Intuit

QuickBooks

Point of Sale

Version 7.0

QuickStart Guide

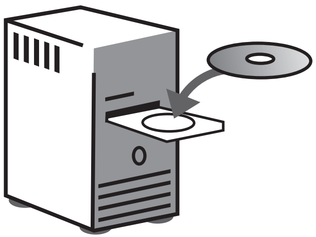
Installation & Setup

Start Here

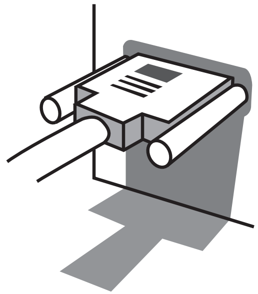
DO NOT connect hardware until prompted by the Hardware Setup Wizard after installing Point of Sale!

Install and Setup Sequence

1. Install Point of Sale

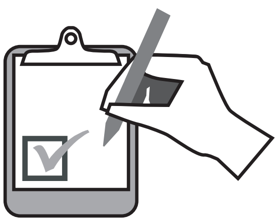


2. Connect hardware

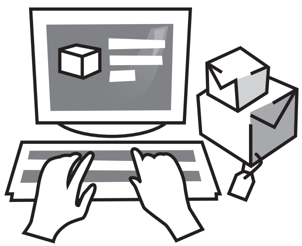


3. Complete Setup Interview

4. Set business preferences



5. Set up inventory



6. Ring up sales!

Note: This file contains low-resolution images that may not appear sharp on your screen.

Before You Begin

All Installations...

- Ensure your workstation(s) meet the minimum system requirements listed on the back cover.
- Sign on to Windows with Administrator rights before installing.
- Install the latest updates for your firewall software. Typically, this is done by right-clicking on the firewall icon in your task tray and selecting the option to check for updates.
- If installing on multiple workstations, ensure they are properly networked; contact a qualified network technician if you need networking help.
- If integrating with QuickBooks financial software, review the **QuickBooks Integration** tab before beginning.

New Single-Store Installations...

1. **Gather the following information:**
   - Names, contact information, account numbers, balances etc., for existing vendors, customers and employees
   - Current on-hand counts, costs, and prices for existing inventory items
   - Applicable sales tax rate(s) and the name of the agency to which they are paid

Don't worry if you don't have all this information now. You can still install and enter the information later.

2. **Follow the order of the tabs in this guide.**

Upgrading from a Previous Version...

- Select the **Upgrade Prior Version** tab for instructions specific to you.

New Multi-Store Installations...

1. **Review the information on the Multi-Store tab.**
2. **Gather the following information:**
   - The information shown for single-store installations
   - Names, addresses, and phone numbers for each store
   - Point of Sale license number and Store Exchange communication method for the Server Workstation at each store
3. **Follow the order of the tabs in this guide.**

About Firewalls

Firewalls are an important part of an overall data protection strategy. With the latest updates, most major software firewalls will be automatically configured to allow Point of Sale operations. Likewise, the firewall included in Windows® XP/Vista is detected and automatically configured when you first run Point of Sale.

For additional information and instructions, refer to the appendix titled "Configuring Firewalls" in your Point of Sale User's Guide.

Installing Point of Sale on the Server Workstation

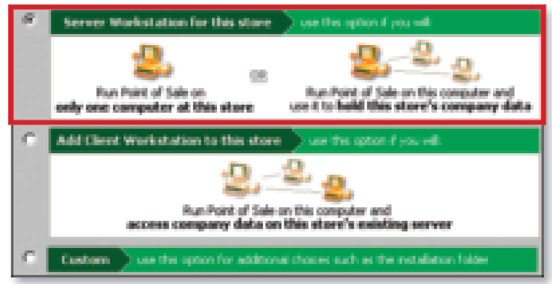
Choosing a Server Workstation

One computer in your store must be made the Server Workstation. This computer performs all Point of Sale activities, plus:

- Creates and stores the Point of Sale company data file
- Manages your Point of Sale registration and user licenses
- Connects to and exchanges data with QuickBooks financial software
- In a multi-workstation environment, must be running to use Point of Sale on any workstation

To install Point of Sale on the Server Workstation:

1. Close all running programs, except Windows.
2. Put the Point of Sale CD in your CD-ROM drive.
   - If the installation doesn't begin automatically, locate and double-click the **setup.exe** file on the CD.
3. Follow the on-screen prompts:
   - Enter the License and Product numbers from the CD holder or provided to you by a sales agent
   - Select **Server Workstation** as the installation type.



