QuickBooks

Point of Sale 8.0

QuickStart Guide

Intuit Storefront for QuickBooks Point of Sale

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Welcome

Thank you for choosing Intuit Storefront for QuickBooks Point of Sale. We are delighted to offer you on an exciting new e-commerce solution for users of QuickBooks Point of Sale.

Web store Checklist

By now, you should have completed the following in preparation for opening your Web store:

- ☑ **Installed Point of Sale 8.0**.

- ☑ **Added items in Point of Sale**. And entered the item descriptions, pictures, and Web price.

- ☑ **Set up your Intuit Storefront account** and have your login name and password.

- ☑ **Completed your web store design** or are in the process of doing so.

- ☑ **Researched sales tax requirements for online sales in your area**.

- ☑ **Set up accounts for integrated services as needed**. Such as with the QuickBooks Merchant Service to process online credit card transactions and with shipping providers.

This guide contains important information to help you complete the setup of your web store, open it, and begin taking and filling orders.

- ☐ **Set web store administration preferences**. This applies to options and preferences specific to your web store, such as online sales tax, shipping, item categories, and payment options.

- ☐ **Connect Point of Sale to your web store**. And set up preferences in Point of Sale, such as your web store login information, synchronization options, and item/customer field mappings.

- ☐ **Specify the items you'll sell on the Web**. In your Point of Sale inventory, specify the items that you will sell online and, if applicable, enter additional item information for Web items, such as shipping weight, manufacturer, and search keywords.

- ☐ **Assign items to web store categories**. This step organizes your items in the way you want customers to see them online.

- ☐ **Initial synchronization of Point of Sale and your web store**. This step uploads your items to the Web store.

☐ **Open your web store!** Think about and implement strategies to help your customer's find your site.

☐ **Schedule routine web store synchronization.**

☐ **Fill and ship orders in Point of Sale.**

Where do I do what?

This chart is an overview of how various Web store activities are split between your Point of Sale program and your online Web store.

Page	Task	In Point of Sale	On your Web store
	Setting Preferences		
8	**Payment options**		X
9	**Shipping**		X
11	**Sales tax**	X	X
14	**Show out of stock items?**		X
15	**E-mail Notifications**		X
16	**Synchronization Options**	X	
17	**Inventory Options**	X	
17	**Customer Options**	X	
18	**Printed Web Order message**	X	
22	**Scheduling Synchronization**	X	
	Working with Inventory and Web Orders		
18	**Add/edit/delete items**	X	
19	**Set web pricing**	X	
19	**Product categories**	X	
20	**Set featured products/categories**		X
-	**Taking Web orders**		X
-	**Authorizing credit cards**		X
24	**Filling & shipping orders**	X	
-	**Track customers**	X	
-	**Report on Web sales**	X	

Web store Terminology

Web store: Your online store hosted by Intuit Storefront for Point of Sale; as opposed to your physical store location.

Store Administration: The web page where you set options specific to the operation of your Web store. Access by logging in at http://www.intuitwebsites.com/~site/Login/index.ffhtml and then selecting the Store Administration tool.

Company data: Your Point of Sale data file that is connected to your web store, and used to track inventory, orders, sales, and customers for both your physical store and Web store.

Synchronization: The process of sending and receiving items, customers, and orders between your Point of Sale company file and your web store.

Web order: An order placed by a customer on your web store. These orders are downloaded and filled from within Point of Sale.

Split order: When a Web Order is only partially filled, the remaining items due are split out and added to a new order. Both the original and new order(s) are referred to as a split order.

Web receipt: Refers to the entry in the receipt **Type** field on Point of Sale sales receipts that record the sale of items ordered from your Web store.

Fill & ship: The process of selling and shipping the items ordered on a Web Order in Point of Sale. Filling and order updates inventory and customer records accordingly.

Web store icon: The green shopping cart icon, used throughout Point of Sale to indicate a document or record associated with your Web store.

Web store MAS: The merchant service used to approve and settle credit and debit card transactions on your Web store.

Assumptions

The instructions in this guide assume you have a working knowledge of Point of Sale. If you need assistance completing a task not detailed in this guide, consult the help system within the Point of Sale program.

Set Up Your Web store (Web store Administration)

Use this information to set up options and preferences for your web store.

> **Important Note:** You must set up payment preferences, sales tax, and shipping options in your Store Administration before you synchronize with Point of Sale and open your web store. Other Store Administration settings are optional and can be changed later, after you open your Web store. The procedures below describe only the setup steps necessary to make Point of Sale and your web store work together. We recommend you select the **Online Guide** or help links on the Store Administration pages to learn more about additional options not discussed here.

