BUSINESS plus **ACCOUNTING**
TOUCH POINT OF SALE

Quick Start Guide

Contents

Initial System Startup

When you initially open the BPA software, you will be asked to enter your company information. At minimum, you should enter your company name. All other information can be entered later by going to Definitions→Companies→Modify.

Defining Employees

As you initialize the software and begin to set things up there will be many operations that will require an employee to be defined, so to create an employee follow these simple steps, go to the **Touch Screen POS→POS Manager Functions→Define Employees→Add**. At minimum, you will want to fill out the following fields:

  a. Employee # - This is a number that you will define for each employee. Most of our customers will use a 4 digit number and can be whatever you choose.
  b. Last Name.
  c. First Name.
  d. Sale Person ID – When a sale is made in the software, this field will be printed on the customer receipt, indicating who made the sale. We recommend either entering the Employee number or the first name of the employee.
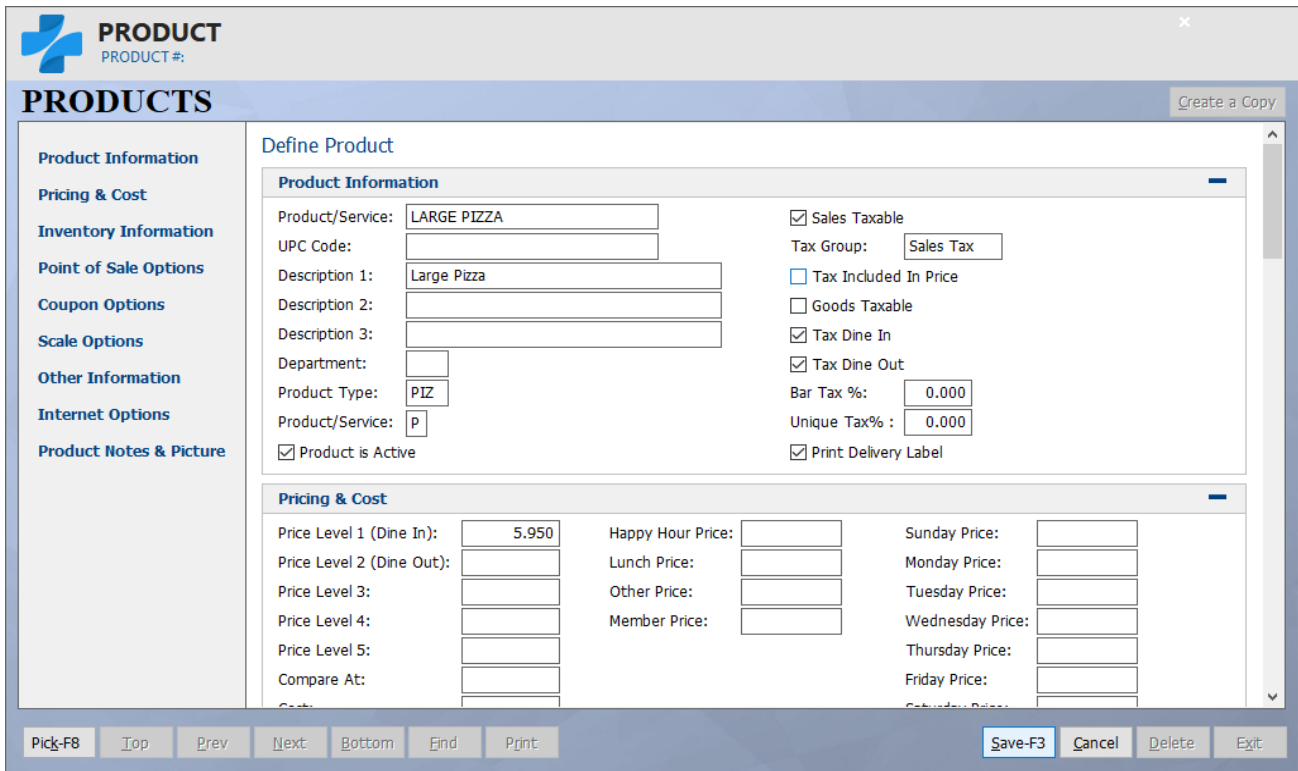
Creating Your Sales Menu