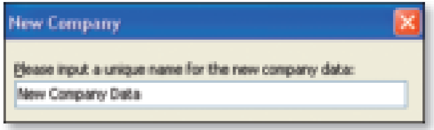
4. If prompted, restart your computer and then launch Point of Sale.

   Point of Sale will automatically install other required applications contained on the CD, if necessary. See requirements on back cover.

Creating Your Company Data

On startup, Point of Sale displays options for opening or creating a company data file.

1. Select **New Company File**.



2. Enter a unique name for your company data and select **OK**.
   - If a multi-store installation, also enter your Store type, Headquarters or Remote, and store number. (Note: Install only one Headquarters store.)
3. When prompted, select a workstation number (1 is suggested for the Server Workstation).
4. Select **OK**.
   Point of Sale creates your company data file; which may take a few minutes.

Registering Point of Sale

Point of Sale must be registered on the Server Workstation or it will cease to function on the 31st day after installation.

1. When prompted, select **Register Now**.
2. Follow the instructions to register online (alternatively, you can register by phone).

After registering, your workstation type and license/ product numbers can be viewed by selecting **About Point of Sale** from the Help menu. You will need to provide these numbers if contacting Intuit for support or to purchase additional user licenses.

Benefits of Registering Point of Sale

You are encouraged to register Point of Sale promptly. Besides keeping your software functional, registration provides other valuable benefits:

- Notification of Point of Sale updates, enhancements and fixes
- Access to online features

About Point of Sale Licensing

Point of Sale can be installed on multiple workstations using a single license number. However, in that case, only one of the workstations can run Point of Sale at one time. For multiple workstations to run the program concurrently requires multiple user licenses (additional licenses sold separately).

With multiple user licenses, the Server Workstation acts as the “license manager”, checking licenses in and out to the other workstations. As many workstations can be using the program concurrently as you have purchased user licenses; up to ten in a store.

The Server Workstation must be running for any workstation to run Point of Sale, but only uses a license itself if it also has Point of Sale open.

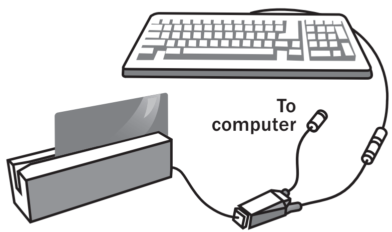
- Instructions for adding Client workstations can be found on the **Add Workstations** tab
- For additional information about Point of Sale licensing, search the in-program Help index by keyword **licensing**.

If integrating with QuickBooks financial software, you have a separate company file in each program

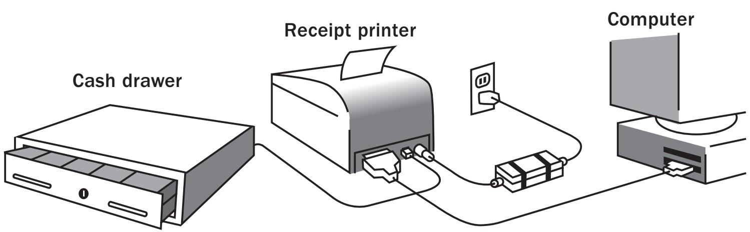
Connecting Hardware

Point of Sale hardware is available directly from Intuit or you can purchase compatible hardware from other sources.

- If you purchased hardware from a source other than Intuit, verify it is on the Point of Sale compatible hardware list (see User Guide appendix) and have any instructions or driver disks that came with the hardware on hand.



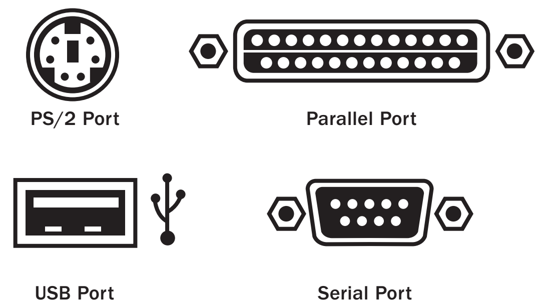
PS/2 Card Reader/Keyboard Connections



Cash drawer/receipt printer connections

Hardware Port Notes

- Ensure you have the required number and correct type of computer ports for the hardware you are installing. For example, the USB hardware bundle sold by Intuit requires three USB ports.
- If more USB ports are needed, purchase a powered USB hub from a local store. Check your computer manufacturer's specifications for the correct type of hub to purchase.
- Installation of some USB devices is specific to the port in which it is plugged at the time of installation. If you later move the connection to another USB port, your device may stop working. We recommend you make a note of the ports used and always plug these devices back into the same port.