> **Warning:** If you have had a web store designed for you, it is strongly recommended that you do not go to the Store Design areas for Logo, Theme, or Home Page of Store Administration. Making changes in these areas can overwrite your custom design.

> **Warning:** There are several wizards available on the Store Administration site to help you set up your store. It is strongly recommended that you **NOT** the use the **General Wizard** for the same reason mentioned above. You may use the individual wizards to set up payment and shipping preferences and sales tax.

To configure your Store Administration settings:

1. Log in at http://www.intuitwebsites.com/~site/Login/index.ffhtml and select the **Store Administration tool**.
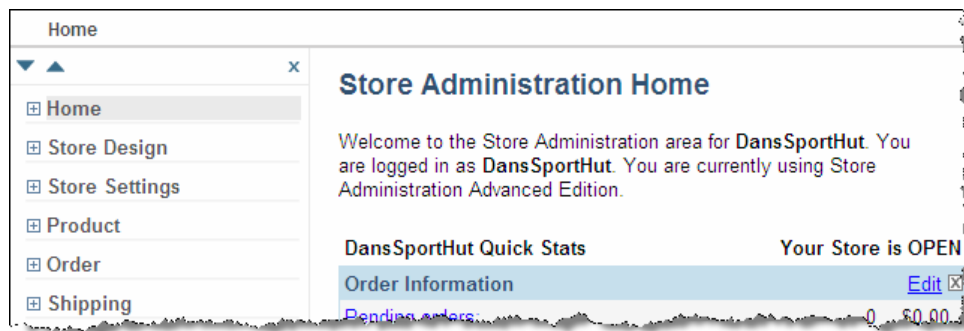

2. Select an area from the menu on the left. Click ⊞ to expand the options within an area.

3. Make changes as necessary. See specific instructions in the following sections.

4. Click **Apply** or **Submit** on individual pages to make the changes to your store.

Previewing changes on your web store:

Previewing requires that your web store be open. If necessary, you can open your store for short periods of time for test purposes. Be aware that the store will be publicly available when open.

1. Select **Store Settings > General > Store Information**, and then select
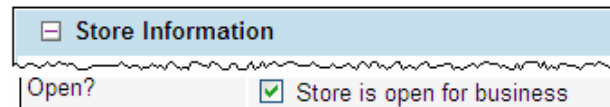
the checkbox labeled **Store is open for business**

2. Select **Submit**.

3. After applying a change to a setting, select **View Live Store** from the upper-right corner of the Store Administration page.

4. Your web store will be opened in a new browser window.

5. If not ready to stay open, go back and close your store by clearing the **Store is open for business** checkbox.

Tip: If you leave your store open while making changes, you can switch between windows to quickly view the effect they have. When switching to your Web store window, press **F5** on your keyboard or click the browser refresh icon to update it with your last Store Administration changes.

Setting up Payment Preferences

Use this area to set up the optional QuickBooks Merchant Service for Web stores and any other payment options applicable to your business.

To set up your QuickBooks Merchant Service:

1. From the Store Administration left-side menu, select **Store Settings > Payment Prefs**.

2. If necessary, expand the **Credit Cards (Merchant Service)** section by clicking the ⊞.

3. Select **QuickBooks Merchant Services** from the drop-down list under Other Processors and then select **Configure**.

4. Follow the on-screen instructions to enter your merchant account number and other information as requested.

5. Go through the remainder of the payment preferences, expanding each section to view your options, and making selections as appropriate for your web store.

6. Select **Submit**.

Setting up Shipping Preferences

Use this area to specify the shipping methods you will offer to your web store customers. You must have an account open with any selected commercial shippers. Enter your account number to make that option available.

The shipping methods you set up on the web store must match those you have selected in your Point of Sale shipping preferences. In your Point of Sale inventory, you can enter a shipping weight for each item so that shipping charges will then be estimated accurately when selling the item from your web store.

If you plan to use Shipping Manager in Point of Sale, configure your web store to use UPS as the preferred shipper. You can offer shipment by other providers as well, but will not be able to process those shipments in Shipping Manager.

Note: **Merchant-Defined Shipper**

One shipper, called **Merchant-Defined**, is available by default. This shipper is used if you do not set up any other shippers or if your preferred shipper is not available or doesn't support a particular shipment. You should review and edit this shipping information to ensure it applies shipping charges per your requirements if used. Select the **Setting up Merchant-Defined Shipping Tables** help link on the right side of the window for more information.
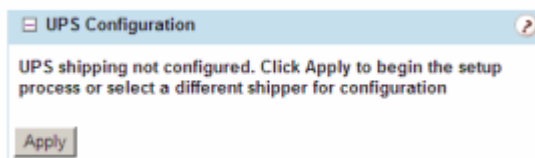

To set up UPS as a shipper:

UPS is used as an example here, since it is supported in the Point of Sale Shipping Manager, but other providers can be set up in essentially the same manner.

