than the total of all the prices of the included inventory items.

The **Kit Maintenance** screen allows you to add items to your inventory as well as edit existing inventory items. To access this screen, select **Kits** from the **View** menu or press **<SHIFT+F3>** in the Invoice Screen.

Once you have accessed the **Kit Maintenance** screen, you can use **<TAB>** or the mouse to move from one field to another. To add a kit, click on **Add** or press **<ALT+A>**. Enter the desired information, then click on **Save** or press **<ALT+V>** to save the new item. To update an item, change the desired information then click on **Update** or press **<ALT+U>**. To exit without making any changes, click on **Exit** or press **<ALT+X>**.

NOTE: Kit Number and Kit Name are required fields. You MUST enter a kit number and kit name for each item.

Search By: This allows you to select the kit sort method. You can choose **ITEM ID** or **ITEM Name**.

Search Kits: This allows you to enter the ITEM ID or ITEM Name to find the item quickly depending on you chosen sort option.

Department Search Description: This allows you to select a department for the kit. Scroll through the Department list by using the cursor keys **(<←>, <↑>, <→>, <↓>)** or by clicking on the up and down arrows with your mouse. Highlight the desired department, then press highlight the desired department. **NOTE:** The Department must first be added through **Add New Department** under **Departments** in the **View** menu. For more information on creating departments, see **Chapter 2: Inventory Control – Departments.**

Category Search Description: This allows you to select a department for the kit. Scroll through the Department list by using the cursor keys **(<←>, <↑>, <→>, <↓>)** or by clicking on the up and down arrows with your mouse. Highlight the desired department, then press highlight the desired department. **NOTE:** The Department must first be added through **Add New Category** under **Category** in the **View** menu. For more information on creating departments, see **Chapter 2: Inventory Control – Categories.**

Kit Number: This is the unique identifier for the kit. It can be up to 18 characters long and consist of any combination of letters and numbers. However, if you are using barcodes, as is recommended, you may only use numbers in the kit number. **NOTE: Do not use any symbols, punctuation, or spaces, except for the underscore (_), as part of the item number.**

Kit Name: This is the description of the kit that will appear on invoices and reports. It can be up to 30 characters long and consist of any upper and lower case letters, numbers, punctuation, or spaces. **NOTE: Do not use the asterisk (*) as part of the item name.**

Calc Cost Per: This is the calculated total cost of all the inventory items in the kit. **This is a read-only field. You cannot enter information in this box.**

Calculated Price: This is the calculated price of the individual inventory items together in the kit. **This is a read-only field. You cannot enter information in this box.**

Price Override: This is the price that will override the calculated price for the kit. Even if the prices of the individual items change, the price override will remain the same.

Tax: This indicates which tax(es) should be charged to this item. Click on the box next to the desired tax level(s) to choose the type of tax to be applied to this item..

Search Inventory: This is where you enter the item name or item number of the items that will be part of the kit. You may scan or type in this information.

Kit Grid: Once an item has been added to the kit, it will appear in the **Kit Grid**. The grid displays the item number, item name, quantity, discount, price, and cost of the items included in the kit. You may change the quantity and specify a discount price for an item, but the **Price Override** will take precedence over the discounted calculated price.

To create a kit:

- Click on **Add** or press **<ALT+A>**.

- Select the desired department, enter a kit number and kit name, then enter the price override. You may use **<TAB>** or the mouse to move between fields. **NOTE: You must enter a kit number and a kit description. Department selection and Price Override are optional fields.**

- Add items to the kit grid by scanning or typing in the inventory items items or select an item from the pull down menu. Once an item is added, it will appear in the Kit Grid. You may change the quantity or enter a discount price for each item in the grid at any time. Repeat this for each item in the kit.

- To delete an item from a kit, position the cursor on the desired item, then press **<CTRL+DEL>**.

- Once you have finished entering all the items in the kit, click on **Save** or press **<ALT+V>** to add the kit to your inventory. Click on **Cancel** or press **<ALT+C>** to quit without adding the kit.

Control Buttons

Add: This button adds the kit to your inventory. **NOTE: Once a kit has been added to your inventory, you cannot change the kit number and it can only be deleted if it has never been sold. However, you can edit the kit name.**

Delete: This will delete the current kit from your inventory. **NOTE: A kit can only be deleted if it hasn't been used in a previous invoice.**

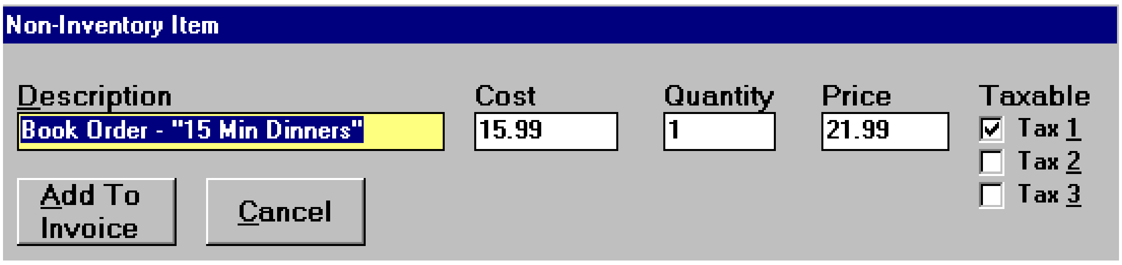
Update: This will save any changes made to the current kit.

Sales Summary: This will display a summary of sales per month of the current year for the kit. The summary will display the total sales, cost, and quantity for each month.

Next and **Previous:** These buttons allow you to scroll through your kits. **Next** will display the next kit while **Previous** will display the preceding kit.

Exit: Click on this button to exit without adding or updating a kit.

Non-Inventory Item



This feature allows you to add an item to an invoice that is not part of your inventory. To access this screen, select **Non-Inventory Item** from the **Invoice** menu or press **<CTRL+N>** in the Invoice Screen.

To add a non-inventory item to an invoice:

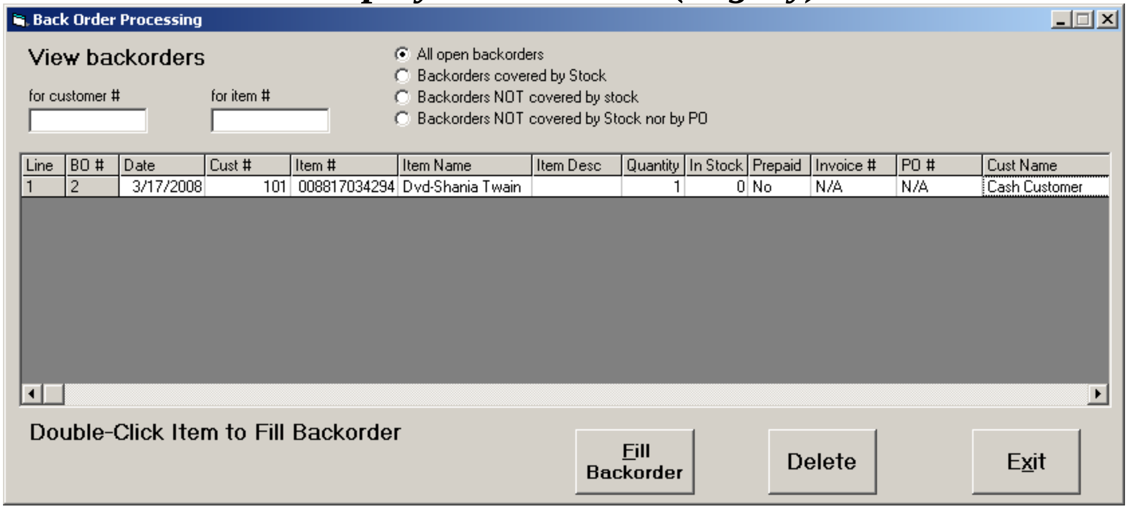
- Enter the description, cost, quantity, and price of the non-inventory item. Click on the box next to the desired tax level(s) to choose the type of tax to be applied to this item. If **Auto Cost %** is set to **Yes** in the **Options Screen**, EXTREMEPOS will automatically calculate the cost once the price of the non-inventory item is entered.

- Click on **Add To Invoice** or press **<ALT+A>** to add the item to the invoice. Click on **Cancel** or press **<ALT+C>** to quit without adding the item to the invoice.

Print Ticket/Voucher

This feature allows you to print additional tickets or vouchers for an item. **You must enter the administrator password before printing additional tickets or vouchers.**

Display Back Orders (Legacy)



(This feature was obsoleted in 2.6 by the Special Orders feature; it is left in the manual for reference of users of older versions.)

This screen displays either the items that are currently on backorder for a selected customer or the customers for whom a particular item is on backorder. The grid displays the date the backorder was placed, customer number, item number, item name, the quantity placed on backorder by the customer, the current quantity in stock, amount paid, whether or not the backorder was prepaid, and the invoice number. To access this screen, select **Backorders** from the **View** menu.

To view items on backorder for a customer:

- Type the desired customer number in the **For Customer #** field.
- Press **<TAB>** to move the cursor to a new field. Only backorders for the entered customer will be displayed.

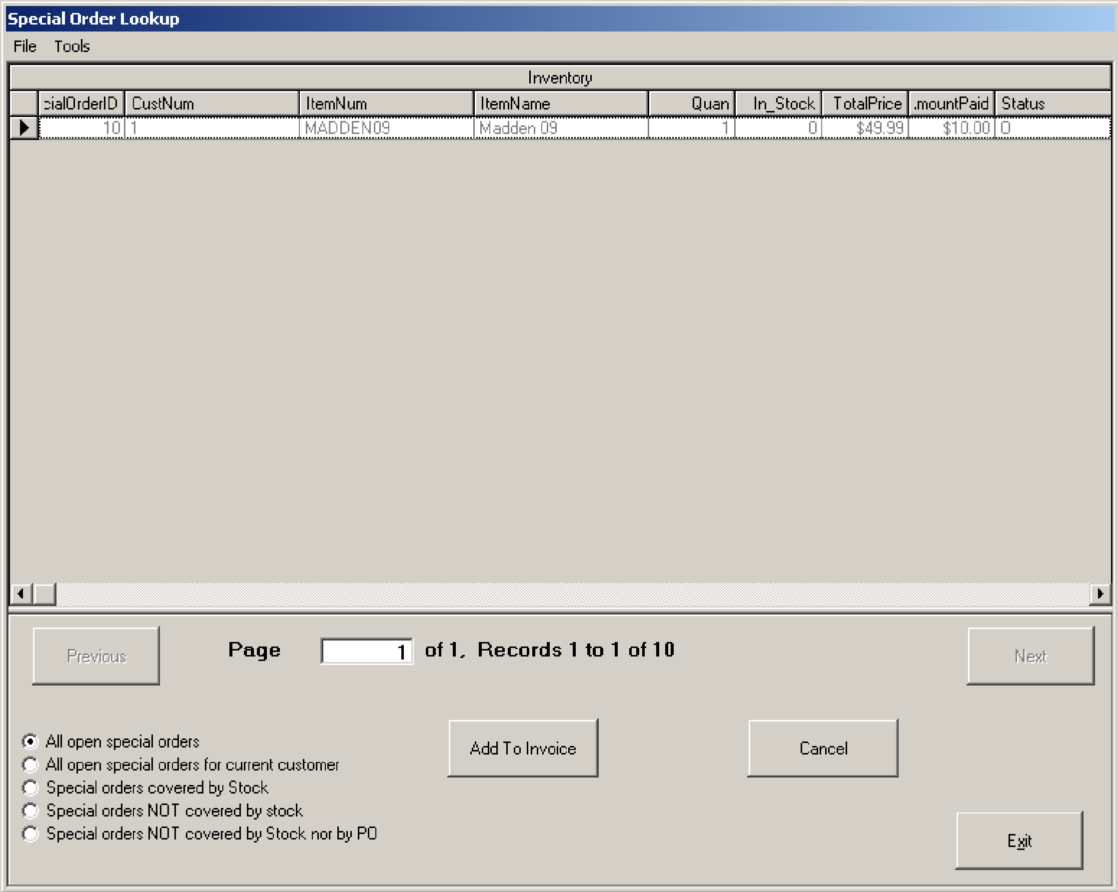
To view which customers have placed a certain item on backorder:

- Type the desired item number in the **For Item #** field.
- Press **<TAB>** to move the cursor to a new field. Only backorders for the entered item will be displayed.

There are three options for displaying backorders. Select **All Open Backorders** to display all backorders that have not yet been filled. Select **Backorders Covered by Stock** to only display backorders for items that are currently in stock. Select **Backorders Not Covered by Stock** to only display backorders for items that are not in stock. Select **Backorders Not Covered by Stock nor by PO** to only display backorders for items that are not in stock or covered by incoming purchase orders.

To fill a backorder, double click on the desired backorder or highlight the desired backorder then click on **Fill Backorder** or press **<ALT+F>**. The item will be added to the current invoice. Click on **Exit** or press **<ALT+X>** to exit without filling a backorder. Click on **Delete** to erase a backorder without filling it.

Special Orders/Preorders



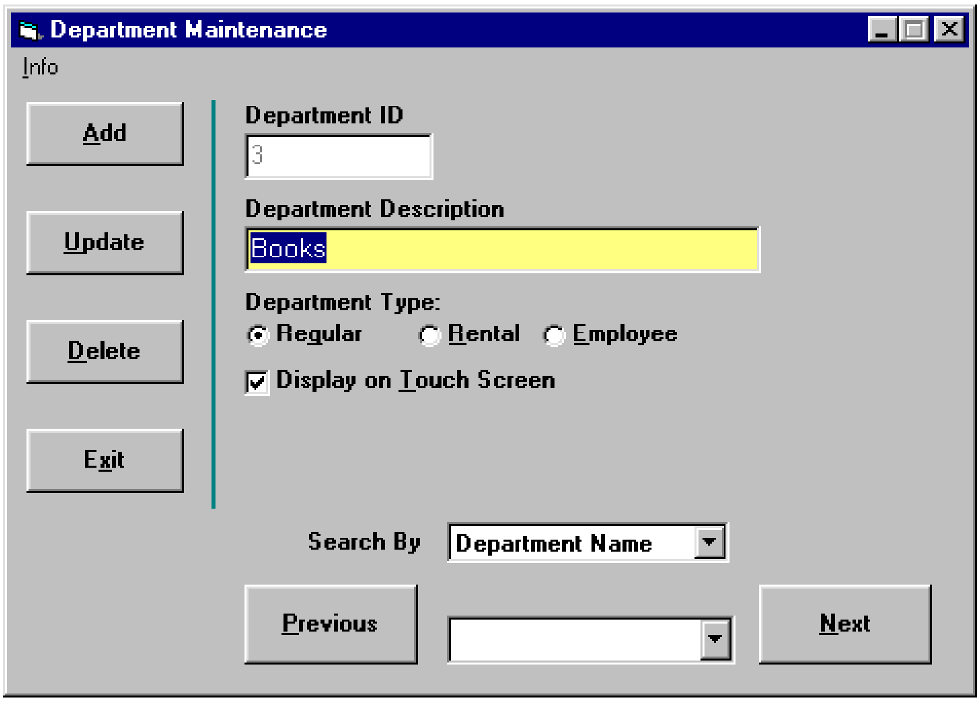
This screen displays items that are either preordered or on special order for customers.

You may filter the displayed items by the radio buttons on the lower left-hand side. **All Open Special Orders** will display all special orders not yet filled. **All Open Special Orders for Current Customer** will display all special orders not yet filled for the customer currently selected on the invoice screen. **Special orders covered by Stock** will display those orders not yet filled that can be filled by inventory currently in stock. **Special orders NOT covered by Stock** will display the orders not yet filled that cannot be filled from current inventory. **Special orders NOT covered by Stock nor by PO** will display orders than cannot be filled from current inventory or from open purchase orders.

Add to Invoice will attempt to pick up the selected item, automatically selecting the reserving customer. **Cancel** will cancel the reservation and place a refund for the customer's money on the invoice.

Departments

Department Maintenance



The **Department Maintenance** screen allows you to create or update departments. To access this screen, select **Departments** from the **View** menu, and then select **Departments.**

Important Note: Do not delete the department called "None". Some functions in eXtremePOS require the presence of this department.

To create a department:

- Click on **Add** or press **<ALT+A>**.
- Type in the new department ID in the **Department ID** field. **NOTE: Do not use an asterisk, *, in the Department ID.**
- Use **<TAB>** or the mouse to move the cursor to the **Department Description** field, then type in the description of the new department.
- Click on the **Department Type**. Select **Rental** to create a rental item department. Select **Employee** to create an employee department. Select **Regular** for all other types of departments.
- Click on **Save** or press **<ALT+S>** to add the department. Click on **Cancel** or press **<ALT+C>** to quit without creating a department.

To update or delete a department:

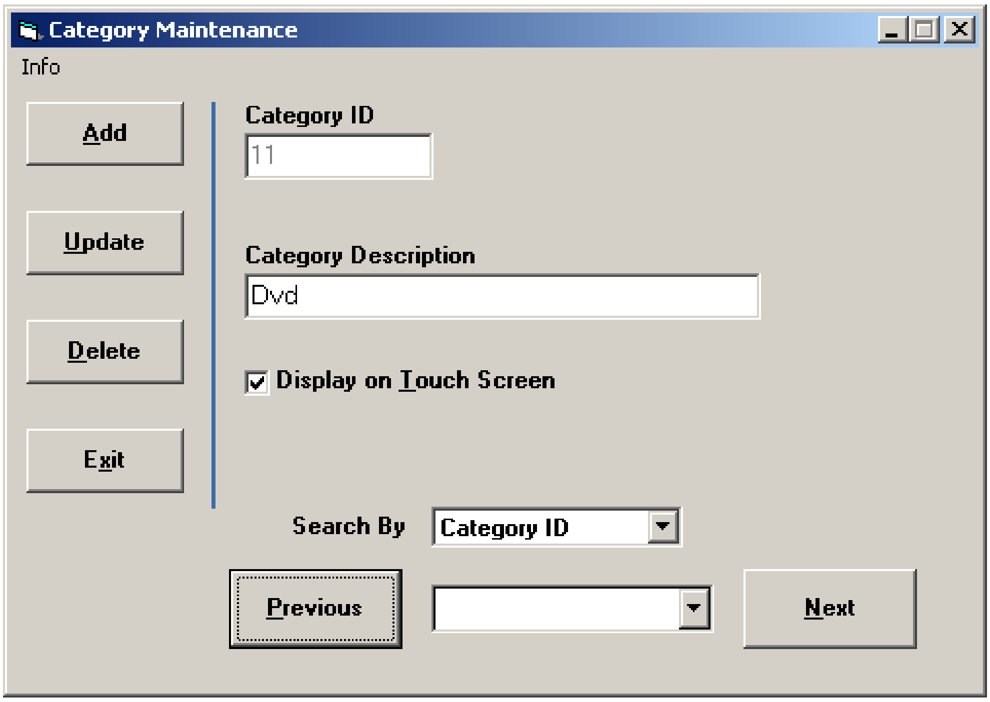
- Select the desired department. Scroll through your departments by using the **Previous** and **Next** buttons. The **Previous** button will display the previous department and the **Next** button will display the next department. To search for a department, type the department name or department number in the **Search by Dept ID** or **Search by Dept Description** field, or click on the down arrow to display a list of all the departments. Once this field is highlighted, you can also use the up and down arrows <↑> and <↓> to scroll through the list.

- Change the desired information, then click on **Update** or press **<ALT+U>**. Click on **Exit** or press **<ALT+X>** to quit without saving any changes.

- To delete the selected department, click on **Delete** or press **<ALT+D>**. All of the items in the deleted department will show a blank department field so we strongly suggest NOT to delete a department once it has been created and assigned to existing inventory items.

Categories

Category Maintenance



The **Category Maintenance** screen allows you to create or update categories. To access this screen, select **Categories** from the **View** menu, and then select **Categories.**

Important Note: Do not delete the category called "None". Some functions in eXtremePOS require the presence of this category.

To create a category:

- Click on **Add** or press **<ALT+A>**.
- Type in the new category ID in the **Catagory ID** field. **NOTE: Do not use an asterisk, *, in the Category ID.**
- Use **<TAB>** or the mouse to move the cursor to the **Category Description** field, then type in the description of the new category.
- Click on **Save** or press **<ALT+S>** to add the department. Click on **Cancel** or press **<ALT+C>** to quit without creating a department.

To update or delete a category:

- Select the desired category. Scroll through your categories by using the **Previous** and **Next** buttons. The **Previous** button will display the previous category and the **Next** button will display the next category. To search for a category, type the category name or category number in the **Search by Category ID** or **Search by Category Name** field, or click on the down arrow to display a list of all the categories. Once this field is highlighted, you can also use the up and down arrows <↑> and <↓> to scroll through the list.

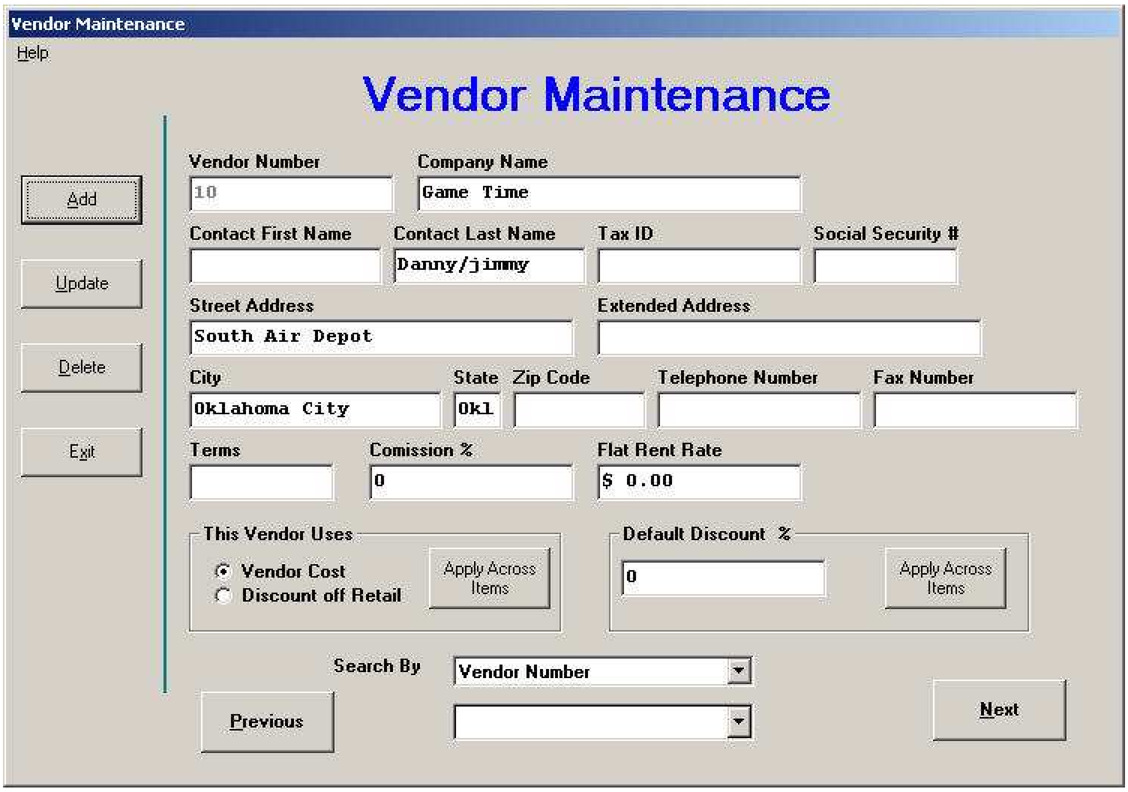
- Change the desired information, then click on **Update** or press **<ALT+U>**. Click on **Exit** or press **<ALT+X>** to quit without saving any changes.

- To delete the selected category, click on **Delete** or press **<ALT+D>**. All of the items in the deleted department will show a blank department field.

Vendors

This menu displays the different options dealing with vendors. A **vendor** is a person or company from whom you purchase items in your inventory.

Vendor Maintenance



This function allows you to create a new vendor. To access this screen, select **Vendors** from the **View** menu.

To create a vendor:

- Click on **Add** or press **<ALT+A>**.
- Type in a vendor number in the **Vendor Number** field. You may wish to use an account number as a vendor number. **NOTE: Do not use an asterisk, *, in the vendor number.**
- Use **<TAB>** or the mouse to move the cursor to each field to enter the vendor's information, then click on **Save** or press **<ALT+S>** to add the vendor. Click on **Cancel** or press **<ALT+ C>** to quit without creating a vendor.

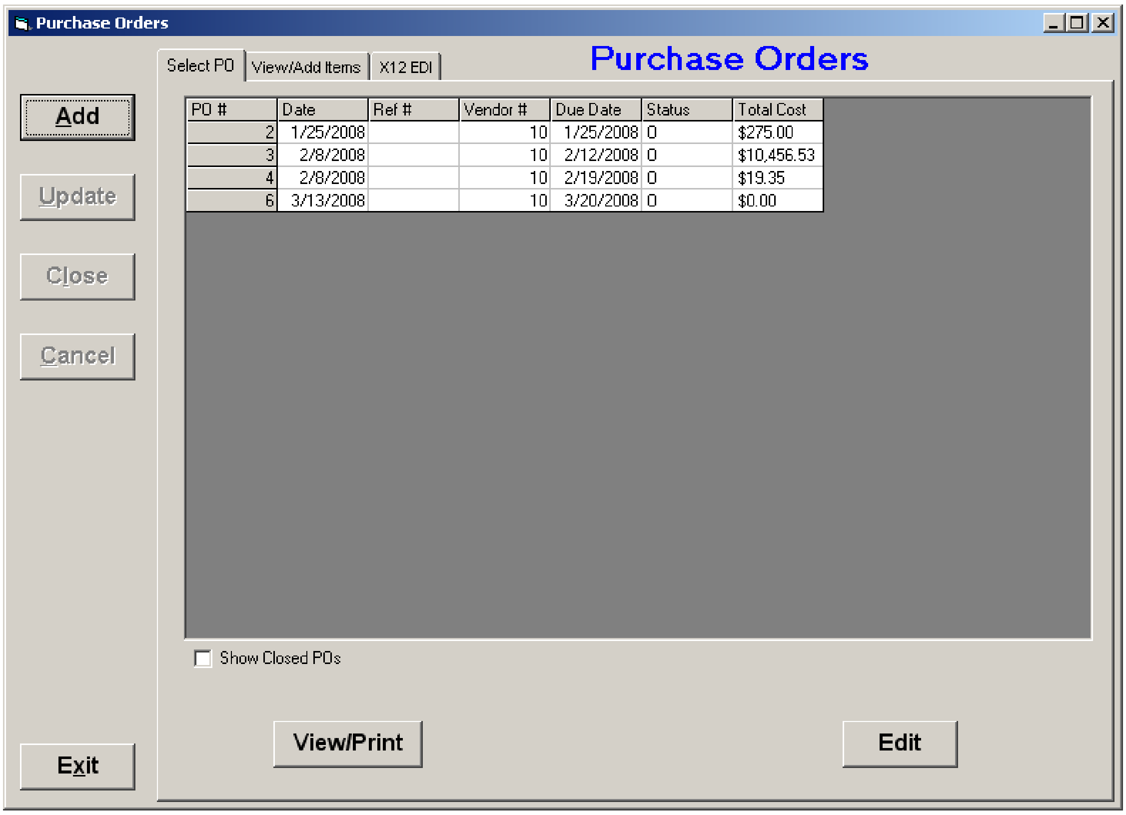
To update or delete a vendor:

- Select the desired vendor. Scroll through your departments by using the **Previous** and **Next** buttons. The **Previous** button will display the previous department and the **Next** button will display the next department. To search for a vendor, type the vendor name or vendor number in the **Search by Vendor Number** or **Search by Vendor Name** field, or click on the down arrow to display a list of all the vendors. Once this field is highlighted, you can also use the up and down arrows <↑> and <↓> to scroll through the list.

- Change the desired information, then click on **Update** or press **<ALT+U>**. Click on **Exit** or press **<ALT+X>** to quit without saving any changes.

- To delete the selected vendor, click on **Delete** or press **<ALT+D>**. **NOTE: Only vendors that are not preferred vendors for an item may be deleted.**

Purchase Orders



The **Purchase Orders** screen allows you to create and update purchase orders. To access this screen, select **Purchase Orders** from the **Actions** menu, or press **<CTRL+P>** in the Invoice Screen.

The main screen displays all open purchase orders:

PO #: This is the purchase order number. It is assigned by EXTREMEPOS after the purchase order is created and cannot be modified.

Date: This is automatically set to the current date. It cannot be modified.

Ref #: This is an optional field and is assigned by the user.

Vendor #: You **must** select a vendor number for each purchase order. This is the vendor from whom you are purchasing the order.

Due Date: You **must** enter a due date for each purchase order. This is the date by which the order should be received. It should be in the format **MM/DD/YYYY**.

Status: This is the current status of the purchase order: **O**-open purchase orders, **C**-closed purchase orders, or **V**-voided purchase orders.

Total Cost: This is the total cost of the order. It is automatically calculated by EXTREMEPOS and cannot be modified.

To create a purchase order:

- Click on **Add** or press **<ALT+A>,** then enter the desired information:

- Once all of the information has been entered, click on **Save** or press **<ALT+S>** to save the purchase order. Click on **Cancel** or press **<ALT+C>** to quit without saving the new purchase order. You will be asked if you would like to print a copy of the purchase order after saving it.

To update a purchase order:

- Click on the desired purchase order and then click **Edit**.

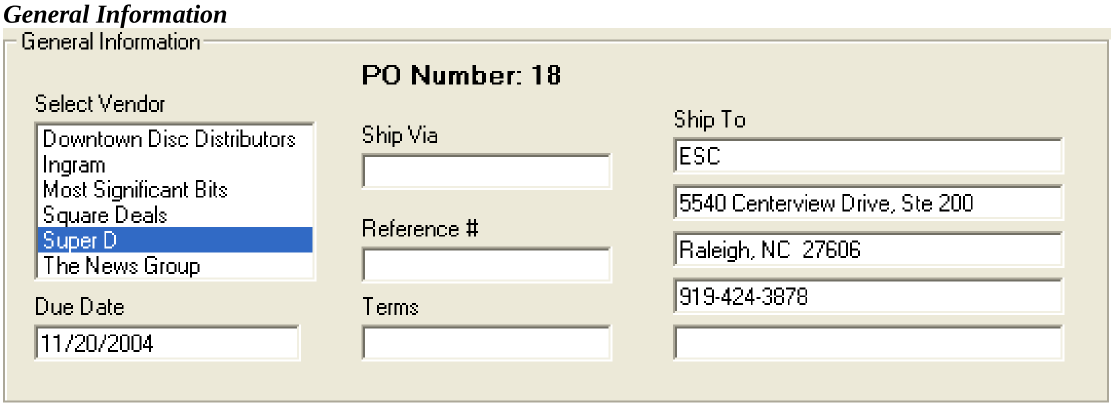
- Click on **Update** or press **<ALT+U>** to save your changes. Click on **Cancel** or press **<ALT+C>** to quit without making any changes.

To close a purchase order:

- Double-click on the desired purchase order.

- Click on **Close** or press **<ALT+L>** to close the current purchase order. Click on **Cancel** or press **<ALT+C>** to quit without closing the purchase order. **NOTE: Closed purchase cannot be reopened.**

General Information



Select Vendor: You **must** select a vendor for each purchase order. This is the vendor from whom you are purchasing the order. Use the mouse to click on the desired vendor.

Due Date: You **must** enter a due date for each purchase order. This is the date by which the order should be received. Due Date should be entered in the format **MM/DD/YYYY**.

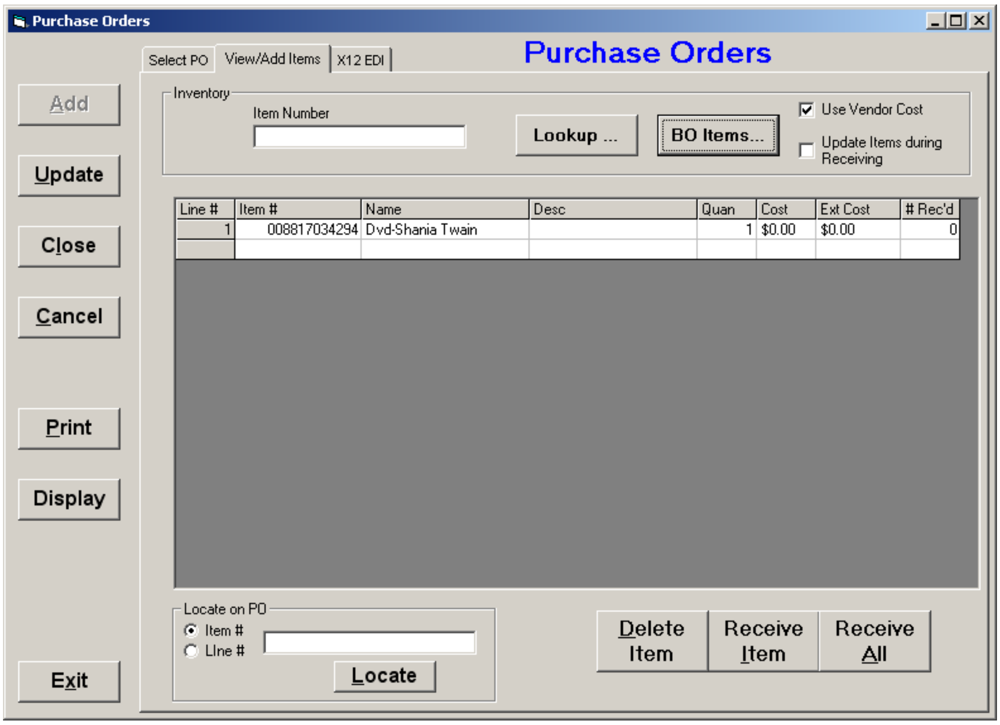
Ship Via: This is an optional field and is assigned by the user. It is the method by which the order is being shipped (**Example:** UPS Ground, Fed Ex Overnight, etc.).

Reference #: This is an optional field and is assigned by the user.

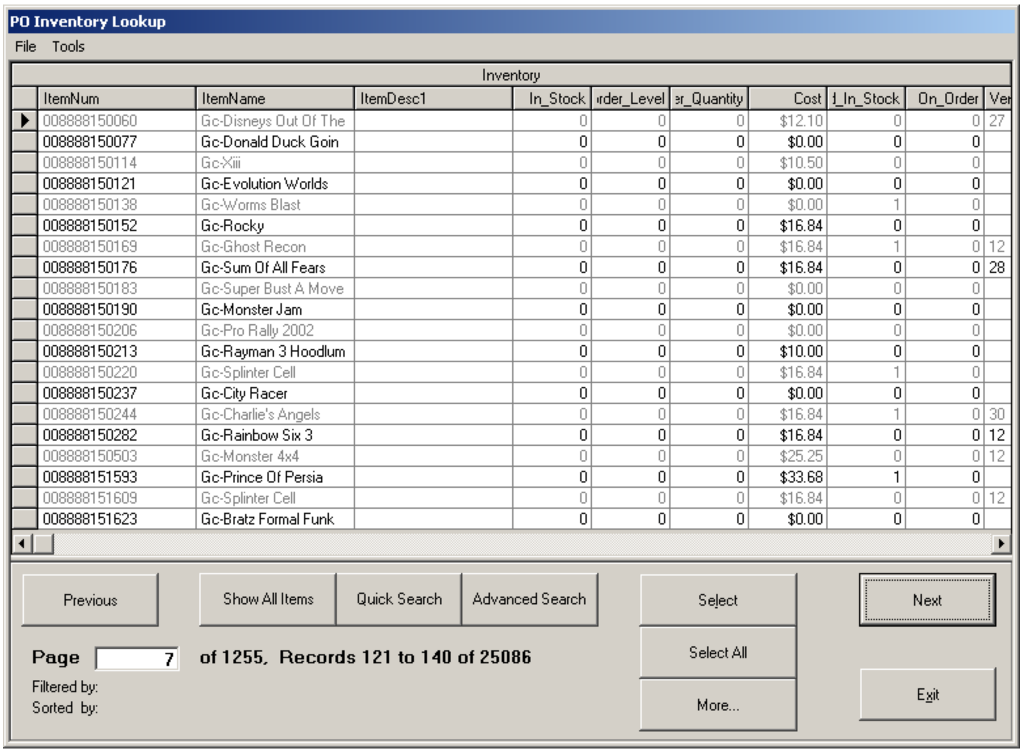
Terms: This is an optional field. It is automatically entered if there are terms present for the vendor. The user can override this information. (**Example:** Net 30)

Ship To: This is an optional field and the user may modify it. The default Ship To Address is the address located in the **Company Information** screen. You may add additional lines for Attn:, phone number, etc.