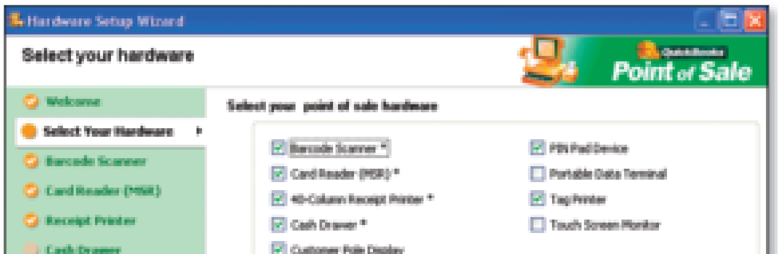
The Hardware Setup Wizard

The Hardware Setup Wizard will automatically launch to walk you through connecting and configuring your hardware.

- **Do not connect hardware to your workstation until instructed to do so by the wizard**
- You can return to the wizard anytime by selecting **Hardware Setup Wizard** from the File menu

To use the Hardware Setup Wizard:

1. If installing hardware purchased from Intuit, put the Point of Sale CD in your CD-ROM drive (cancel the installation wizard if it launches).
2. Click **Next** after reading the welcome page.
3. Select the checkbox for each type of hardware you are installing.



4. Select **Next** and follow the on-screen instructions to connect, set up, and test each piece of hardware.
   - If installing non-Intuit hardware, you may be prompted to use the manufacturer's CD. When done return to the setup wizard and continue.

Configuring an Inkjet or Laser Printer

1. Use the manufacturer's instructions or the Windows **Add Printer** function to install your printer.
2. From the Edit menu in Point of Sale, select **Preferences > Workstation**.
3. Select **Documents and Printers** from the left-side menu.
4. Select your printer from the drop-down list for each document you will print with it.

   Also, select a print template that matches the printer (typically one of the **Letter** templates).
5. Select **Save**.

What if my hardware stops working?

If your hardware stops working in the future, you can use the Hardware Troubleshooter to pinpoint the cause and get it working again.

From the Point of Sale Help menu, select **Hardware Troubleshooter** and follow the prompts.

To set printing preferences: From the Edit menu, select **Preferences** > **Workstation**, and then **Documents & Printers**

Completing the Setup Interview

The Setup Interview is automatically launched and will help you configure basic Point of Sale options for your business.

Notes about the interview:

- If you are not prepared to complete a page, skip it and come back later (select **Setup Interview** from the File menu)
- Most of the choices you make can be changed later
- Use the **Tell me more links** on each page for answers to frequently asked questions
- More advanced options can be set up later in either **Company** or **Workstation Preferences** (accessed from the Edit menu)

What's important about interview pages?

Your Company

The company information you enter is printed on sales receipts and other documents created in Point of Sale. If you specify your business type, some default merchandise departments are added to help get you started.

Other Stores

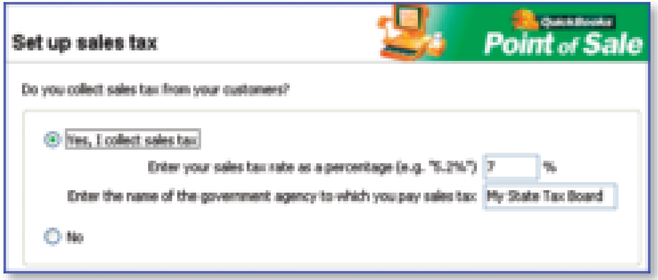
This section applies to a Pro Multi-Store installation only, and allows you to enter store information and set up communications with your other stores. Select the **Multi-Store** tab of this guide for more information.

Customize Features

Use this page to remove features you don't plan to use. Clearing a check-box removes all menu options, fields, and windows for that feature so they don't clutter your screen. Removed features can be turned back on later by returning here or in company preferences.