1. From the Store Administration left-side menu, select **Store Settings > Shipping Prefs**.

2. In the Available Shippers section, select **Configure** for UPS.

3. Select **Apply** on the UPS Configuration message shown.

4. Read and accept the UPS license agreement that is displayed.

5. Enter your company and contact information, pickup location postal code, and existing UPS account number.

6. Select **Apply**.

7. When the Registration Successful message is displayed, select **Apply** to continue to the UPS shipping options detail page.

8. Enter or select shipping options as appropriate for your store.

   Important: Make sure to select only **Offered Delivery Methods** that are also available in Point of Sale; the default Point of Sale methods for UPS are reflected in the choices shown below. You can add other UPS methods, provided you add them both on your Web store and in Point of Sale.

9. Select **Apply**.

10. **Optional**: In the **Options** section, enter a markup percentage or amount to add to all shipments. Some retailers choose to add a standard shipping markup to pay overhead and material costs related to shipping. Select **Apply** when done.

11. In the **Available Shippers** section, select the checkboxes to make UPS show on your storefront and to be your preferred shipper. Then, select **Apply.**

12. Repeat for other shippers as necessary.

📝 **Note**: **Point of Sale Shipping Preferences**

To verify the shipping preferences you have set up in Point of Sale, from the Edit menu select **Preferences > Company** and then select **Sales > Shipping** from the left side of the preference window.

Setting up Sales Tax

Many states are still working to implement regulations governing how sales tax should be collected on Internet sales and these regulations can vary substantially depending on your area. It is your responsibility to investigate the sales tax regulations applicable to you and set up your web store taxes accordingly. The web store checkout procedure will then apply sales tax according to your setup, typically based on where the customer is located.

What you need to know about web store Sales Taxes

- Your web store taxes must be set up on the Store Administration site; tax information is not uploaded from Point of Sale to your web store. However, once set up, your web store tax information will be displayed in your Point of Sale tax preferences for reference.

- The tax terminology on your web store differs from that used in Point of Sale as shown below:

Web store Tax Term	Is similar to this POS Tax Term	Description
Tax Region	Tax Location	Changes how taxes are charged based on where customer is located. You may require more or less regions for web store sales that you have Point of Sale tax locations, depending on local requirements.
Tax Category	Tax Code	Assigned to items and used in conjunction with tax regions to apply the correct tax based on the item type.
Tax Code	-	Used to specify the name of your web store tax regions.

- You must set up at least one tax region on your web store and you must specify a region as the default tax region.

- Your tax categories on your web store must match your tax codes used in Point of Sale.

- The web store **Online Guide**, accessed from the Store Administration site, contains a discussion of how sales tax are set up and applied to your Web sales. We recommend you read the topics in the **Help by Process > Preparation > Sales Tax** area of the Online Guide for more information.
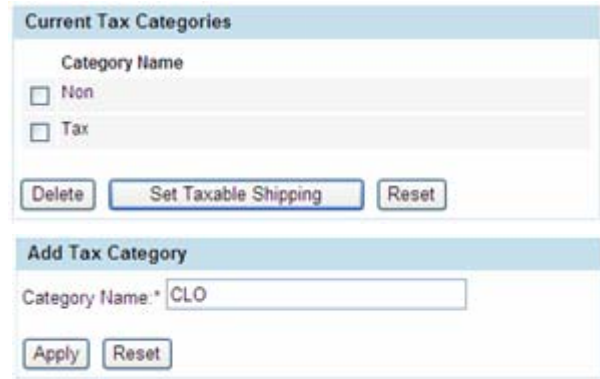
To set up your web store sales taxes:

This is an example sales tax setup. We make certain assumptions in this example, however you are responsible for verifying the requirements in your area and adjusting your settings accordingly.

1. From the Store Administration menu, select **Store Settings > Sales Tax**.

2. Scroll to the bottom of the window and select the **Sales Tax Categories** link.

3. In the **Current Tax Categories** section, add tax categories as needed:

    - You must have tax categories here that exactly match the tax codes you have set up in Point of Sale.