To create your sales menu, you should perform the following steps:

1. Add (define) your products.
2. Name (define) menu names.
3. Add products to your menus.

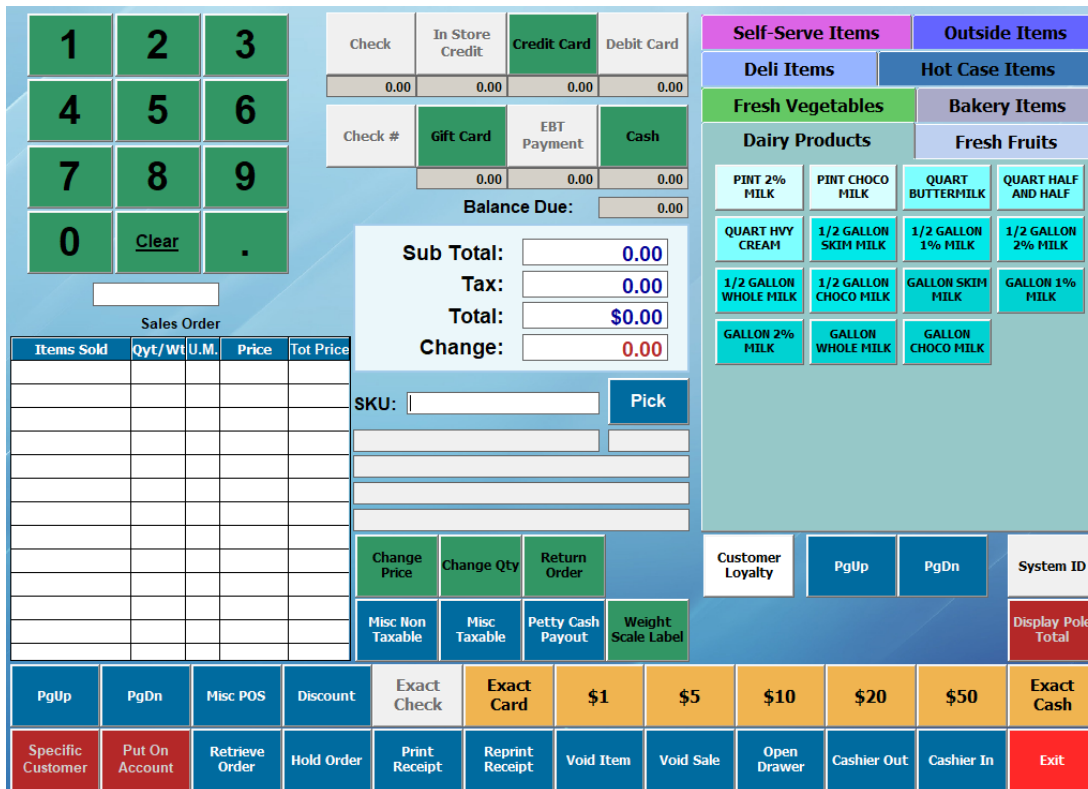## Adding Product Information to Your System

Anything that may possibly be sold in the system should be defined as a product. To create the product, perform the following steps:

1. Go to Touch Screen POS→POS Manager Functions→Define Products→Add.
2. At minimum, fill out the following fields:
    a. Product/Service – This will be the name of the product that you are selling. For example, if you are selling crushed ice, you can enter "Crushed Ice" in this field.
    b. UPC Code – If you are using or plan on using a bar code scanner with your system, you will need to scan or type the product's UPC Code in this field.
    c. Description 1 – Again, this is the name of the product you are selling. This field appears on the customer receipt, so try not to use any abbreviations that will confuse or not allow the customer to easily understand, from the receipt, what they have purchased. If you run out of space, you can use Description 2 and 3.
    d. Product Type – This field allows you to categorize the product for reporting purposes. Using our "Crushed Ice" example, you can place this product under the "Food Items" category. Press the F8 key to view a list of categories, and then select the appropriate category.
        i. If you need to add an additional Product Types to the system, you can do this by going to Touch Screen POS→ POS Manager Functions→Define Products→Define Product Types.
    e. Sales Taxable – Place a Y in this field if this product needs to be taxed.
    f. Price Level 1 – This is the price that you are charging for this product.
3. Press Save when finished.