Sales Tax

If you charge sales tax, answer **Yes** and enter the total sales tax rate and the agency to which you make your tax payments.



Other Sales Tax Options

Point of Sale offers several advanced sales tax options, such as:

- Different rates based on item type, customer location, or unit price thresholds
- Collecting and paying taxes to multiple agencies
- Removing taxes on sales to tax-exempt customers
- And others to help you meet local taxing requirements

If you need to set up more advanced sales tax options, enter the tax rate you most often charge on this page and then, after completing the interview, set up other tax options in company preferences.

More information on sales taxes can be found on the **Set Up Inventory** tab.

POS Merchant & Gift Card Services

On these pages you can learn about, sign up for, and enter account information for either or both of these optional, fee-based services.

With these accounts, you will have totally integrated credit, PIN debit, and/or gift card transaction authorization, settlement, and reporting from within Point of Sale. Select the **Merchant/Gift Services** tab for more information about setting up these services to work with Point of Sale.

Use with QuickBooks Financial Software

Specify on this page if you are going to integrate Point of Sale with QuickBooks financial software. You can answer **Yes** even if you are not ready to integrate now. Point of Sale will prompt you to connect the programs when needed for certain features.

If you are ready to integrate now, you can establish the connection between the two programs from this page.

To connect now:

1. Leaving the interview open, launch your QuickBooks financial software and open the company file you will use with Point of Sale.
2. Switch (**Alt + Tab**) back to Point of Sale and select **Connect to QuickBooks Now**. The QuickBooks Connection Wizard is launched to guide you through the process.
3. Follow the on-screen instructions to complete the connection.

Select the **QuickBooks Integration** tab for more information about integrating the two programs.

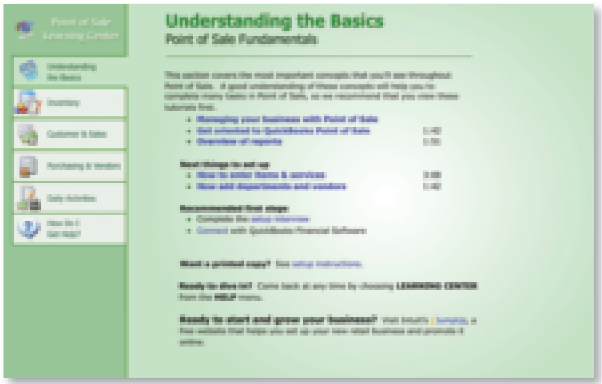
Once connected with QuickBooks, Point of Sale will always reconnect to the same company file whenever needed

Next Steps

The Learning Center

When you finish the Setup Interview, the Point of Sale **Learning Center** is launched. The Learning Center contains short tutorials covering the basics of working in Point of Sale.

We suggest you take some time to watch these tutorials before completing the setup of Point of Sale for your business.



You can return to the Learning Center at anytime by selecting **Learning Center** from the Point of Sale Help menu.

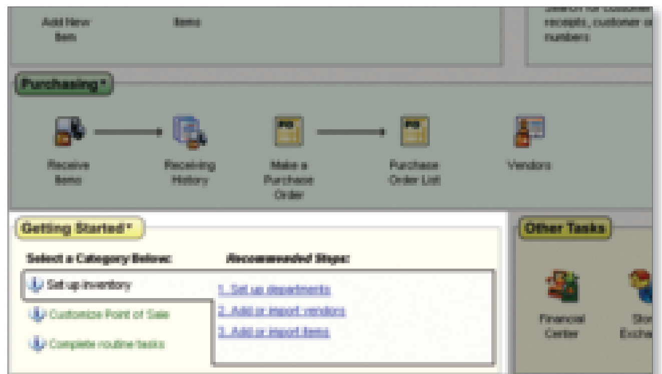
Practice Mode

To try out Point of Sale with some practice data, select **Enter Practice Mode** from the File menu. You can see how things work without risking your own data.