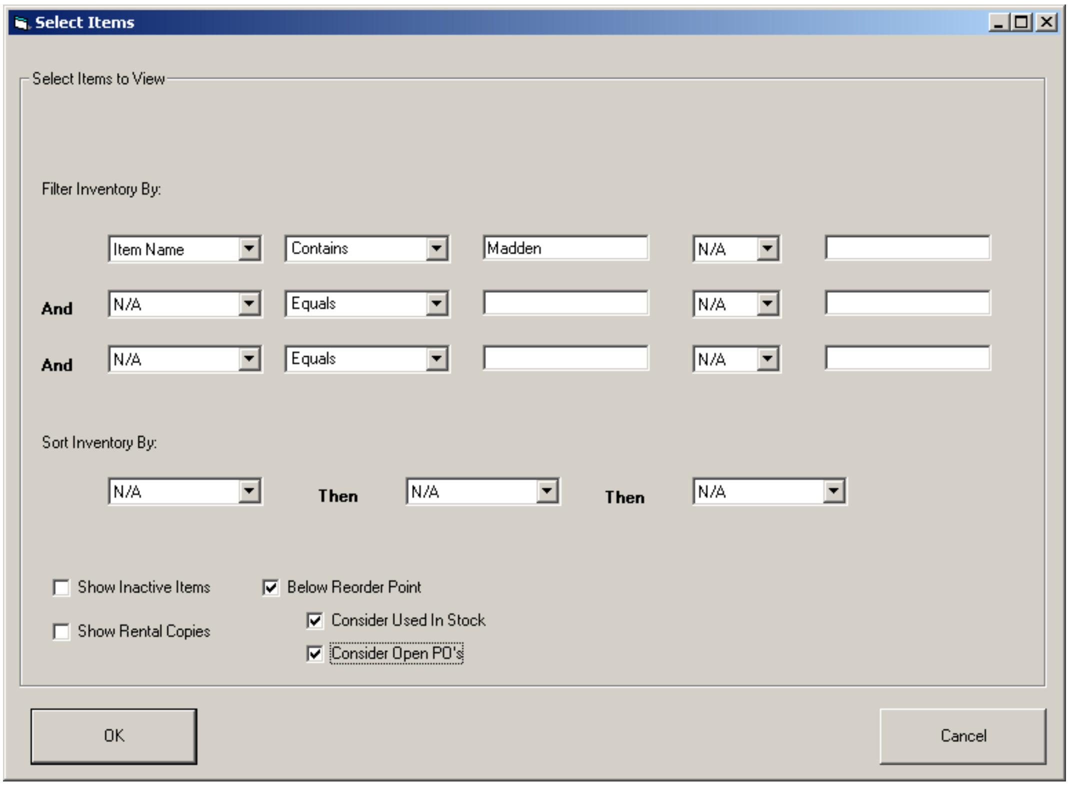
Add Items



To add items to a purchase order, you may either scan or enter the item number you wish to add into the item number field, followed by the quantity desired when prompted, or you may use the lookup or BO items tools.



This screen works much like the other lookup screens in the software, in that you may show all of your inventory items, quick search by item number, or do an advanced search. The advanced search offers several powerful tools for your purchase orders.

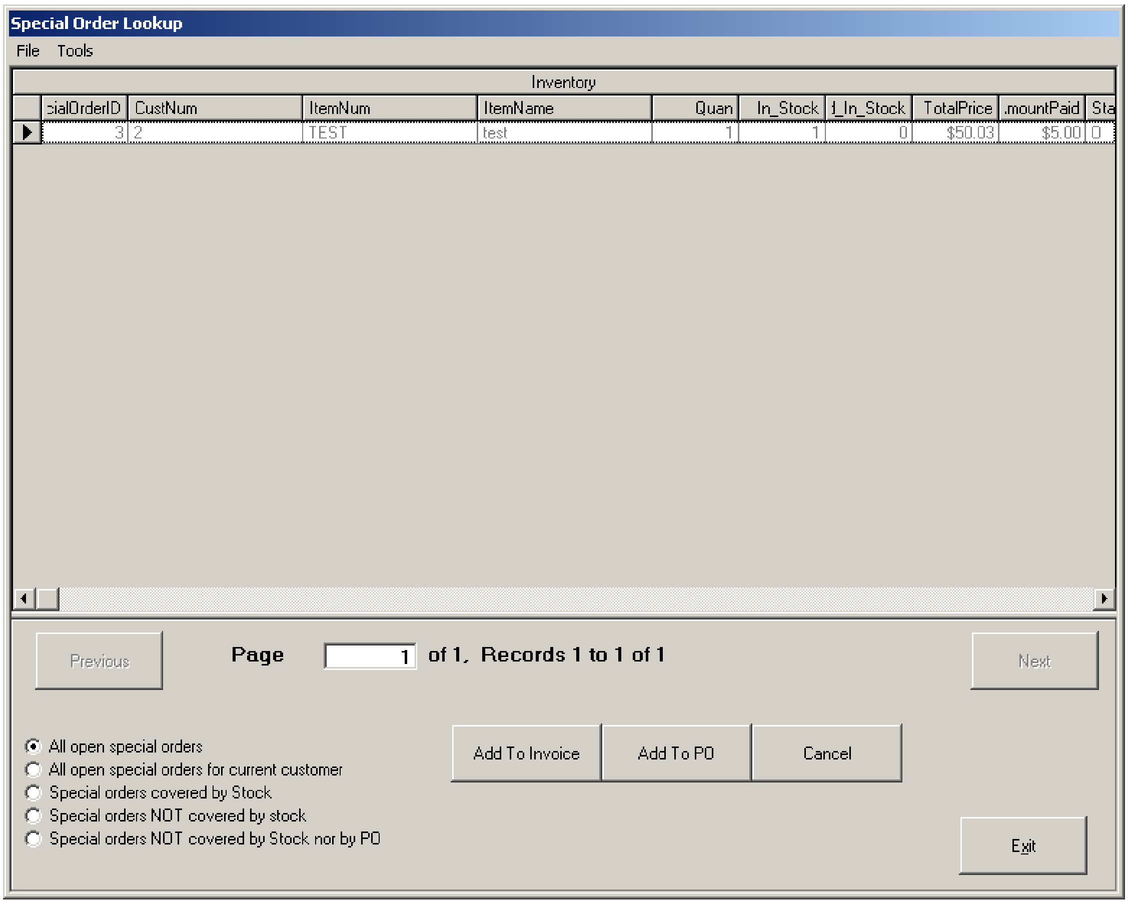


You may search by item name, by vendor, or by one of several other fields, and by up to three of these at any one time. This allows you to find, for example, all games with the name of Madden that you have set with VPD as a vendor, or all King James Bibles you get from Spring Arbor.

Additionally, you may search for only items that are below the reorder level you have set by checking the **Below Reorder Point** box. You may modify your in-stock amount for this calculation by using the **Consider Used in Stock**, which will add your used stock to your new, and by **Consider Open PO's**, which will count items ordered in open purchase orders.

Once you have searched, you may individually select items to add to the purchase order, followed by a quantity, or you may select all in which case the quantity will default to what you have set as the Reorder Quantity number on that item's inventory screen. You may modify it on that screen by clicking the quantity field of the line you wish to modify and typing in the quantity you want.

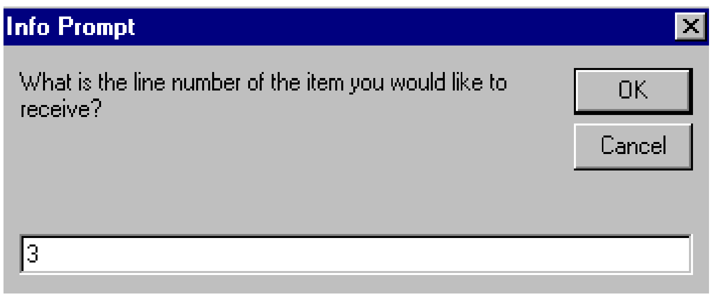
In order to check Special Orders to see what customers have on hold, click **BO Items**. It will bring up the following screen:



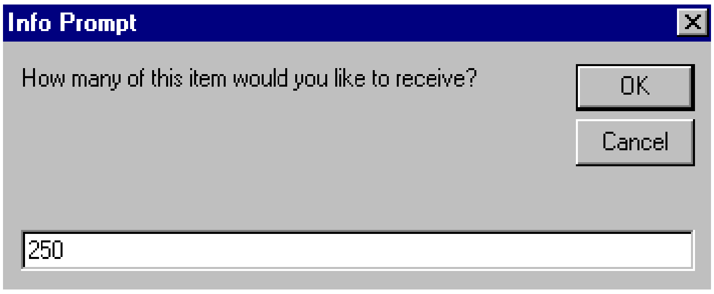
To add an item to the PO from this screen, click it in the grid and hit **Add to P.O.** Enter the quantity you want to order. Click **Add to Invoice** to finish the special order, **Cancel** to remove it without filling it, or **Exit** to return to the PO screen.

To receive items on a purchase order:

- Double-click on the desired purchase order.
- To receive one item on the purchase order, click on **Receive Item** or press **<ALT+I>**. To receive all of the items on the purchase order, click on **Receive All** or press **<ALT+A>**.
- If you choose to receive a single item, you will be prompted to enter the line number of the item to receive. Enter the desired line number then click on **OK** or press **<ENTER>**.



- Next you will be prompted to enter the quantity received of that item. Enter the received amount then click on **OK** or press **<ENTER>**.



- Click on **Update** or press **<ALT+U>** to update the purchase order and the inventory.

To print a purchase order:

- Click on the desired purchase order.
- Click on **View/Print**.
- To print while editing a purchase order, click **Print** or press **<ALT+P>**.

Control Buttons

Add: This creates a new purchase order.

Update: This updates any changes made to the displayed purchase order.

Close: This closes the displayed purchase order. **NOTE: Closed purchase orders cannot be reopened.**

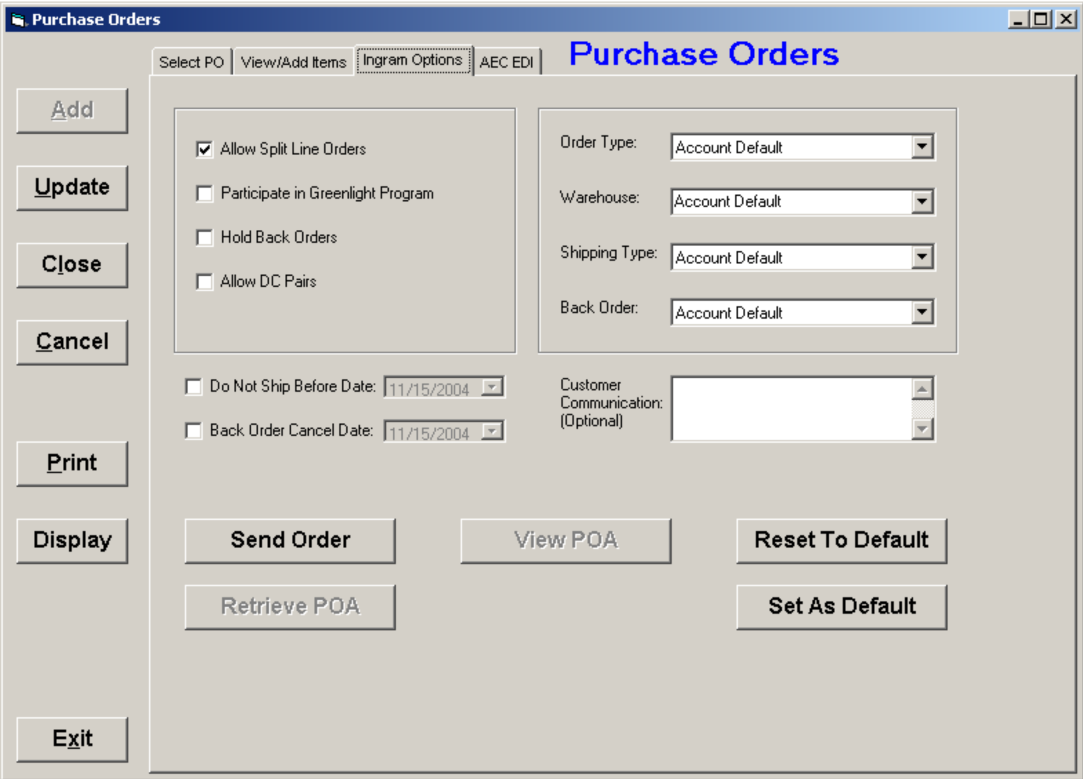
Cancel: This exits the edit mode without saving any changes made.

Exit: Click on this to exit the Purchase Orders screen.

Online Ordering

There currently are two online ordering systems integrated into the software: Ingram and EDI. Each allows the ability to place product orders in minutes and is highly customizable. An added option for Ingram orders is the ability to save and restore configurations for future orders.

Ingram Ordering (Praiz Only)



Set options for Ingram/Spring Arbor ordering here

Allow Split Line Orders: This option sets whether Split Line Orders will be permitted for this order. A checked box allows Split Line Orders. A blank box disallows Split Line Orders.

Participate in GreenLight Program: This option places the order in the GreenLight program. For further information involving the GreenLight program contact Ingram.

Hold Back Orders: This option, if checked, will cause the order to be held until back orders are filled. Unchecked, the order will be sent out without waiting for back ordered items.

Allow DC Pairs: This option enables or disables the use of DC Pairing for the order.

Order Type: This drop down list allows the selection of order type. Changing of this option is not required for normal operation.

Warehouse: This drop down list determines from which warehouse the order will be shipped. An additional warehouse may be entered manually if not found in the list. Changing of this option is not required for normal operation.

Shipping Type: This drop down list determines the method of shipping for the order. Changing of this option is not required except for normal operation. **NOTE: Currently Unavailable.**

Back Order: This drop down list determines what action will be taken in the event of a back order on one or more items in the order.

Do Not Ship Before Date: This option instructs Ingram to not ship the order until the specified date.

Back Order Cancel Date: This option instructs Ingram to cancel any back orders on the specified date.

Customer Communication: This text field allows for any further information or special instructions to be sent with the order.

Send Order: This button sends the current order to Ingram. Ensure all settings are set appropriately beforehand. This action requires several minutes to send and then receive confirmation from Ingram. An acknowledgement screen will be displayed upon success.

Retrieve POA: This button will be enabled if an order was sent and has not yet received an acknowledgement. Clicking this button will attempt to retrieve the acknowledgement from Ingram.

View POA: This button will allow the review of a received order acknowledgement. If no such acknowledgement is available the button will be disabled.

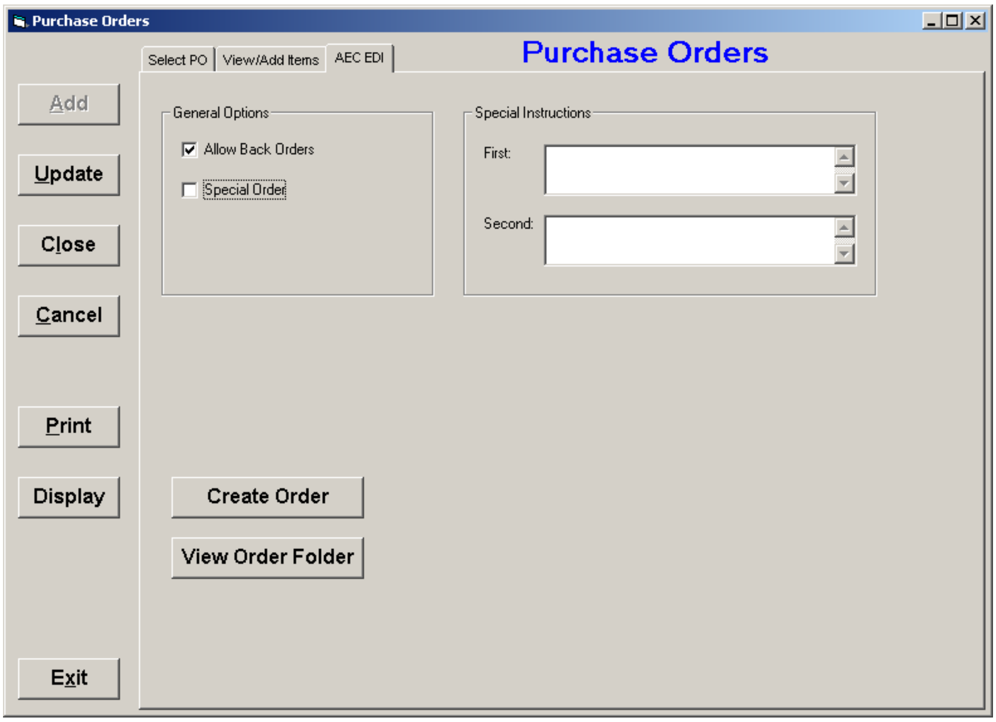
Reset to Default: This button restores the available settings to the currently defined default values.

Set As Default: This button saves the currently selected settings, with the exception of Customer Communication, for use with other Orders.

To Order Online via Ingram:

- Double click on the desired purchase order or create a new purchase order.
- Click on the Ingram Tab.
- Select desired Ingram order options.
- Click Send Order button and wait for operation to complete.
- Upon successful completion of the order process the acknowledgement will be displayed.

AEC EDI Ordering



Allow Backorders: This option determines whether backorders will be allowed for this order. A checked box allows for backorders. A blank box disallows backorders.

Special Order: This option sets the order as a "Special Order". A checked box flags the order as special. A blank box represents a normal order.

Special Instructions: Any special instructions for the current order may be typed here. A maximum of two (2) special instructions may be entered. These fields may be left blank.

Create Order: This button creates the order file and saves it to disk where it can then be sent to AEC EDI immediately or any time in the future. Make all option selections before using the Create Order action. **NOTE: EXTREMEPOS only creates the order. It does not send the order to AEC EDI.**

View Order Folder: This button will open the folder where created order files are stored.

To Order Online via AEC EDI:

- Double click on the desired purchase order or create a new purchase order.
- Click on the AEC EDI Tab.
- Select desired order options.
- Click Create Order button and wait for operation to complete.
- Upon successful completion of the order file creation process the output folder will be displayed

Chapter 4:

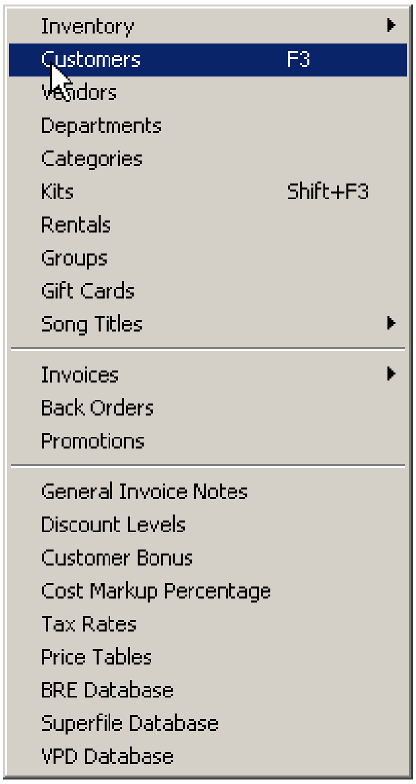
Customer Control

Customer Menu

Every transaction in ExtremePOS uses a specific customer, and each customer must have a customer number. The default customer is **Customer #101** (Cash Customer). Businesses who are running a cash business, such as a convenience store, that don't need to store customer names or addresses should use Customer #101. However, stores such as video stores or restaurants may want to keep their customers' names, addresses, and telephone numbers on file. These stores should use the **Customer Menu** to add and edit customers. To access the **Customer Menu**, click on **View** in the **Menu Bar** or press **<F3>**.

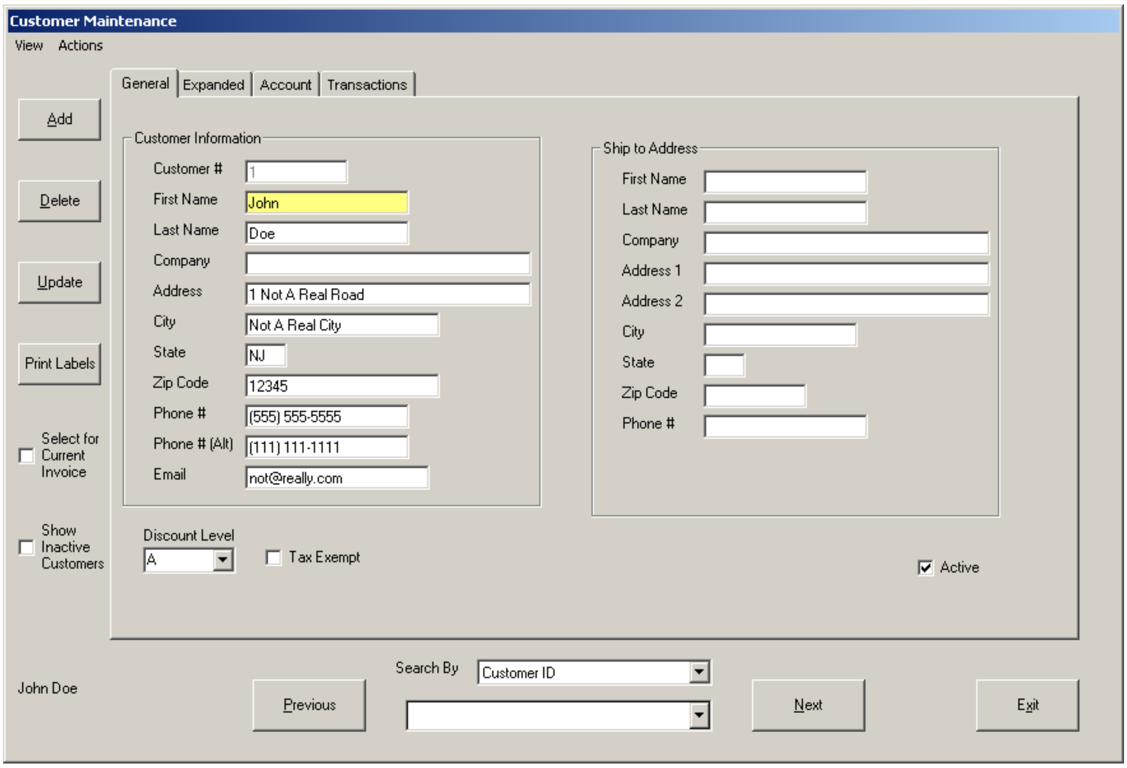
NOTE: The Cash Customer is a necessary customer to have. Do not edit this customer. If this customer gets edited or in any way deleted, you must replace it by running the Check Database utility in the File menu of the Login Screen (See **Chapter 1: Setting Up ExtremePOS**).

Customer Maintenance



Customer Maintenance allows you to create and update customer numbers for a customer. To access this screen, select **Customers** from the **View** menu or press **<F3>** in the Invoice Screen.

Once you have accessed the **Customer Maintenance** screen, you can use **<TAB>** or the mouse to move from one field to another. To add a customer, click on **Add** or press **<ALT+A>**. Enter the desired information, then click on **Save** or press **<ALT+V>** to save the new customer. To update a selected customer, change the desired information then click on **Update** or press **<ALT+U>**. To exit without making any changes, click on **Exit** or press **<ALT+X>**.



General Info

The **General Info** screen displays all the general information about a customer, such as name, address, and phone number. To access this screen, click on the **General Info** tab or press **<ALT+G>**.

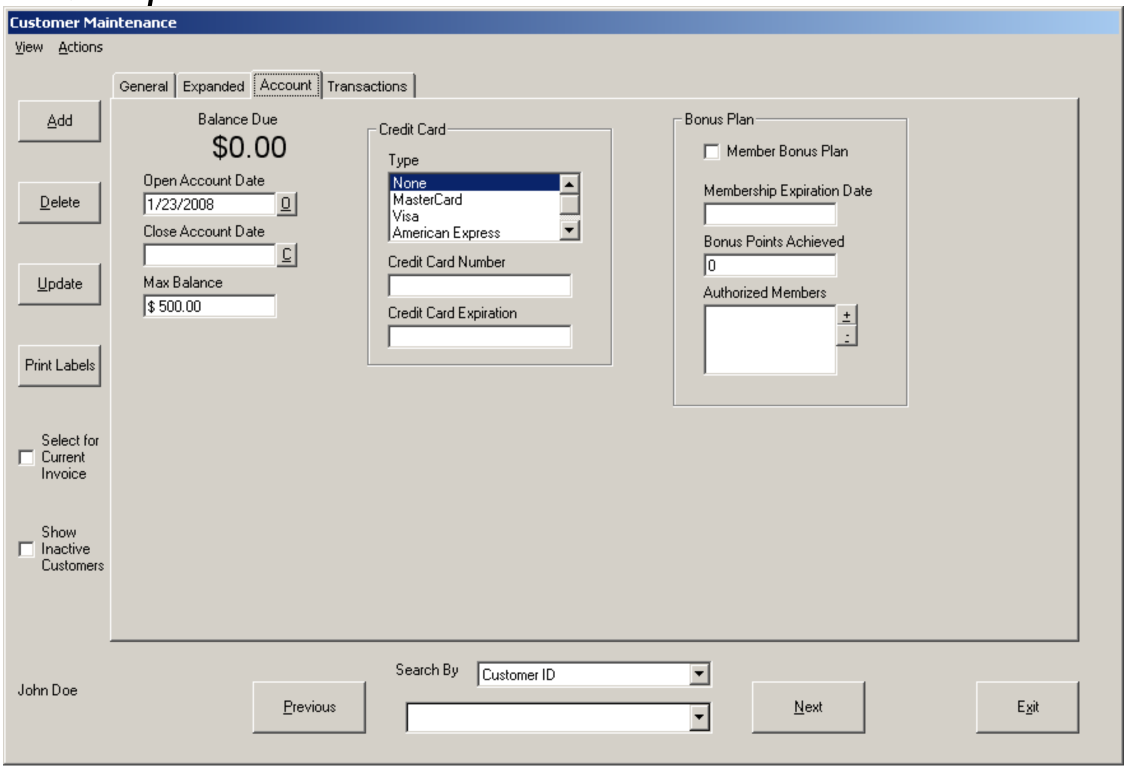
Customer Number: This is the **unique** identifier for a customer. Every customer **MUST** have a customer number. Customer #101 is the default cash customer and cannot be changed. Customer numbers can be up to 10 digits long and can contain any alphanumeric characters. Some common customer numbers are phone numbers or a zip code followed by the first three letters of the customer's last name. **NOTE: Do not use any punctuation or spaces, except for the underscore (_), as part of the customer number.**

Discount Level: This is the selected discount level for the customer. Click on the arrow to drop down the box for more choices. The default discount level is "A". The discount levels correspond to the levels specified under the **Setup** menu. Each time an inventory item is selected for a customer invoice, the price will be based upon the customer's discount level. **NOTE:** You can override **Setup** discount levels for an inventory item.

Tax Exempt (Y/N): This indicates whether or not the customer is tax exempt. If a customer is tax exempt, click on the box to put a check in it. If the customer is not tax exempt, leave the box empty.

Ship To Info: These fields allow you to enter a shipping address for the customer.

Account Info



The **Account Info** screen displays all the information about a customer's account. To access this screen, click on the **Account Info** tab or press **<ALT+C>**.

Customer Balance: This is the current on account balance for the customer.

Open Account Date: This is the date that the customer's account opened. A customer with an open account may pay for invoices On Account. To open an account for a customer, click on the **O** to the right of the **Open Account Date** field. The current date will appear in the **Open Account Date** field. You may also manually enter an open account date if it is differerent than the current date.

Close Account Date: This is the date that On Invoice payment for the customer was terminated. To close a customer's account, click on the **C** to the right of the **Close Account Date** field. The current date will appear in the **Close Account Date** box. You may also manually enter a close account date if it is different than the current date.

Max Balance: This is the maximum amount a customer may charge to their account. If Max Balance is enabled in the Options Screen, customers will not be allowed to charge any amount on their account greater then their max balance.

Credit Card: You may set information about the customer's preferred credit card here.

Type: The type of credit card the customer uses.

Credit Card Number: The number of the card. In the database, this is stored as an encrypted number.

Credit Card Expiration: The expiration date of the card.

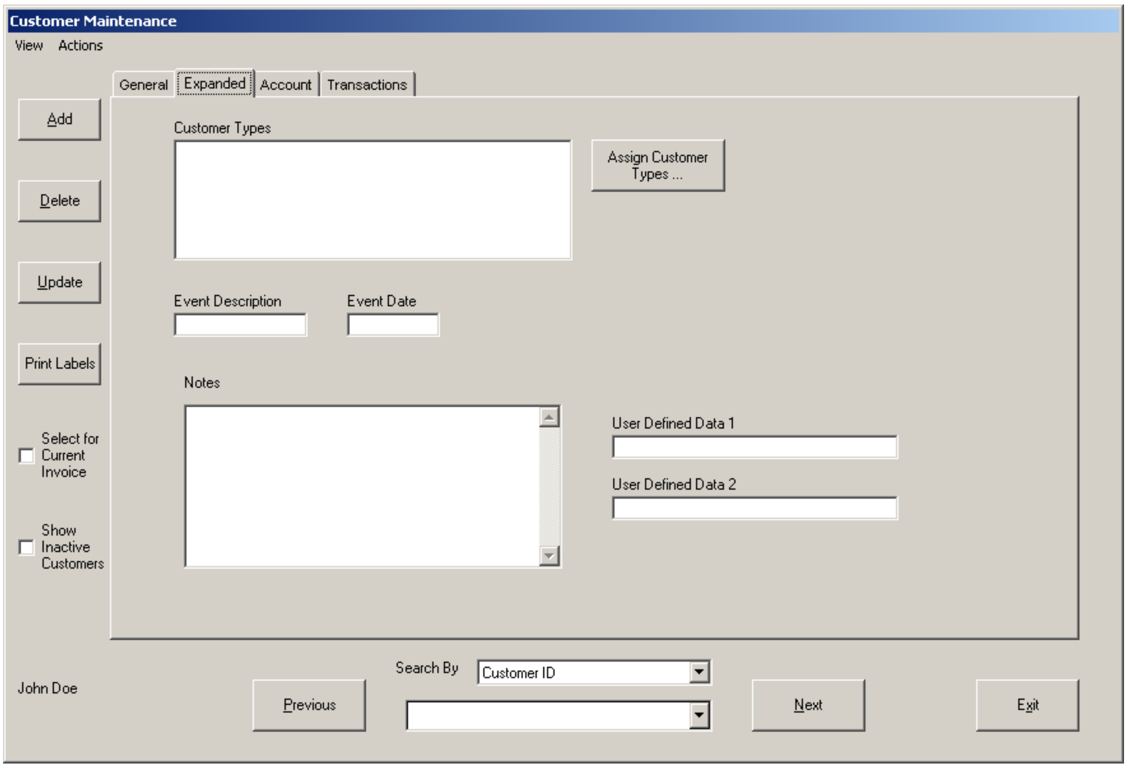
Member Bonus Plan: If a Customer Bonus Plan is activated, this indicates whether the customer is a member. Click on the box to enroll the customer in the plan. Leave the box empty if the customer is not a bonus plan member.

Membership Expiration Date: This is the date when the customer's club membership expires. This date bears no relation to On Account info or the Bonus Points Plan.

Bonus Points Achieved: This is the current number of bonus points that the customer has accumulated for the bonus plan.

Authorized Members: Enter all members that are authorized to charge on account under this customer.

Extended Info



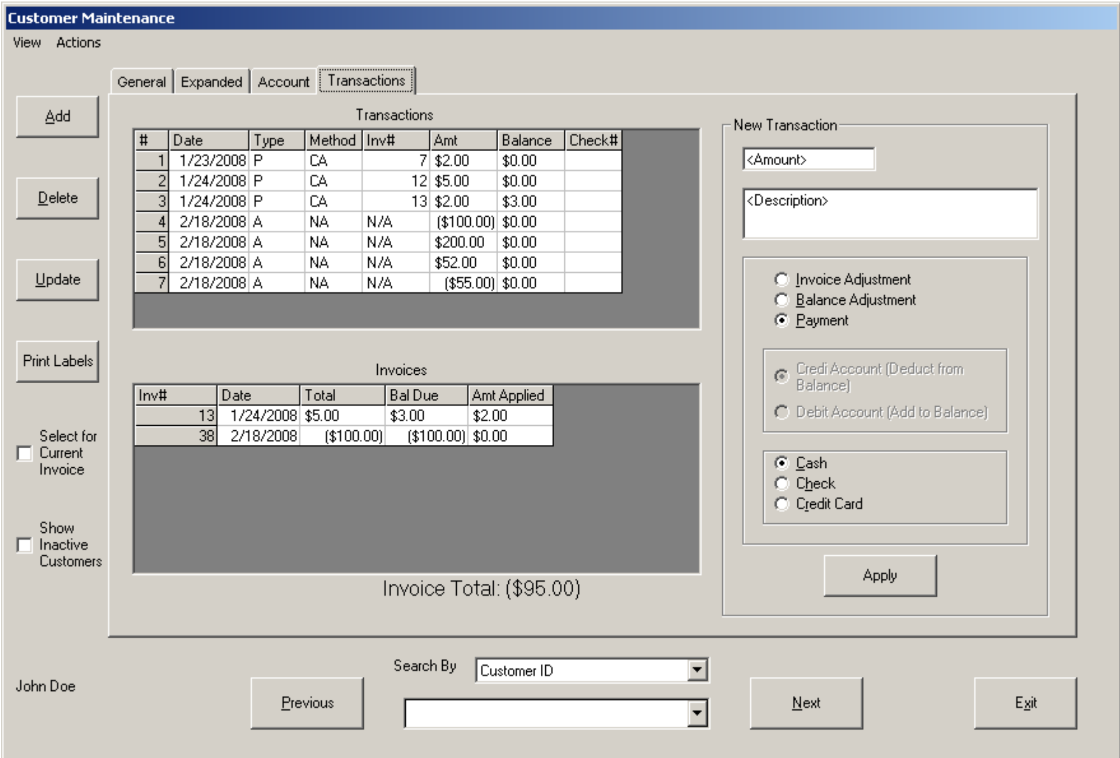
The **Extended Info** screen displays additional info about the current customer.

Customer Types displays information about the types assigned to this customer. You may set it through the **Assign Customer Types…** button.

Notes contains miscellaneous notes on the customer, and may be filled out by the user.

User Defined Data 1 and 2 are fields for custom uses, defined by you.

Transactions



To make a payment on an account:

- Enter in the amount in the **Amount** field. You can type any notes regarding the transaction in the **Description** field.

- Select the type of transaction by either clicking on the description or the preceding circle. **Invoice Adjustment** allows you to adjust the amount owed on a particular invoice. **Balance Adjustment** allows you to directly change the customer's balance. **Payment** allows you to apply a payment to the account. For Invoice Adjustments or Balance Adjustments, choose whether to **Credit Account** or **Debit Account**.

- If applicable, choose the form of payment (**Cash**, **Check**, or **Credit Card**).

- If you make a mistake, you can click on **Clear** or press **<ALT+L>** to clear any information that has been entered. You can also click on **Exit** or press **<ALT+X>** to exit the **Accounts Receivable** screen.

- Click on **Apply Payment** or **Apply Adjustment** or press **<ALT+A>** to apply the payment or adjustment. If the form of payment is by check, you will be prompted to enter the check number. If the form of payment is credit card and no credit card information is entered in the **Customer Maintenance** screen, you will be prompted to enter the credit card number and expiration date.

Date: This column shows the date that the transaction was completed.

Type: This column shows what kind of transaction was done. '**P**' indicates a payment and '**A**' indicates an adjustment.

Method: This column shows what kind of payment was made. '**CA**' indicates a cash payment, '**CH**' indicates a check payment, and '**CC**' indicates a credit card payment. '**NA**' appears in this column for adjustments.

Balance: This column shows the balance before the payment or adjustment was applied.

Amount: This column shows the amount for the payment or adjustment.

Check #: This column shows the check number from a check payment.

Inv#: This column shows the invoice number of the invoice.

Date: This column shows the date that the invoice was completed.

Total: This column displays the total price of the invoice, including tax.

Balance Due: This column displays the remaining balance due on the invoice.

Amt Applied: This column displays the amount that has been applied to the invoice so far.

Control Buttons

Next and **Previous:** These buttons allow you to scroll through your customers. **Next** will display the next customer while **Previous** will display the preceding customer.

Add: This creates a new customer number.

Update: This updates any changes made to the customer information.

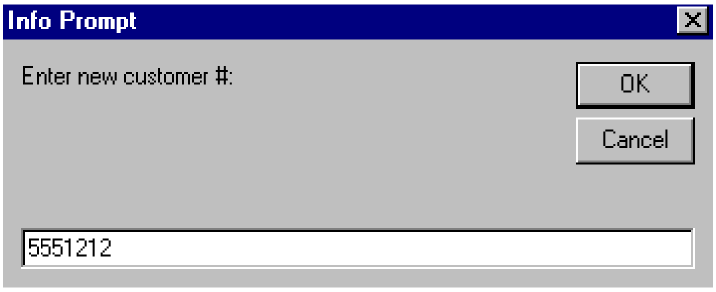
Delete: This will delete the displayed customer number from your database.

Exit: Click on this button to exit from the **Customer Maintenance** screen. All unsaved information will be lost.

Search by Customer #/Last Name: To search for a customer, type the customer number or last name in the **Search by Customer #** or **Search by Last Name** field, or click on the down arrow to display a list of all customers. You can also use the up and down arrows, <↑> and <↓>, to scroll through customers when that field is highlighted.