      > 📝 **Note**: To view your tax codes in Point of Sale, from the Edit menu select **Preferences > Company** and then select **Sales Tax** from the preferences menu.
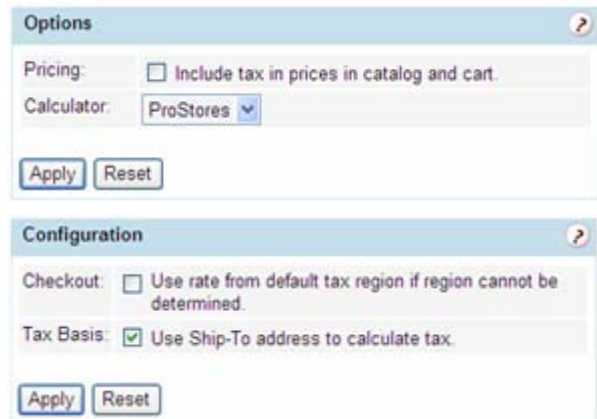
    - Use the **Add Tax Category** section to add categories. Type a category name (maximum of 3 characters) and select **Apply**. The category is added to the Current Tax Categories list.

    - If shipping charges are taxable in your area, select the checkbox for the appropriate category and then select **Set Taxable Shipping**. The category name will display bolded to indicate that shipping is taxable for that category.

    - To remove a category, select its checkbox and then select **Delete**.

4. When done, select **Sales Tax Preferences** at the bottom of the screen.

5. In the **Options** and **Configuration** sections, leave the default settings as shown in the examples to the right.

    With the default settings, the built-in tax calculator uses your customer's shipping address along with the tax regions you have defined (see below) to calculate the correct tax.

    Select the help button on these sections for more information about when you might change these settings.
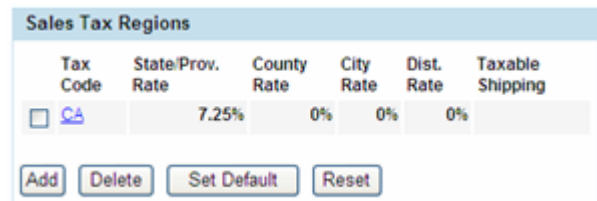
6. In the **Sales Tax Regions** section, set up your sales tax regions (described below).

Sales Tax Regions

Tax regions are associated with a tax category and specify the specific tax rate(s) to be collected. The web store tax calculator will look at the customer's shipping address and then it will look at the tax categories assigned to the region and to the items being sold to determine the amount of the tax.

- You must set up at least one tax region. If you don't collect tax, set up one region and select the tax category **None** and assign a 0% tax rate.

- If you collect different tax rates based on where the customer lives, set up a tax region for each governmental division (state, county, city, or tax district) that is taxed differently.

- With the default settings, if the customer's shipping address does not match one of your tax regions, no tax is charged.

- When calculating taxes, your Web store will look at the lowest government division (by name of state, county, city, or district) in the customer's address that matches the regions you have set up to determine the region to use.

Tax Region Example

This example assumes the country is United States and a single taxable category is assigned to each region. (Tax rates shown are not official; do not copy.)

Tax Region/Code	Tax Setup	Total Tax Rate
CA	State of California 7.25%	7.25%
CA/SAC	State of California 7.25% County of Sacramento 0.5%	7.75%
CA/SAC/CH	State of California 7.25% County of Sacramento 0.5% City of Citrus Heights 0.25%	8.00%

When making sales with this example setup:

Customer Address is in	Tax Region Used	Tax Applied
Los Angeles, CA	CA	7.25%
Any state other than California	-	0%
Sacramento, CA	CA/SAC	7.75%
Citrus Heights, CA	CA/SAC/CH	8.00 %

To set up your web store tax regions:

1. In the **Sales Tax Regions** section, select **Add**. The Region Information window is opened.

2. In the **Tax Code** field, enter a name for this region.

3. In the **State/Province** field, enter the two-letter U.S. state abbreviation.

4. In the **County**, **City**, and **District** fields, enter the official government names for each division **ONLY** if tax rates are different or need to be collected separately for each.

    - If a single tax rate is collected statewide and paid to a single agency, you do not need to enter these government subdivisions.

    - If you enter a tax rate at any division, you must also make entries for each level above it. For example, if you collect a 0.5% city tax, then you must also enter the county name above the city, even if you don't collect a separate tax for the county. Shown to the right is how sales tax for the city of Citrus Heights (from example above) is set up.

5. Select the appropriate **Tax Category** from the drop-down list.

6. In the rate fields for each government division, enter a rate for the state (required) and for each subdivision you entered in Step 4. 0% is a valid rate for this entry.

7. Select **Submit**.

8. Repeat for each tax region you need to set up.

9. With your Sales Tax Regions list displayed, select the checkbox for one of the regions and then select **Set Default**.