Getting Started Guide

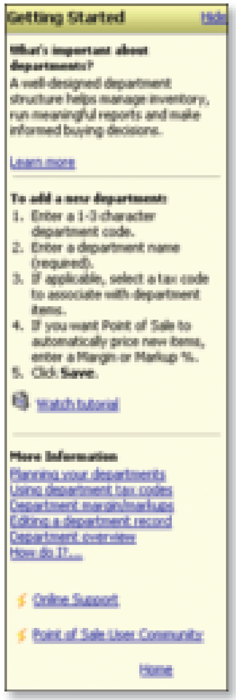
The Setup Interview helped you to configure basic program options. The Getting Started Guide, automatically displayed in the lower-left of the home page Navigator, will assist you in completing the recommended next steps for your business:

- **Set Up Inventory** – create departments and add your vendors and inventory items
- **Customize Point of Sale** – add employees, assign security rights, set up sales tax options, and define printing options
- **Complete Routine Tasks** – receive and sell merchandise, run reports, and share data with QuickBooks financial software



What's important about the Getting Started Guide?

- Walks you through the recommended tasks, in sequence, to complete your Point of Sale setup and enter your data
- Selecting a task launches the Point of Sale screen on which the task can be completed and adds a special Getting Started help sidebar to the screen as shown here
- Use the instructions, help links, and tutorials provided on the sidebar to learn and complete each task
- You can turn off the display of the guide and the help sidebars at any time; and turn them back on later when needed



To turn off/on the Getting Started Guide on the Navigator:

- Click the small down arrow in the Getting Started caption and select **Help & Support**

The Navigator panel changes to display help and support resources. Reverse this procedure to turn the Getting Started Guide back on.

To turn off the display of the help sidebars:

- Select **Hide** in the upper-right corner of the sidebar.

To display the help sidebars again:

- With the desired task window displayed, select **Show Getting Started Help** from the Help menu

OR

- Select the task again from the **Getting Started Guide** on the home page Navigator

Have data you can import into Point of Sale?

Getting your vendor, item, and customer records entered into Point of Sale is, without doubt, the most difficult challenge in getting up and running with Point of Sale.

If you already have this information, Point of Sale can help make this unavoidable chore much easier and faster.

There are two ways existing data can be imported:

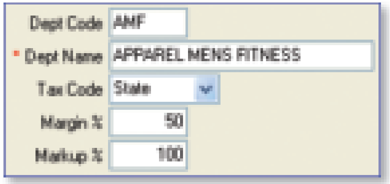
- Import data from your QuickBooks financial software
- Import data from an Excel spreadsheet or text file

Select the **Import Data** tab to learn more about these options.

Setting Up Inventory

Take some time to set up your inventory right from the beginning and Point of Sale reports, reminders, and other tracking tools will help you maximize profit while minimizing your investment of time and money.

Planning your Departments



In Point of Sale, inventory is categorized into departments. A well-planned department structure helps monitor sales performance, manage inventory, and run meaningful reports, allowing you to make informed buying decisions.

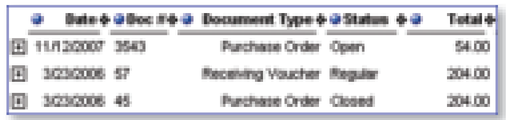
Carefully planned departments will also save you data entry time and give you greater flexibility when conducting a physical inventory, modifying prices, and printing tags.

Tips for planning your departments:

- Adding departments should be the first task completed in setting up inventory; department tax codes and profit margins are automatically associated with new items added to the department.
- There is no right number of departments. If you want to compare the performance of two groups of items, each should be assigned to its own department. On the other hand, having too many departments makes it difficult to consolidate data on your reports.
- Use the **Planning your departments** link on the department help sidebar to view an example department structure.

Adding or Importing Vendors

Each vendor from whom you purchase merchandise should be set up in Point of Sale. As you add items in inventory, you associate them with a vendor, allowing Point of Sale to automatically add vendor account numbers, terms, and order costs to purchase orders and receiving vouchers and build a history for the vendor, easily viewed from the vendor record.



If you have vendor records in another application or Excel spreadsheet, you may be able to import them to Point of Sale. Select the **Import Data** tab for more information.

Using Price Levels (Optional)

Each item can have a regular price and up to four alternate price levels, allowing you to offer different prices to qualifying customers.

If you plan to use price levels, define them now and Point of Sale will calculate the prices at each level for you as you add your items to inventory.