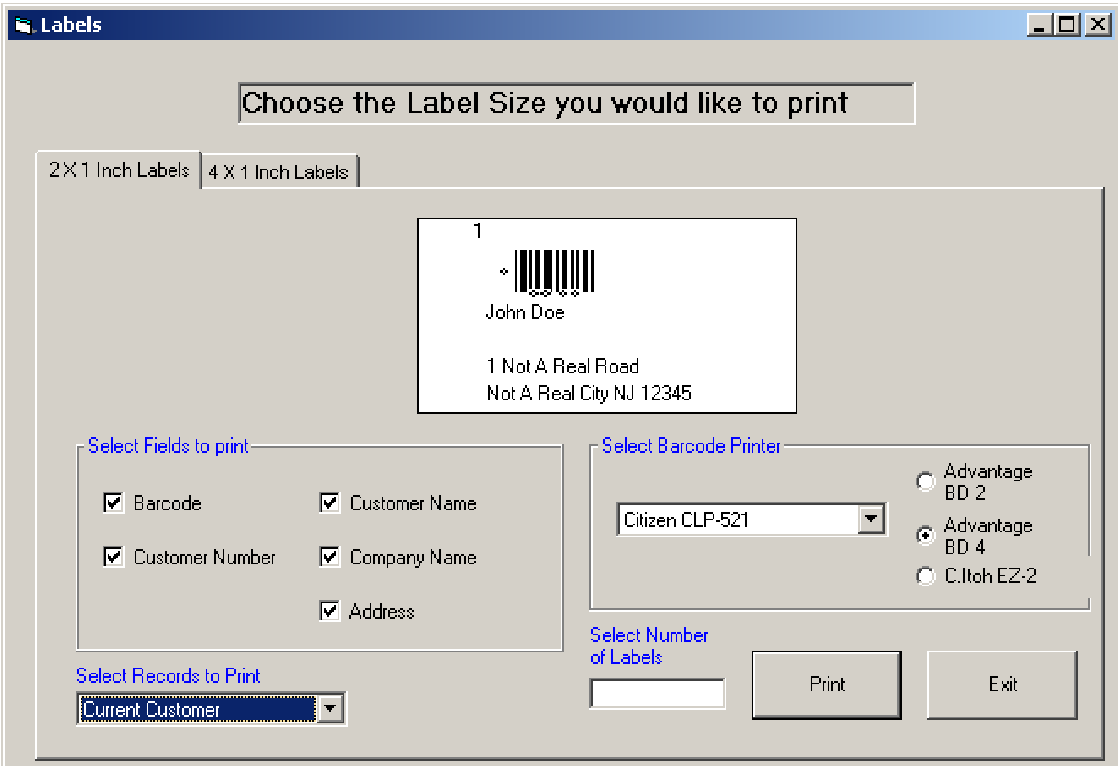
Select for Current Invoice: Click on this box to select the current customer for the current invoice.

Change Customer Number



This function allows you to change the customer number for any given customer. To use this function, select **Change Customer #** from the **Actions** menu in the **Customer Maintenance** screen. Enter the new customer number, then click on **OK** or press **<ENTER>**. Click on **Cancel** to exit without changing the customer number. **NOTE: You cannot change the customer number for Cash Customer.**

Print Customer Labels

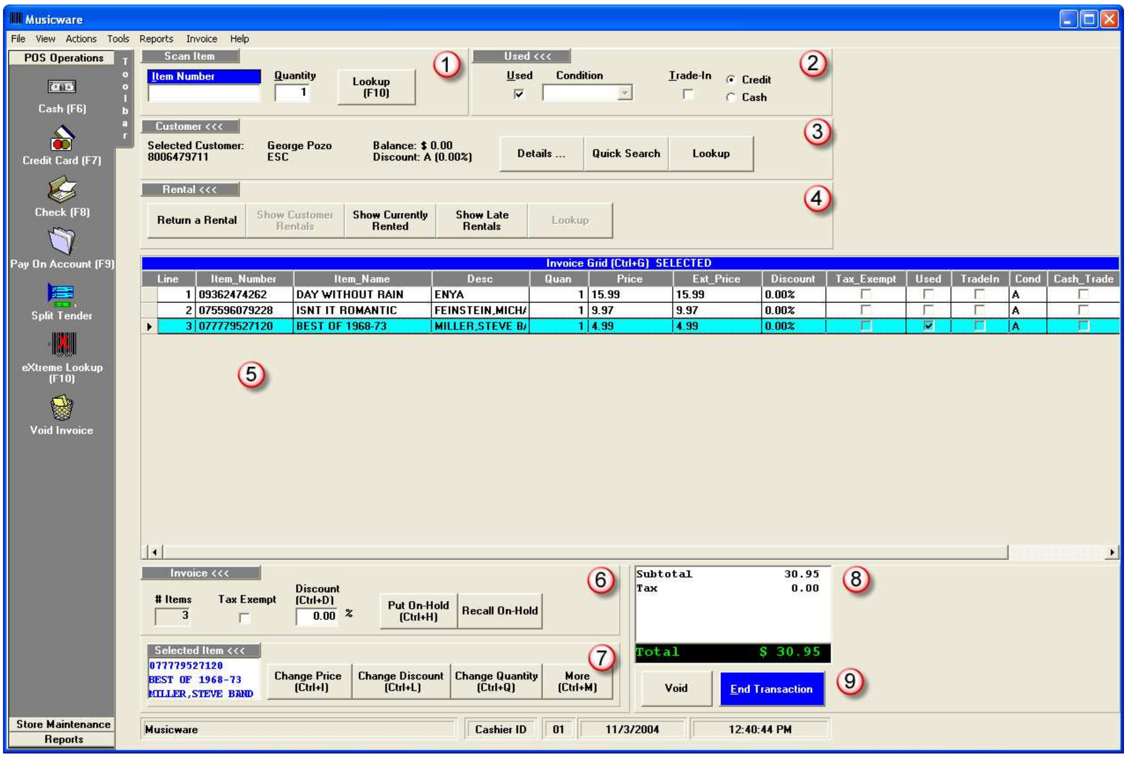


Print Labels allows you to print labels for a customer on a supported label printer. You can choose to print a label for the current customer, all customers, customers who satisfy a specified bonus point range, or customers who satisfy a specified event description and date range. Each label has the customer number as a barcode and displays the customer name, address, city, state, and zip code. To access this menu, click on **Print Customer Labels** in the **Actions** menu of the **Customer Maintenance** screen. In order to select which records to print, look to the lower left portion of the screen at **Select Records to Print.** To print a label for the current customer, select **Current Customer**. To print a label for all customers, select **All Customers**. To print a label for all customers who satisfy a specified bonus range, select **Bonus Point Range.** You will be prompted to enter the lower and upper limits for the bonus point range. To print a label for all customers who satisfy a specified event date and description, select **Event Range**. You will be prompted to enter an event description and the upper and lower limits for the event date range. To include all event descriptions in your range, enter **‘*’** for the event description.

Chapter 5:

Creating Invoices

The Invoice Screen



The Invoice Screen is where all of your daily invoicing will be done. Administration tasks such as **Reports, Accounts Receivable, Purchase Orders, Inventory Control** are performed in different screens in ExtremePOS and are explained in other chapters.

Before you begin processing invoices, you must manually enter your inventory items into EXTREMEPOS. You may want to enter just a few items at first so you can get a feel of how the program works, then progressively add more items. Refer to Chapter 2: Inventory Control for more information on adding inventory items.

Let’s take a more in-depth look at the key features of the invoice screen:

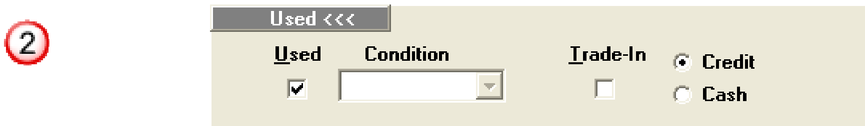
Dissecting the Invoice Screen

Scan Item

Scan Item is the section of the Invoice Screen where you ring up the items that the customer wants to purchase. To add an item to the current invoice, using your barcode scanner, scan the barcode of an inventory item you wish to sell. Make sure the cursor is blinking in the **Item Number** box before you attempt to scan. The item will then appear on the invoice grid if it is contained in your inventory. If you are entering the number by hand, you must press **<ENTER>** after typing the number.

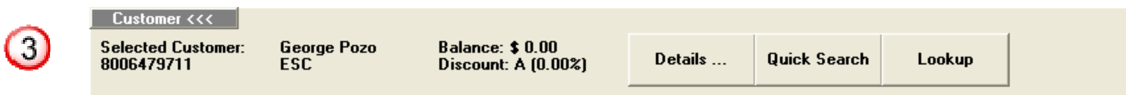
If the quantity for an item you are adding to the invoice is different than one, you may change it prior to scanning or entering the item by pressing <**ALT+Q**> or clicking on the **Quantity** box. Note that the quantity can be negative and it does not need to be a whole number. **If the customer is returning an item, use a negative quantity. This will add a negative amount to the current total as well as properly update the in-stock amount of the inventory item once the transaction is completed.**

Used



Used is the section for of the invoice screen to indicate whether the item about to be scanned in used. It you are buying a used item from a customer then check the **Trade-In** box. You can have a "credit" or "cash" value for the trade-in. You can also sell and buy different "conditions" of used items.

Current Customer



The default customer for each invoice is **101 Cash Customer**. You can also keep track of your customers by creating a customer number for each customer and then selecting it for the current invoice (Creating a customer is explained in detail in **Chapter 3: Customer Control**. There are two ways to select a customer for an invoice, **Quick Search** and **Lookup**. **Quick Search** allows you to select a customer by entering his or her number while **Lookup** allows you scroll through your customer records. **Details** displays the customer number, discount level, and address of the current customer.

To select a customer for the current invoice when you know the customer number:

- Click on **Quick Search.**

- Type in the customer number, then press **<ENTER>** or click on **OK**. You may also “scan” a customer barcode and find the customer instantly.

- If the customer number is valid, that customer will appear in the current customer box.

To select a customer for the current invoice when you don’t know the customer number:

- Click on **Lookup**.

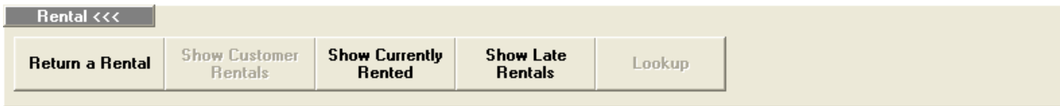
- Click on **Next** or **Previous** (or use **<ALT+N>** and **<ALT+P>**) to scroll through the customer records.

- Once the desired customer’s record is displayed, click on **Select** or press **<ALT+L>** to select the customer.

- Click on **Exit** or press **<ALT+X>** to exit without selecting a customer.

Rental Return

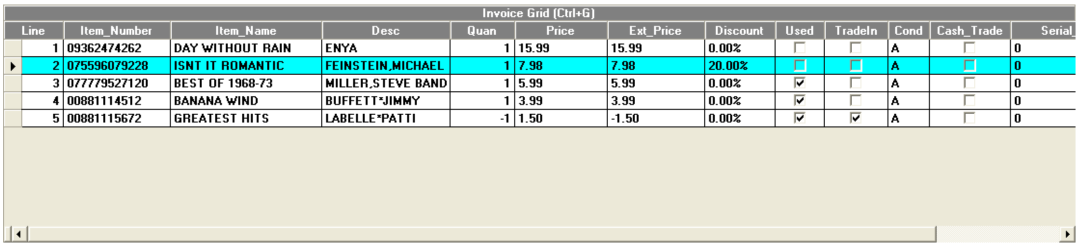
4



Rental is the section of the invoice where you can return a rental item, such as a video. You can also display currently rented items and late rentals for the selected customer.

Invoice Grid

5



Invoice Grid (Ctrl+G)

Line	Item_Number	Item_Name	Desc	Quan	Price	Ext_Price	Discount	Used	TradeIn	Cond	Cash_Trade	Serial_
1	09362474262	DAY WITHOUT RAIN	ENYA	1	15.99	15.99	0.00%	☐	☐	A	☐	0
2	075596079228	ISNT IT ROMANTIC	FEINSTEIN,MICHAEL	1	7.98	7.98	20.00%	☐	☐	A	☐	0
3	077779527120	BEST OF 1968-73	MILLER,STEVE BAND	1	5.99	5.99	0.00%	☑	☐	A	☐	0
4	00881114512	BANANA WIND	BUFFETT*JIMMY	1	3.99	3.99	0.00%	☑	☐	A	☐	0
5	00881115672	GREATEST HITS	LABELLE*PATTI	-1	1.50	-1.50	0.00%	☑	☑	A	☐	0

The Invoice Grid shows all of the items that are in the current invoice. It is located in the middle half of the Invoice Screen. The columns are resizable and movable. If you make customer changes to the grid and want to make the change permanent, chose **Tools>Save Grid Settings** from the menu. Scrolling to the right by clicking on the right arrow in the bottom right-hand corner of the grid reveals additional information about the item.

If you need to change information on an invoice, press **<CTRL+G>** to move the cursor to the invoice grid, then use the arrow keys to move to the line on the invoice you wish to change. You may change various attributes of the item by using the selected item section, which will be discussed shortly.

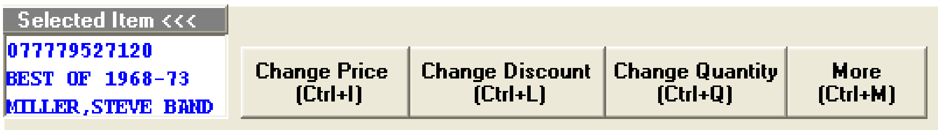
Invoice

6

The **Invoice** section is used to manipulate the entire invoice. You have the ability to apply a discount globally to the invoice. You can also put an invoice on hold and recall an on-hold invoice.

Selected Item

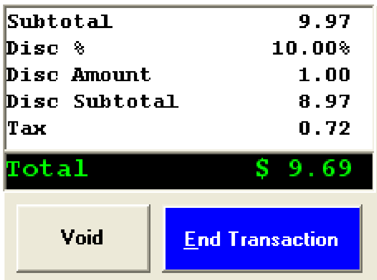
7



The Selected Item section is used to change a line item on the invoice grid. Once you highlight the item in the invoice grid you would like to change, just click the button for the attribute you would like to alter.

Totals

8



Running totals are kept for the current invoice. Each time you add a new inventory item to the invoice, the totals portion is updated. If you are using a pole display, it will be updated as well.

Subtotal: This line displays the total amount of all the items in the invoice added together before taxes or discounts.

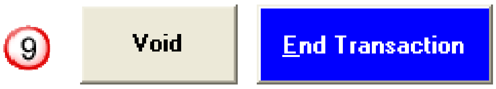
Discount %: This line displays the discount percentage applied to an entire invoice. This line only appears when the discount is applied to the entire invoice by selecting **Invoice Discount** from the **Invoice** menu or pressing <**CTRL+D**>.

Discount Amount: This line displays the amount of the discount being applied to the entire invoice.

Disc Subtotal: This line displays the new Grand Total due to the invoice discount percentage.

Tax: This line displays the total amount of tax for the invoice after any invoice discounts.

Total: This line displays the invoice total after taxes and invoice discounts.



Void: This button will clear your entire invoice and start a new invoice without finalizing the transaction.

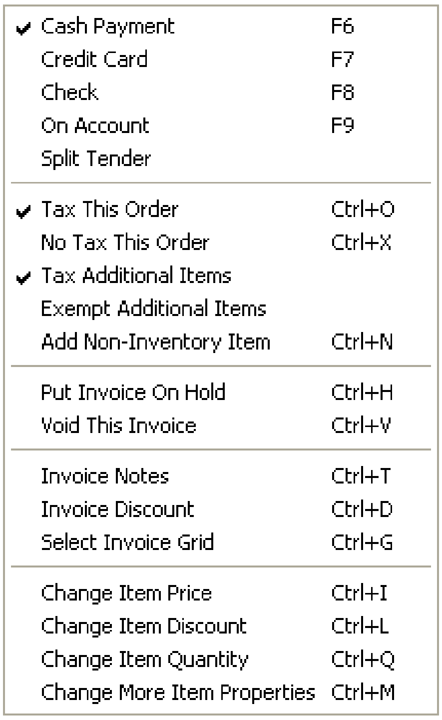
End Transaction: Choose this button to finalize the invoice and enter the payment information screen.

Payment Information

The Payment Information screen is where you will you will enter in the customer's form of payment. You have the option of using your mouse or keyboard. To jump right to a payment type, use the **<ALT>** and underlined letter in the payment type you seek. For example, **<ALT+H>** takes you to the Check form of payment.

Split Tender allows a customer to pay for an invoice using two or more forms of payment. To use split tender on an invoice, select **Split Tender** from the **Invoice** menu. Select the forms of payment by clicking on the corresponding field or using the shorcut keys. Press **<ALT+C>** for cash, **<ALT+H>** for check, **<ALT+R>** for credit card, **<ALT+A>** for on account, or **<ALT+G>** for gift certificate. Enter the amount using either the keyboard or the on-screen number pad. Once you have made your selection, click on **OK** or press **<ALT+O>**. You can click on **Cancel** or press **<ALT+E>** to exit without choosing a form of split tender.

Invoice Menu



The **Invoice** menu contains the options we have just discussed as well as many more. This menu is only accessible when there is an invoice in progress. To access this menu, click on **Invoice** in the Invoice Screen menu bar or press **<ALT>** release, then press **I**.

Cash Payment

To choose cash as the form of payment for an invoice, select **Cash Payment** from the **Invoice** menu or press **<F6>** in the Invoice Screen.

Check

To choose check as the form of payment for an invoice, select **Check** from the **Invoice** menu or press **<F7>** in the Invoice Screen.

Credit Card

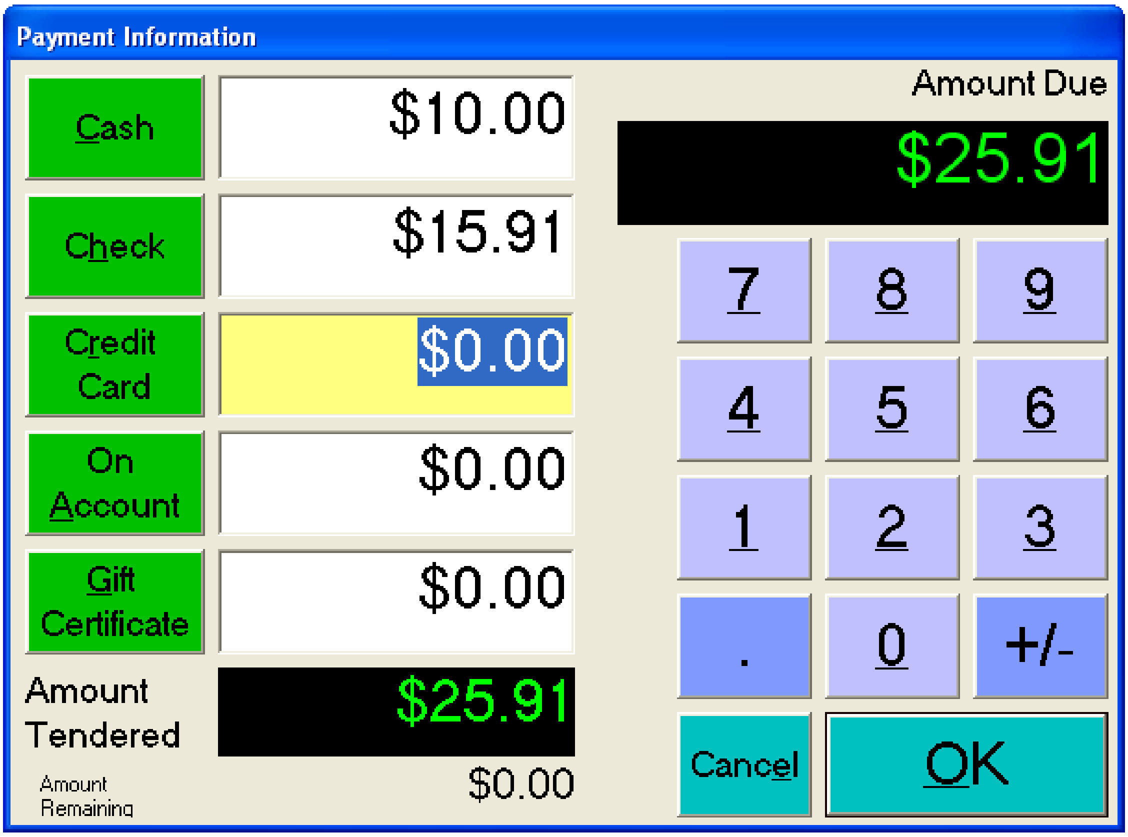
To choose credit card as the form of payment for an invoice, select **Credit Card** from the **Invoice** menu or press **<F7>** in the Invoice Screen.

If you are using **Express Manual Processing**, you will not have to enter the card information into the software. Make certain that it has been accepted by your third party processor before finishing the transaction.

On Account

On Account allows a customer to put the invoice on his account. Only customers who have an open account can choose this form of payment. To choose On Account as the form of payment for an invoice, select **On Account** from the **Invoice** menu or press **<F9>** in the Invoice Screen. **NOTE: You cannot choose On Account as a form of payment for Cash Customer #101.**

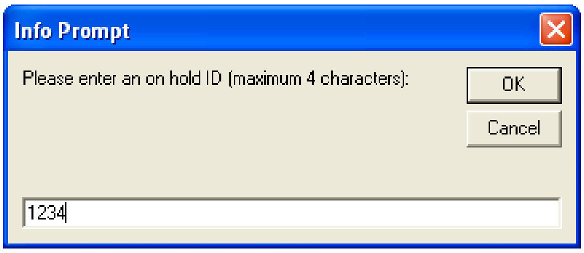
Split Tender



Split Tender allows a customer to pay for an invoice using two or more forms of payment. To use split tender on an invoice, select **Split Tender** from the **Invoice** menu. Select the forms of payment by clicking on the corresponding field or using the shorcut keys. Press **<ALT+C>** for cash, **<ALT+H>** for check, **<ALT+R>** for credit card, **<ALT+A>** for on account, or **<ALT+G>** for gift certificate. Enter the amount using either the keyboard or the on-screen number pad. Once you have made your selection, click on **OK** or press **<ALT+O>**. You can click on **Cancel** or press **<ALT+E>** to exit without choosing a form of split tender.

Put Invoice On Hold

This function allows you to place an invoice on hold and then enter new transactions. **Put Invoice On Hold** could be used if the cashier began ringing up an order but then the customer realized that he forgot to pick up something on his list. The cashier could place the invoice on hold and ring up other customers in line while the original customer gets the forgotten item. To access this screen, select **Put Invoice On Hold** from the **Invoice** menu. You will be prompted to enter an On Hold ID of up to 4 characters to use later to recall the invoice.



NOTE: To recall an on hold invoice, select **Recall On Hold Invoice** from the **View** menu. You will be prompted to enter the Hold ID that you originally entered when you placed the invoice on hold.

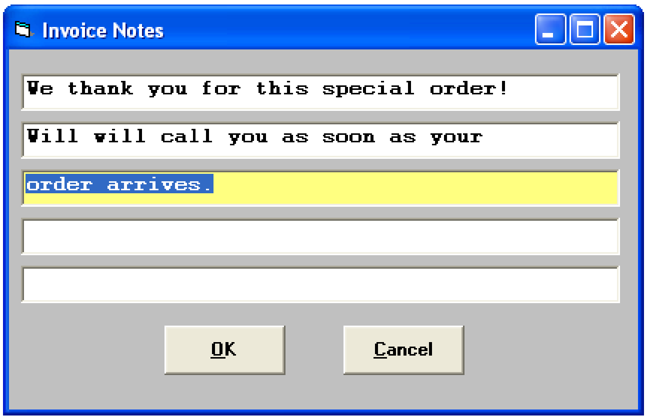
Print On Hold Invoice

This function prints the invoice and puts it on hold. You will be prompted to enter an On Hold ID of up to 4 characters. To use this function, select **Print On Hold Invoice** from the **View** menu.

Void This Invoice

This function allows you to void the current invoice. To void the current invoice, select **Void This Invoice** from the **Invoice** menu.

Invoice Notes

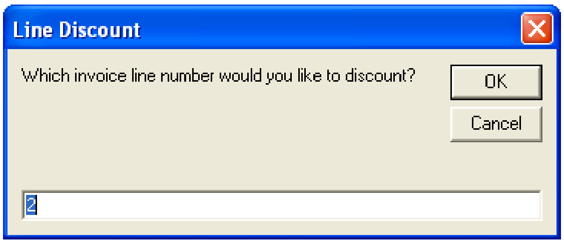


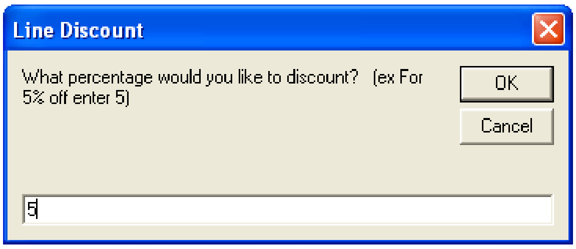
Invoice Notes allow you to establish a personal relationship with each customer. Additionally, such notes can be used to track specific information associated with an invoice. These notes can be viewed whenever the invoice is recalled or reprinted. To add a note to an invoice, select **Invoice Notes** from the **Invoice** menu. You can type up to five lines with 42 characters each per note. **NOTE:** Notes can be changed for On Hold Invoices, but once an invoice is processed to completion, the notes cannot be changed.

Invoice Discount

This function allows you to apply a specific discount amount to the current invoice. To apply a discount percentage to an invoice, press **<CTRL+D>** or just insert the discount in the **Invoice** section at the bottom of the invoice screen. Enter the discount amount as a percentage (ex: 15.00 for 15%).

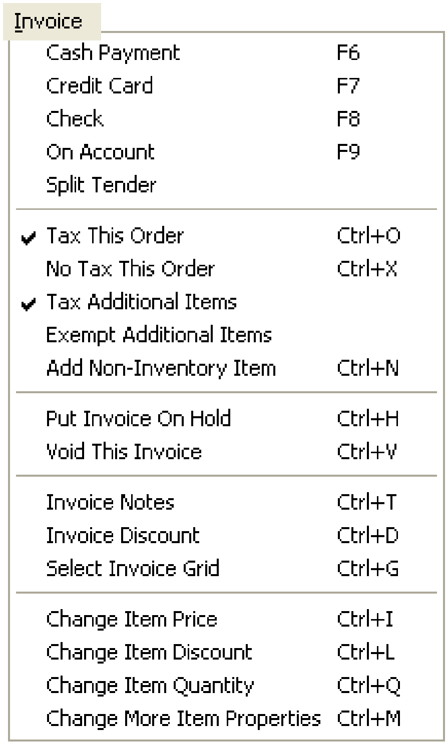
Line Discount





This function allows you to apply a discount to a specific line of the current invoice. To apply a discount percentage to a particular line of an invoice, select **Change Item Discount** from the **Invoice** menu or press **<CTRL+L>** in the Invoice Screen. Enter the line number that you wish to discount, then click on **OK** or press **<ENTER>**. Enter the discount amount without the percent sign (ex: 15 for 15%), then click on **OK** or press **<ENTER>**. Click on **Cancel** to quit without applying a discount.

Tax Menu



The **Tax** menu allows you to apply or not to apply tax for taxable items on an invoice. A check will appear next to the current selection. To access this menu, click the **Invoice** menu bar.

Tax This Order

By default, ExtremePOS applies tax to each invoice. To tax an invoice, select **Tax This Order** from the **Tax** menu or press **<CTRL+O>** in the Invoice Screen.

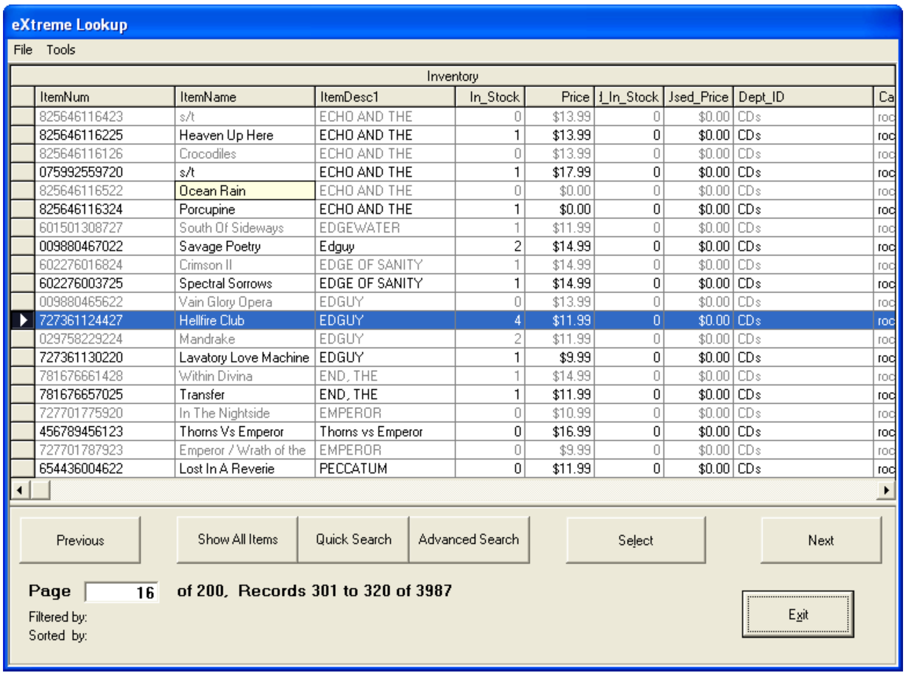
No Tax This Order

This option allows you to bypass taxing taxable items. To choose no tax for an invoice, select **No Tax This Order** from the **Invoice** menu or press **<CTRL+X>** in the Invoice Screen. You may also bypass tax by setting up a customer with a tax-exempt status. If this customer is selected for an order, tax will not be applied.

NOTE: You must choose this option **BEFORE** you add any items to the invoice or else taxable items will be taxed.

Searching Inventory

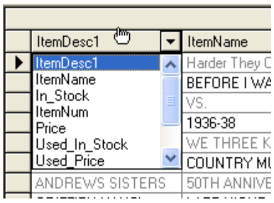
Extreme Lookup Screen



The **Extreme Lookup screen** is your primary interface for performing inventory lookups while in POS operations. You can access this screen by selecting Lookup from the “Scan Item” group box on the invoice screen, selecting “Extreme Lookup” from the “POS Operations” tab in the Invoice screen toolbar, or hitting F10 while in the Invoice screen. The following are the functions available on the Extreme Lookup screen.

Results Grid – The grid will display the results of your search. When the screen is first entered, the grid will be blank until “**Show all Items**”, “**Quick Search**” or “**Advanced Search**” is selected. Only fields containing critical information are displayed. To view additional information about an item, you should look it up in the Inventory Maintenance screen. The grid will display the results of your search in “pages”. Each page will contain 20 items. The screen displays the current page number and the total number of pages in your search results. It also displays the record numbers shown on the current page and the total number of records. You can navigate through the search results using the “**Previous**” and “**Next**” buttons or by typing a page number to jump to that location. You can customize the appearance of the data on the grid by:

1. Click on a column header and click on the resulting drop down arrow. This will bring up a list of fields and allow you to select which field you want to display in that column. Selecting a new field will cause your selection to switch locations with the currently displayed field.



.

2. Left click on a column header and hold the button to drag a field to the desired location on the grid. The field will move to the location you've dragged it to and the other fields will shift over.

3. Left click and hold on the dividing line to the right of a field and drag the line to increase/decrease the field size.

Double Click on an item on the grid to add it to the current invoice. This has the same effect as clicking the Select Button. An input box will come up to allow you to enter the quantity. (Note that the state of the used settings on the Invoice form will determine the used properties of the item when it gets added to the invoice. You can later change the item's used properties from the Invoice form if necessary.)

File Menu
Exit – Selecting this will close the Extreme Lookup screen

Tools Menu
Save Grid Settings – selecting this will save the current grid appearance (field order and field width). ExtremePOS will remember these settings whenever you re-enter the screen in the future.

Previous Button – This will navigate to the previous page of data

Next Button – This will navigate to the next page of data

Page Number Box – Typing a page number within the current range of pages and hitting "Enter" will jump to that page.

Show All Items Button – This will show all the items currently in your inventory database

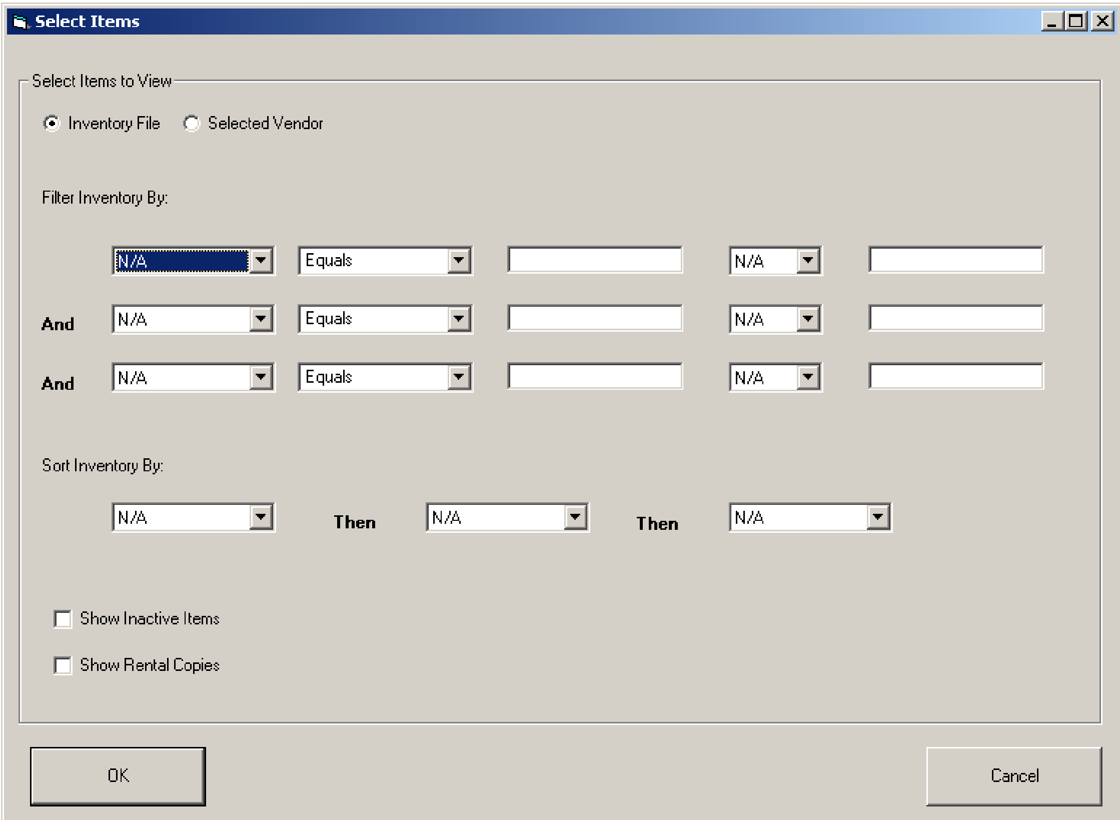
Quick Search – This will allow you to quickly find an item by item number. An input box will be presented. Type or scan an item number into the box to search for that item.

Advanced Search Button – This will bring up the Advanced Search Screen which will allow you to filter and sort your search results. The Advanced Search screen is discussed in the next topic.

Select Button – This will add an item to the current invoice. An input box will come up to allow you to enter the quantity. (Note that the state of the used settings on the Invoice form will determine the used properties of the item when it gets added to the invoice. You can later change the item's used properties from the Invoice form if necessary.)

Exit Button – This will close the Extreme Lookup screen.

Advanced Search Screen



The Advanced Search screen allows you to conduct detailed searches against your inventory. The following functions are available on the Advanced Search screen.

Inventory/Vendor option buttons – This allows you to specify whether you wish to search your inventory or a vendor database file. You should always select Inventory. Vendor searches are currently not implemented in the software.

Filter Boxes – You can select up to 3 filter criteria. By default all filter criteria come up as "N/A" (not applicable). To set your filter criteria:

1. Choose a field to filter by from the leftmost filter box.
2. Choose a filter option from the center filter box. You can choose whether the selected field should equal, start with or contain your filter string.
3. Type the string to filter by in the rightmost filter box.

Sort Boxes – You can sort your results by up to 3 fields. Select a field from the drop down list to sort by that field. By default, the sort boxes display "N/A" until you select a field. The results will be sorted by the field in the topmost sort box first, then the second and third boxes.

NOTE: The Advanced Search screen remembers the filter and sort settings for your last search and will redisplay them when you re-enter the screen.

OK Button – Click this to start your search. The Advanced Search screen will close and you will be returned to the Extreme Lookup screen. Your search results will be displayed on the Extreme Lookup results grid.

Cancel Button – Selecting this will close the Advanced Search screen without performing a search.

Steps for Invoicing an Order

1. **Select Customer** (Chapter 5: Creating Invoices)**:**

   - Use the default **Cash Customer (#101)**

     Or

   - Use **Quick Search** or **Lookup** to select a customer

2. **Tax** (Chapter 5: Creating Invoices)**:**

   - Use the default **Tax This Order**

     Or

   - Select **No Tax This Order** from the **Tax** menu

   NOTE: You must select **No Tax This Order BEFORE** you add any items to the invoice or else taxable items will be taxed.

3. **Select Inventory Items** to be placed on the Invoice Grid (Chapter 5: Creating Invoices)**:**

   You can either scan in the item number with a bar code scanner or manually enter the item number or item name.