Handling Out-of-Stock or Drop-Ship Items

This setting determines if items with a zero on-hand quantity remain available on your web store. If you purchase merchandise from your vendors only after receiving an order, you would want your items to always be available. On the other hand, if you stock and ship your items from your physical store, you may not want zero-quantity items displayed.

To change this setting:

1. From the Store Administration menu, select **Store Settings > Product Prefs**.

2. In the **Inventory Status** section, select the checkbox labeled **Inventory: Enable**.

3. In the **Catalog Preferences** section:

    - To show only items for which you have an on-hand quantity, select the checkbox labeled **Out of Stock: Hide products from catalog when quantity is zero**.

    - To show all items, ensure this checkbox is not selected (no check mark).

4. Select Submit.

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E-Mail Notifications

You can set up automatic e-mail notifications for various actions on your Web store. For example, you can generate an e-mail to go to the customer confirming the order and another when shipment is confirmed. You can also have e-mails sent to yourself or your staff for orders.

To configure e-mail notifications:

1. From the Store Administration menu, select **Store Settings > Mail**.

2. In the **Basic Information** section, enter e-mail addresses for yourself or your staff. Leave the default mail server and port settings.

3. In the **Notification Options** section, select the checkboxes for the e-mails you want automatically sent.

4. Select **Submit**.

Connect to Web store and Set Point of Sale Preferences

After you have completed your web store Admin preferences setup, you are ready to connect Point of Sale to your web store and set preferences in Point of Sale. The preferences set here are concerned with how information is exchanged with your web store.

To establish the connection to your web store:

1. From the Point of Sale Edit menu, select **Preferences > Company**.

2. From the left-side preference list, select **Web Store**.
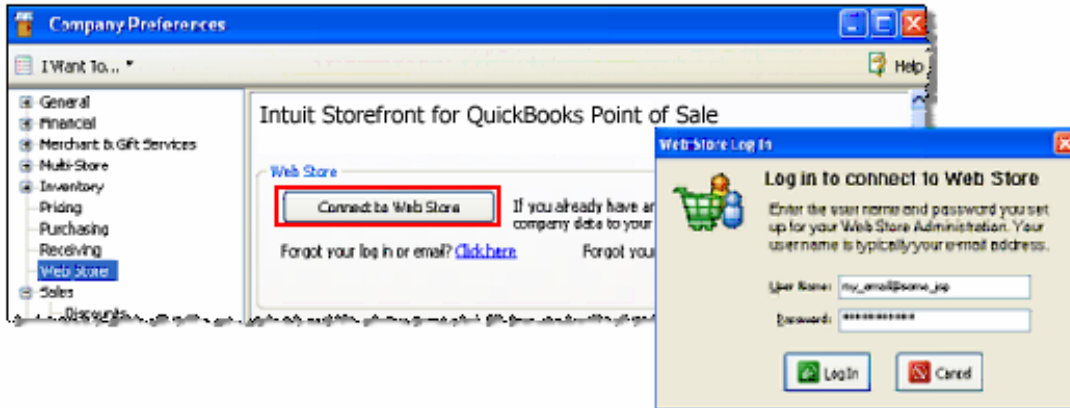
3.   Select **Connect to web store**.

4.   Enter the user name and password you've set up for your web store. Your user name is typically your e-mail address.

5.   Select **Log In**.

The preference options on the lower part of the page will now be active. Making this connection also adds additional web store fields to the item form in your Point of Sale inventory.

You can set the options described below now, but we suggest you just familiarize yourself with them and return here later to make your selections, after finishing entering item information in inventory.

Synchronization Options
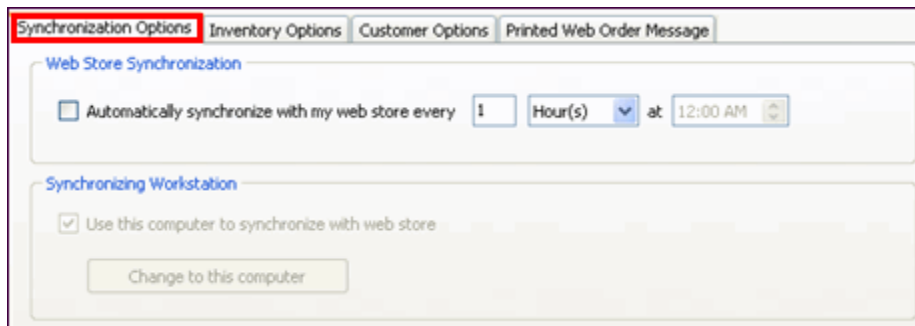
1.   Select the **Synchronization Options** tab.

2.   To have Point of Sale automatically send and receive information from your web store, select the **Automatically synchronize…** checkbox. Specify how often or at what time synchronization should occur.