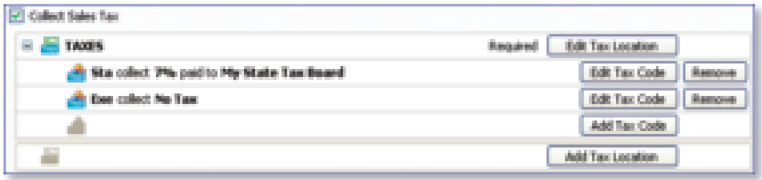
Use the **More Information** links on the inventory help sidebar to learn more.

Sales Tax Options

During the Setup Interview, you entered one sales tax rate and the agency to which you pay sales taxes. If necessary, you can set up other sales tax options in company preferences. The sales tax codes, locations, and taxing instructions you set up can then be associated with inventory items and customers, so the correct sales tax is collected on sales.

- From the **Customize Point of Sale** section of the Getting Started Guide on the home page Navigator, select **Set up sales tax options**.

The Sales Tax page of company preferences is opened with the help sidebar displayed:



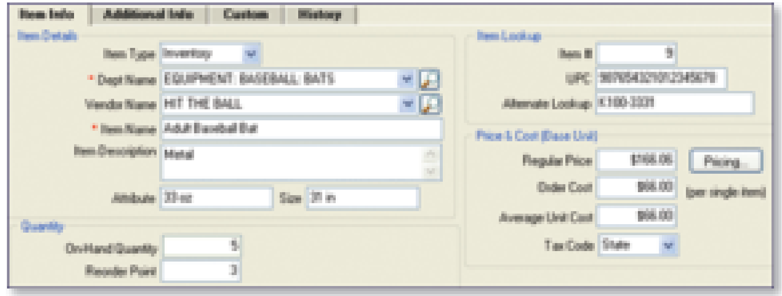
Use the **Add** or **Edit** buttons to set up sales tax codes and locations and define taxing instructions for each.

- Sales **tax codes** allow you to collect tax based on what merchandise is sold
- Sales **tax locations** allow you to use different taxing instructions for each tax code based on where the merchandise is sold or where the customer is located

Use the **More Information** links on the sidebar for help and examples.

Adding or Importing Items

Each item added to inventory must be unique in the combination of item type, department, description, size and attributes you enter.



Tips for entering items:

- For merchandise items, select **Inventory** as the item type.
- **Department** and **Description 1** are required fields.
- If entering new items not yet received, leave the **On-Hand Quantity** field empty. Point of Sale will update this field.
- If using department margins to calculate prices, enter the item cost but leave price fields empty. Point of Sale will calculate the prices when the item is saved or received.
- Press **F1** on the item window or use the **More Information** links on the help sidebar to learn more about adding items.

If you have existing item records in QuickBooks financial software, an Excel spreadsheet, or a text file, Point of Sale can import those records for you. Select the **Import Data** tab for more information.

Importing existing items can save you many hours of time

Importing Data

Point of Sale offers two importing options that can greatly reduce your initial data entry time. Importing not only saves time, it also helps avoid data entry errors that can occur with manual entry. Using these tools, you can import existing customer, vendor, and item records.

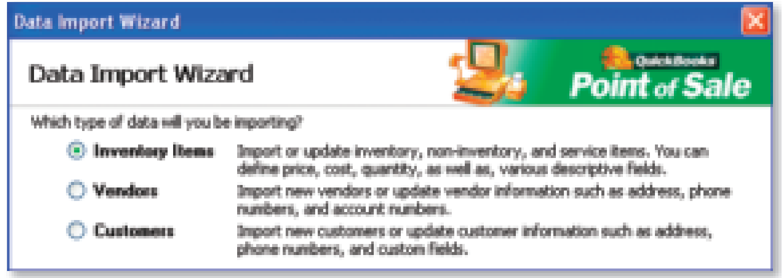
Using the Data Import Wizard

The Data Import Wizard can be used to import data you have exported from another software application, received from a vendor, or have in an Excel spreadsheet or text file (text files must be saved with the .csv extension).

Point of Sale provides a default Excel template or you can custom map fields from your own file to the fields in Point of Sale.

1. From the Point of Sale File menu, select **Utilities > Import**.
2. Follow the on-screen prompts to specify the type of data and file format for the import.
   - **Default Template:** Enter (or copy and paste) your data to the appropriate columns of the template.
   - **Custom File:** Follow the on-screen instructions to indicate how the data will be imported to Point of Sale.
3. Specify other import options, as available, and then start the import.