   \- **Non-Inventory** Items (Chapter 3: Inventory Control)**:**

   If you wish to add a non-inventory item to the invoice grid, select **Non-Inventory Item** from the **Invoice** or **Actions** menu or press **<CTRL+N>**. The Non-Inventory Item screen will appear. Enter the required information, and then click on **Add to Invoice** or press **<ALT+A>** to add the item to the current invoice. To quit without adding an item, click on **Cancel**.

   NOTE: All items entered using the Non-Inventory Item screen will be tracked under the item **Non-Inventory Item**.

4. **Deleting an Item from the Invoice Grid** (Chapter 5: Creating Invoices)**:**

To delete an item from the invoice, press **<CTRL+G>** to position the cursor on the invoice grid or click on the item on the grid with the mouse. Use the up/down arrow keys (<↑> and <↓>) to move the cursor to the item to be deleted. Once you highlight the item in the invoice grid you would like to delete, just press the <**Delete**> key on your keyboard.

5. **Changing the Item Quantity on the Invoice Grid** (Chapter 5: Creating Invoices)**:**

To change quantity for an item on the invoice, press **<CTRL+G>** to position the cursor on the invoice grid or click on the item on the grid with the mouse. Use the up/down arrow keys (<↑> and <↓>) to move the cursor to the item to be changed. Once you highlight the item in the invoice grid you would like to change, just click the attribute you would like to change within the **Selected Item** section of the invoice. In this case, choose **Change Quantity** or <**CTRL+Q**> and follow the on-screen prompts.

6. **Changing the Item Price on the Invoice Grid** (Chapter 5: Creating Invoices)**:**

To change the price for an item on the invoice, press **<CTRL+G>** to position the cursor on the invoice grid or click on the item on the grid with the mouse. Use the up/down arrow keys (<↑> and <↓>) to move the cursor to the item to be changed. Once you highlight the item in the invoice grid you would like to change, just click the attribute you would like to change within the **Selected Item** section of the invoice. In this case, choose **Change Price** or <**CTRL+I**> and follow the on-screen prompts.

7. **Repeat steps 3-6 for all items purchased.**

8. **Invoice Notes** (Chapter 5: Creating Invoices)**:**

   Add notes to an invoice by selecting **Invoice Notes** from the **Invoice** menu or by pressing **<CTRL+T>**.

9. **Invoice Discount** (Chapter 5: Creating Invoices)**:**

   Apply a specific discount amount to the entire invoice by selecting **Invoice Discount** from the **Invoice** menu or by pressing **<CTRL+D>**. As an alternative, you may enter a discount in the **Discount%** input box within the **Invoice** section at the bottom of the invoice screen.

10. **Line Discount** (Chapter 5: Creating Invoices)**:**

    Apply a discount to a specific line number of the invoice by selecting **Line Discount** from the **Invoice** menu or by pressing **<CTRL+L>**.

11. **Put Invoice On Hold** (Chapter 5: Creating Invoices)**:**

    Place an invoice on hold by selecting **Put Invoice On Hold** from the **Invoice** menu or pressing <**CTRL+H**>. You will be prompted to enter a Hold ID of up to 4 digits.

12. **Recall On Hold Invoice** (Chapter 4: Creating Invoices)**:**

    To recall an On Hold Invoice, select **Recall On Hold Invoice** from the **Invoice** menu or press the **Recall On Hold** button within the Invoice section at the bottom of the invoice screen. You will be prompted to enter the Hold ID that you originally entered when you placed the invoice on hold.

13. **Select Payment Method** (Chapter 5: Creating Invoices)**:**

    There are six payment methods:
    - **Credit Card:** You will be prompted to enter credit card information for the sale
    - **Cash:** This is the default payment method.
    - **Check:** You will be prompted to enter the check number.
    - **Gift:** You will be prompted to enter the gift certificate or card number.
    - **Split Tender:** This uses a combination of two or more payment methods.
    - **On Account:** This form of payment can only be selected if the customer has an open account.

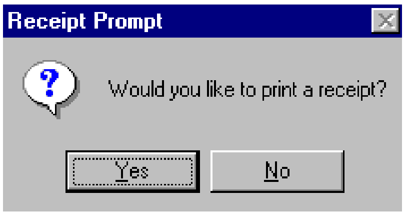
14. **End Transaction** (Chapter 5: Creating Invoices)**:**

    Once all of the items have been added and you have selected the payment method, click on **End Transaction** or press **<ALT+E>** to complete the invoice.

15. **Amount Tendered:**

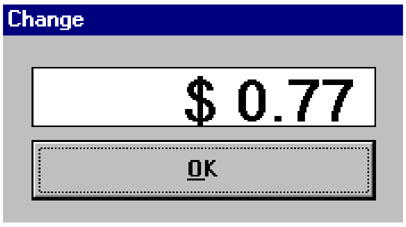
    This is the amount of money that the customer gave to the cashier. Enter the correct amount tendered, then click on **OK** or press **<ENTER>** to complete the transaction. Click on **Cancel** or press **<ALT+E>** to exit without completing the transaction.

16. **Receipt Prompt:**



If **Print Invoices** is set to **Prompt** in the **Options Screen**, this screen will appear. Click on **Yes** or press '**Y**' to print a receipt, or click on **No** or press '**N**' if you do not want to print a receipt.

Change:

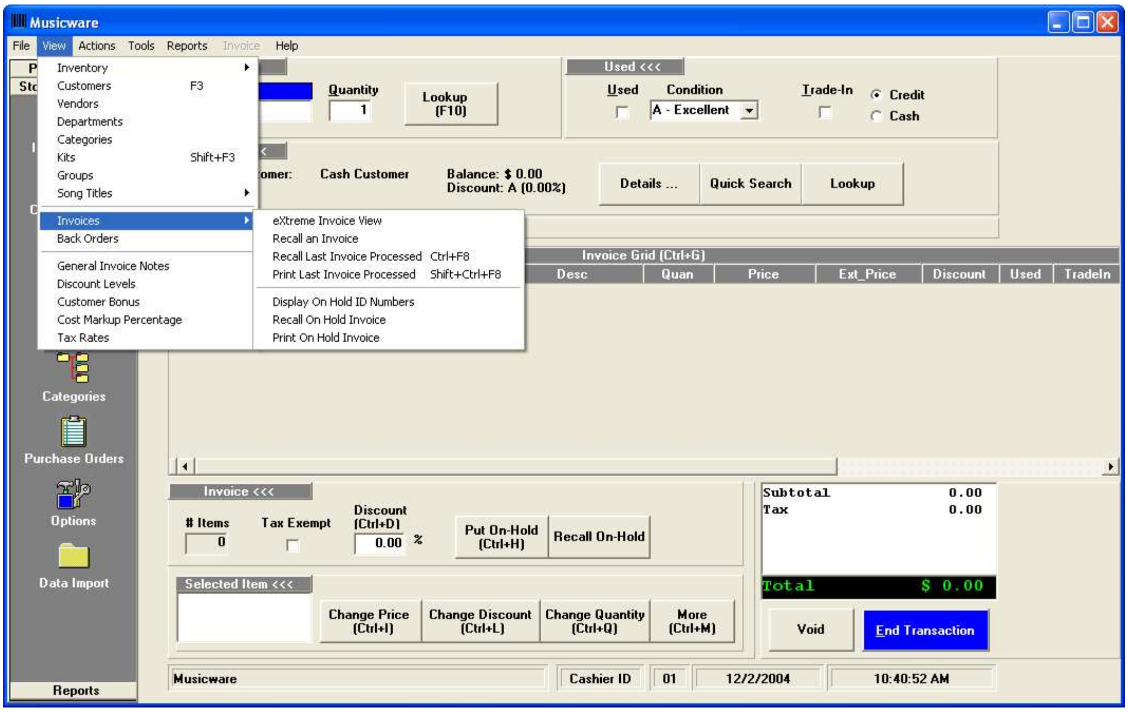


This is the amount that the customer should receive back based on the amount tendered and the grand total of the invoice. Click on **OK**, press **<ENTER>**, or press **<ALT+O>** to clear the screen for a new invoice.

Chapter 6:

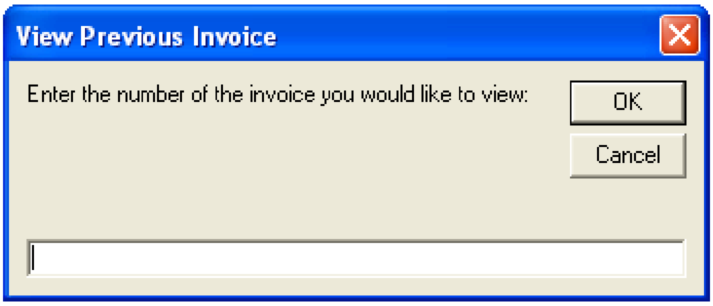
Sales Information and Reports

Invoices Menu

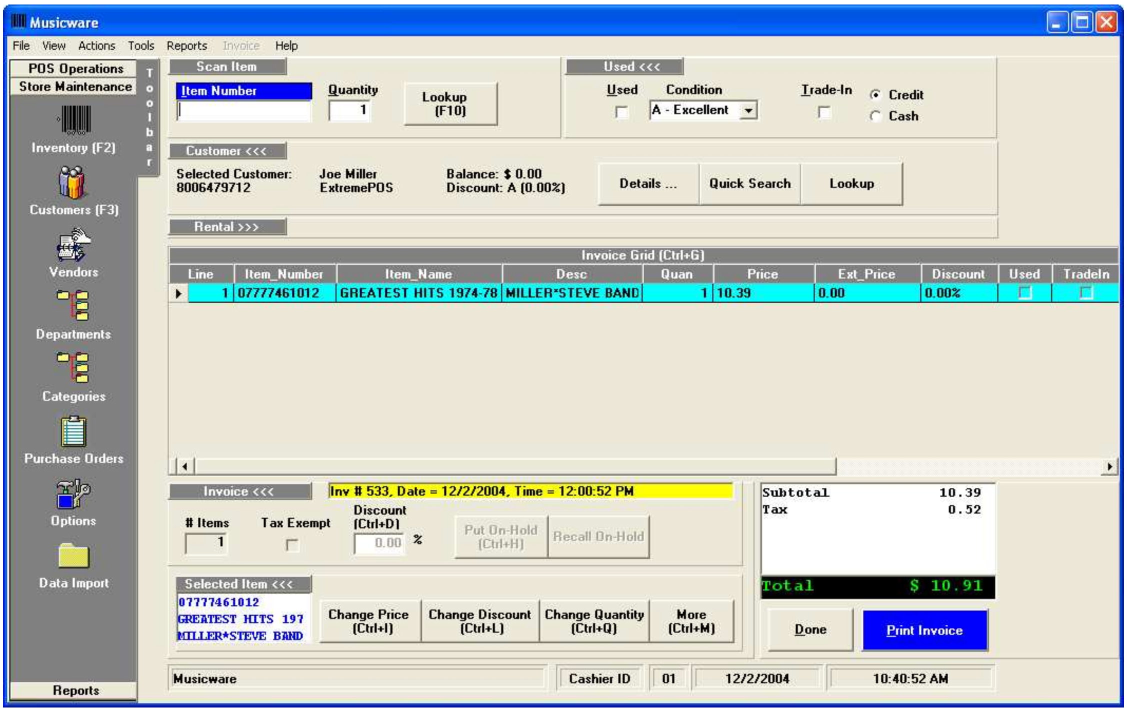


The **Invoices** menu offers options regarding invoices. To access this menu, click on **View** in the Invoice Screen menu bar or press **<ALT+V>**.

Recall Invoice

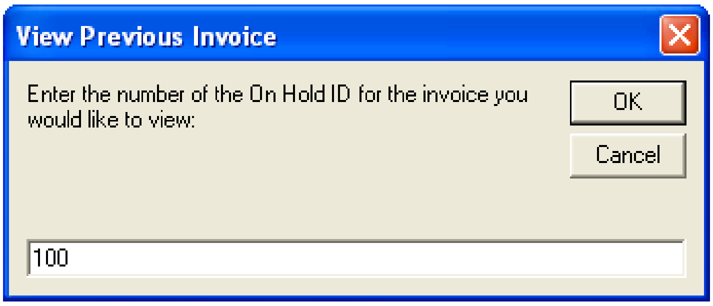


This function allows you to display a completed or voided invoice. To view an invoice, select **Recall Invoice** from the **View/Invoices** menu. To reprint the invoice from this screen, click on **Print Invoice** or press **<ALT+P>**. The date the invoice was processed appears below the inventory grid in the **Invoice Date** field. Once you are done viewing an invoice, click on **Done** or press **<ALT+D>** to exit this screen.



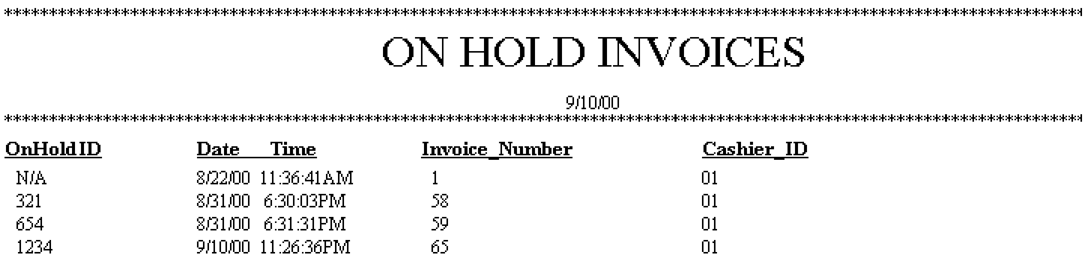
NOTE: When you recall an invoice, you cannot edit it in any way, nor can you delete it.

Recall On Hold Invoice



This function allows you to recall an on hold invoice by the Hold ID that you entered when you originally put it on hold. Once you recall an on hold invoice, you can process it to completion, void it, modify it, or put in on hold again. To access this screen, select **Recall On Hold Invoice** from the **Invoice** menu. For more information on placing an invoice on hold, see the **Put Invoice On Hold** section in **Chapter 4: Creating Invoices**.

Display On Hold ID Numbers



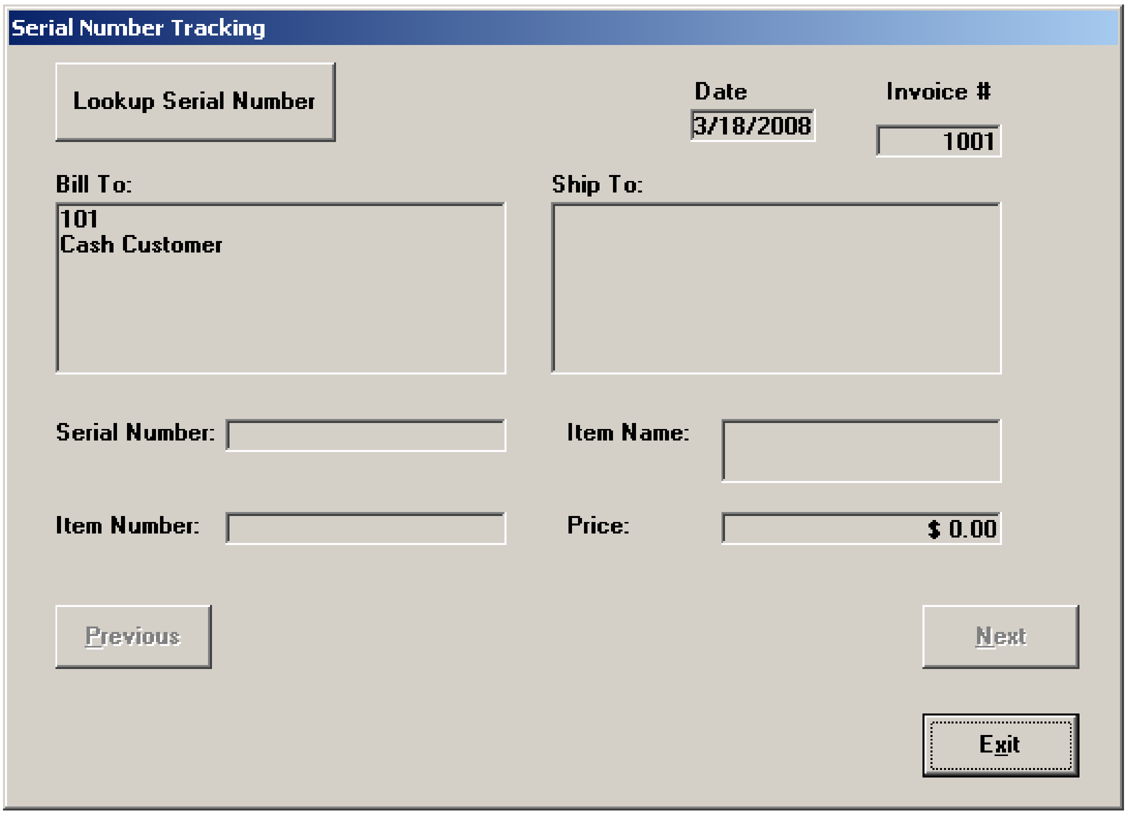
ON HOLD INVOICES

9/10/00

OnHold ID	Date Time	Invoice_Number	Cashier_ID
N/A	8/22/00 11:36:41AM	1	01
321	8/31/00 6:30:03PM	58	01
654	8/31/00 6:31:31PM	59	01
1234	9/10/00 11:26:36PM	65	01

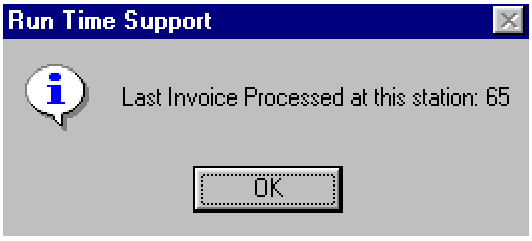
This function displays an on screen report of all the invoices currently on hold. The report also shows the corresponding On Hold ID, invoice number, as well as the date and time that the invoice was placed on hold. You can use this report if you forget the On Hold ID for an invoice. To access this screen, select **Display On Hold ID Numbers** from the **Invoice** menu.

Track Serial Numbers



This function allows you to track a serial number for an item that was purchased. To track a serial number, click on Track Serial Numbers from the Tools menu bar, hit **Lookup Serial** Number, enter the serial number, then click on **OK** or press **<ENTER>**. The serial number will appear, as well as the associated item number, item name, price, invoice number, date that the invoice was processed, and the customer who purchased the item. If the serial number has been used more than once, you can use **Next** and **Previous** to track all the occurrences of that serial number until the correct one is displayed.

Last Invoice Processed

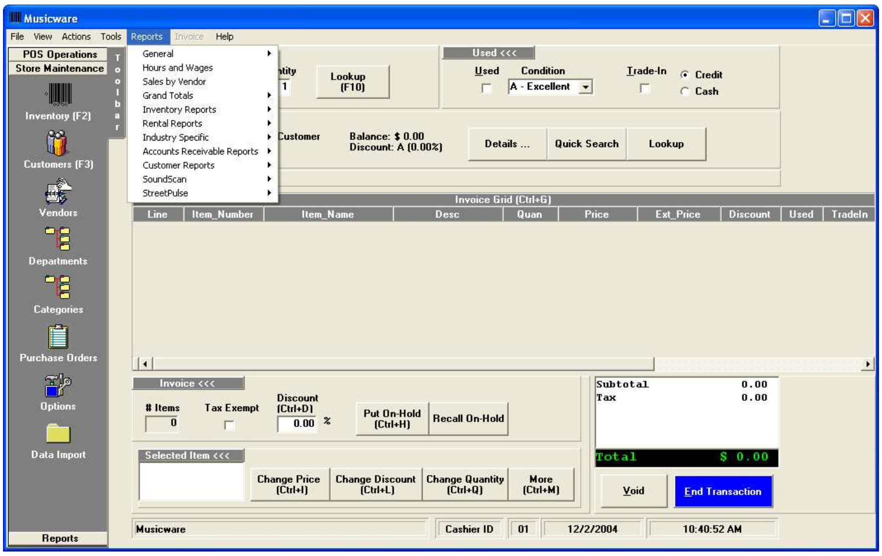


This function displays the invoice number of the last invoice processed on that computer. To access this screen, select **Last Invoice Processed** from the **View/Invoices** menu or press **<CTRL+F8>**.

Print Last Invoice Processed

This function prints a receipt for the last invoice processed on that computer. To use this function, select **Print Last Invoice Processed** from the **View/Invoices** menu or press **<SHIFT+CTRL+F8>**.

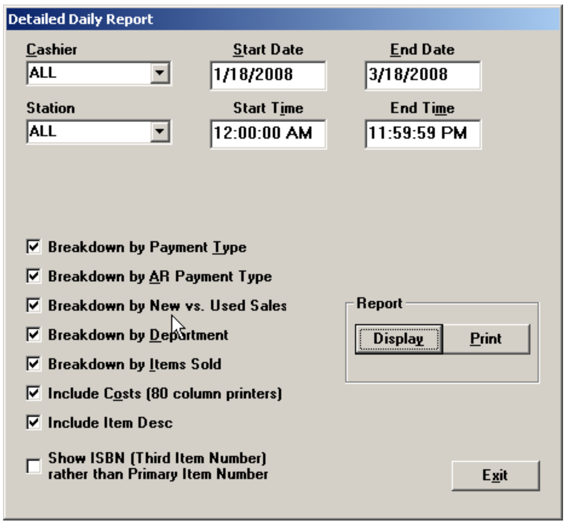
Reports Menu



ExtremePOS offers you the ability to generate a wide variety of reports. The following are brief descriptions of all the reports. Many of the reports require parameters in order to run them, such as a date range, and most of the reports can be displayed on the screen and then printed from there. To access this menu, click on **Reports** in the Invoice Screen menu bar or press **<ALT+R>** in the Invoice Screen.

Print Detailed Daily Report

This is perhaps the most widely used and import report in ExtremePOS. This report prints the sales totals for the day. You can also get a breakdown by payment type, accounts receivable payment type, department, item, and you can choose to print for all cashiers or for a particular cashier as well as all workstations or a particular workstation. You can also choose to **Include Costs** if you have an 80 column printer. This will print the cost, extended cost, gross margin, and gross margin %. To print this report, select **Print Detailed Daily Report** from the **Reports/General** menu, select the desired cashiers, stations, date, and breakdown, and then click on **Print** or press **<ALT+P>**. Click on **Exit** or press **<ALT+X>** to exit without printing the report.



Below is a sample of what is included in the Detailed Daily Report:

```
          Detailed Daily Report

          1/18/2008 - 3/18/2008

Cashier: ALL

Station: ALL

      Extreme Software Corporation


Sales Before Discounts...        $636.42
Invoice Discounts........          $5.25
                              ----------
Net Sales................        $631.17
Total Tax 1..............         $14.36
Total Tax 2..............          $0.00
Total Tax 3..............          $0.00
Trade-ins................      ($144.00)
Gift Cards...............        $738.00
                              ----------
Grand Total..............      $1,239.53

Cost of Goods............         $73.83


       Breakdown by Payment Type
Cash.....................      $  557.39
Check....................       $ 759.45
  Total Cash + Checks....      $ 1316.84
Total On Account.........       -$ 88.00
Total Credit Cards.......         $ 0.00
Gift Cards...............        $ 10.69

Number of cash transactions: 22
Number of Check transactions: 14
Number of CC transactions: 0
Number of OA transactions: 3
Number of GC transactions: 1

       Breakdown by AR Payment Type
       (Accounts Receivable are NOT filtered by Station ID)
Total Payments...........        $106.00
Rec'd Cash...............        $106.00
Rec'd Check..............          $0.00
Rec'd Credit Card........          $0.00

       Breakdown by New vs. Used Sales
New......................       $ 186.19
Used.....................        $ 44.98
TradeIn..................      -$ 144.00

         Breakdown by Department

Department ID: 0

  PS2 CHAOS WARS TBA (Used Trade-In)  -  ACT
    873469003048            Quantity in stock: 1              SP: $0.00
     -1 @ $5.00            ($5.00)         $5.00   ($5.00)    $0.00     0.00%

  Psx-Suikoden 2
    r083717170426           Quantity in stock: 1              SP: $5.00
     3 @ $5.00             $15.00          $0.00     $0.00   $15.00   100.00%
```

Generate Invoice Totals Report

This report prints detailed information from invoice processing. You can view an **Invoice Totals Report** for all cashiers or for a specific cashier. You can also choose to view either complete, on hold, or voided invoices. You can select any date range you wish. To view a single day, use the same start and end date. The report displays the following information about an invoice: Date/Time, Invoice Number, Customer Number, Cashier ID, Payment Method, Total Cost, Total Price, Tax, Grand Total, and Gross Profit. It also displays the total number of invoices processed and the grand totals. To view this report, select **Generate Invoice Totals Report** from the **Reports/General** menu.

Invoice Totals by Customer

This report displays all invoices in a given date range. It is sorted by customer last name. To view a single day, use the same start and end date. The report displays the following information about an invoice: Customer Last Name, Customer First Name, Invoice Number, Date/Time, Customer Number, Total Price, and Grand Total. It also displays the total of all invoices in the specified date range for each customer and a grand total of all invoices. To view this report, select **Invoice Totals by Customer** from the **Reports/General** menu.

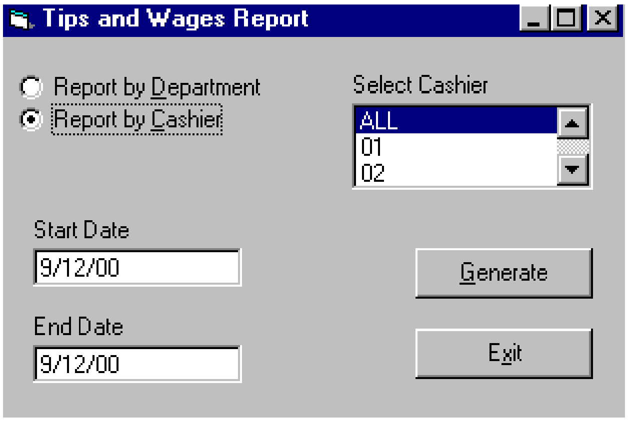
Grand Totals by Payment Method

This report breaks down the invoices by their payment methods. To view this report, select **Grand Totals by Payment Method** from the **Reports/General** menu.

Print Daily Totals on Receipt Printer

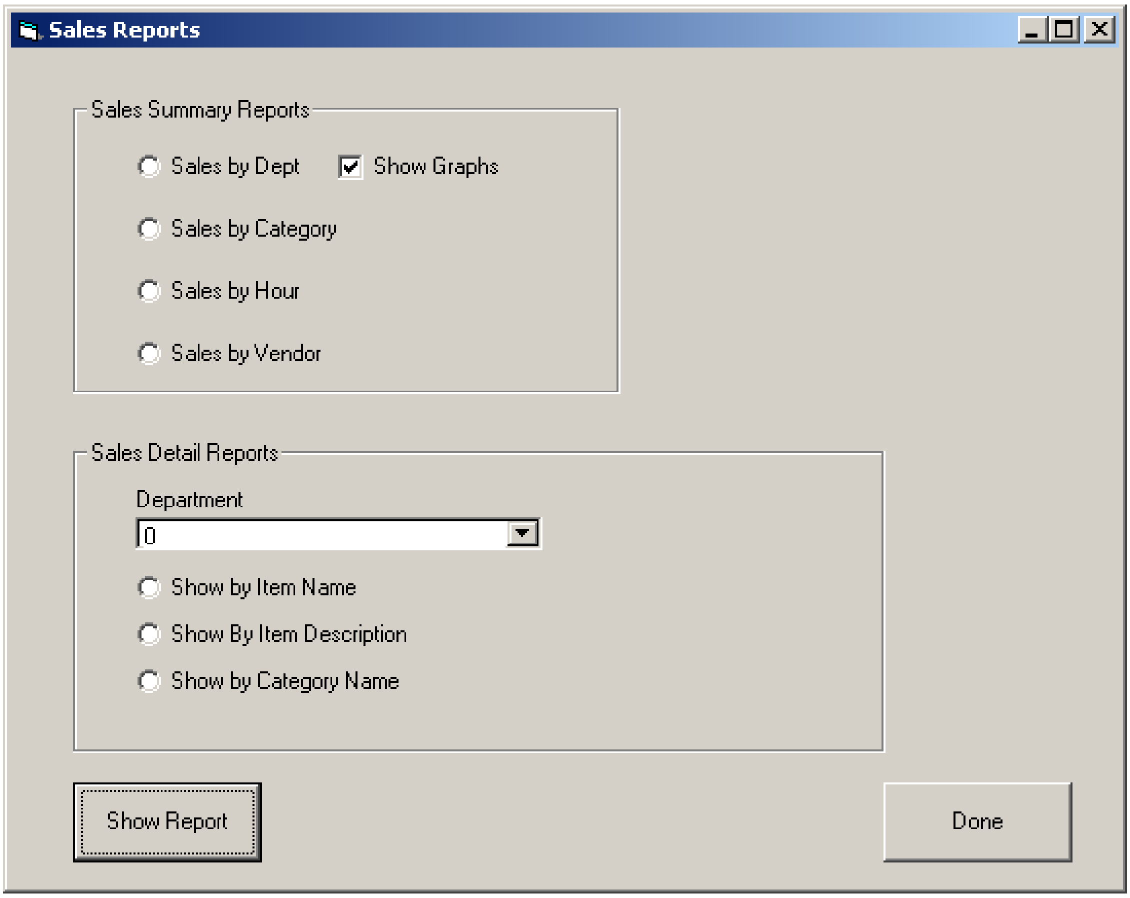
This report is a summary of all the invoices for all cashiers for the specified date. This report will print on a standard receipt printer. To print this report, select **Print Daily Totals on Receipt Printer** from the **Reports/General** menu.

Hours and Wages



This report displays the total wages earned and tips collected in a specified date range. You can choose to generate this report for a specific cashier or employee department. To display this report, select **Hours and Wages** from the **Reports** menu, enter the desired information, then click on **Generate** or press **<ALT+G>**. Click on **Exit** or press **<ALT+X>** to exit without generating this report.

Sales Analysis

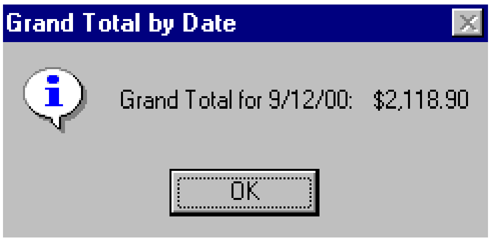


This screen allows you to produce a variety of reports for a specified date range.

Sales Summary Reports allow you to choose a criterion you wish to view sales by, such as hourly or by vendor, for one or all cashiers. Check the radio button next to the one you wish to view, select **Show Graphs** if you want to make graphs, and hit **Show Report** at the bottom left. You will be prompted for whether to show for one cashier or all, as well as the date range.

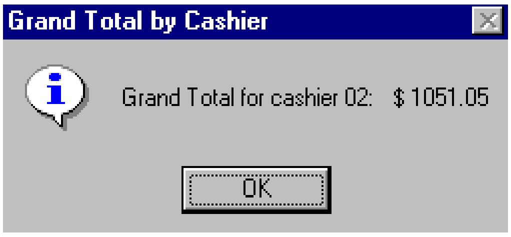
Sales Detail Reports give you a detailed departmental breakdown. Select the department and whether to **Show by Item Name, Show by Item Description**, or **Show by Category Name.** Hit **Show Report** to bring your report up. You will be prompted for whether to show for one cashier or all, as well as the date range.

Grand Total by Date



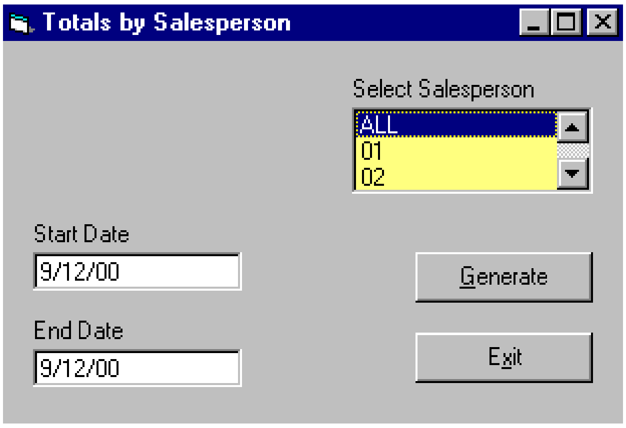
This function displays a message box with the selected day's grand total. To access this screen, select **Grand Total by Date** from the **Reports/Grand Totals** menu, enter the desired date, and then click on **OK** or press **<ENTER>**.

Grand Total by Cashier



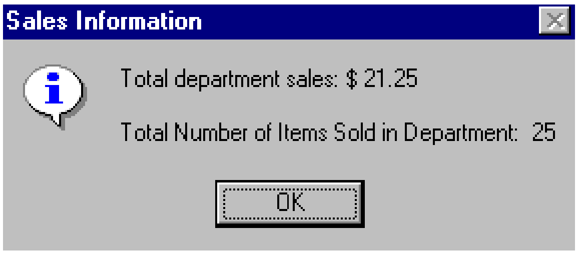
This function displays a message box with the selected cashier's grand total for the selected day. To access this screen, select **Grand Total by Cashier** from the **Reports/Grand Totals** menu, enter the desired cashier number and date, and then click on **OK** or press **<ENTER>**.

Grand Total by Salesperson



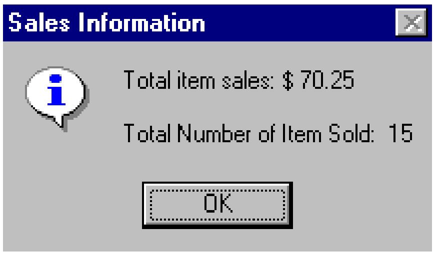
This report prints the grand total for each salesperson for a specified date range. You can choose to generate this report for either a specific salesperson or for all salespeople. To print this report, select **Grand Total by Salesperson** from the **Reports/Grand Total** menu, enter the desired information, then click on **Generate** or press **<ALT+G>**. Click on **Exit** or press **<ALT+X>** to exit without printing this report.

Grand Total Sales by Department



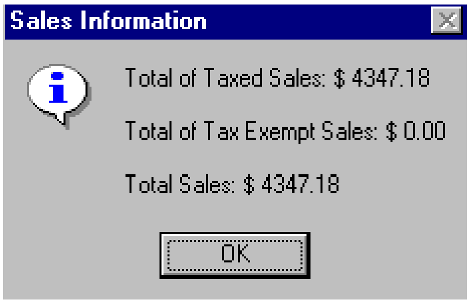
This function displays a message box with the grand total for the specified department as well as the amount of items from that department that were sold. To access this screen, select **Grand Total Sales by Dept** from the **Reports/Grand Totals** menu, then enter the desired department, starting date, and ending date.

Grand Total Sales by Item



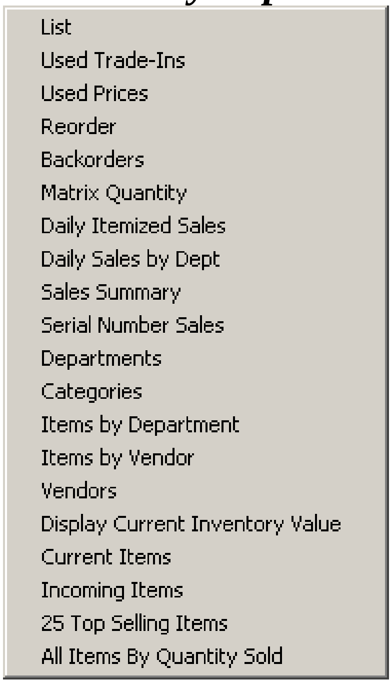
This function displays a message box with the grand total for the specified item as well as how much of that item were sold. To access this screen, select **Grand Total Sales by Item** from the **Reports/Grand Totals** menu, and then enter the item number, starting date, and ending date.