> **Note:** We recommend that you NOT schedule automatic synchronizations until you have completed all the setup steps in this guide and have opened your web store. To synchronize during setup, use the option from the 'I Want To' menus in your item and Web order lists. Additional information about scheduling synchronization is included later in this guide.

3. If you have multiple workstations, you can specify that the current workstation is to handle all communication with your Web store by selecting the **Use this computer to synchronize** checkbox.

If the checkbox is already selected and grayed out, then the current workstation is already designated for this communication.

> **Note**: This setting is used to tell Point of Sale which of your workstations have an Internet connection to handle this communication. It does not mean that only the specified workstation can perform Web store tasks. To route communication through a different workstation, access this preference page from that workstation and select the checkbox.

Inventory Options

1. Select the **Inventory Options** tab.

2. Select or clear the **Update** checkboxes for the item description and price fields. If a field checkbox is selected, the information in the Point of Sale item field is sent to the Web store when you synchronize.

3. For each item description field selected, specify the web store field to which the information should be sent (mapped). By default, these fields map to the fields of the same name in your web store.

4. For each web store price field selected, specify the Point of Sale price level which should be sent to that field for each item. Typically, the **Retail Price** field would be used to demonstrate savings at your Web store if you are setting your **Sell Price** lower.

Customer Options

1. Select the **Customer Options** tab.

2. Select or clear the **Update** checkboxes for the customer contact information fields. If a field checkbox is selected, the information in that Point of Sale customer field is sent and updates the customer record at the web store when you synchronize.

Information is sent only for customers that have an entry in the **Web Customer #** field in your customer records (indicating the customer came from the Web).

3. To map Point of Sale customer information to other than the default web store fields, select different fields from the drop-down lists.

   Other customer information, such as addresses, are automatically mapped to the corresponding fields on your web store.

Printed Web Order Message

1. Select the **Printed Web Order Message** tab.

2. Type a message you would like to be printed on each order placed at your web store.

   The default is a simple "thank you" message, but you may want to add your return policy, news about upcoming specials, or an invitation to visit you at your physical store.

3. Select **Save** at the bottom of the Preference window to save all of your changes.

Set Up Web store Items in Point of Sale

Once you have established the connection to your web store, additional fields are added to the item form and item list in your Point of Sale inventory. Use the instructions below to specify which items you will sell on your web store and to enter other web-specific item information.

To specify your web items:

1. In your Point of Sale item list, select an item and then choose **Edit Item**.

2. Select the **Web store** tab.

3. Select the checkbox labeled **I sell this item on my web store.**

Only items with this checkbox selected will be sent to your web store.

4. Review and enter other web information for the item.

   Web Price: Point of Sale calculates this price for new items based on your Web Price level or you can edit it directly. Select the **Pricing** button to review your price levels. See note below.

   Web SKU: Item number used on web store.

   Manufacturer: If entered, can help customer find items by manufacturer or brand name on your Web store.

   Shipping Weight: Will be uploaded to the web store for use in calculating shipping charges. Required if you will base shipping charges on weight.

   Search Keywords: Used to help customers find items on your web store. Select **Generate Keywords** to automatically create keywords based on item description fields, and then add or remove keywords as needed. Note that the keywords entered here do not get used by other Internet search engines.

   Assign Categories. Assign categories in which the item will appear (more detail below).

5. Select **Save**.

6. Repeat for other items.

🗒️ **Note**: **Using the Web Price Level**
The Web Price is added as a new price level in Point of Sale and works like your other price levels. By default, the Web Price is the same as your regular price (0% markdown) but can be revised at your discretion. Like other price levels, you can change the markdown percentage on specific items, and your Web Price will automatically adjust whenever your regular price changes. You can also use Price Manager to change Web Prices at any time.

Assign Product Categories

Product categories provide a logical grouping of your items displayed on your storefront. Categories allow your customers to browse your customer list and also help to separate search results.

Product categories may be similar to your Point of Sale departments, or may be very different.

For example, you may have all new items added to your Web store by default go to the **New** category, making it easy for your repeat customers to quickly find recently added merchandise. You can also add sub-categories to help customers to find a specific item. In the example shown, Men, Women, and Children are subcategories of

Western Boots. Your use of categories is limited only your imagination.

Once set up you will assign your items to the appropriate product categories. A category will not show up on your web store until at least one item has been assigned to it.

To add product categories:

1. From an item's Web Store tab, select **Add Category**.

2. Enter a name for the product category. Note that each category must have a unique name, and that each subcategory within a category must have a unique name.

3. Optionally set other category values:

    -   **Subcategory of:** To add a subcategory, select the category to which it belongs.