Changing Menu Tab Names

On your sales menu, you can have up to eight (8) tabs.

To change the tab names, perform the following steps:

1. Go to Touch Screen POS→POS Manager Functions→Assign Menu Names.
2. Change the menu names as needed, then press the F3 key on your keyboard.

```
ASSIGN MENU NAMES                                            [─][□][✖]
   DEFAULT MENU NAME          YOUR MENU NAME        ACTIVE         ^
▶ Menu 1                    Dairy Products            Y
  Menu 2                    Fresh Fruits              Y
  Menu 3                    Fresh Vegetables          Y
  Menu 4                    Bakery Items              Y
  Menu 5                    Deli Items                Y
  Menu 6                    Hot Case Items            Y
  Menu 7                    Self-Serve Items          Y
  Menu 8                    Outside Items             Y




                                                                    v
 <                                                       >
| F1=HELP | F3=DONE |
```

Adding Buttons To Your Sales Menu

Once you have created all product records and created menu tabs, you can now begin placing products into your menu. To do this, perform the following steps:

1. Go to Touch Screen POS→POS Manager Functions→Define Menu Items→Add.
2. Enter the following fields:
    a. Product Code(SKU) - This is the name of the product that you added in Define Products. To view a list of these products, press the F8 key on the keyboard.
    b. Select Menu – This is where you will place the product in the appropriate menu tab on your sales menu. To view a list of your menu tabs, select the F8 key on the keyboard.
    a. Button Text Top/Bottom – This is the text that will show on the button on your menu. Using the Crushed Ice example, you could just enter "Crushed Ice" in this field.
        i. Each line allows you to type in ten (10) characters. So, if you do not have enough space on the Button Text Top, you can use the Button Text Bottom to fill this space.
3. Press Save when finished.

You have now successfully added products to your sales menu.

Adding Sales Tax

To enter your sales tax percentage, perform the following steps:

1. Go to Definitions→Sales Tax Table.
2. Under Tax Code 1, enter your City, State, and Tax Rate.
3. Press Save and Exit when finished.

Define Sales Tax Rates

Customer Sales Tax Rates	Product Tax Reporting Groups

When customers are defined they are given a sales tax table number. That table number corresponds to a sales tax rate. All customers given the same table number will have the same sales tax rate.

Use this screen to assign tax rates to the tax table numbers. To change a sales tax rate for a group of customers you only have to change the rate in the tax table. For exempt customers create a 0.0 tax rate.

If you have products that should be charged at a different rate from your standard sales tax rate, you can specify their tax unique tax rate using product definitions.

Sales Tax

TAX CODE	CITY - COUNTY	STATE	TAXRATE
1	Your City	UT	6.0000
2			0.0000
3			0.0000
4			0.0000
5			0.0000
6			0.0000
7			0.0000

Sales Tax name to print on invoices: Sales Tax

Minimum Sales Amount for Sales Tax In Restaurant POS (If Applicable): $ 0.00

GST Tax

Goods And Services Tax Rate (Used In Canada): 0.000

Goods & Services Tax name to print on invoices: GST

Save and Exit   Cancel

Clocking In and Out of the Time Clock

Before you can perform sales in the system, you must be clocked into the time clock. To clock in, perform the following steps:

1. Go to Touch Screen POS→ Employee Time Clock→Employee Clock In.
2. Enter the employee number you wish to clock in, and then press OK.
3. You should now receive a message that says "Employee Login Successful."

```
Employee Login Successful

   (i)   Employee Login Successful              OK

  Employee: 1 @ 16:18

  SUNDAY      08/30/2020    0.00  HRS
  MONDAY      08/31/2020    0.00  HRS
  TUESDAY     09/01/2020    0.00  HRS
  WEDNESDAY   09/02/2020    0.00  HRS
  THURSDAY    09/03/2020    0.00  HRS
  FRIDAY      09/04/2020    0.00  HRS
  SATURDAY    09/05/2020    0.00  HRS

  WEEKLY  TOTAL: 0.00 HRS

                25
```
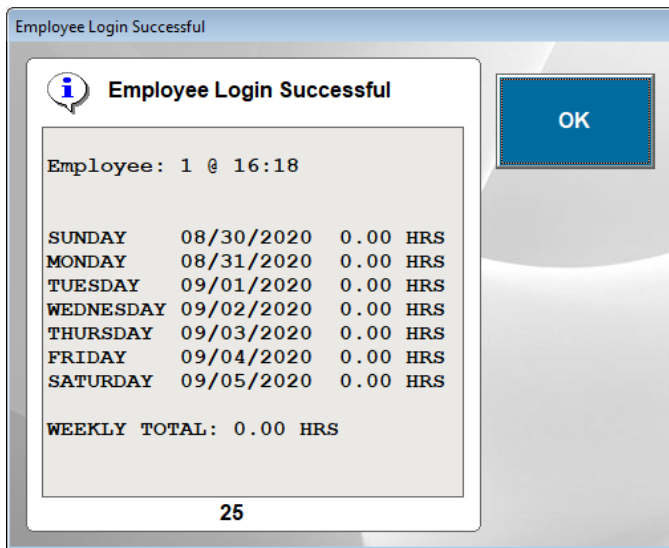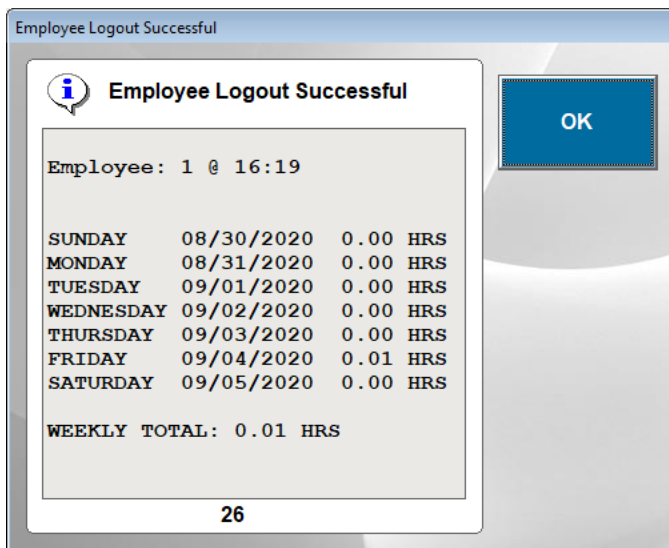
At the end of the day, to clock out of the time clock, perform the following steps:

1. Go to Touch Screen POS→ Employee Time Clock→Employee Clock Out.
2. Enter the employee number you wish to clock out, and then press OK.
3. You should now receive a message that says "Employee Logout Successful."

```
Employee Logout Successful

   (i)   Employee Logout Successful             OK

  Employee: 1 @ 16:19

  SUNDAY      08/30/2020    0.00  HRS
  MONDAY      08/31/2020    0.00  HRS
  TUESDAY     09/01/2020    0.00  HRS
  WEDNESDAY   09/02/2020    0.00  HRS
  THURSDAY    09/03/2020    0.00  HRS
  FRIDAY      09/04/2020    0.01  HRS
  SATURDAY    09/05/2020    0.00  HRS

  WEEKLY  TOTAL:  0.01 HRS

                26
```

How to Create an Order

Once you have created an employee, and you have built your sales menu, you can begin creating sales in the system. Remember, you must be logged into the time clock to ring up sales.

To create an order, perform the following steps:

1. Go to Touch Screen POS→POS Sales.
2. A Server Log In screen will appear. Enter your employee number, then press OK.
3. At this point, you may begin adding items to the ticket.

1 2 3
4 5 6
7 8 9
0 Clear .