Grand Total of Tax Exempt Sales

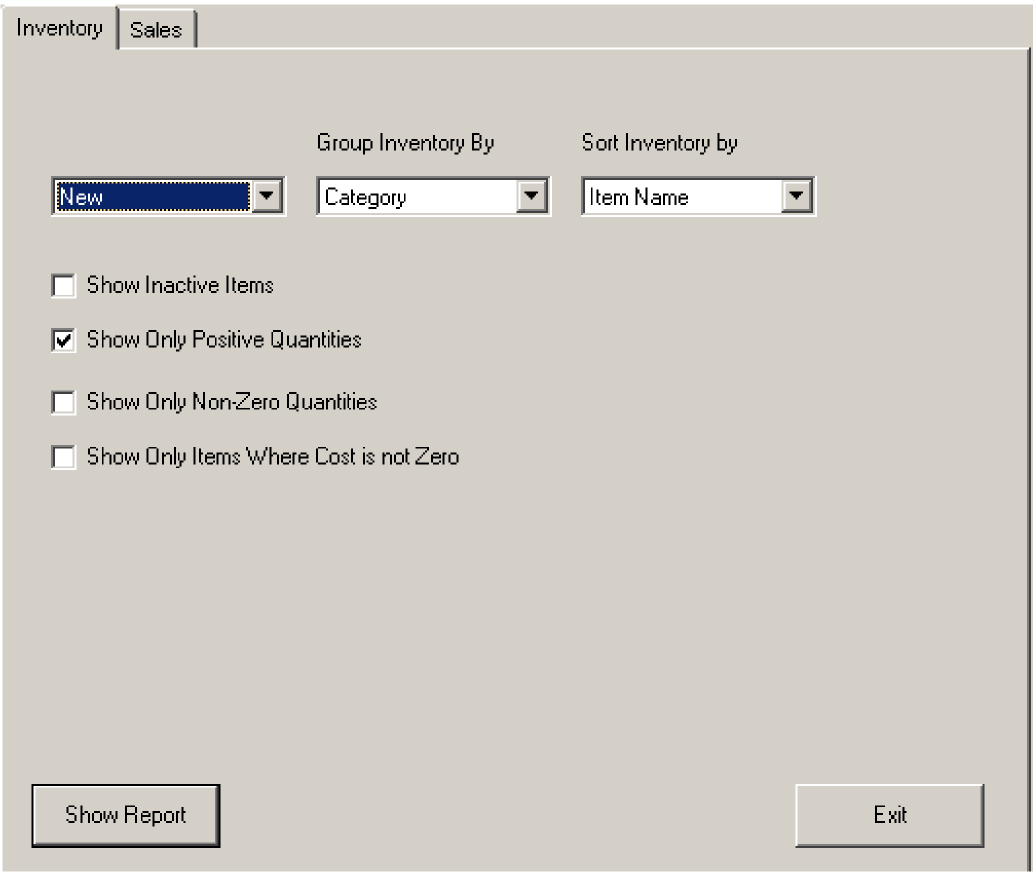


This function displays a message box with the total of taxed sales, the total of tax exempt sales, and the total sales all before taxes were applied. To access this screen, select **Grand Total of Tax Exempt Sales** from the **Reports/Grand Totals** menu, enter the desired date, and then click on **OK** or press **<ENTER>**.

Inventory Reports



List



This report allows you to list your new or used inventory grouped and sorted as you choose.

New or **Used** in the first dropdown box allows you to choose between new or used quantities.

Group Inventory By allows you to choose whether to group your items by category or department.

Sort Inventory By determines the ordering within groups. Available options are Item Name, Item Number, and Item Description 1.

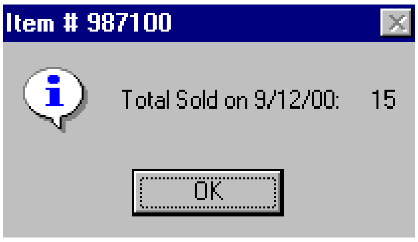
Show Inactive Items: Checking this will show items you have marked as Inactive on the report in addition to your active inventory.

Show Only Positive Quantities: Checking this will show only items whose in stock quantity is greater than zero.

Show Only Non-Zero Quantities: Checking this will show only items whose in stock quantity is not equal to zero.

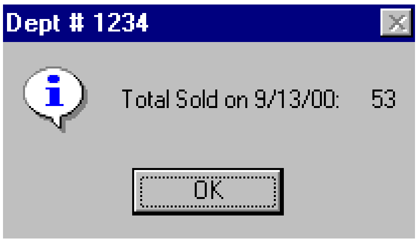
Show Only Items Where Cost is not Zero: Checking this will show only items whose cost is not equal to zero.

Daily Itemized Sales



This function displays a message box with the total number sold of a particular item on a particular date. To access this screen, select **Inventory Reports** from the **Reports** menu, then select **Daily Itemized Sales**. Enter the item number and the desired date, then click on **OK** or press **<ENTER>**.

Daily Sales by Dept



This function displays a message box with the total number of items sold from a particular department on the selected day. To access this screen, select **Inventory Reports** from the **Reports** menu, then select **Daily Sales by Dept**. Enter the department number and the desired date, then click on **OK** or press **<ENTER>**.

Sales Summary

This report lists a monthly breakdown of quantity sold, total cost, total sales, and gross profit for every inventory item. The items are listed by item name. To view this report, select **Inventory Reports** from the **Reports** menu, then select **Sales Summary**.

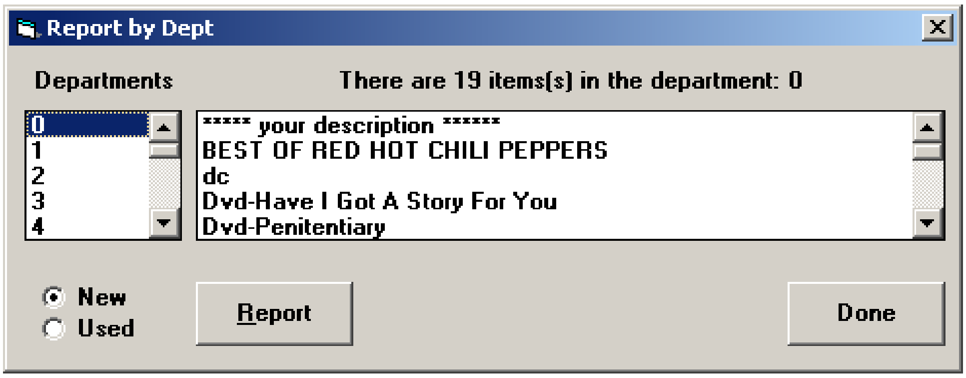
Serial Number Sales

This report lists all the serial numbers sold for a specified range of dates. The following information is displayed in the report: Invoice Number, Date, Serial Number, Item Name, Item Number, and Customer Name. To view this report, select **Inventory Reports** from the **Reports** menu. Select **Inventory Reports – Serial Number Sales**, then enter the desired dates.

Departments

This report generates a complete listing of all the Department IDs with their corresponding descriptions. To view this report, select **Inventory Reports** from the **Reports** menu, then select **Departments**.

Items By Department



This report displays information about inventory in a specific department. The following information is displayed in the report: Item Name, Item Number, Department, Cost, In Stock, Value, and Price. To view this report, select **Inventory Reports** from the **Reports** menu, then select **Items By Department**. Use the mouse or the arrow keys to highlight the desired department, and select either new or used. Click on **Report** or press **<ALT+R>** to display the report. Click on **Done** to exit without viewing the report.

Items by Vendor

This report lists items for a specified vendor in numerical order by item number. The following information is displayed in the report: Item Number, Item Name, Department, Cost, In Stock, Value, and Price. To view this report, select **Inventory Reports** from the **Reports** menu. Select **Items by Vendor**, enter the desired vendor number, then click on **OK** or press **<ENTER>**.

Vendors

This report generates a complete listing of all the vendors and their corresponding vendor number. The following information is displayed in the report: Vendor Number, Contact Name, Company Name, City, State, Zip Code, and Phone Number. To view this report, select **Inventory Reports** from the **Reports** menu, then select **Vendors**.

Display Current Value

This function displays a message box with the current value of your inventory. To access this screen, select **Inventory Reports** from the **Reports** menu, then select **Display Current Value**.

Current Items

This function displays a message box with the current number of valid items. To access this screen, select **Inventory Reports** from the **Reports** menu. Select **Current Items**, then enter the start and end date of the desired date range.

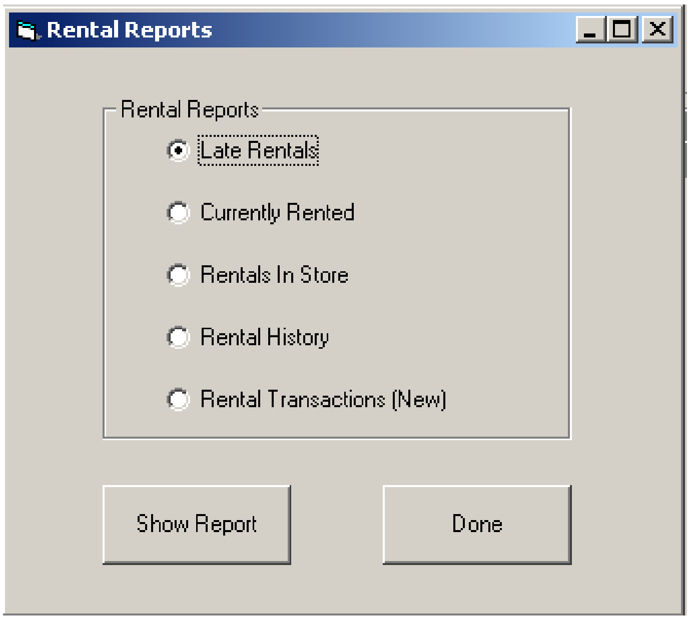
Incoming Items

This report shows items that are coming in open purchase orders. To view it, select **Inventory Reports** from the **Reports** menu, then **Incoming Items.**

25 Top Selling Items

This report lists the 25 top selling inventory items during the specified date range. To view this report, select **Inventory Reports** from the **Reports** menu. Select **25 Top Selling Items**, enter the start and end date of the desired date range, then click on **OK** or press **<ENTER>**.

Rental Reports



Late Rentals Report

This report lists rentals that are currently overdue. To print this report, select **Rental Reports** from the **Reports** menu, then select **Late Rentals Report**.

Currently Rented

This report lists items that are currently rented. The following information is displayed in the report: Item Number, Item Name, and the Customer Number, Customer Name, and phone number of the cusomter currently renting the item. To view this report, select **Rental Reports** from the **Reports** menu, then select **Rentals Currently Rented**.

Rentals in Store

This report lists rental items that are currently in the store. The following information is displayed in the report: Item Number, Item Name, and the Customer Number, Customer Name, and phone number of the last customer to rent the item. To view this report, select **Rental Reports** from the **Reports** menu, then select **Rentals in Store**.

Rental History

This function displays the rental history of a rental item. The top grid contains the following information: Date the item was rented, Invoice Number, Customer Number that rented the item, and Price. The bottom grid contains the following information: Item Number, Total Number of times that the item has been rented, and the total amount of money from the rental (not including tax). To view this screen, select **Rental Reports** from the **Reports** menu, then select **Rental History**. Click on **Select** or press **<ALT+S>,** then enter the item number. Click on **Exit** or press **<ALT+X>** to exit the **Rental History** screen.

Rental Transactions

This function allows you to view rental transactions in a date range. To view this screen, select **Rental Reports** from the **Reports** menu, then select **Rental Transactions.** Click on **Select** or press <**Alt+S>**, then choose how to sort it.

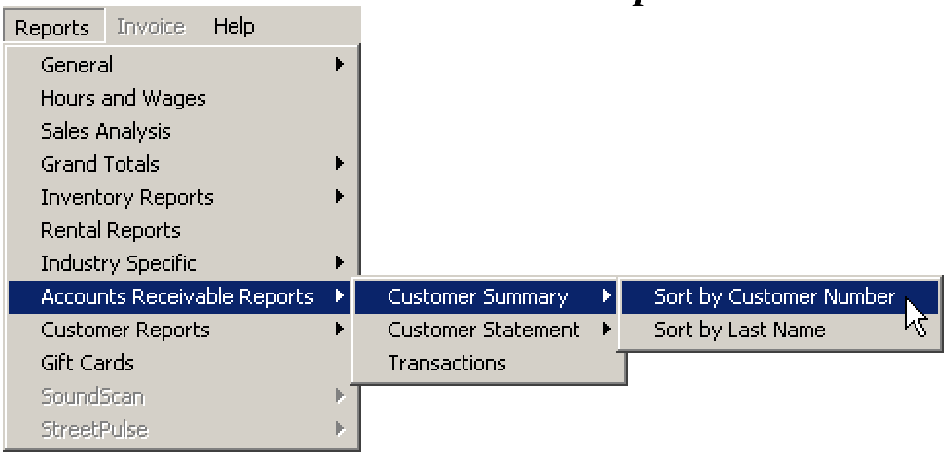
Number of People Served

This function displays a message box showing how many people were served within a specified time range when recorded through touch screen invoicing in Restaurant ExtremePOS. You will be prompted to enter the start date and the end date of the desired range. To access this screen, select **Number of People Served** from the **Reports/Industry Specific** menu.

Server Tips

This report lists all of the server tips for credit card purchases during a specified time range. The report lists the Server ID, Date, Time, Invoice #, and Tip Amount and is sorted by Server ID. To view this report, select **Server Tips** from the **Reports/Industry Specific** menu.

Accounts Receivable Reports



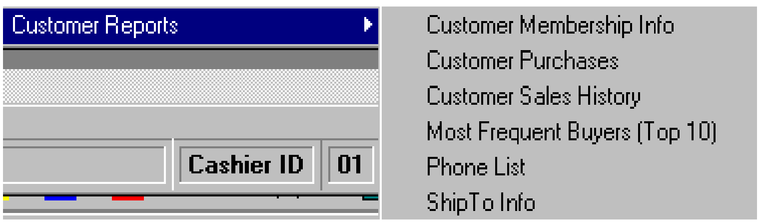
Accts Receive – Customer Summary

This report displays a summary of all customers and their current balances. The following information is displayed in the report: Customer Number, Last Name, First Name, Company Name, and On Account Balance Due. To view this report, select **Accounts Receivable Reports** from the **Reports** menu, then select **Accts Receive – Customer Summary**. You can choose to sort by **Customer Number** or by **Last Name**.

Accts Receive – Customer Statement

This function prints a billing statement for either all customers or a specific customer. To print a statement for all customers, select **Accounts Receivable Reports** from the **Reports** menu. Select **Accts Receive – Customer Statement**, then select **All Customers**. You will be asked whether or not to print statements for customers that have a total balance due of $0.00 and to enter the starting date of transactions. To print a statement for a specific customer, select **Accounts Receivable Reports** from the **Reports** menu, then select **Accts Receive – Customer Statement**. Select **Specific Customer**, then enter the customer number. You will be asked whether or not to print statements for customers that have a total balance due of $0.00 and to enter the starting date of transactions. **NOTE: Invoices that have been fully paid appear on the statement for 30 days.**

Customer Reports



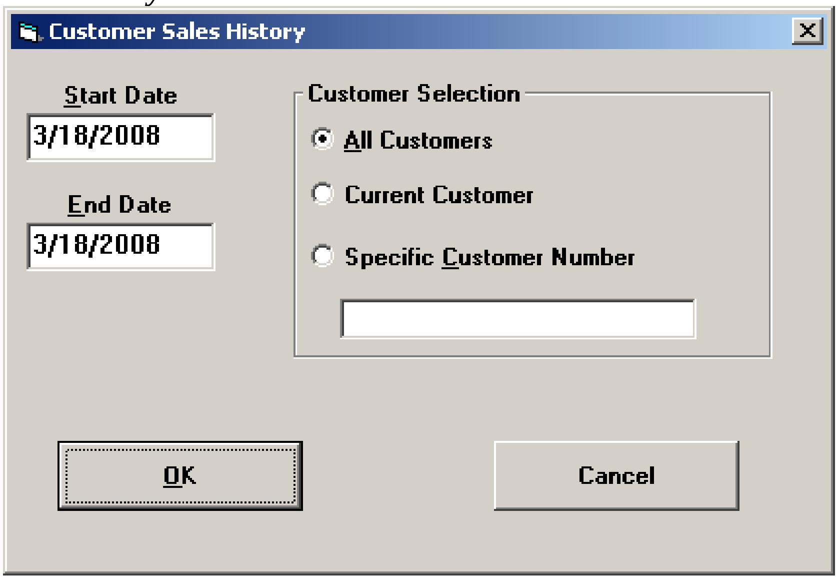
Customer Membership Info

This report generates a list of all the customers who have an active club membership. The report lists the Customer Number, Full Name, and Membership Expiration Date. To view this report, select **Customer Reports** from the **Reports** menu, then select **Customer Membership Info**.

Customer Purchases

This report displays a list of customers who purchased a specific item. The following information is displayed in the report: Date, Time, Customer Number, First Name, and Last Name. To view this report, select **Customer Reports** from the **Reports** menu, then select **Customer Purchases**.

Customer Sales History



This report displays the sales history of either all customers or a specific customer for a specified range of dates. The report shows every invoice and every item sold to the customer along with how many bonus points were earned. Each customer record appears on a separate page. To view this report, select **Customer Reports** from the **Reports** menu, then select **Customer Sales History**. Enter the start and end date, select either all customers or enter a specific customer number, then click on **Display** or press **<ALT+D>**. Click on **Exit** or press **<ALT+X>** to exit without viewing the report.

Most Frequent Buyers (Top 10)

This function displays a message box with the top ten frequent buyers for a specified date range. To access this screen, select **Customer Reports** from the **Reports** menu, select **Most Frequent Buyers (Top 10)**, then enter the start and end date of the desired date range.

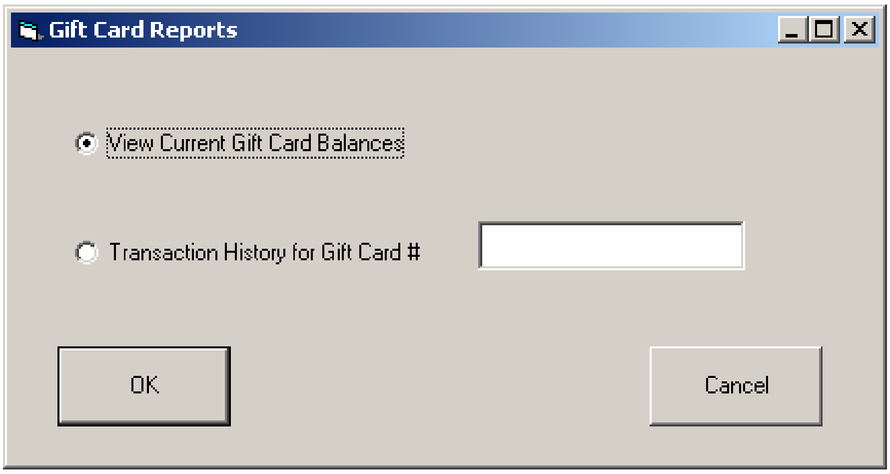
Phone List

This report generates a list of customers and their phone numbers. You can sort the list by either customer number or customer last name. The following information is displayed in the report: Customer Number, Last Name, First Name, Company Name, Phone Number, and Alternate Phone Number. To print a Customer Phone List by Customer Number, select **Phone List** from **Customer Reports** in the **Reports** menu, type '**1**', then click on **OK** or press **<ENTER>**. To print a Customer Phone List by Customer Last Name, select **Phone List** from **Customer Reports** in the **Reports** menu, type '**2**', then click on **OK** or press **<ENTER>**.

Ship To Info

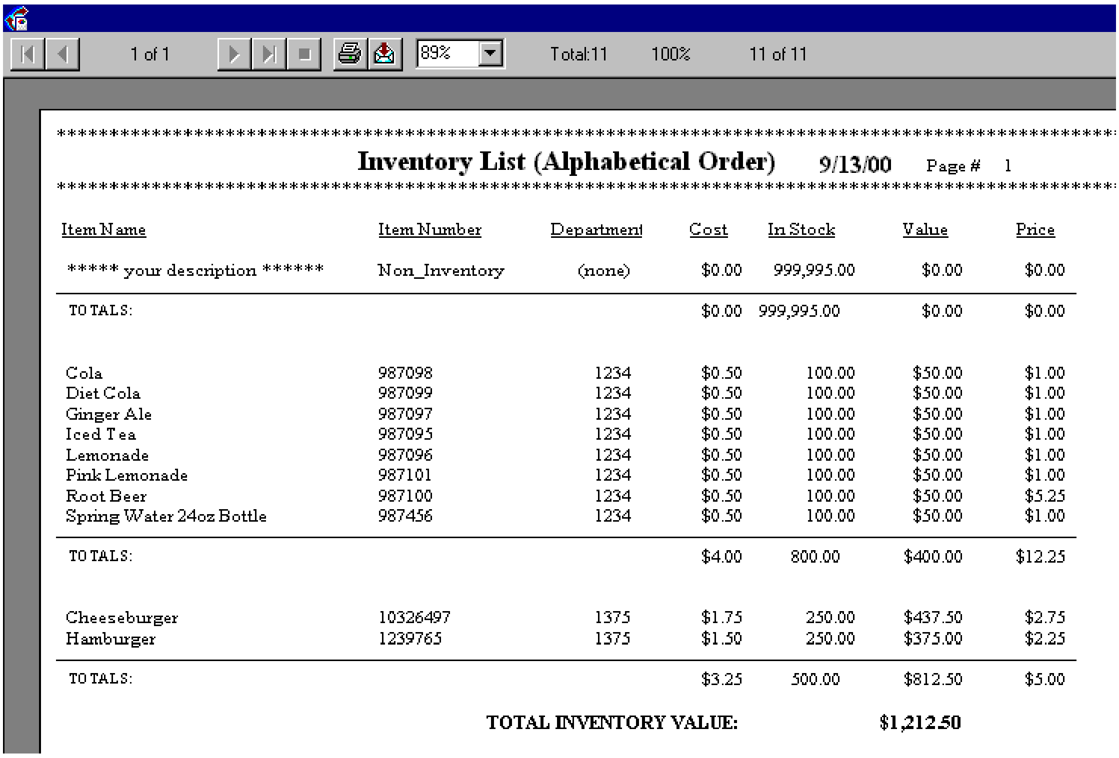
This report generates a list of customers and their Ship To addresses. All customer information, including credit card information, is printed. To print this report, select **Ship To Info** from **Customer Reports** in the **Reports** menu.

Gift Cards



This report will allow you to check the current outstanding balances on gift cards and receipts, or allow you to view a specific card's transaction history. To see a report of all balances, check the radio button next to **View Current Gift Card Balances** and hit **OK.** To see a card's history, hit the radio button next to **Transaction History for Gift Card #** and fill in the card you wish to view.

Sample Report

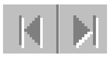


Inventory List (Alphabetical Order) 9/13/00 Page # 1

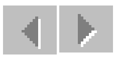
Item Name	Item Number	Department	Cost	In Stock	Value	Price
***** your description ******	Non_Inventory	(none)	$0.00	999,995.00	$0.00	$0.00
TOTALS:			$0.00	999,995.00	$0.00	$0.00
Cola	987098	1234	$0.50	100.00	$50.00	$1.00
Diet Cola	987099	1234	$0.50	100.00	$50.00	$1.00
Ginger Ale	987097	1234	$0.50	100.00	$50.00	$1.00
Iced Tea	987095	1234	$0.50	100.00	$50.00	$1.00
Lemonade	987096	1234	$0.50	100.00	$50.00	$1.00
Pink Lemonade	987101	1234	$0.50	100.00	$50.00	$1.00
Root Beer	987100	1234	$0.50	100.00	$50.00	$5.25
Spring Water 24oz Bottle	987456	1234	$0.50	100.00	$50.00	$1.00
TOTALS:			$4.00	800.00	$400.00	$12.25
Cheeseburger	10326497	1375	$1.75	250.00	$437.50	$2.75
Hamburger	1239765	1375	$1.50	250.00	$375.00	$2.25
TOTALS:			$3.25	500.00	$812.50	$5.00

TOTAL INVENTORY VALUE: $1,212.50

The above is a sample ExtremePOS report. At the top of each report view screen there are several command buttons with specific functions:



Use these buttons to go to the first and last pages of the displayed report.



Use these buttons to the previous or next page of the displayed report.

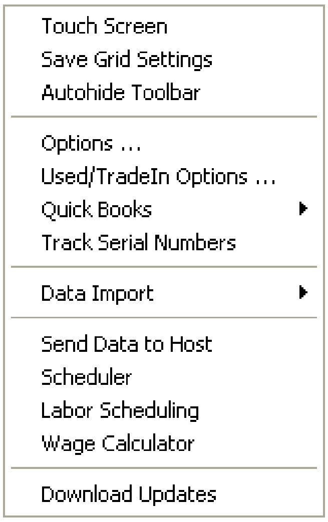
Click on this button to print the current report. You may print the whole report or a selection of pages.

Click on this button to export your report to another program. The following are your choices of format: Lotus 1-2-3 spreadsheet, Excel spreadsheet, Word for Windows, Crystal Reports, Data Interchange Format, HTML, Record Style, character-separated values, comma-separated values, paginated text, rich text format, text, tab-separated values, and tab-separated text. You must save the export file as a disk file (default) or Microsoft Mail (MAPI).

Chapter 7:

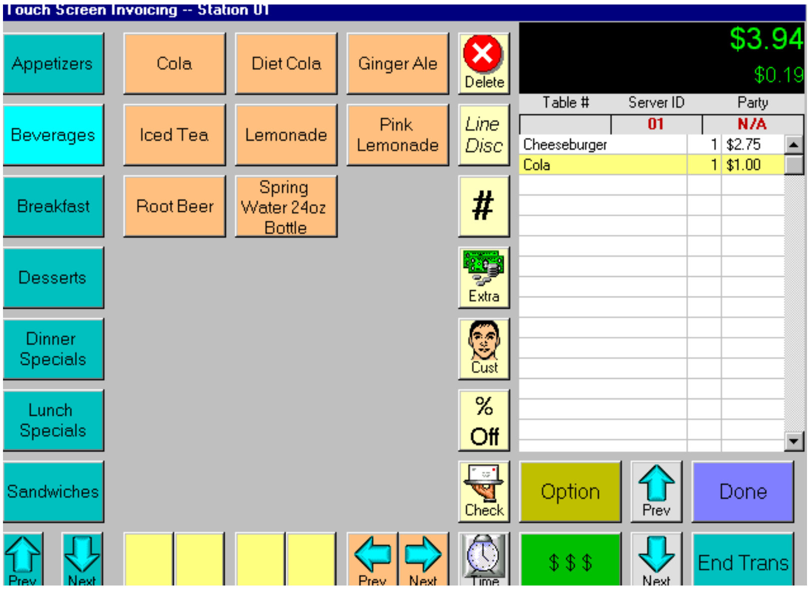
ExtremePOS Tools

Tools Menu



The **Tools** menu contains several tools to use with ExtremePOS. To access this menu, click on **Tools** in the Invoice Screen.

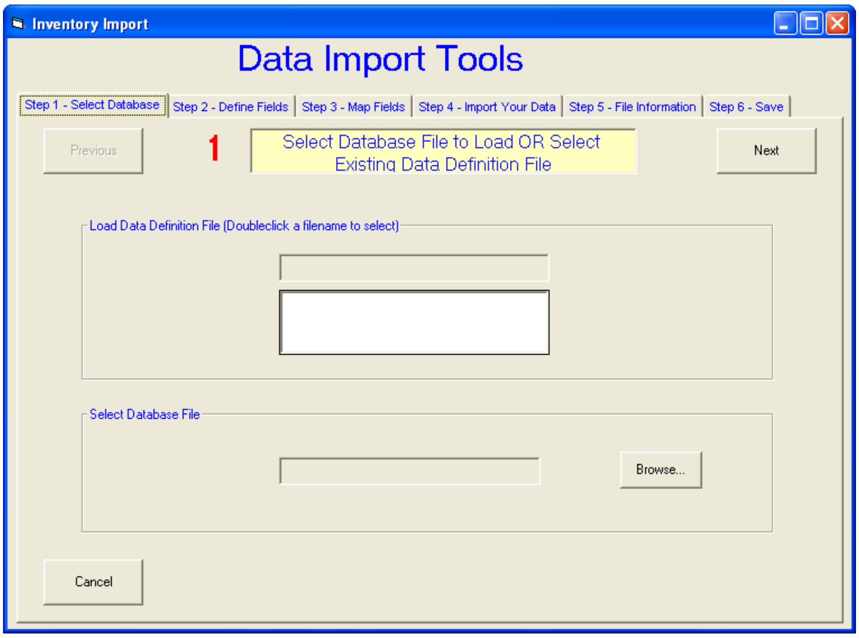
Touch Screen



The **Touch Screen** in ExtremePOS can be used in conjunction with a touch screen monitor to process invoices. You can do the same functions for invoicing as in the Invoice Screen, such as select a customer, enter a non-inventory item, recall an On Hold invoice, enter a multiple quantity, delete an item, discount an item, and void an invoice. You can choose to use a scanner or you can manually enter item numbers using a keyboard. You can also choose to display departments to minimize the number of items on the screen at once. To use the Touch Screen, select **Touch Screen** from the **Tools** menu. For more information on this screen, see **Chapter 9: Restaurant ExtremePOS: Invoice Screen**.

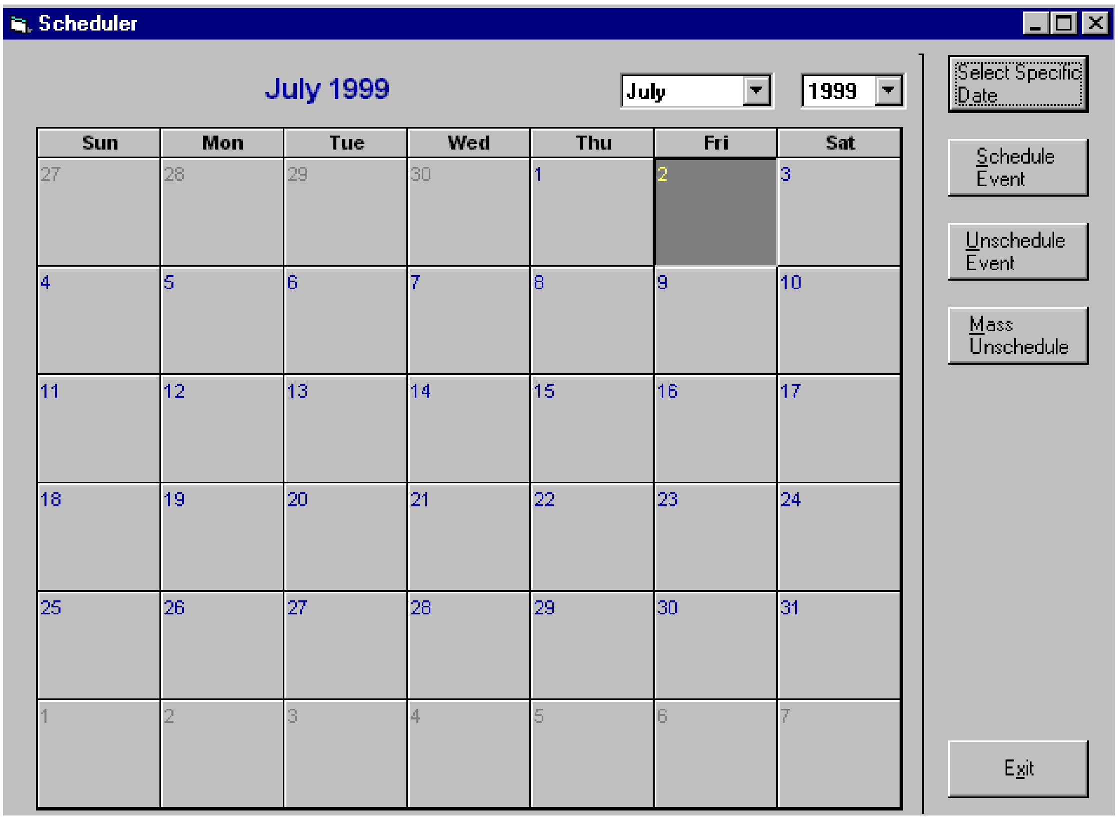
Data Import

Import Inventory



Import Inventory allows you to import delimited or fixed length vendor text files. Please contact technical support for help with this advanced feature of ExtremePOS.

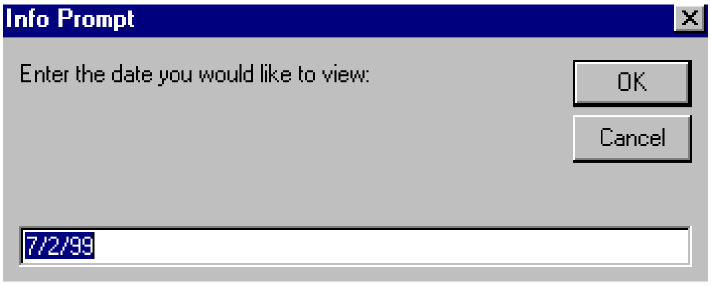
Scheduler



Scheduler allows you to schedule events under different Cashier IDs.

Select Specific Date

Select this option to move to a specific date on the calendar (Example: 7/2/99 for July 2, 1999)

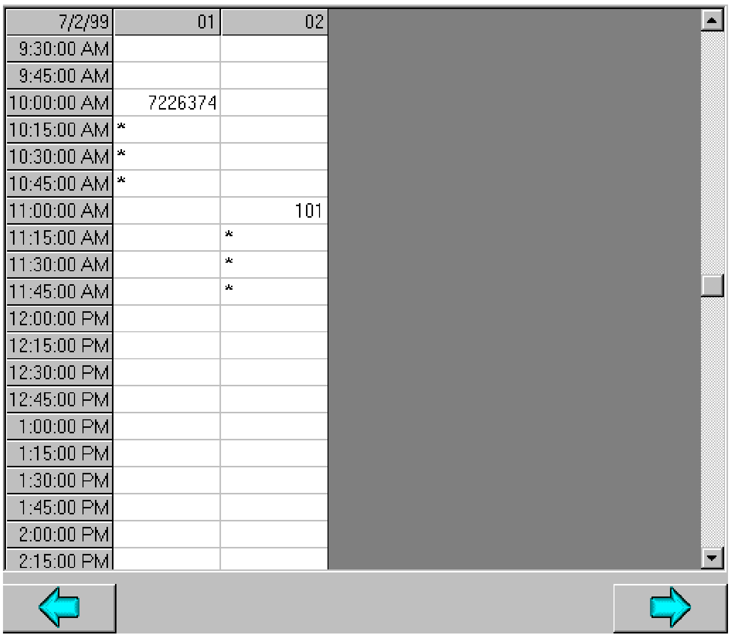


Schedule Event

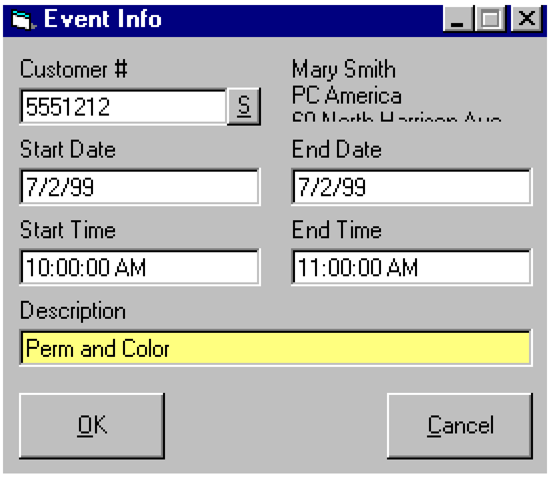
To schedule an event:

- Select a day by either clicking on a day on the calendar or selecting a date using **Select Specific Date**.

- Select the start time of the event by clicking on the appropriate box under the desired Cashier ID.



- Click on **Schedule Event** or press **<ALT+S>**. This screen will appear.



- Select a customer by clicking on **S** or by pressing **<ALT+S>**. Then enter the correct end time of the event and description.

- Click on **OK** or press **<ALT+O>** to schedule the event or click on **Cancel** or press **<ALT+C>** to exit the screen without scheduling an event.

Unschedule Event

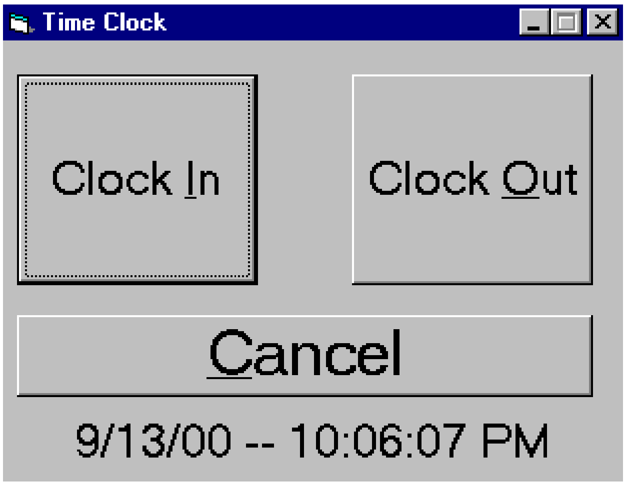
To unschedule an event:

- Click on the event that you wish to cancel or use the arrows to highlight the desired event.
- Click on **Unschedule Event** or press **<ALT+U>** to unschedule the event.