    -   **Description:** This is a short description for the category that may be displayed on you web store depending upon its design.

    -   **Sort Priority:** This determines the order in which your categories are listed on your web store and defaults to 9999 for all items. With the default setting, categories will be ordered alphabetically (A-Z) and numerically (0-9). To use a custom sort order, enter smaller numbers for categories to appear first. We recommend leaving space between entries (example:100, 200, 300, 400) so you can slot new categories at any position in the future.

    -   **Default Category:** If selected, all new items will be added to this category when added to your web store.

4. Select **Add** to save the category.   Once a category is added it is available to all items.

To assign categories to your items:

1. From an item's Web store tab, select the checkboxes of the categories or subcategories you wish to contain that item.

    -   When selecting a subcategory, the category to which it belongs is automatically selected.

    -   When viewing a group of items as a style, choosing categories from the Web store tab will assign those categories to all members of that style.

2. When finished, select **Save**.

3. Repeat for your other items.

To set additional category options later:

Log in at http://www.intuitwebsites.com/~site/Login/index.ffhtml and select **Product > Categories** from the Store Administrator screen to optionally set additional category options such as:

- **Photo:** Select or browse to a photo for the category; which will be shown as a thumbnail with the category name on your store front.

- **Sort Priority:** This determines the order in which your categories are listed on your web store and defaults to 9999 for all items. With the default setting, categories will be ordered alphabetically (A-Z) and numerically (0-9). To use a custom sort order, enter smaller numbers for categories to appear first. We recommend leaving space between entries (example:100, 200, 300, 400) so you can slot new categories at any position in the future.

- **Featured Category:** Depending on your store design, a featured category has more predominant placement

Tip: assigning multiple items at the same time – You can assign the same categories to multiple items at the same time when in list view.   Simply select the items you want to assign (by clicking while holding down the Shift or Alt keys), choose **I Want To > Web Store > Assign categories to selected item(s)** and then select the categories to which those items belong.

Synchronize Point of Sale with your web store
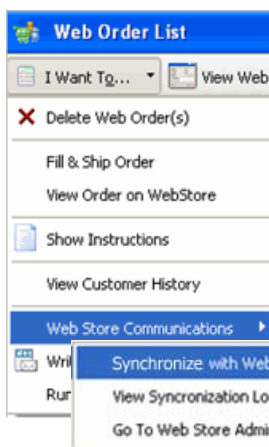
The initial synchronization uploads your Point of Sale items and information to your web store and downloads information from your web store so it is available in Point of Sale. Routine synchronizations do this plus exchange information for new customers and Web orders you have received.

To manually synchronize:

- From the I Want To menu in your Point of Sale item list or Web Order list, select **Web store Communications > Synchronize with web store**.

The Web Store Synchronization progress dialog is displayed. In the event that error occurs, select **View Log** to see all synchronization actions and troubleshoot the error.
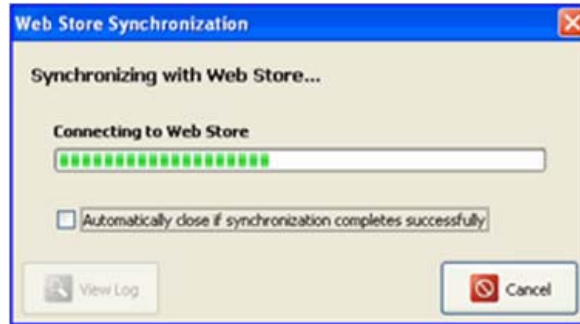

Scheduling Synchronization

Synchronization can be scheduled to automatically occur as often as every hour, even when your computer is unattended. This allows you to quickly know when orders have been received and to ensure changes made in Point of Sale are reflected on your web store in a timely manner. Likewise, if your need for synchronization is only a couple times a week, you can schedule for that too.

To schedule synchronization:

1. From the Point of Sale Edit menu, select **Preferences > Company**.

2. From the left-side preference list, select **Web store for Point of Sale**.

3. Select the **Synchronization Options** tab and then select the checkbox labeled **Automatically synchronize…**
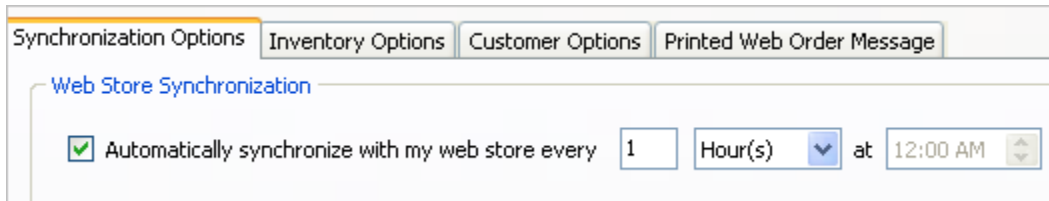

4. Specify the frequency for synchronization to occur.

5. Select **Save**.

The Web Store Synchronization icon is displayed in the task bar of the workstation that communicates with your web store (may or may not be the same workstation that changes this setting).