Additional information is included on the default template or can be accessed by selecting **Help** from within the wizard.



Importing from QuickBooks Financial Software

Importing from QuickBooks is enabled after you have established the connection between the two programs. Review the **QuickBooks Integration** tab for an overview of integration.

Importing QuickBooks vendors and customers

Active QuickBooks vendors and customers are automatically imported with every data exchange.

- If you do not want a customer or vendor imported, mark them as **Inactive** in QuickBooks before your first data exchange
- After the initial exchange is completed, review the imported customer and vendor records and edit them as necessary to take advantage of Point of Sale features unique to each
- New or edited customers and vendors in either program are exchanged routinely

Importing QuickBooks items (optional)

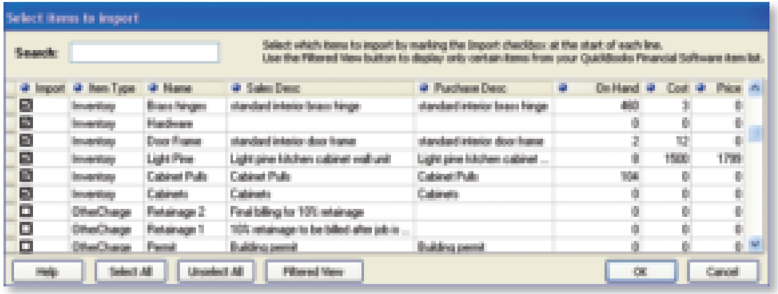
Point of Sale will prompt you to import QuickBooks items until you do so or decline.

1. Select to import when prompted or select **Import Items Now** from the Advanced Options page of the Financial Center.
2. In the **Item Fields** window displayed, specify how you want to map the QuickBooks description fields to Point of Sale item description fields.
3. On the **Item Selection** window, specify if you want to import all items or selected items.

   Note: If you prefer to track some items in QuickBooks, such as non-resale items, don't import them.
4. If importing selected items, use the **Select Items to Import** window to specify the items.
   - Select or clear the checkboxes at the left. All selected items will be imported.
   - Click a column header to sort the list by the values in that column.
   - Use the **Select All, Unselect All,** or **Filtered View** buttons at the bottom to help locate items and make selections.
   - Select **Help** for more information.
5. Select **OK** to start the import.

What's Important about importing items from QuickBooks?

- You can import all or just selected items
- After importing, all activities related to the imported items, such as ordering, receiving and selling, should be done in Point of Sale
- Imported item quantities, costs, and prices are tracked only in Point of Sale, although your QuickBooks financial accounts are updated to reflect item transactions
- Quantities of imported items are "zeroed out" in QuickBooks
- Review the imported item records, and edit as necessary to take advantage of Point of Sale inventory features
- Select **Help** on the Import windows for more information



Selecting QuickBooks items to import

The Data Import Wizard can also be used to update data in existing records

"What's New" in this version is automatically launched after installing...take a few minutes to review the exciting changes!

Upgrading From a Prior Version of Point of Sale

Preparing to Upgrade...

- Ensure you meet the system requirements for Point of Sale 7.0 outlined on the back cover of this guide
- Complete 7.0 ivities in your previous version:
  - Settle any pending credit card/debit transactions
  - If applicable, conduct data exchanges with other stores and your QuickBooks financial software
  - Make a backup of your Point of Sale company data file
  - If you require passwords to log in to use Point of Sale, ensure you have a password assigned to the Sysadmin user; some activities in Version 7.0 re restricted to this user
- Do not uninstall your previous version before upgrading; if you have already uninstalled, you must insert the CD from the previous version when prompted
- Update any installed firewall software to the latest release. Typically, this is done by right-clicking on the firewall icon in your task tray and selecting **Check for Updates**
- If changing your configuration in conjunction with this upgrade, such as adding workstations, stores, or integrating with QuickBooks, read the information on the applicable tabs of this guide before beginning

Upgrade Notes

Previous version remains intact. Your previous version and data remain intact after upgrading. However, you should enter new transactions only in the new version. You can safely uninstall the previous version, if desired.

Upgrade one workstation at a time. If you have multiple workstations, close Point of Sale on all and then upgrade the Server Workstation. Then install other workstations, one at a time.