Mass Unschedule

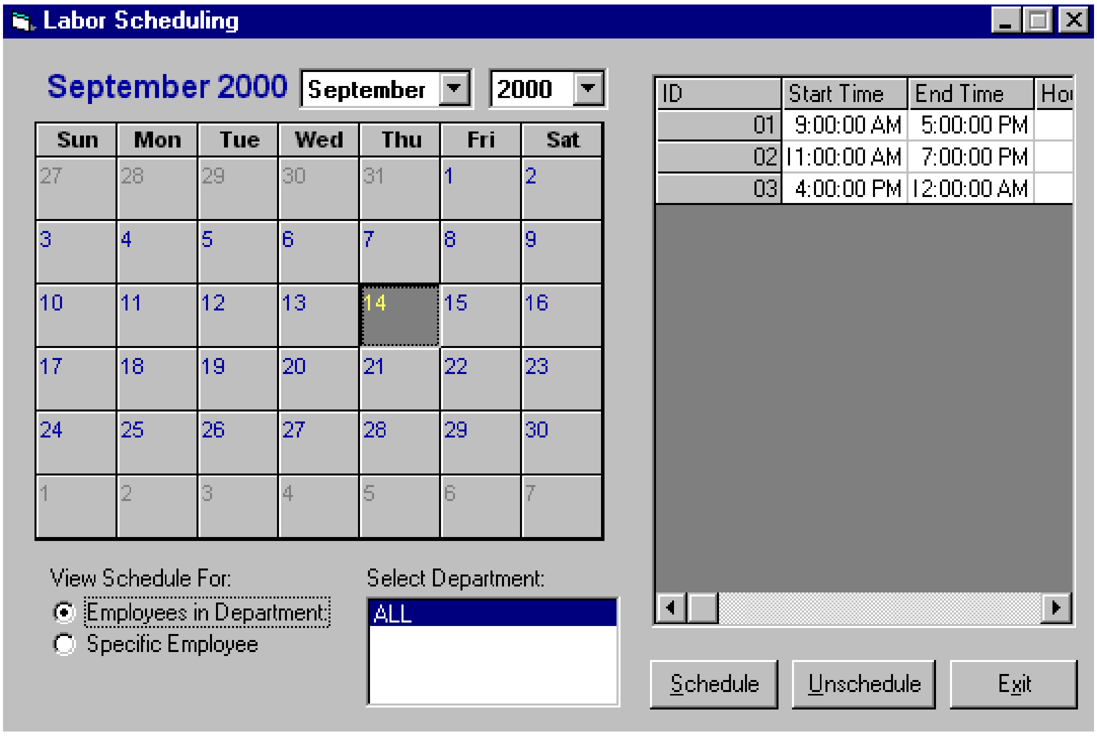
Mass Unschedule unschedules all past scheduled events. To do this, click on **Mass Unschedule** or press **<ALT+ M>**.

Clock In/Clock Out



This function allows employees to clock in or clock out. Restaurant employees are prompted to enter the amount of tips they collected when they clock out. To access this screen, select **Clock In/Clock Out** from the **Tools Menu**. To clock in, click on **Clock In** or press **<ALT+I>**. To clock out, click on **Clock Out** or press **<ALT+O>**. Click on **Cancel** or press **<ALT+C>** to quit without clocking in or out.

Labor Scheduling

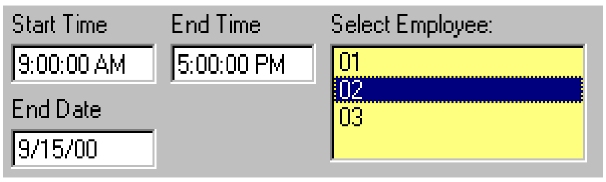


Labor Scheduling allows you to create work schedules for your employees in EXTREMEPOS.

Schedule

To schedule an employee:

- Select a day by clicking on a day on the calendar.
- Click on **Schedule** or press **<ALT+S>**.
- Enter the desired information then click on **Done** or press **<ALT+D>**.



Unschedule

To unschedule an employee:

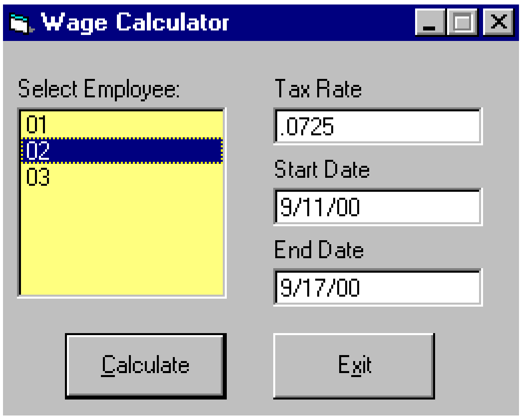
- Click on the event that you wish to cancel.
- Click on **Unschedule** or press **<ALT+U>** to unschedule the employee.

View Schedule

To view a day's schedule:

- Select a day by clicking on a day on the calendar.
- Choose which schedules to display, either **Employees in Department** or **Specific Employee**.
- Select **ALL** to display all employees in all departments, or select a specific department or employee to display.
- The Employee ID, Start Time, End Time, and Hour/Min for the selected employees will appear in the grid.

Wage Calculator



Wage Calculator allows you to calculate an employee's wages for a specified range of dates based on the hourly wage entered in **Employee Maintenance**. To calculate an employee's wages, select **Wage Calculator** from the **Tools Menu**, select the employee, enter the tax rate and range of dates, then click on **Calculate** or press **<ALT+C>**. Click on **Exit** or press **<ALT+X>** to exit without calculating wages.

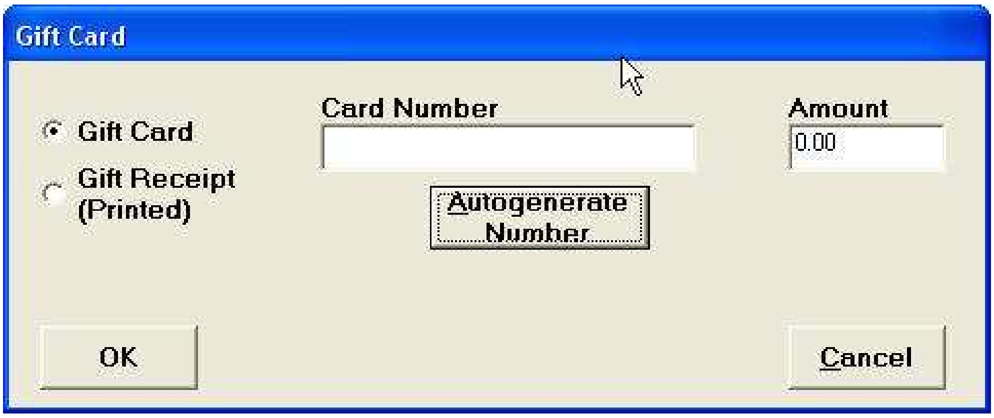
Chapter 8:

Using Gift Cards with ExtremePOS

Selling Gift Cards:

In order to sell a gift card at the register, just enter GC in the item number box at the POS screen.

This will bring up the Gift Card / Gift Receipt sale screen, shown below. At this screen, select whether you want to sell a physical gift card or print a gift receipt. Then scan or type in the gift card number. If you are printing a gift receipt, you can choose to let the system autogenerate a number for you by hitting the Autogenerate button under the card number text box. Then enter the gift card / gift receipt amount in the amount box and hit OK to add the gift card / receipt to the current invoice.



Redeeming Gift Cards:

To redeem gift cards / gift receipts, just hit "Gift" as the method of tender in the payment window.

.

This brings up the Gift Card / Receipt redemption screen, shown below. Scan or type the gift card number and the amount to redeem, then hit "Redeem". If there is a balance due to the customer and you want to issue a gift card / receipt for store credit, select "New". This will take you back to the Gift Card / Receipt sales screen where you can create the gift card / receipt.

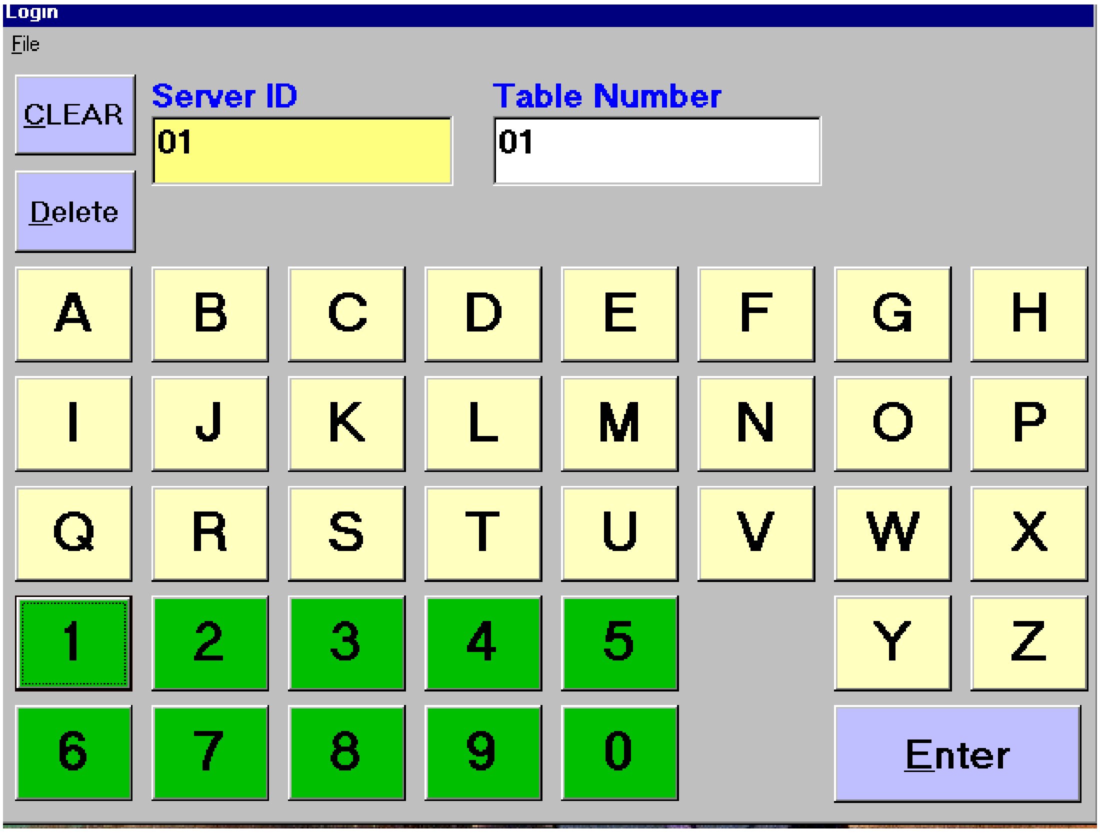
You can re-enter the redemption screen to redeem additional gift cards by selecting "Gift" again from the payment window. When you are done, select OK from the payment screen as youn normally do. Any Gift Receipts you've sold will be printed after the sales receipt.

It's that simple. Now you're ready to start using Gift Cards & Gift receipts!

Chapter 9:

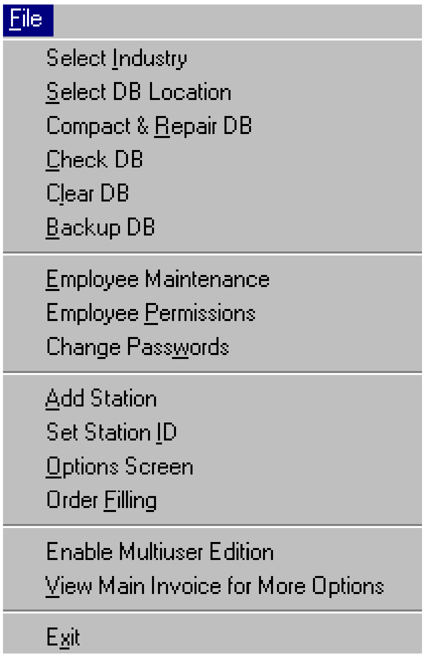
Restaurant ExtremePOS

Log-In Screen



The first screen that appears when you run Restaurant ExtremePOS is the Log-in Screen. To log in to Restaurant ExtremePOS, enter your **Server ID** and **Table #**, then click on **Enter** or press **<ALT+E>**. Click on **Delete** or press **<ALT+D>** to backspace or click on **Clear** or press **<ALT+C>** to clear the entire field.

File Menu



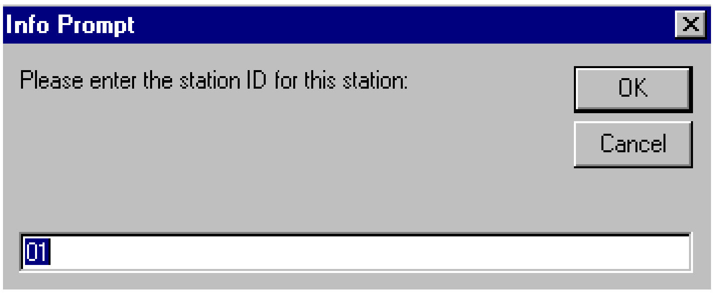
Several of the functions listed in the Restaurant ExtremePOS **File** menu have the same functionality in ExtremePOS.

For more information on the following functions, see **Chapter 1: Setting Up ExtremePOS: File Menu**:

- Select Industry
- Select Database Location
- Compact & Repair Database
- Check Database
- Clear Database
- Employee Maintenance
- Employee Permissions
- Change Passwords
- Add Station
- Enable Multiuser Edition

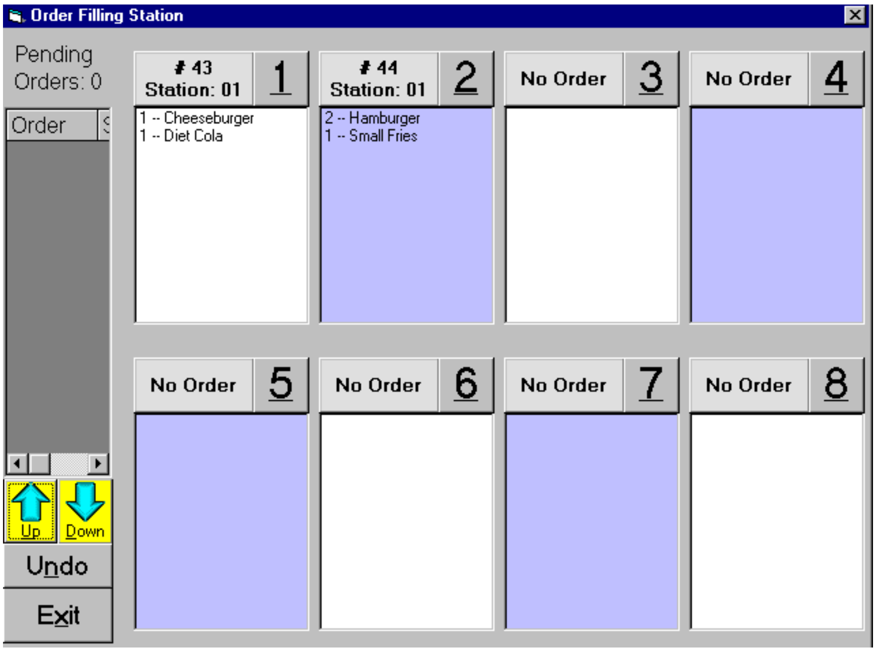
For more information on **Options Screen**, see **Chapter 1: Setting Up ExtremePOS: Setup Menu: Options Screen**.

Set Station ID



This function allows you to set station IDs for different stations once they have been created using **Add Station**. To access this function, select **Set Station ID** from the **File** menu. For more information on adding station IDs, see **Chapter 1: Setting Up ExtremePOS: File Menu: Add Station**.

Order Filling

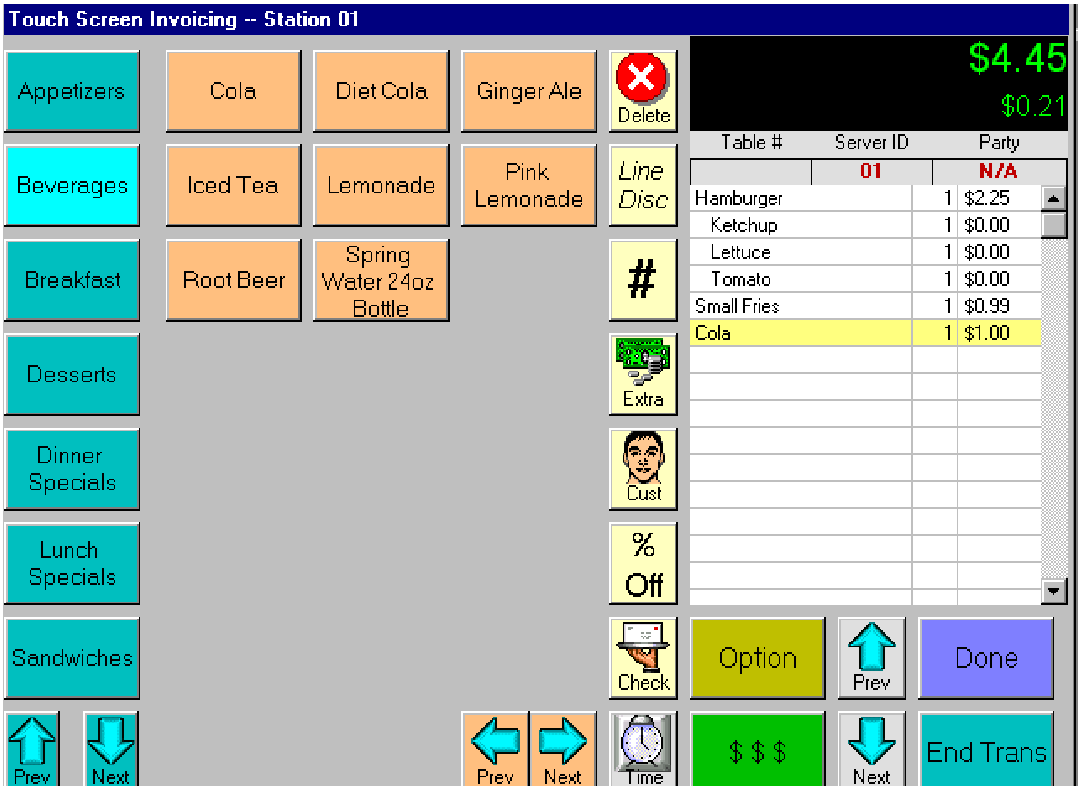


This screen displays all orders sent to this Station ID as designated in the **Printers** tab of **Inventory Maintenance**. Each tile shows a different invoice and they are displayed in the order in which they were placed. When an order has been completed, click on **No Order** or the corresponding number or press **<ALT+#>** to remove it from the active orders.

View Main Invoice for More Options

This function allows you to view the Main Invoice screen for more setup options. These options include: adding inventory (See **Chapter 2: Inventory Control**), adding customers (See **Chapter 3: Customer Control**), and printing reports (See **Chapter 5: Sales Information and Reports**). To display the main invoice screen, select **View Main Invoice for More Options** from the **File** menu.

Invoice Screen



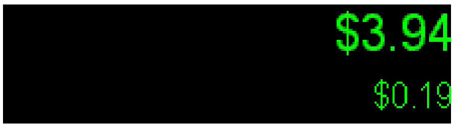
The Invoice Screen is where all of your daily invoicing will be done. Administration tasks such as **Reports, Accounts Receivable, Purchase Orders,** and **Inventory Control** are performed in different screens. Select **View Main Invoice for More Options** from the **File** menu in the **Log-In** screen to access these functions. Further explanations on these functions can be found in earlier chapters.

Before you begin processing invoices, you must manually enter your inventory items into REPOS. You may want to enter just a few items at first so you can get a feel of how the program works, then progressively add more items. Refer to **Chapter 2: Inventory Control** for more information on adding inventory items.

NOTE: For Restaurant ExtremePOS, all items MUST be entered into a department to appear on the Invoice Screen.

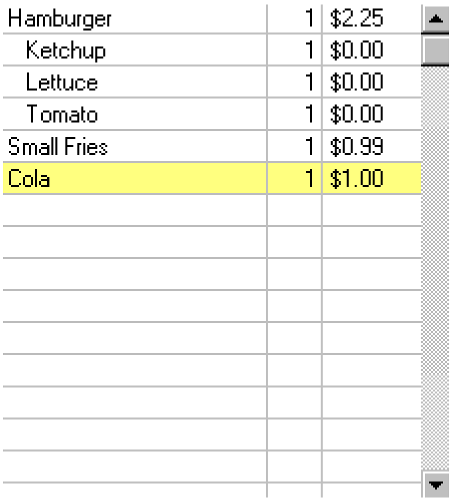
Dissecting the Invoice Screen

Totals

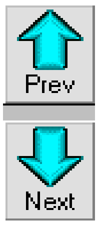


Running totals are kept for the current invoice. Each time you add a new inventory item to the invoice, the totals portion is updated. If you are using a pole display, that will be updated as well. The top number is the **Grand Total.** This line displays the invoice total after taxes. The second line is the **Tax Amount**. This line displays the total amount of tax for the entire invoice.

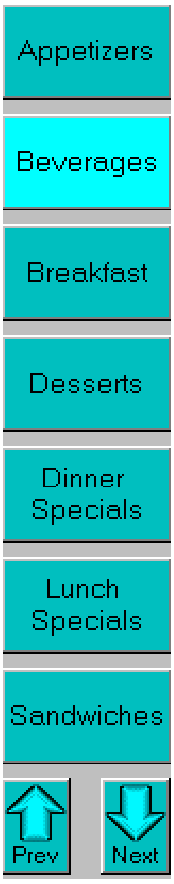
Invoice Grid



The Invoice Grid shows all of the items in the current invoice. The first column shows the item description. The second column indicates the quantity of that item, and the third column indicates the total price for that line. Use the arrows on the side of the grid to scroll up and down. The selected line of the invoice is highlighted yellow. To select a line, use the **Prev** and **Next** buttons below the grid to move the marker to the desired line or click on the desired line with the mouse.



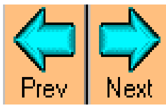
Departments



All of the departments are listed in alphabetical order on the left side of the screen. Up to seven departments can be displayed on the screen at one time. Use the corresponding **Prev** and **Next** buttons to scroll up and down through the list of departments. To select a department, press the desired button. Once the department is selected, the button will be a lighter color and all the items in that department will appear on the screen.

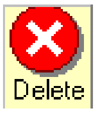
Items

Once a department has been selected, all of the items in it will be displayed. Up to twenty-one items can be displayed on the screen at one time. Use the corresponding **Prev** and **Next** buttons to scroll left and right through the list of items.



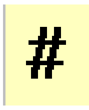
To select an item, press the desired button. Once an item has been selected, it will appear on the Invoice Grid. **NOTE:** To enter a multiple quantity for an item, you must press the **#** button and enter the appropriate quantity **BEFORE** selecting the item. For more information on the **#** button, see the following section.

Additional Invoice Screen Buttons



Delete: Click on this button to delete a line from the current invoice. To delete a line, use **Prev** and **Next** to highlight the desired line, then click on the **Delete** button. You will be prompted to enter the administrator password before being able to delete a line.

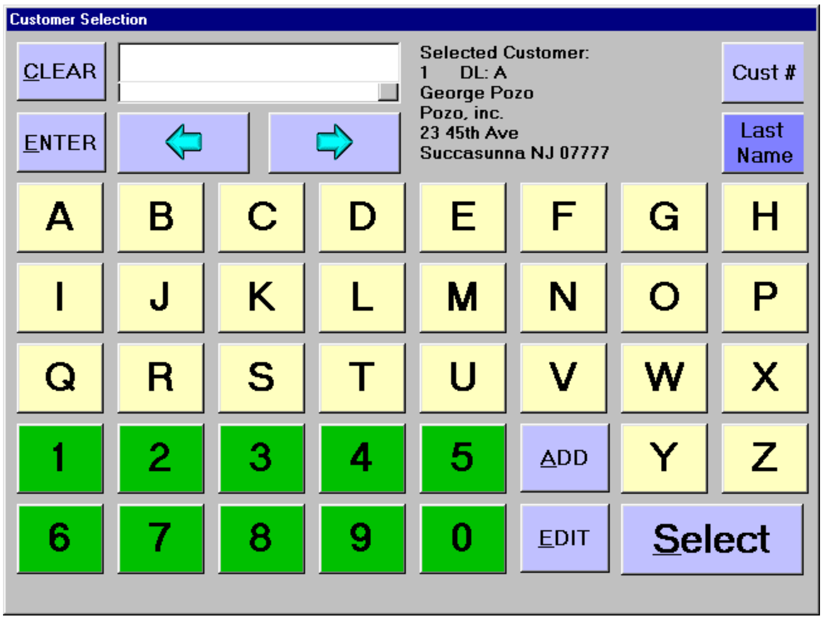
Line Discount: Click on this button to discount a line in the current invoice. To discount a line, use **Prev** and **Next** to highlight the desired line, then click on the **Line Discount** button. Enter the percentage (not the decimal value) to be discounted, then press **OK** to apply the discount. If you make a mistake, you may press **Clear** to re-eneter a percentage or press **Cancel** to exit the screen without applying a discount.



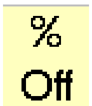
Quantity: Click on this button to enter a multiple quantity for an item. Enter the desired quantity, and then press **OK**. If you make a mistake, you may press **Clear** to re-enter an amount or press **Cancel** to exit without choosing a quantity. Once the quantity has been entered, select the desired item. **NOTE: You must enter the appropriate quantity BEFORE selecting the item**.

Extra Item: Click on this button to add a non-inventory item to the invoice. Enter the dollar amount of the non-inventory item, and then press **OK** to add the item to the invoice. If you make a mistake, you may press **Clear** to re-enter an amount or press **Cancel** to exit the screen without adding an item. The item will appear as **Extra Item** in the Invoice Grid.

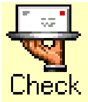
Customer: Click on this button to select a customer for the current invoice. This will bring up the customer selection screen:



To search for a customer, partially enter a customer number and then press the down arrow key <↓> to get a listing of all customers beginning with those numbers or letters. You can also use the left and right arrows to scroll through your customers. Click on **Select** to select the customer for the current invoice. You can also click on **Add** or **Edit** to open the **Customer Maintenance** screen (See **Chapter 3: Customer Control**).

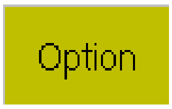


Invoice Discount: Click on this button to discount an entire invoice. Enter the discount percentage (not decimal) for the invoice. Press **OK** to apply the invoice discount or press **Cancel** to exit without applying a discount. Press **Clear** to re-enter a percentage.



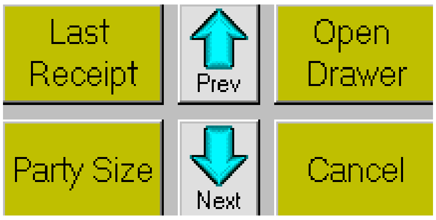
Check: Click on this button to print a check for the current invoice.

Time: Click on this button to clock in or clock out. For more information on this function, see **Chapter 6: EXTREMEPOS Tools: Clock In/Clock Out**.



Option

Click on this button to view more additional options – **Last Receipt**, **Open Drawer**, and **Party Size**.



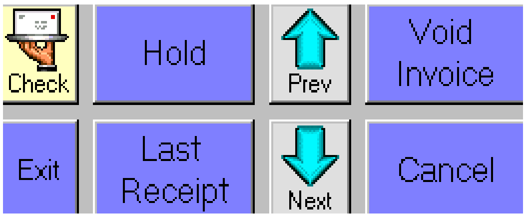
Last Receipt: Click on this button to print a copy of the last receipt printed at this station.

Open Drawer: Click on this button to open the cash drawer. You will be prompted to enter the administrator's password.

Party Size: Choose this option to enter the number of people in the party for the current invoice. Enter the correct number of people, and then press **OK**. If you make a mistake, you may press **Clear** to re-enter an amount or press **Cancel** to exit the screen without entering a party size.

Done

Click on this button to display options for exiting the invoice screen – **Hold**, **Void Invoice**, **Last Receipt,** and **Exit**.

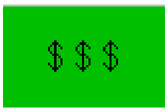


Hold: Click on this button to place the current invoice on hold. You will be returned to the Restaurant ExtremePOS Log-In screen.

Void Invoice: Click on this button to void the current invoice. You will be prompted to enter the administrator password.

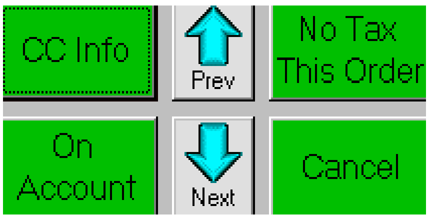
Last Receipt: Click on this button to print a copy of the last receipt printed.

Exit: Choose this option to exit the RPE Invoice Screen and return to the RPE Log-In Screen.



Payment Options

Click on this button to display payment options for the current invoice –**CC Info**, **On Account**, **No Tax This Order**.



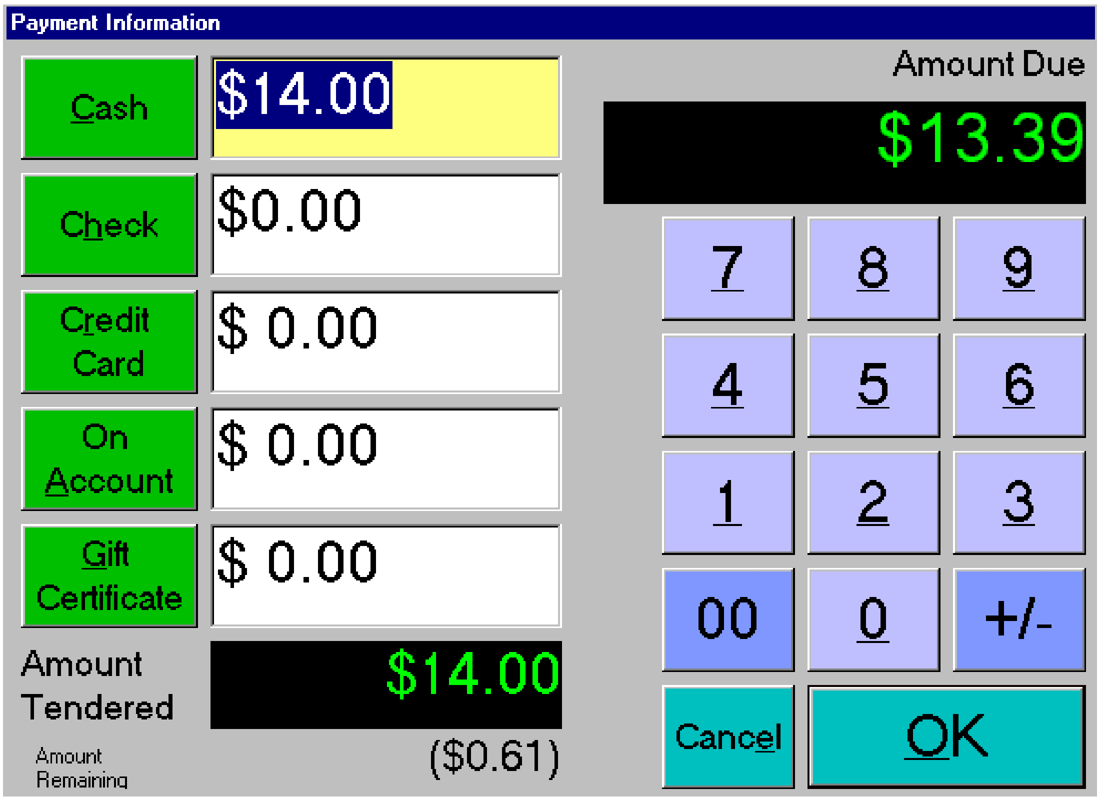
CC Info: Click on this button to choose Credit Card as the form of payment for the current invoice. You will be prompted to enter the credit card information.

No Tax This Order: Click on this button if tax should not be applied to the current invoice.

On Account: Click on this button to choose On Account as the form of payment for the current invoice. You must select a customer before choosing this option.

End Transaction

Click on this button to end a transaction. If **Prompt Amount Tendered** is set to **Yes** in the **Options Screen**, the amount-tendered screen will appear:



Enter the amount tendered in the correct field(s) (**Cash, Check, Credit Card, On Account,** or **Gift Certificate**). You can enter the amount using either the keyboard or the on-screen number pad. Once you have made your selection, click on **OK** or press **<ALT+O>**. You can click on **Cancel** or press **<ALT+E>** to exit without ending the transaction.

Amount Due: This is the amount due from the customer for the current invoice.

Amount Tendered: This is the payment received from the customer.

Amount Remaining: This is the amount still due on the invoice. Parentheses indicate a negative amount remaining (i.e. change to the customer).

Invoice Information

This box shows information about the current invoice – **Table #**, **Server ID,** and **Party.**

Table #: This is the table number where the party is seated.

Server ID: This is the Server ID of the employee serving this party.

Party: This is the party name. If a customer is selected, the customer's last name will appear here, otherwise N/A.

Restaurant Invoicing Tips

Server IDs

- When assigning Server IDs, make sure that they are easy to remember, such as the servers initials.

Item Numbers

- When assigning item numbers to items, have all similar items start with the same number. For example, have all burgers start with 1000 (Hamburger – 1000, Cheeseburger – 1001, BLT – 1002, etc.). This will make reports much more organized and easier to read.

Departments

- When assigning a department ID to a department, select a number that is similar to the items in that department. For example, if you were to create a department called "Burgers", you would assign it Department ID 1000 since all of the burgers have item numbers that begin with 1000.

Chapter 10:

Physical Inventory

ExtremePOS is capable of taking Physical Inventory in one of two ways. You will need to select one method or another. You should NOT use both methods to attempt to speed up the inventory process.

1. ExtremePOS works in conjunction with the ESC Mobile Inventory application, allowing you take and import inventory from a PDA device . The recommended PDA devices supported by Mobile Inventory are the Symbol 1550 (with integrated barcode scanning) and the Handspring with CSM150 barcode scanner attachment.

2. Physical Inventory can be performed on the station computer from within ExtremePOS.

We'll discuss the process for taking physical inventory using each of these mechanisms in the sections that follow.

Physical Inventory Using ESC Mobile Inventory

System Requirements

Desktop:

1. eXtremePOS, Musicware for Windows or Praiz for Windows
2. Palm Desktop software (available free for download from http://www.palm.com)

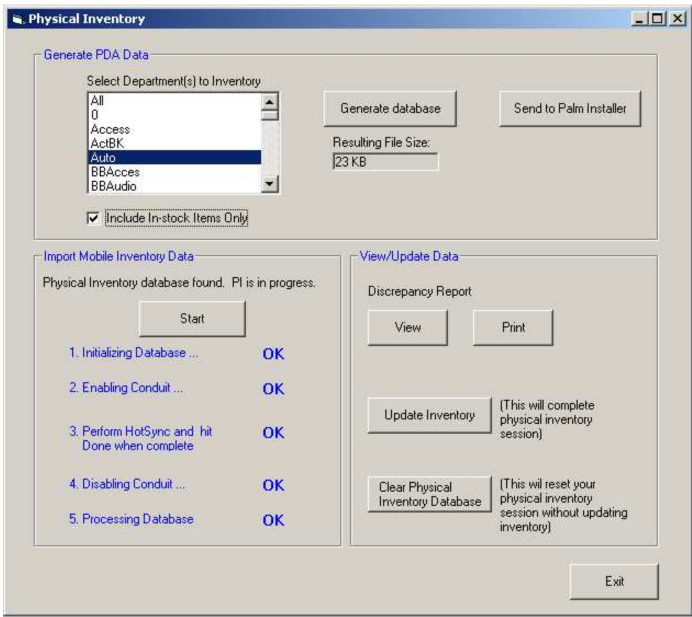
PDA:

1. ESC Mobile Inventory application
2. Handspring Visor and Symbol CSM 150 Barcode Scanner springboard module or Symbol SPT 1550 with serial cradle

The Physical Inventory Process

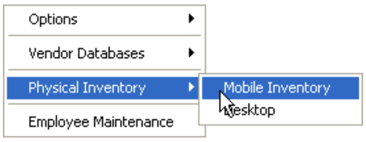
This section will only describe the steps involved in taking physical inventory. For more details on Mobile Inventory, see the next topic.

Important: First, select a POS station which you will use for physical inventory. All physical inventory functions, including all HotSyncs, should be performed to the selected station. eXtremePOS currently does NOT support HotSyncing to multiple stations. Performing HotSyncs to multiple stations will result in incorrect totals.



Step 1: Create and upload PDA Inventory Database

Start eXtremePOS and select Tools -> Physical Inventory -> Mobile Inventory from the login screen to enter the Physical Inventory screen.



In the “Generate PDA Database” frame, select the department(s) you want to inventory. To inventory your entire store, select “All” from the Department list box. To select multiple departments, hold down the “Control” key and click each department you want to select.

Note: If you have a large number of items in inventory, it is recommended that you break down your physical inventory by department. This will reduce the size of your PDA database and speed up database searches on the PDA. Mobile Inventory will only recognize and count items in the selected departments.

Select whether you want to include In-Stock Items only in your PDA database by checking or unchecking the box found below the department list. If you have a large number of items in your store database that are not in stock, you may want to exclude these item in order to reduce PDA database size.

Note: Be aware that if you exclude these items, they will not be recognized or counted by Mobile Inventory.

Click “Generate Database” button. The database files will be created and the resulting file size will be displayed. Ensure the resulting file size does not exceed the available memory on your PDA device or the file HotSync will fail. If you need to reduce the file size, reduce the number of departments to inventory or select “include in-stock items only” and click “Generate Database” again to recreate the database files. There are 4 database files created. They are:
Cats.pdb
Depts.pdb
InvDtl.pdb
InvMain.pdb

Click “Send to Palm Installer”. This will start up the Palm Installer program (included with your Palm Desktop) and pass it the newly generated PDA database files. Palm installer will come up and show you the files to be installed. Select “Done”. Palm Installer should give you a message box telling you that files will be installed the next time you perform a Hot Sync.
Note: You will not be able to send files to Palm Installer again until you have performed a Hot Sync. If you want to replace the database files with new ones, you should manually start up Palm Installer from Palm Desktop, select the 4 pdb files listed above and choose “remove” to clear them from the list of files to be installed. You will then be able to send the new files from eXtremePOS.

Insert your PDA in the cradle and perform a HotSync. This will physically upload the database files to your PDA. For more information on HotSyncing, see your PDA documentation. The PDA will have to be HotSynced at the computer where the database was generated in order for the database to be uploaded.

Step 2: Collect inventory using ESC Mobile Inventory

This section is intended as an overview only. Please review the “Mobile Inventory Tutorial” appendix to this manual before using Mobile Inventory.