Clicking this icon will display the Web Store Synch Service status dialog, listing the date/time of the last completed synchronization and the date/time for the next scheduled synchronization.

Because scheduled synchronizations run as a service on your computer, the workstation
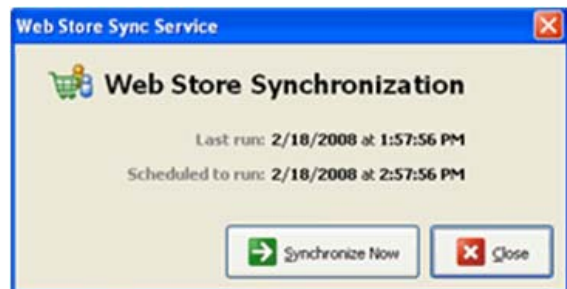
displaying this icon must be running for scheduled synchronizations to occur (but Point of Sale does not need to be running). If the workstation communicating with the web store is not your Server Workstation, then the Server Workstation must also be running for scheduled synchronizations to occur.

Go Live with Your Web Store

Congratulations! If you have completed all of the previous steps, you are now ready to open your web store to the public and begin reaping the rewards of all your hard work.

To open your web store:

1. Return to your Store Administration site.

2. Select **Store Settings > General > Store Information**, and then select the checkbox labeled **Store is open for business**


3. Select **Submit**.
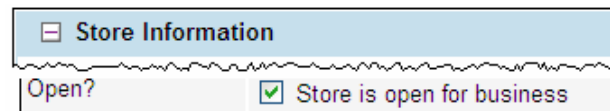
Working with Web Orders

Each time you synchronize Point of Sale with your web store, waiting orders will be downloaded and an alert displayed. The web store icon is also added to the status bar at the bottom of your Point of Sale screen anytime you have unfulfilled web orders.

To access your Web Order list:

1. When the web order alert is displayed, click anywhere on the alert to go to your Web Order list.

   Or

   • Click the Customer Order List icon on the Navigator, and then select **Web Order List** from the drop-down menu.

   Or

   • From the Point of Sale menu, select **Web Order List**.
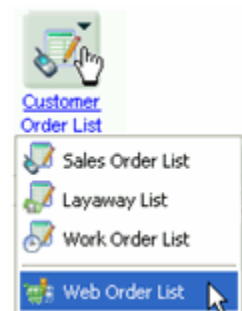
2. Use normal list procedures to sort or search to find the desired order.

To fill and ship a Web order:

1. With an order selected in your Web Order list, select **Fill & Ship Order** from the I Want To menu.

2. Make selections and follow the prompts to complete the sale and shipment.

   The options presented may vary depending on available quantity of the items, the shipping provider, and your selections, but you always have the opportunity to change shipping address, print a packing slip, or print a copy of the final sales receipt.

Web orders filled in POS are automatically changed to a status of Closed in the Web Order list and online the order is updated to reflect that it has been filled and shipped. In your sales history, Web sales are identified by an entry of *Web Sale* in the **Receipt Type** field.

Web orders in general work the same way as other customer orders in Point of Sale. Search the in-product help system by keywords *customer order* for additional information.

Security

When downloading Web orders, the **Associate** and **Cashier** fields on the order form will be auto-filled with *Web*.

When filling the Web order, the **Associate** for the receipt will be auto-filled with *Web*, but the **Cashier** field will reflect the currently logged-in user or, if logins are not required, will also display *Web*.

Web Order

Sales Receipt

The following security rights have been added to Point of Sale for the web store for Point of Sale feature. The default setting for each of the predefined security groups is indicated by the chart below.

View or edit these rights by selecting **Security** from the Employees menu. Press **F1** with the Security window displayed for additional instructions.

Area	Right	Owner	Mgr	Asst Mgr	Assoc
Web Orders	Synchronize with web store	X	X	X	
	Access Web Orders	X	X	X	X
	Delete/cancel Web Orders	X	X	X	

Additional Resources

Free assistance is always available on our comprehensive support website www.quickbooks.com/support/pos. Visit our Installation Center, view useful resources and search for answers to your questions.

Visit the User Community at www.quickbooksgroups.com/pos and connect with other users and experts to ask questions and share advice