Sales Order

Items Sold	Qyt/Wt	U.M.	Price	Tot Price
PINT 2% MILK	1.00	EA	0.89	0.89
PINT CHOCO MILK	1.00	EA	0.99	0.99
APPLE FRITTER	1.00	EA	0.89	0.89

Check — 0.00
In Store Credit — 0.00
Card — 0.00
Debit Card — 0.00

Check #
Gift Card — 0.00
EBT $2.77 QUALIFIES — 0.00
Cash — 0.00

Balance Due: 0.00

Sub Total: 2.77
Tax: 0.17
Total: $2.94
Change: 0.00

SKU: | Pick

BAK_DONUT_APPLEFRITT 0.89
APPLE FRITTER

Change Price | Change Qty | Return Order
Misc Non Taxable | Misc Taxable | Petty Cash Payout | Weight Scale Label

Self-Serve Items | Outside Items
Deli Items | Hot Case Items
Dairy Products | Fresh Fruits
Fresh Vegetables | Bakery Items

1/4 SHEET CAKE	1/2 SHEET CAKE	ROUND CAKE	CUSTOM CAKE
DOZEN ASST DONUTS	DOZEN GLZD DONUTS	APPLE FRITTER	BAVARIAN CRM DONUT
CAKE DONUT	CHOCOLATE BAR	CRUMB DONUT	FRENCH CRUELLER
GLAZED DONUT	JELLY FILL DONUT	LEMON FILL DONUT	MAPLE BAR
POWDERED DONUT	RAISED DONUT	APPLE PIE	CHERRY PIE
BANANA CREAM PIE	CHOCOLATE CREAM PIE	BLUEBERRY BAGEL	CHEESE BAGEL
ONION BAGEL	PLAIN BAGEL	STRAWBERRY BAGEL	DOZEN COOKIES

Customer Loyalty | PgUp | PgDn | System ID
Display Pole Total

PgUp | PgDn | Misc POS | Discount | Exact Check | Exact Card | $3 | $5 | $10 | $20 | $50 | Exact Cash

Specific Customer | Put On Account | Retrieve Order | Hold Order | Print Receipt | Reprint Receipt | Void Item | Void Sale | Open Drawer | Cashier Out | Cashier In | Exit

How to Close a Sale

To close a sale, perform the following steps:

1. On a typical sale you will use the row of yellow buttons at the bottom of your screen which we call quick cash out buttons. Simply click the appropriate button and the sales will be closed. For example, if the customer gave you a $20 bill, then select "$20." If they pay with a credit card select "Exact Card."
2. The sale will now be closed.

1	**2**	**3**	Check	In Store Credit	Card	Debit Card	
4	**5**	**6**			EBT $2.77 QUALIFIES		
7	**8**	**9**	Check #	Gift Card		Cash	
0	Clear	.					

Self-Serve Items | **Outside Items**
Deli Items | **Hot Case Items**
Dairy Products | **Fresh Fruits**
Fresh Vegetables | **Bakery Items**

Payment amounts:
Check 0.00, In Store Credit 0.00, Card 0.00, Debit Card 0.00
Gift Card 0.00, EBT $2.77 QUALIFIES 0.00, Cash 0.00

Balance Due: 0.00

Sub Total: 2.77
Tax: 0.17
Total: $2.94
Change: 0.00

SKU: | **Pick**

BAK_DONUT_APPLEFRITT   0.89
APPLE FRITTER

Sales Order

Items Sold	Qyt/Wt	U.M.	Price	Tot Price
PINT 2% MILK	1.00	EA	0.89	0.89
PINT CHOCO MILK	1.00	EA	0.99	0.99
APPLE FRITTER	1.00	EA	0.89	0.89