Mobile Inventory will need to be installed on your PDA. Installation instructions are included in the “Readme” file provided with your Mobile Inventory application.

Launch Mobile Inventory by clicking the Barcode icon on your PDA. Select “Start” from the startup screen. This will bring you to the Scan Screen.

Begin taking inventory. Scan items to add them to your quantities by selecting the Scan button on the screen. At any time, you can see the current count and expected count for an item by selecting “details” while that item is displayed on the screen.

> Note: Symbol will allow you to choose any of the 4 keys on your PDA to double as a scanner key. This may simplify the process of taking inventory since it may be inconvenient to hit the onscreen button at certain angles. To select a scan key, click on the “Symbol” icon on your PDA screen and follow the instructions.
>
> Note: Mobile Inventory will only recognize and count items in the departments you selected when generating the database, so you should only inventory these departments. You will be able to repeat this process as many times as needed in order to inventory all desired departments. Select “Options” from the startup screen to view all the departments included in your database

When you have completed taking inventory, exit Mobile Inventory by selecting “Done” on the scan screen, then “Exit” on the startup screen.

Step 3: Import Inventory from your PDA

Restart eXtremePOS, and enter the Physical Inventory screen again.

Click the “Start” button in the “Import Mobile Inventory Data” frame. eXtremePOS will now walk you through the process of importing your data. First, eXtremePOS will create a new Physical Inventory database on your computer if one does not exist. This database will be used to sum up totals from all your Mobile Inventory sessions. Then eXtremePOS will enable the Conduit program that will be used to sync your PDA database with the Physical Inventory database on your desktop during HotSync.

eXtremePOS will ask you to perform a HotSync, then hit “Done” when complete. Put your PDA in the cradle and perform a HotSync. Wait until the HotSync has completely finished before hitting “Done” on the Physical Inventory screen. Hitting “Done” button early will result in improper program operation.

Note: Ensure you always HotSync to the same station you have selected for physical inventory.

eXtremePOS will now complete the import and add the PDA database totals to the Physical Inventory database on your computer. Because eXtremePOS keeps a running total of your inventory, you may import multiple times with one or more PDAs running Mobile Inventory.

To continue to count inventory in the same department(s), restart Mobile Inventory and clear the quantities to start with zero count in the database. For information on clearing quantities, see the Mobile Inventory tutorial.
To take inventory in different department(s), create a new PDA database as described in step 1, selecting the desired departments from the department list box.

Step 4: View Discrepancy Report

Select View or Print inventory discrepancy report to see all differences between expected and actual quantities, and value of any lost inventory. Discrepancy report addresses both new and used items. If you select to view the report, it will be sent to a text file in your store data directory named “DiscRpt.txt”. You can select to save this to a unique file name if you wish to retain the report. Otherwise the report will be overwritten the next time “View Report” is selected.

Note: When quantities are updated, the final discrepancy report will be automatically saved to your store data directory under Backup\Reports. The filename will be based on the date and time the report was created. The program will inform you of the location and filename that the final report is saved to..

Step 5: Update Quantities

Selecting “Update Inventory” will update overwrite the quantities in your store database with the counted quantities in your physical inventory database. Update should not be performed until you have COMPLETELY inventoried the departments you have selected. Quantities will be updated ONLY for the departments which you have inventoried during this session. It is recommended that you view the discrepancy report one last time before updating quantities to verify that you are ready to perform the update. When the update is performed, it CANNOT be undone. If you find you need to adjust the quantities after you have already performed the update, you will need to do this at the inventory maintenance screen.

The program will automatically perform a full back up your database before it updates quantities. If for any reason you need to return to your previous quantities, you actually can restore from this backup file. If you run into a situation where you feel you need to revert to the backup, we recommend you contact customer support for assistance.

Note: If for any reason you need to return to your previous quantities, you actually can revert to this backup file. If you run into a situation where you feel you need to revert to the backup, we recommend you contact customer support for assistance.

If you wish for any reason to discard the inventory taken thus far, select “Clear Physical Inventory Database”. This will delete the quantities and allow you to restart inventory from scratch. This is primarily helpful if you are experimenting with the software rather than actually taking inventory. Be aware that once you select “Clear Physical Inventory Database”, it CANNOT be undone.

ESC Mobile Inventory

You will need to have created and uploaded a Palm inventory database using eXtremePOS, Musicware or Praiz before launching Mobile Inventory. For more information on generating the Palm inventory database, see your POS software manual.

1. Main Screen – This is the startup screen for Mobile Inventory.

Start – Go to scan screen and begin/continue taking inventory

Options – Go to the options screen to change setup parameters, clear database quantities or view database information.

Exit – Quit the application

2. Options screen

Clear Quantities - allows you to reset the count on all items in your Palm database to zero. If you collect quantities on a dept(s), hot sync those quantities back to your POS software, and wish to continue collecting quantities in the same dept(s), you should Clear Quantities before continuing. Clearing your quantities will keep you from re-syncing the previous count to your POS software (which would result in an inaccurate count). ESC Mobile Inventory will detect that your data has been Hot Synced and will prompt you to Clear Quantities when you restart the software.

Check Digit – This button selects whether or not Mobile Inventory should include the check digit when looking up an item in your database. If you include the barcode check digit in your POS software inventory database, make sure “Check Digit On” is shown. If you exclude the barcode check digit in your inventory database, make sure “Check digit Off” is shown.

Done – Exit the options screen and return to the main screen

3. Scan screen

Scan Button – Starts the CSM 150 scanner module when in scanner mode. This button is not available in manual mode. Mobile Inventory will perform a database lookup and show you the Item number and description of item scanned on the screen.
NOTE: The item is not added to your quantities until you either:

1. Hit the “Add” button
2. Scan another item. This will hit the “Add” button behind the scenes and then display the newly scanned item. If you don’t wish to add the item to your quantities, you should hit “Cancel” prior to scanning another item.

Item Number box – In manual mode, this box is used to enter the item number. In scanner mode, this box displays the item number scanned.

Quantity box – Use this box to indicate the quantity of the scanned item to add to inventory. Quantity can only be modified after an item is scanned (or manually entered), but before hitting the “Add” button (or scanning another item). Default quantity is always “1”.

New/Used Select Button – Determines whether to increment new quantity or used quantity for the item scanned (or manually entered). When inventorying a new item, ensure the New/Used Select Button shows “New Item”. When inventorying a used item, ensure the Button shows “Used Item”. The New/Used Button should be toggled only after an item is scanned but before hitting the “Add” button (or scanning another item).

Add Button – Adds the quantity in the Quantity Box of the item shown in the Item Number Box to either the New or Used Quantities (based on the state of the New/Used Select Button). The Item Number Box and Quantity Box is then cleared and is ready for the next item.
NOTE: If you have an item in the Item Number box, then scan another item, the program will automatically hit the “Add” button and add the item to your quantities before displaying the new item.

Cancel Button – Clears the item number box and quantity box without adding the item to your inventory quantities.

Details Button – Shows the Details screen for the Item in the Item Number box.

Mode Select Button – Toggles between Scanner or Manual mode. As you will most likely be using a CSM 150 Scanner Module, you should ensure the Button reads “Scanner”. To manually enter items, ensure the button shows “Manual”. The application defaults to Scanner mode on startup.

4. Details screen

Tabs - Details screen allows you to quickly view reference data on a scanned item. Select the appropriate tab to view Quantities, General or Price information.

Back – Return to the Scan Screen

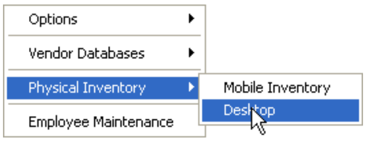
Physical Inventory from within ExtremePOS

The Physical Inventory Process

This section will cover the steps involved in taking physical inventory from within ExtremePOS.

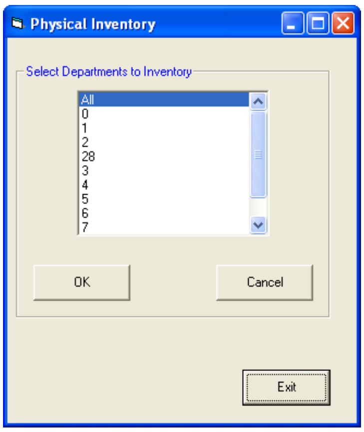
Step 1: Select the Department to inventory.

Start eXtremePOS and select Tools -> Physical Inventory -> Desktop from the login screen to enter the Physical Inventory screen.



You will be presented with the Department Select screen, depicted below. Select the department(s) you want to inventory. To inventory your entire store, select "All" from the Department list box. To select multiple departments, hold down the "Control" key and click each department you want to select.

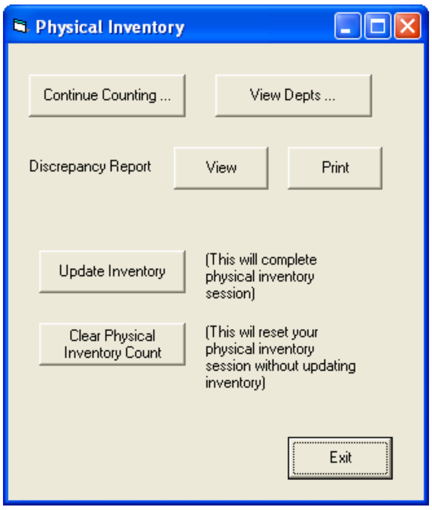
Note: While taking Physical Inventory, ExtremePOS will only recognize and count items in the selected departments.



Click the OK button. This will create a Physical Inventory database in your "Shared Files" directory called PI_Sum.mdb. This Access database file will hold your inventory quantities for the specified departments until you are ready to update quantities in your store database.

IMPORTANT: You will need to COMPLETE inventory in the selected departments before you update quantities to your store database. At that point, you will be able to go back and select other department(s) to inventory.

You will now be presented with the main Physical Inventory screen, shown below.



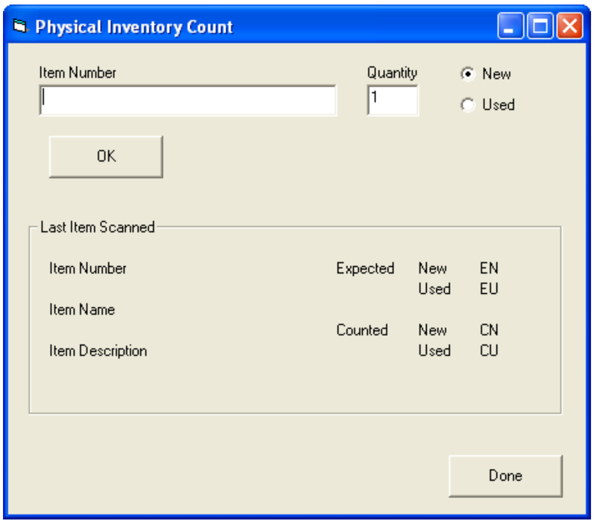
You should select "Continue Counting" to bring up the Count screen and begin taking inventory. Select "View Depts" if you want to see a list of departments currently being inventoried.

Step 2: Collect inventory from the Count Screen

The Count Screen is depicted below. In order to count an item:

1. Enter the quantity in the Quantity box
2. Indicate whether this is a new or used item by selecting the appropriate option button.
3. Scan the item OR type in the item number and hit OK

Information about the item including expected and actual quantities for new and used will be shown in the "Last Item Scanned" box. When you have completed taking inventory, exit the Count screen by selecting "Done". This will return you to the main Physical Inventory screen.



Note: ExtremePOS will only recognize and count items in the departments you selected when generating the database, so you should only inventory these departments. You will be able to repeat this process as many times as needed in order to inventory all desired departments.

Note: You can exit physical inventory at any time during the process and resume at a later time by again selecting Tools -> Physical Inventory -> Desktop from the login screen. ExtremePOS will indicate that you have a session in progress and allow you to continue counting where you left off.

Step 3: View Discrepancy Report

Select View or Print inventory discrepancy report to see all differences between expected and actual quantities, and value of any lost inventory. Discrepancy report addresses both new and used items. If you select to view the report, it will be sent to a text file in your store data directory named "DiscRpt.txt". You can select to save this to a unique file name if you wish to retain the report. Otherwise the report will be overwritten the next time "View Report" is selected.

Note: When quantities are updated, the final discrepancy report will be automatically saved to your store data directory under Backup\Reports. The filename will be based on the date and time the report was created. The program will inform you of the location and filename that the final report is saved to.

Step 4: Update Quantities

Selecting "Update Inventory" will overwrite the quantities in your store database with the counted quantities in your physical inventory database. Update should not be performed until you have COMPLETELY inventoried the departments you have selected. Quantities will be updated ONLY for the departments which you have inventoried during this session. It is recommended that you view the discrepancy report one last time before updating quantities to verify that you are ready to perform the update. When the update is performed, it CANNOT be undone. If you find you need to adjust the quantities after you have already performed the update, you will need to do this at the inventory maintenance screen.

The program will automatically perform a full back up your database before it updates quantities. If for any reason you need to return to your previous quantities, you actually can restore from this backup file. If you run into a situation where you feel you need to revert to the backup, we recommend you contact customer support for assistance.

If you wish for any reason to discard the inventory taken thus far, select "Clear Physical Inventory Count". This will delete the quantities and allow you to restart inventory from scratch. This is primarily helpful if you are experimenting with the software rather than actually taking inventory. Be aware that once you select "Clear Physical Inventory Count", it CANNOT be undone.

Selecting "Exit" will return you to the Login screen.

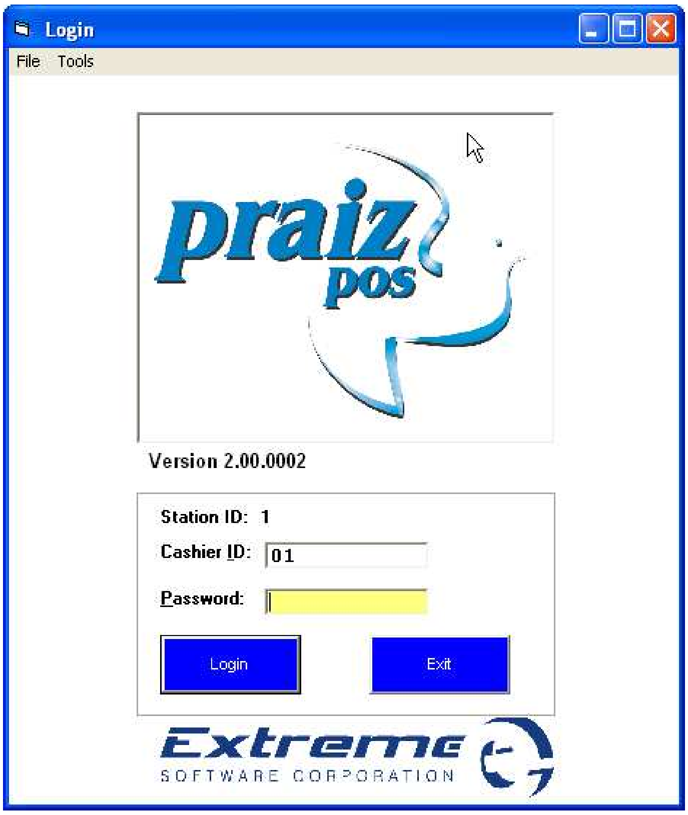
Appendix

A Quick Tutorial of ExtremePOS

This quick tutorial is designed to familiarize you with ExtremePOS. For this tutorial, we will be adding inventory, departments, and customers for a fictitious company. We will also process some transactons to get a feel for the invoicing process.

Log-in Screen

Note: Musicware and ExtremePOS users will see slightly different screens.



The first screen that appears when you run PRAIZ® is the Log-in Screen. To log in, type in the password for the shown cashier ID, then press **<ENTER>** or click on **Login**. To log in as the administrator, type in the administrator password under any Cashier ID. To log in as a cashier under a different cashier ID, type in the desired ID in the **Cashier ID** field, then enter that cashier's password. You may only change Cashier IDs if you have manually added in the ID through the **Tools** menu. This option is enabled in both the single and multi-user versions.

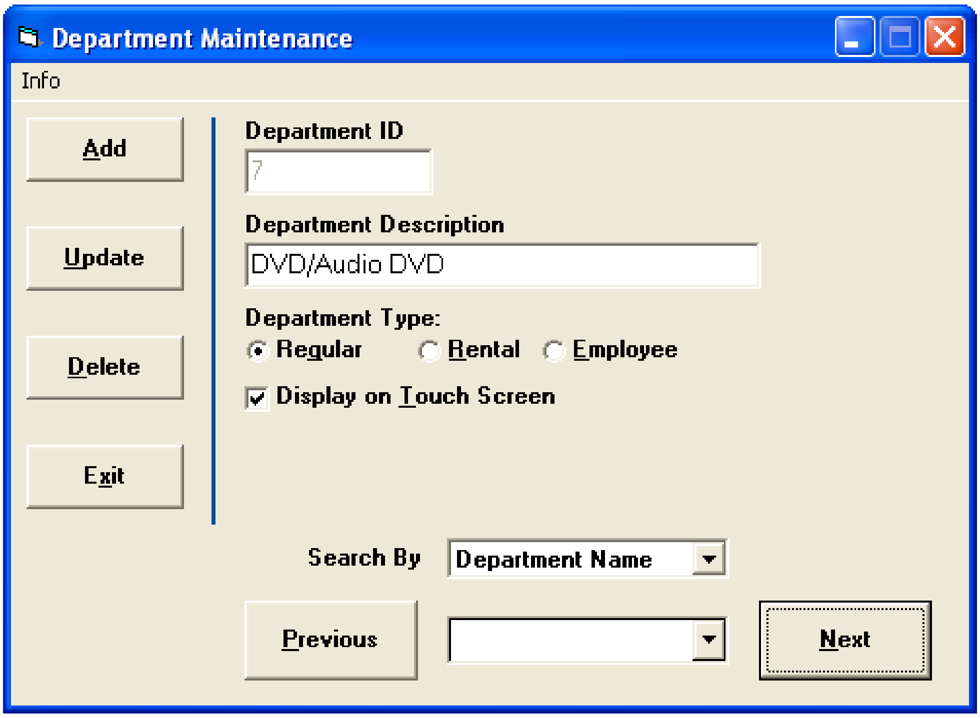
The default Administrator Password is: admin

The default Cashier Password is: cashier

Add a Department

1. To add a department, click on the **View** menu, and then click on **Departments**.

2. A window entitled **Department Maintenance** will appear on your screen, as shown below:



3. Click on **Add**.

4. For **Department ID**, enter 7.

5. Use **<TAB>** to move from **Department ID** to **Department Description**.

6. For **Department Description**, enter **DVD/Audio DVD**.

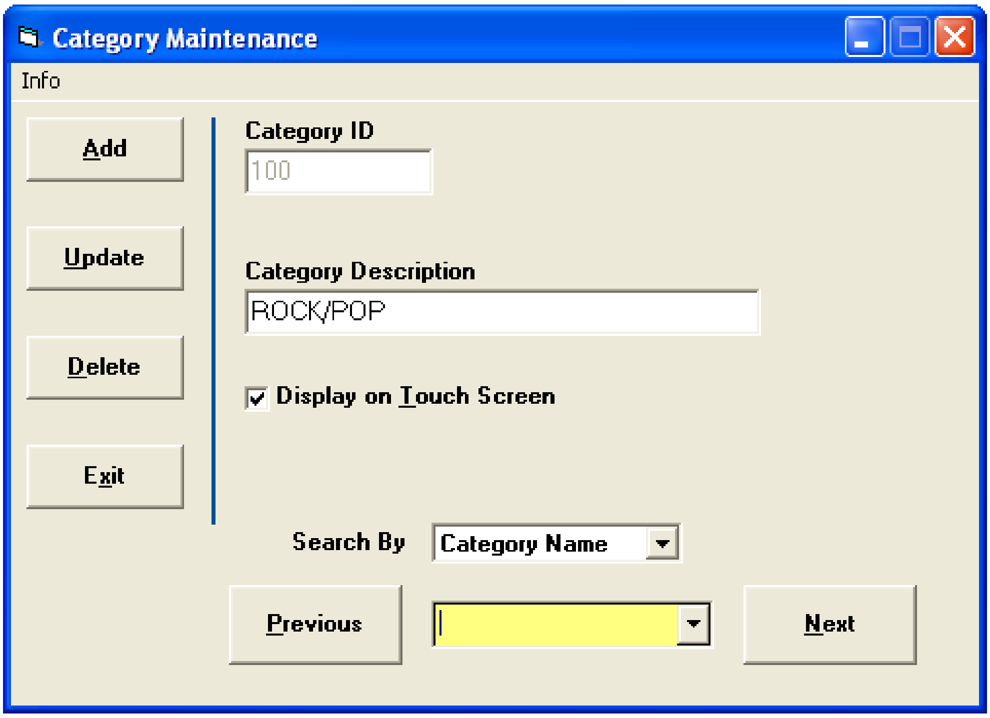
7. Choose the **Department Type** as **Regular**.

8. Click on **Save**. You have just entered a department.

Add a Category

1. To add a category, click on the **View** menu, and then click on **Departments**.

2. A window entitled **Category Maintenance** will appear on your screen, as shown below:



3. Click on **Add**.

4. For **Category ID**, enter 100.

5. Use **<TAB>** to move from **Category ID** to **Category Description**.

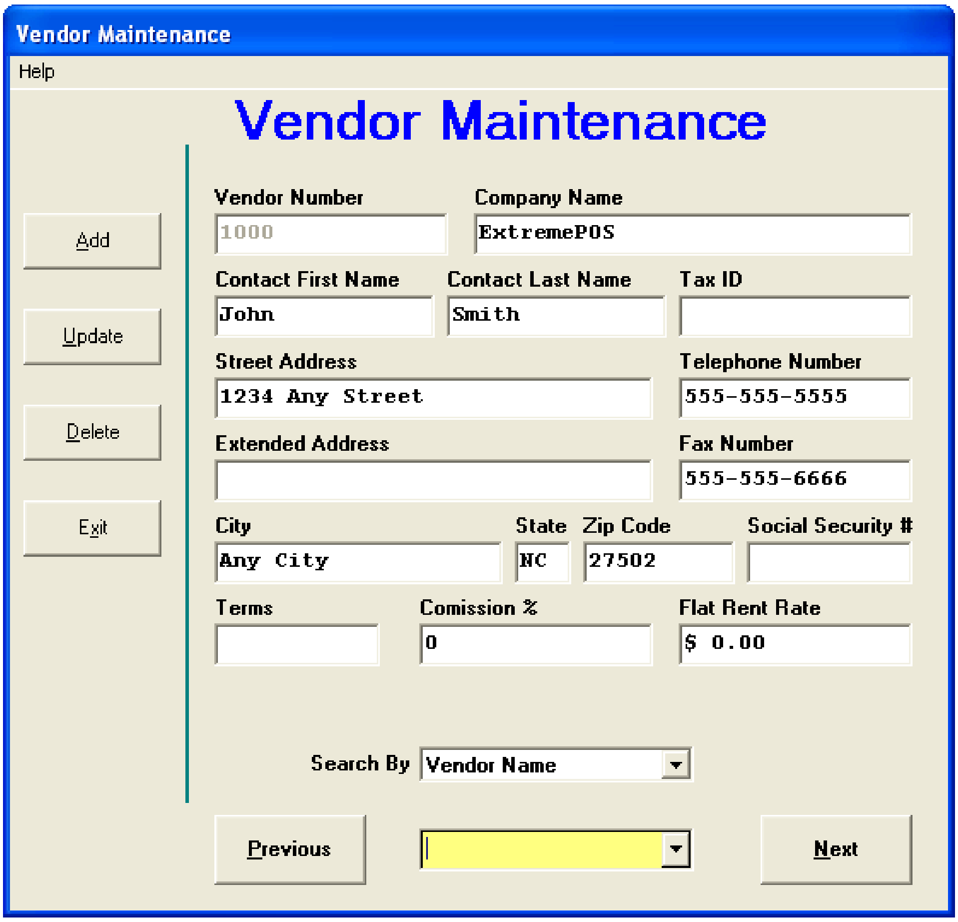
6. For **Category Description**, enter **ROCK/POP**.

7. Click **Save**. You have just entered a category.

Add a Vendor

1. To add a vendor, click on the **View** menu, and then click on **Vendors**. Select **Vendor Maintenance**.

2. A window entitled **Vendor Maintenance** will appear on your screen, as shown below:



3. Click on **Add**.

4. For **Vendor Number**, enter 1000.

5. Press **<TAB>** to move the cursor to the **Company Name** field. Type **ExtremePOS**.

6. Press **<TAB>** to move the cursor to the **Contact First Name** field, and type **John**. Press **<TAB>** to move the cursor to the **Contact Last Name** field, and then type **Smith**.

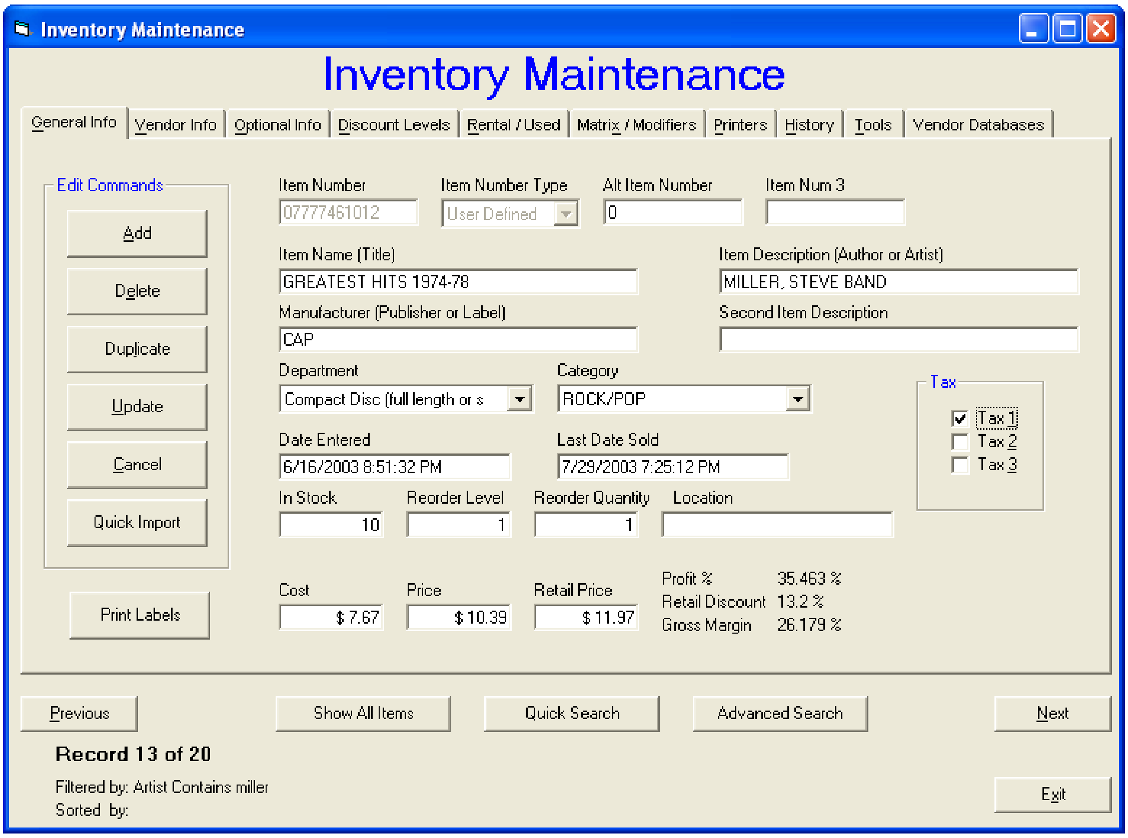
7. Press **<TAB>** to move the cursor to the **Address** fields. Type **1234 Any Street.** Move the cursor to the **City** field, and then type **Anytown**. Move the cursor to the **State** and **Zip Code** fields, and then type **NC** and **27502**.

8. Move the cursor to the **Telephone Number** field, and then type **555-555-5555**. Press **<TAB>** to move the cursor to the **Fax Telephone Number** field, and then type **555-555-6666**.

9. Click on **Save**. You have just added a vendor.

Add an Inventory Item

1. To add inventory, click on the **View** menu, then select **Inventory**. The screen below should appear:



2. Click on **Add**.

3. Click on the **Item Number** field and type or scan **07777461012,** or the item number you are adding.

4. Click on **Item Number Type** and select the appropriate type for the number you are adding.

5. Click in the **Item Name** field and type the "title" of the item you are adding.

6. Click in the **Item Description** or press **<TAB>** and enter **MILLER, STEVE BAND**.

7. Press **<TAB>** and move to the Manufacturer field and enter **CAP**.

8. Click on the department list box and select a **Department**.

9. Click on category field and select a **Category**.

10. Press **<TAB>** to move the cursor to the **In Stock** field. This field specifies how much of the item you have in stock. Type **10**.

11. Click on the **Cost** field. The **Cost** is how much the item cost to purchase from the vendor. Type **7.67**.

12. Press **<TAB>** to move the cursor to the **Price** field. The **Price** is for how much the item is being sold. Type **10.39**.

13. Press **<TAB>** to move the cursor to the **Retail Price** field. The **Retail Price** is a reference field. It can be used to record how much the item in question is going for in the market. Type **11.97**.

14. Click on **Tax 1**.

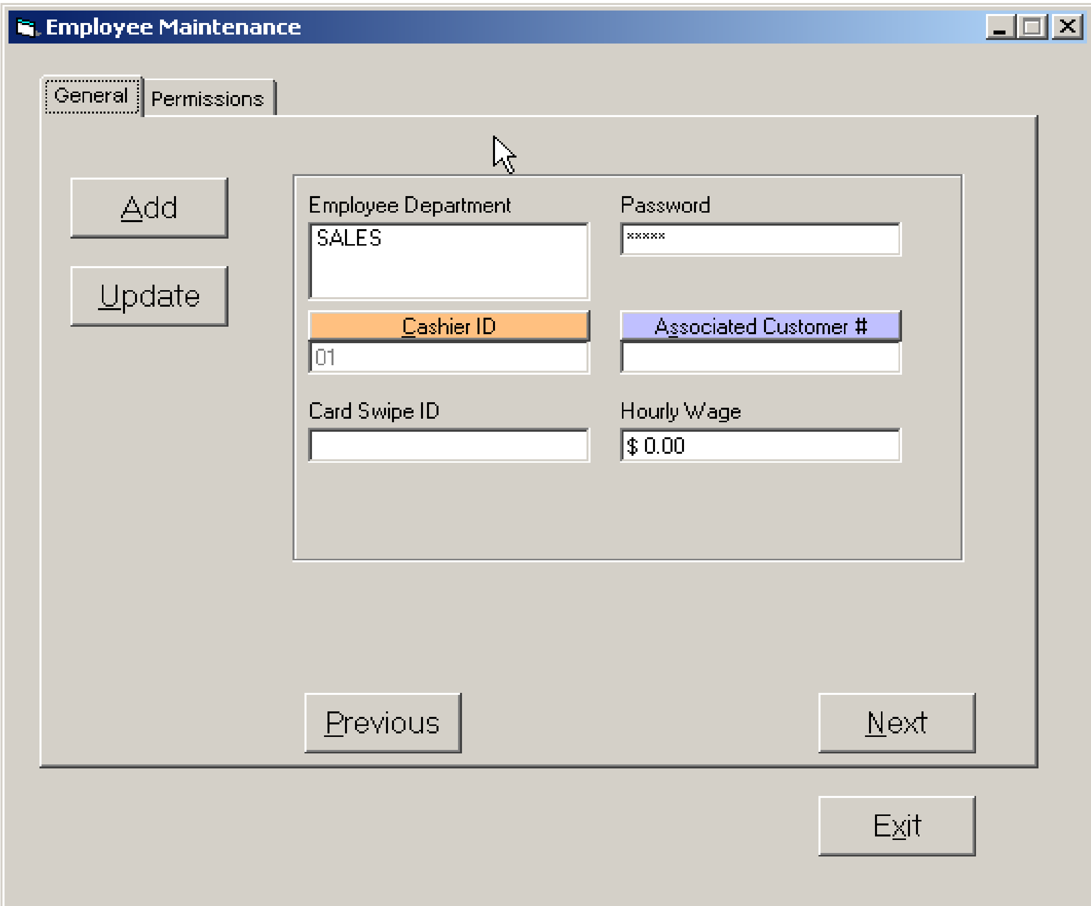
15. Click on the **Reorder Level** field. This field specifies the level the In Stock amount should drop below before needing to reorder this item, for example type **1**. When the In Stock quantity drops to 0, this will trigger a reorder of the quantity specified in the **Reorder Quantity** field.

16. Press **<TAB>** to move the cursor to the **Reorder Quantity** field. This field specifies how much of the item should be reordered at a time. Type **1**.

17. Click on the other tabs to display more options for an inventory item. Enter information as needed. Once you have finished entering all the information for an item, click on **Save**. You have just added an item to your inventory.

Add an Employee

1. At the primary login screen, select **Tools** and then **Employee Maintenance**. The following screen should appear:



2. Hit the **Add** button or **<Alt+I>**.

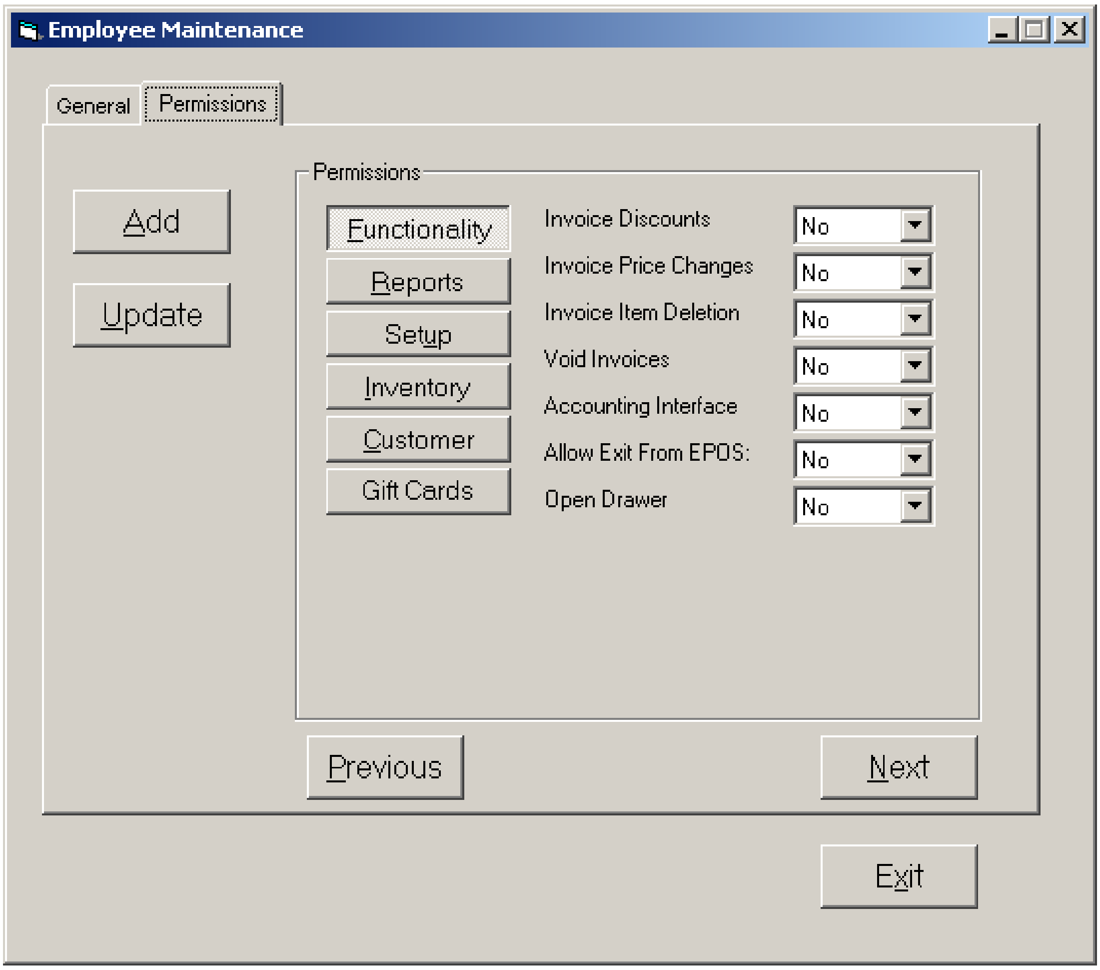
3. Enter a two-digit unique cashier id in the cashier id field.

4. Enter a password for the cashier.

5. You may, if you choose, associate a customer number with this employee for the purposes of tracking contact information. If so, hit the associated customer number button to select one.

6. You may also enter a card swipe ID, an hourly wage, and a employee department with this employee. These are all optional.

7. Click the **Permissions** tab. You should now see the following screen:

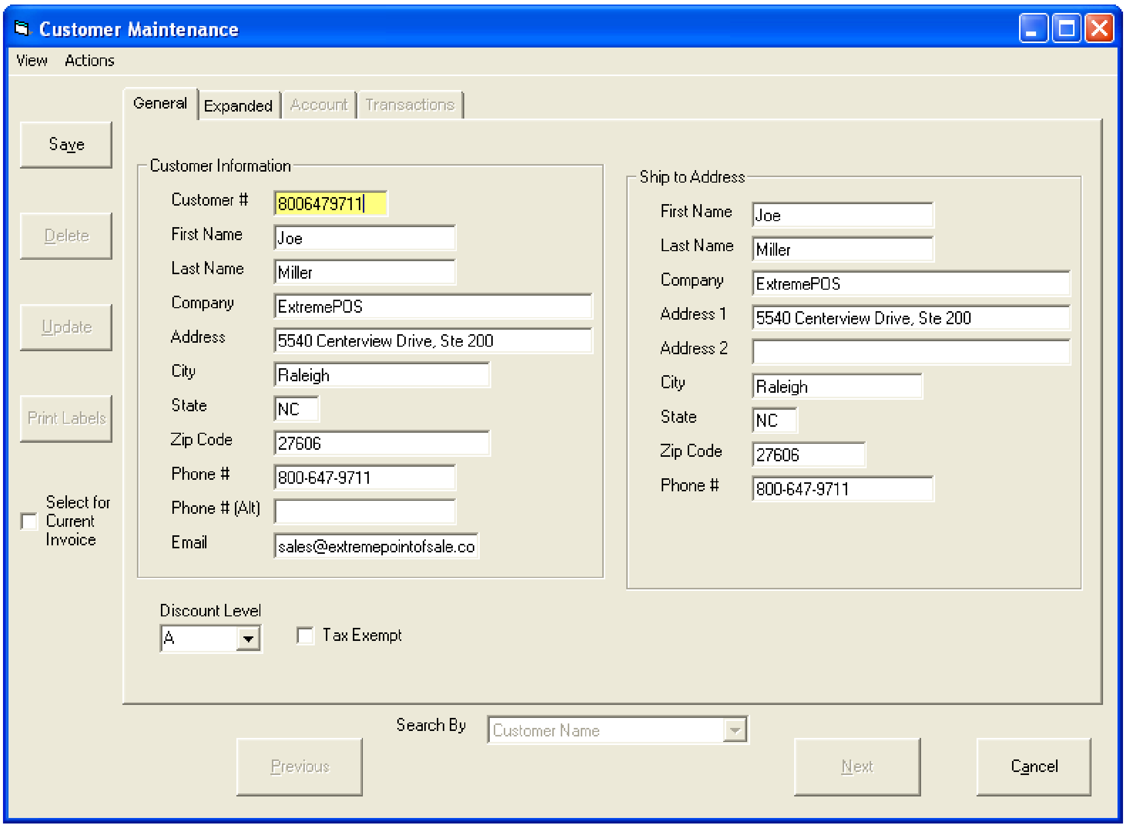


8. Set the new employee's permissions by clicking the drop-down menu next to each item. **No** means the system will not allow that employee to perform the action, **Yes** allows them to, **Prompt** will ask for the admin or an override user's login to access the action, and **Override** gives the user both the ability to perform the action themselves and to allow prompted users to do so.

9. Hit the **Update** button.

Add a Customer

1. To add a customer, click on the **View** menu, and then select **Customers**. The **Customer Maintenance** screen, shown below, should appear:



2. Click on **Add**.

3. Assign a Customer Number in the **Customer Number** field. It is recommended that you use the customer's telephone number or driver's license number. For this customer, type **8006479711**.

4. Press **<TAB>** to move the cursor to the **First Name** field. Type **Joe**.

5. Press **<TAB>** to move the cursor to the **Last Name** field. Type **Miller**.

6. Press **<TAB>** to move the cursor to the **Company Name** field. Type **ExtremePOS**.

7. Press **<TAB>** to move the cursor to the **Street Address** field. Type **5540 Centerview Drive, Ste 200**.

8. Press **<TAB>** to move the cursor to the **City** field. Type **Raleigh**.

9. Press **<TAB>** to move the cursor to the **State** field. Type **NC**.

10. Press **<TAB>** to move the cursor to the **Zip Code** field. Type **27606**.

11. Press <**TAB**> to move the cursor to the **Primary Phone Number** field. Type **800-647-9711**.

12. Press **<TAB>** to move the cursor to the **Email** field and type **sales@extremepointofsale.com**.

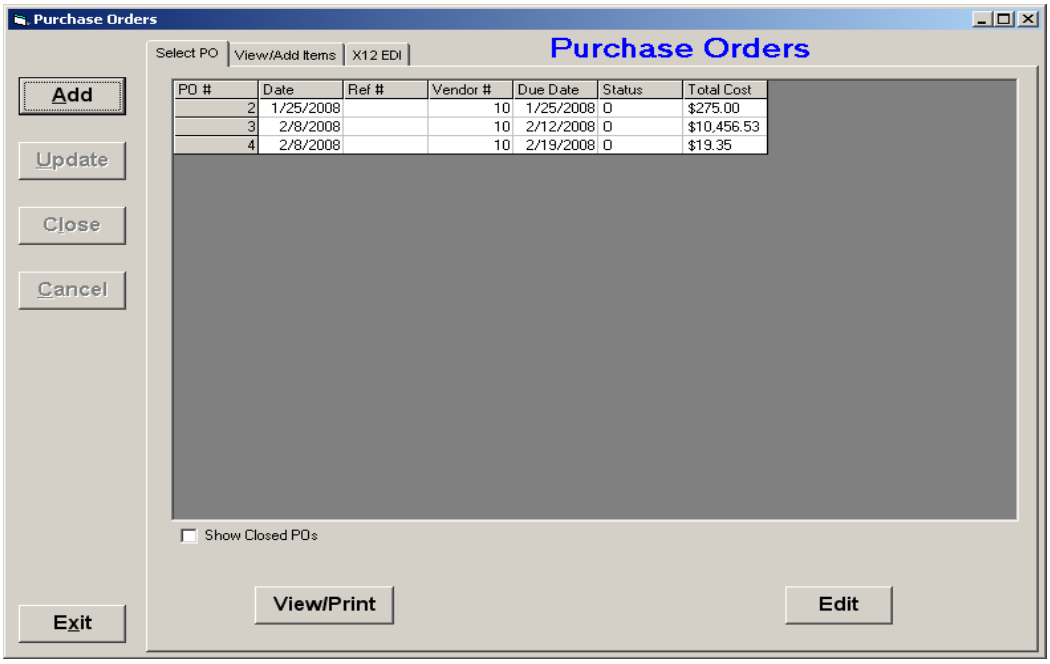
13. Click on the arrow next to the **Discount Level** field and choose **A**.

14. Click on **Save**. You have just added a customer with only the basic customer information. You may need to enter the information in other fields later on down the road. **NOTE:** EXTREMEPOS does not require you to enter customers. The default will always be **Cash Customer**.

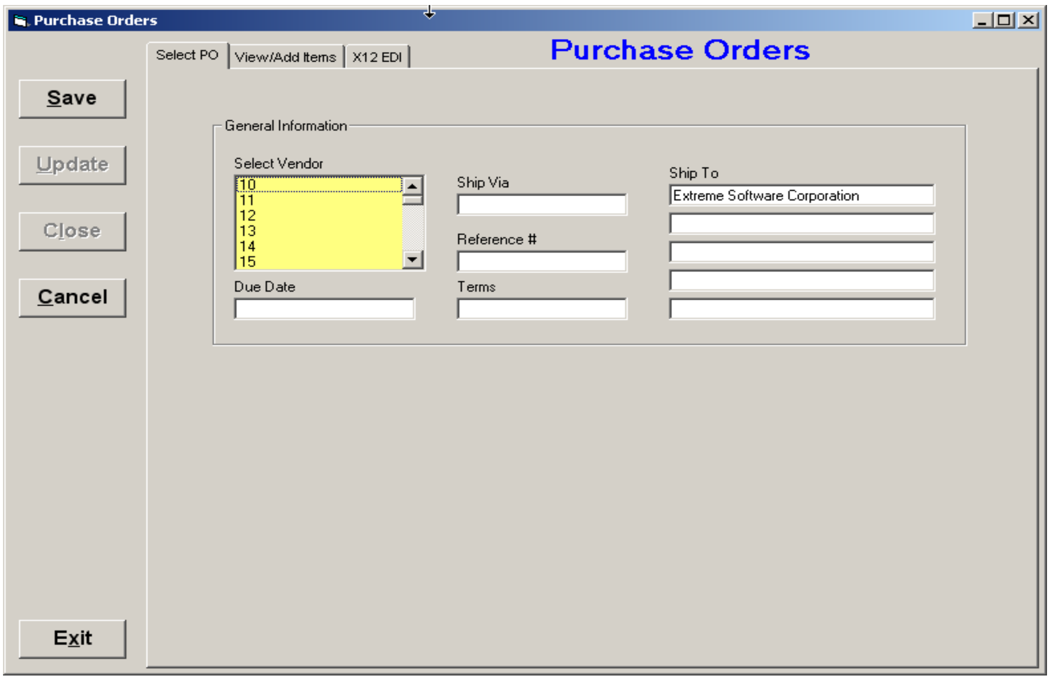
Make a Purchase Order

1. Before making a purchase order, you must have at least one vendor set up. See the relevant tutorial above.

2. From the main invoice screen, either hit **<Ctrl + P>** or go to the **Actions** menu and then **Purchase orders**. You will see the following screen:



3. Hit the add button. The following screen will appear:



4. Select a vendor from the list. Enter a due date in MM/DD/YYYY format. The other fields are for your reference, but the first two are required by the software.

5. Hit the **View/Add Items** tab to bring up a blank list of items to receive. You may add items by doing a search for them or by entering or scanning the bar code associated with them. Hit Save to save the purchase order.

6. You may add to the order by selecting it from the main purchase order screen and hitting edit. This will allow you to change the order as you like. When finished, hit **Update** to save the changes.

7. When ready to receive the order, go into it as listed in step 6 above. You may either receive all items at once or receive line by line. Hitting update will update your inventory to reflect received items. Hitting close will permanently close the purchase order, and should be done once the order is fully finished and received. However, it is irreversible, and so should only be done after checking for errors.

Install the BRE database

1. The BRE database is a subscription service, and you must have a current subscription before using it.

2. In the main invoice screen, go to **Tools** and then **Options**. On the left hand side, go to the **Vendor Databases** option on the left. Check **Quick Import** and **Save Check Digits on Imported UPCs,** and then set the BRE database in one of the dropdown menus below that.

3. Exit ExtremePOS and run the BRE manager software from the launchpad. Hit the check for database update button.

4. If you would like to update your in-inventory pricing, check the relevant boxes and hit perform update.

Install the VPD database

1. The VPD database is available to registered users of ExtremePOS.

2. In the main invoice screen, go to **Tools** and then **Options**. On the left hand side, go to **Internet Options.** Enter your VPD username and password in the spaces under the VPD Database header.

3. Still in options, go to the **Vendor Databases** option on the left. Check **Quick Import** and **Save Check Digits on Imported UPCs,** and then set the VPD database in one of the dropdown menus below that.

4. Exit ExtremePOS and run the VPD manager software from the launchpad. Hit the check for database update button.

5. If you would like to update your in-inventory pricing, check the relevant boxes and hit perform update.

Install the Superfile database

1. You must have the Superfile database downloaded in the form of a zip file prior to following these instructions. The Superfile database is a subscription service; you will need to purchase updates from SuperD if you wish to keep it up-to-date.

2. Extract the zip file on the server station to the vendors directory within your shared files. For MOST users, this will be C:\program files\extremeposmaint\shared_files\vendors\

3. From the login screen, go to **Tools**, **Vendor Databases**, **Superfile,** and then to **Create Database.**

4. At the bottom of the screen, change the files of type dropdown menu to All Files. Open the file named SFA8.

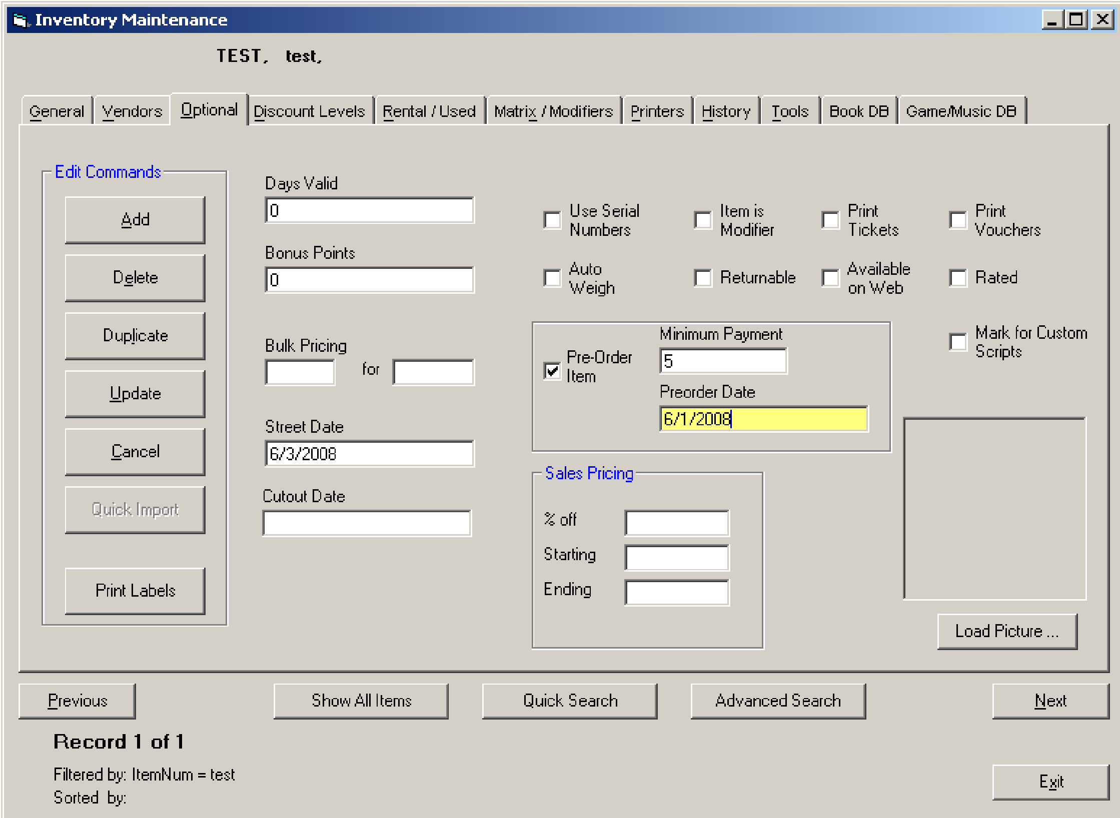
NOTE THAT THIS PROCESS TAKES SEVERAL HOURS AND SHOULD NOT BE DONE WHEN THE SYSTEM WILL BE NEEDED.

Set Up a Discount Card

1. Go into view -> promotions and create a promotion (or more than one if desired). Designate the promotion as “Discount card only” when you create it.
2. Go into Inventory Maintenance and create a discount card item. Create a new item, assign it an item number and name as desired. Check off “This item is a discount card”, then click on “Select promotions” button which will become enabled. This brings you to a screen where you can select promotions to associate with the discount card. When you’re done, exit back into inventory maintenance and save your item.
3. Select a customer for an invoice and scan or enter the item number for the discount card. You will need to assign a unique number to the discount card, which should be preprinted or written onto the card. This will be used to identify the card when it’s used in the future. Complete the sale. The expiration date on the card is currently fixed at 1 year from date of purchase.
4. Start another invoice. On the invoice screen, select “Scan discount card” and scan or enter the card number (this is the unique card number printed or written on the card, NOT the item id you gave it for sale purposes). This should automatically bring up the customer who purchased the card. Scan in some items that should trigger a promotion which you associated with that card. The software will automatically apply the promotion pricing to items on that invoice.

Use Preoders and Special Orders

Setting an item up for preordering:



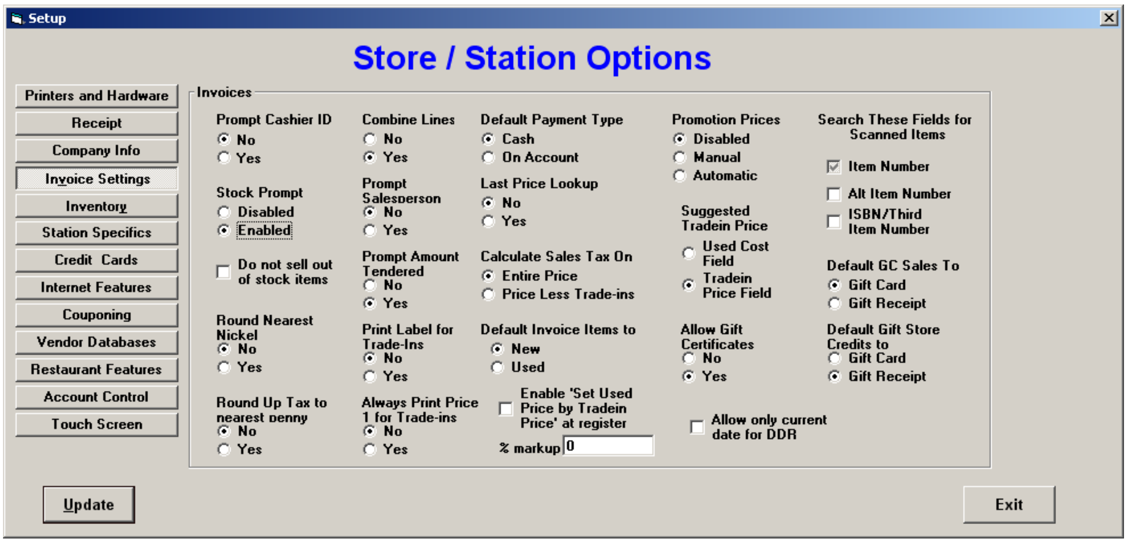
1. Under inventory maintenance, add the item or select the item you wish to take preorders on.

2. Under the optional tab for that item, check the Pre-Order Item box. Put the minimum deposit you will take in the Minimum Payment box.

3. If the item must not be sold before a certain date, put that date in mm/dd/yyyy format (I.E. 11/31/2008) in the street date box. If you do not want to take preorders on a item before a certain date, put that date in the Preorder date box.

4. Update the item. It is now set up for preordering!

Setting items up for special ordering:



1. Under tools and options, go to the invoice tab.

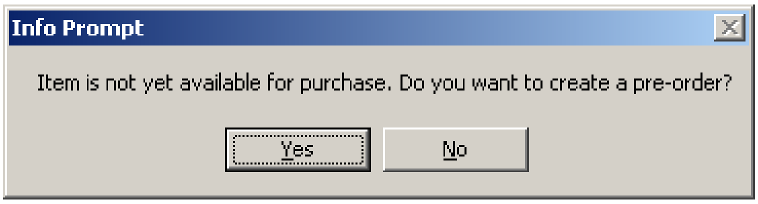
2. Under the Stock Prompt option, check enable.

3. Hit the update button. The POS system will now prompt you asking if you would like to place a special order when you attempt to scan something that is out of stock.

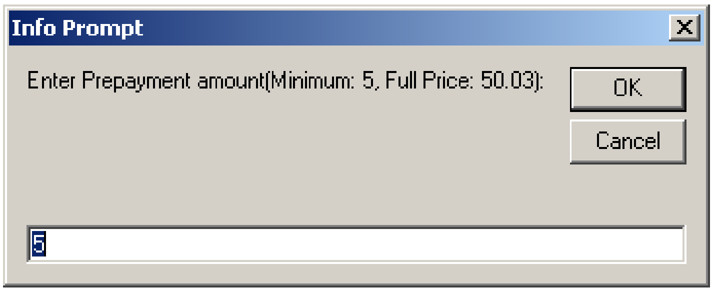
Placing a preorder:

1. Select a customer. There must be a specific customer (NOT the cash customer) associated with all preorders and special orders.

2. Scan or type in the item number associated with an item set up for preordering. The system will prompt you asking if you want to sell a preorder. Say yes.

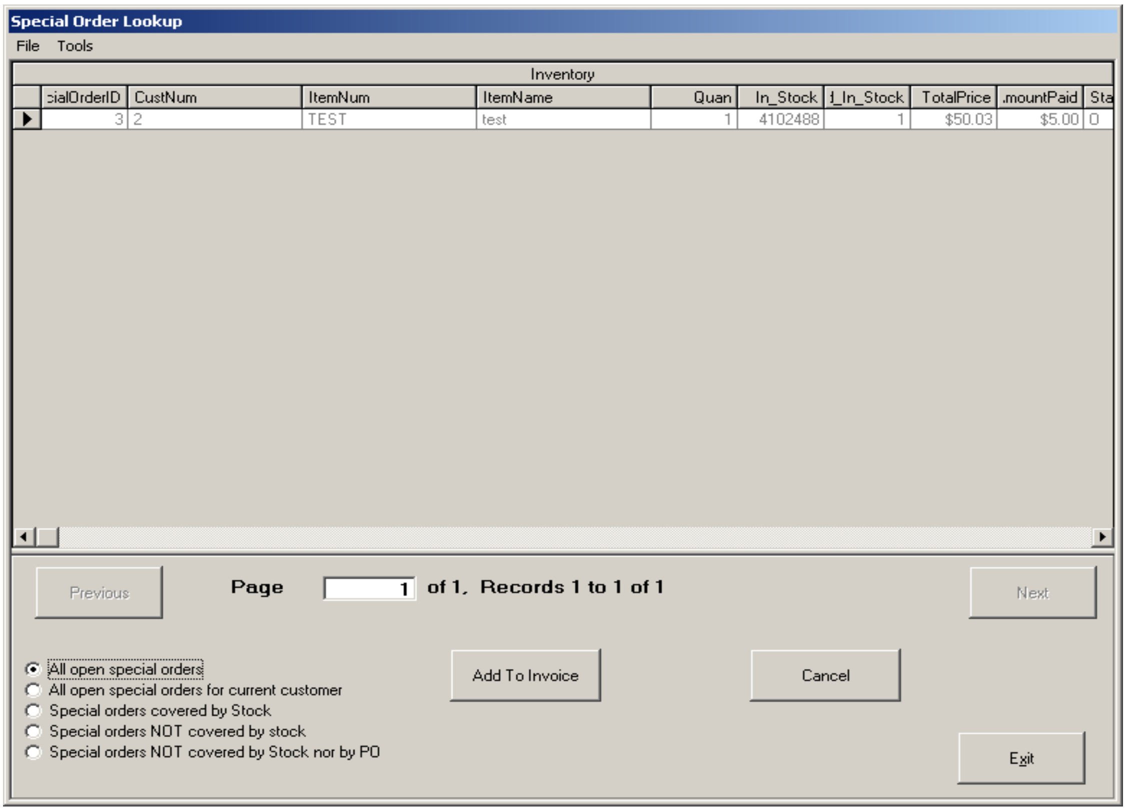


3. Enter the customer's deposit and the expected pickup date. The preorder will be placed on the invoice.



4. Ring the item out as normal.

Picking up a preorder/special order:



1. Access the special orders screen, either through View to Special Order/Preorders or by selecting the customer and hitting the Special Orders button on the invoice screen.

2. Click the preorder to be picked up, then click the add to invoice button. Do this for all items being picked up by this customer.

3. Click exit and ring the transaction out as normal. The amount deposited by the customer will automatically be included at the tender screen.

Refunding a preorder/special order:

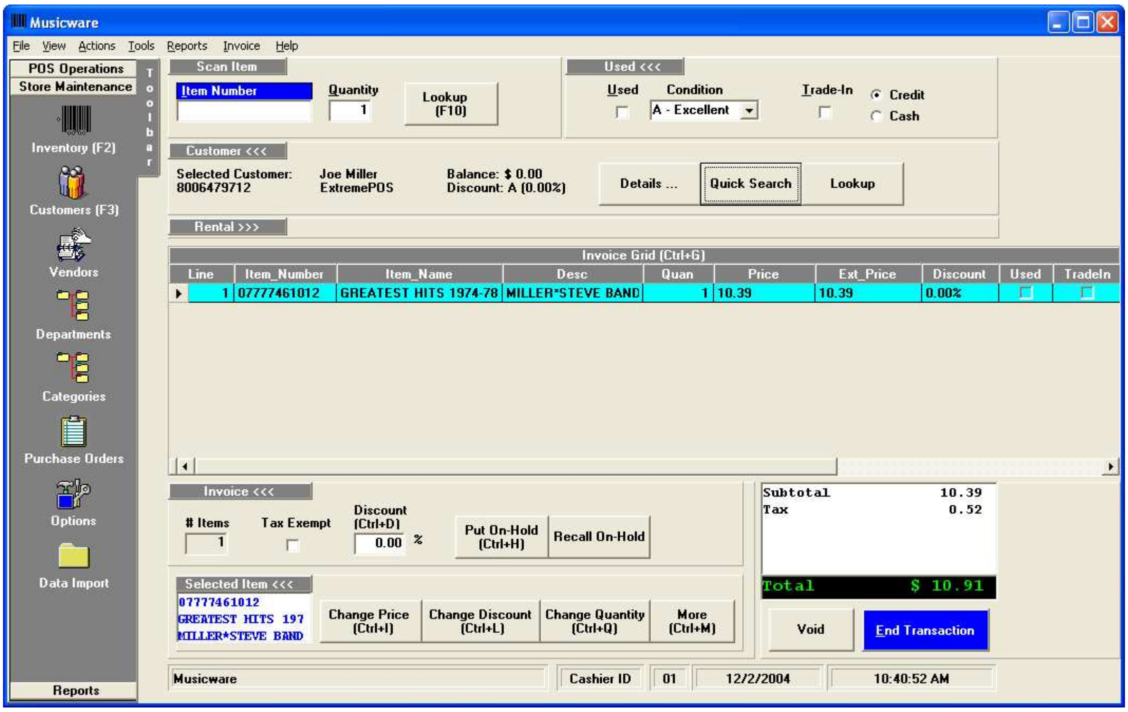
1. Access the special orders screen, either through View to Special Order/Preorders or by selecting the customer and hitting the Special Orders button on the invoice screen.

2. Click the preorder to be refunded, then click the cancel button. Do this for all items being canceled by this customer.

3. Ring the transaction out as normal for a refund transaction.

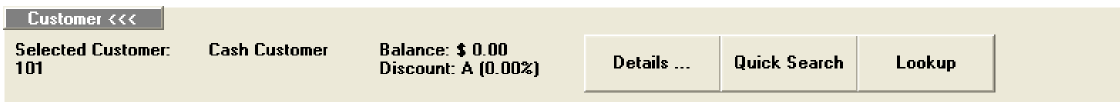
Process a Cash Transaction

Processing a cash transaction involves selecting the customer who wishes to make a purchase and finding the item that the customer wants to purchase.



To select a customer:

1. In the center of the main invoice screen, there is a group of buttons showing the current customer. These buttons are Details, **Lookup** and **Quick Search**. The buttons are shown below:



2. Clicking on **Lookup** will take you to the **Customer Maintenance** screen and allowing you to find the customer by name or number. Clicking on **Quick Search** will allow you to “type” or “scan” the customer’s number and thereby quickly selecting the customer for the current invoice.

3. Let’s select the customer you just created by clicking on **Quick Search** and typing **8006479711**. The customer information will appear in the customer window.

4. Click on **Details** to display the complete customer information.

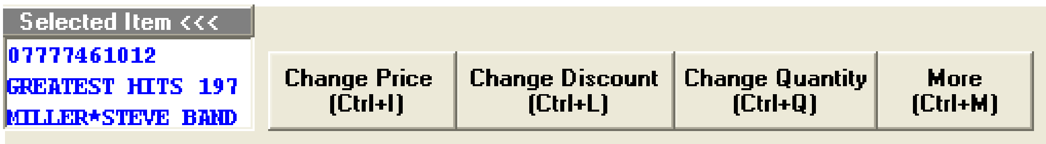
5. Next, we need to find the inventory that the customer wishes to purchase. Above the **Current Customer** area there is another area entitled **Search By**. This is where we choose the item and the quantity to be purchased.

To choose an inventory item:

1. Click in the **Item Number** field or press **<ALT+I>** to give focus to the field. Now “scan” or “type” **07777461012** to enter the inventory item we created earlier. If you type the number, press enter to complete the search.

2. As an alternative, you can click on the **Lookup** button or use the hotkey **<F10>** to manually select the item from a detailed lookup screen.

3. The item will appear in the invoice grid in the middle half of the invoice screen. If you need to change the quantity, price, etc. just choose the appropriate button at the bottom of the screen:



4. To finalize this invoice just click on **End Transaction** at the bottom right corner of the screen. You will be prompted to enter the amount tendered. Enter the amount tendered if it is different than the amount displayed, and then click on **OK**.

5. A window will appear displaying the change for the customer. Click on **OK** when you are finished. Congratulations, you have just processed a cash invoice.

Shortcut Keys

Customer Maintenance	<F3>
Customer – Look Up Customer	<ALT+L>
Daily Gross Profits	<SHIFT+F1>
Discount – Invoice Discount	<CTRL+D>
Discount – Line Discount	<CTRL+L>
Gift Cards	GC in Item Number
Help – Invoice Screen Help	<F1>
Inventory Maintenance	<F2>
Inventory/Kit Sort Order – Sort by Item Name	<SHIFT+F7>
Inventory/Kit Sort Order – Sort by Item Number	<SHIFT+F8>
Invoice – Void This Invoice	<CTRL+V>
Kit Maintenance	<SHIFT+F3>
Non-Inventory Item	<CTRL+N>
Payment – Cash	<F6>
Payment – Credit Card	<F7>
Payment – Check	<F8>
Payment – On Account	<F9>
Price Check	<F5>
Purchase Orders	<CTRL-P>
Return Rentals	<CTRL+F1>
Last Invoice Processed	<CTRL+F8>
Print Last Invoice Processed	<SHIFT+CTRL+F8>
Select Invoice Grid	<CTRL+G>
Tax – No Tax This Order	<CTRL+X>
Tax – Tax This Order	<CTRL+O>
Tax – Set Tax Rate	<CTRL+T>

NOTE: These shortcut keys only work from the main ExtremePOS invoice screen. If any control has an underscore (**_**) under a letter, that option can be activated by pressing **<ALT>** + **<LETTER WITH UNDERSCORE>**. For example, the menu command **Exit** can be activated by clicking on **Exit** or by pressing **<ALT+ X>**.

Common Questions and Answers

Q: I often get messages that I should register within the next 200 invoices, but I never got around to it. Now I get a message that says the 200 invoice limit was exceeded and I can no longer get into ExtremePOS. What do I do now?

A: Call your dealer. They will help you on the proper registration process.

Q: I am using a barcode reader or wand. When I scan the barcode, either no numbers show up or not all the numbers show up. Why is this happening?

A: Your barcode reader or wand is probably not set up correctly. To test this, try scanning a barcode in DOS or in a simple program such as **Microsoft Notepad**. If the numbers on your barcode are not showing up correctly, your barcode reader or wand is not set up properly. Check the manual of your input device for help with setting up your barcode reader or wand.

Q: I accidentally added the wrong item onto an invoice. How do I get this item off of the invoice?

A: Press **<CTRL+G>** to set the focus to your invoice grid. Use the arrow keys to move the box onto the line of the item you would like to delete from your invoice. Press **<DELETE>** to delete the item from your invoice.

Q: My customer bought something and now wants to return his purchase. How do I do this?

A: To do a return in EXTREMEPOS, all you have to do is create a new invoice in which you add the items to the invoice with a negative quantity. For example, if a customer bought two boxes of diskettes from you, you would add –2 boxes of diskettes to the invoice. EXTREMEPOS will automatically take money out of your profits and update the quantity.

Q: Why can't I enter departments in the Inventory screen?

A: You must enter your departments in the **Department Maintenance** screen and then they will be made available for selection from the **Inventory Maintenance** screen.

Q: What is the ****non-inventory** item for and can I delete it?**

A: No, you should not delete it or modify it. You will need this item in your inventory in order to add **Non-Inventory** items to your invoice. If this item is deleted, the Non-Inventory feature will not work properly.

Q: Which printer driver should I use for my receipt printer?

A: **Generic/Text Only** is the required printer driver and is included with Windows. It can be set from the **Set Default Printer** option from the **Actions** menu of the Main Invoice Screen.

Q: Why doesn't my barcode printer work?

A: You probably have not installed the correct printer driver for your model printer. Please make sure that you install the appropriate driver from the CD-ROM that shipped with your printer. To can view your existing printers within Windows under the **Settings> Control Panel>Printers** menu.

Q: How can I enter additional Cashier IDs?

A: To add a Cashier ID, select **Employee Maintenance** from the **Tools** menu in the **Log-In Screen**. You will be prompted to enter the administrator's password. Click on Add or press **<ALT+A>**. Enter the new Cashier ID and the employee's information. When you are finished, click on **Done** or press **<ALT+D>**. To quit without adding a Cashier ID, click on **Cancel** or press **<ALT+C>**. NOTE**: Cashier IDs must be two characters long.** The default password for new cashiers is **Cashier**. You may change this password in **Employee Maintenance**.

Q: Where does ExtremePOS store all of my information?

A: All of your information (invoices, customers, vendors, inventory, etc.) is stored in the ESC_V20 database. The Database Management System used by ExtremePOS is Microsoft SQL Server Desktop Engine, which is a scaled down version of the full SQL Server product. The database file is physically located in the SQL Server data directory.

Q: Why can't I delete inventory items?

A: If an inventory item has never been used in a past invoice, you are free to delete it. However, if an item has been used in a past invoice, you cannot delete it. An extra few items will not take up space or slow you down in any way. Also, if you are trying to get a detailed sales history, it is important that all the proper information is there to recall when it is needed. If the item were deleted, you could not get an accurate report.

Q: Why does my cash drawer not open?

A: There is a known issue where the cash drawer will not open on or before the first transaction after opening the software. Try again after ringing someone out. If the drawer still does not open, first ensure that it is enabled in the options menu (**Tools** then **Options** from the main invoicing screen) and second ensure that the cable is plugged in correctly. The cable for the cash drawer is one way, and the ends are labeled: EPSON or STAR goes to the receipt printer, C/D to the cash drawer.

Q: Why do I get an error when trying to update?

A: There are two main reasons: either you have a firewall blocking the program from accessing the update server, or else you do not have your correct, current username and password entered into the program.

Q: My display pole is showing odd things such as 'btotal=' the price and receipts are not printing.

A: This is caused by initializing the display pole improperly. Turn it off and exit the software, then turn the display pole back on. When you reenter the software, it should work. If not, make certain that the display pole is configured correctly in the options menu. Additionally, on the bottom of the display next to the power switch are a series of small white switches. Make sure that the sixth is enabled and no others are.

Technical Support & Hardware Service Contract

Technical support and Extreme Point of Sale, Inc. supplied software updates are FREE for 90 days from date of purchase. The plans below are only valid when subscribed to before the "FREE" period expires. Otherwise, the user must first upgrade to the newest version and then purchase a contract. Full phone support plans also include a hardware warranty that will replace defective Extreme Point of Sale, Inc. supplied hardware with a similar working replacement until which time Extreme Point of Sale, Inc repairs the user's original hardware. Extreme Point of Sale, Inc. reserves the right to replace the item instead of repairing the originally purchased unit. Ground shipping of replacement items from Extreme Point of Sale, Inc will be covered at no additional charge. The user is responsible for shipping to Extreme Point of Sale, Inc. Additional charges will apply should the user require expedited shipping of the replacement units or parts. Warranty only applies to hardware purchased if support has been continuous since purchase date.

The charge for software updates is $100 per quarter per station. There is an additional $100 per quarter per store charge for phone support. There is a $55 per half hour charge for phone calls for users not on a phone support contract, with a minimum of half hour charged per call.

Technical support hours are from 9 AM – 5 PM EST, Monday – Friday, by calling 919-387-7597 or emailing support@extremepos.com

Decline support and updates

Check or Money Order **Visa** **MasterCard** **AMEX**

Name on Credit Card

____

Company Name

____

Street Address

____

City, State and Zip Code

____

Credit Card Number

____

Credit Card Exp Date ____________________ **Today's Date** ______________

Signature

____

BUYER ACKNOWLEDGES THAT IT HAS READ THIS AGREEMENT, AND UNDERSTANDS AND AGREES TO ALL TERMS AND CONDITIONS STATED HEREIN.

Support Frequently Asked Questions

- **Busy Signals when calling for technical support. Our technical support lines are free at least 40% of the day between 9 AM and 5 PM, EST, M-F. We do not place callers in a queue to wait for the next available support person. If you get our voice mail, please leave a message under the support option so we can return your call in a timely fashion. You may also try one of the below options for additional or alternative support methods.**

- **Support Via Email. You can get support by writing to support@extremepos.com. This email address is monitored daily. You will normally receive a reply the same day if submitted by 3 pm EST.**

- **Network Problems. If you have two or more computers connected via a network and you did not purchase your network from ExtremePOS, we cannot support your network at no charge. Our technician will ask you questions to confirm that your network is operational. If your network is not functioning, you must seek help from the person who installed your network, or ExtremePOS can help you get your network working via a $99 tech support fee.**

- **Other Hardware Problems. If you purchased your hardware from a company other than Extreme Point of Sale, Inc., or its dealers, we cannot give you hardware support at no charge. We have methods of testing most of your hardware. If your hardware is not working properly, you must go back to your original hardware supplier for support. The most frequent problems we find with hardware are serial port conflicts with modems and modem software and printer conflicts with certain printers which have software that takes over the parallel port.**