Bakery items: 1/4 SHEET CAKE, 1/2 SHEET CAKE, ROUND CAKE, CUSTOM CAKE, DOZEN ASST DONUTS, DOZEN GLZD DONUTS, APPLE FRITTER, BAVARIAN CRM DONUT, CAKE DONUT, CHOCOLATE BAR, CRUMB DONUT, FRENCH CRUELLER, GLAZED DONUT, JELLY FILL DONUT, LEMON FILL DONUT, MAPLE BAR, POWDERED DONUT, RAISED DONUT, APPLE PIE, CHERRY PIE, BANANA CREAM PIE, CHOCOLATE CREAM PIE, BLUEBERRY BAGEL, CHEESE BAGEL, ONION BAGEL, PLAIN BAGEL, STRAWBERRY BAGEL, DOZEN COOKIES

Buttons: Change Price, Change Qty, Return Order, Customer Loyalty, PgUp, PgDn, System ID

Misc Non Taxable, Misc Taxable, Petty Cash Payout, Weight Scale Label, Display Pole Total

PgUp	PgDn	Misc POS	Discount	Exact Check	Exact Card	$3	$5	$10	$20	$50	Exact Cash
Specific Customer	Put On Account	Retrieve Order	Hold Order	Print Receipt	Reprint Receipt	Void Item	Void Sale	Open Drawer	Cashier Out	Cashier In	Exit

On occasion a customer may give you an odd cash amount or want to split the sale between two types of payment. To close out a sale in this scenario do the following:

1. Using the keypad in the upper left corner of the screen, type in the amount the customer gave you. For example, if the customer gave us $20.42, then enter "20.42."
2. Select the appropriate payment button at the top of the screen.
3. The sale will now be closed.

4. For multiple forms of payment repeat steps 1 and 2 until the full payment has been received. Always enter the cash amount first! For example, if this customer gave us $1 cash and wanted to put the rest on a card you would do the following:
   a. Type 1 on the green keypad and select cash.
   b. Type 1.42 on the green keypad and select card.
   c. The sale will now we closed.

1	2	3
4	5	6
7	8	9
0	Clear	.

	Check	In Store Credit	Card	Debit Card
		0.00	0.00	0.00	0.00
	Check #	Gift Card	EBT $2.77 QUALIFIES	Cash
		0.00	0.00	0.00

Balance Due: 0.00

Sub Total: 2.77
Tax: 0.17
Total: $2.94
Change: 0.00

SKU: [ ] **Pick**

BAK_DONUT_APPLEFRITT — 0.89
APPLE FRITTER

Sales Order

Items Sold	Qyt/Wt	U.M.	Price	Tot Price
PINT 2% MILK	1.00	EA	0.89	0.89
PINT CHOCO MILK	1.00	EA	0.99	0.99
APPLE FRITTER	1.00	EA	0.89	0.89

| Change Price | Change Qty | Return Order | |
| Misc Non Taxable | Misc Taxable | Petty Cash Payout | Weight Scale Label |

| PgUp | PgDn | Misc POS | Discount | Exact Check | Exact Card | $3 | $5 | $10 | $20 | $50 | Exact Cash |
| Specific Customer | Put On Account | Retrieve Order | Hold Order | Print Receipt | Reprint Receipt | Void Item | Void Sale | Open Drawer | Cashier Out | Cashier In | Exit |

Self-Serve Items		Outside Items	
Deli Items		Hot Case Items	
Dairy Products		Fresh Fruits	
Fresh Vegetables		Bakery Items	

1/4 SHEET CAKE	1/2 SHEET CAKE	ROUND CAKE	CUSTOM CAKE
DOZEN ASST DONUTS	DOZEN GLZD DONUTS	APPLE FRITTER	BAVARIAN CRM DONUT
CAKE DONUT	CHOCOLATE BAR	CRUMB DONUT	FRENCH CRUELLER
GLAZED DONUT	JELLY FILL DONUT	LEMON FILL DONUT	MAPLE BAR
POWDERED DONUT	RAISED DONUT	APPLE PIE	CHERRY PIE
BANANA CREAM PIE	CHOCOLATE CREAM PIE	BLUEBERRY BAGEL	CHEESE BAGEL
ONION BAGEL	PLAIN BAGEL	STRAWBERRY BAGEL	DOZEN COOKIES

| Customer Loyalty | PgUp | PgDn | System ID |
| | | | Display Pole Total |

If you have any other questions, feel free to give us a call at 801-336-3303.