Upgrade all workstations/stores to new version. Workstations not upgraded to this version will not be able to access the company data until upgraded.

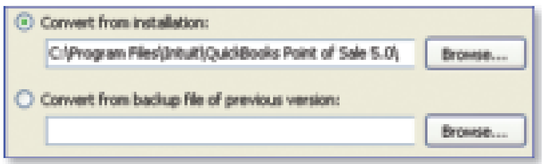
Review custom settings. Some settings (varies by previous version) may be returned to the default configuration to accommodate new features in this version. Review the following settings:

- **List columns and order**. To reconfigure columns, right-click in a column header and select **Customize Columns**.
- **Memorized reports**. Reconfigure and rememorize.
- **Custom security groups**. Employees in a custom group will not have access to new features until the group properties are updated.

Update Store Exchange settings. Pro Multi-Store users must update their Store Exchange settings to reflect new license numbers and exchange folder paths for each store.

Upgrading the Server Workstation

1. Close all running programs except Windows.
2. Put the Point of Sale Upgrade CD into your CD-ROM drive.
   If the installation doesn't begin automatically, locate and double-click the ***setup.exe*** *file on the CD.*
3. When prompted:
   - Enter the License and Product Numbers from the CD holder or provided to you
   - Select **Server Workstation** as the installation type
4. If prompted, restart your computer when the installation is completed.
5. Launch Point of Sale 7.0.
   Your previous version is detected and you are prompted to convert it for use with the new version.
6. Select **Yes** to copy and convert your data. Enter a name for the new company file (can be the same as previous).
7. On the window displayed, accept the suggested location for your previous data or browse to a different location and select **OK**. The conversion process may take some time, as Point of Sale builds the data necessary for new features.



8. If applicable, use your existing user name and password to log in.
9. Register your new software when prompted; then select **Manage My License > Synch License Data Online** from the Help menu.

Synching your license data is necessary to update your company file with the number of user licenses you have purchased.

Upgrading Client Workstations

1. Close Point of Sale on the Server Workstation, but leave the Server Workstation running.
2. Follow the same procedure to install the upgrade to each client workstation, selecting **Client Workstation** as the installation type.
3. Restart your computer and launch Point of Sale 7.0.
4. Point of Sale will search for and connect to the company data on the Server Workstation. If more than one company data file is found, a list is displayed. Select the correct company data and select **OK**.
5. If prompted, enter a workstation number and then your user name and password to log on.
6. If prompted, follow the on-screen instructions to merge licenses with the Server Workstation. Select **Help** on the Merge window for more information.

On subsequent launches, Point of Sale will reconnect to the same company data from the Client Workstations.

Search the in-program help system by keyword "Licensing" to learn how Point of Sale licensing works

Adding Client Workstations

Point of Sale supports up to ten networked workstations in a store, one Server Workstation and up to nine Client Workstations, which access the Point of Sale company data on the Server Workstation across the network.

Before beginning...

- Make sure your computers are properly networked and meet the minimum system requirements (see back cover). Consult a qualified network technician if you need assistance with your network.
- Review the Point of Sale licensing information on the **New Installation** tab for information about when additional licenses are needed for multiple workstations.
- Install the Server Workstation and create your company data file. Close Point of Sale on the Server Workstation, but leave the computer running.

Multi-Workstation Guidelines

Only one Server Workstation allowed. Additional workstations must be installed as Client workstations.

Install one workstation at a time. Point of Sale must be able to determine what workstation numbers are available and in use during each Client installation. Installing on multiple workstations at the same time could result in duplicate workstations numbers, which could cause data conflicts.

Same version/level required at all workstations. Workstations on the same network must be installed with the same version (e.g. 7.0) and level (Basic, Pro, or Pro Multi-Store) as installed on the Server Workstation.

Server Workstation must always be running. For Clients to access the company data, the Server Workstation must be running (but not necessarily running Point of Sale).

Server Workstation

- Program and company data files
- Database applications
- Communicates with QuickBooks
- Must always be running for any workstation to use Point of Sale

Network

Client Workstation

- Program files
- Accesses company data across network

Installing a Client Workstation

1. Close all programs except Windows on the computer being installed as a Client.
2. Put the Point of Sale CD in your CD-ROM drive.
   - If the installation doesn't begin automatically, locate and double-click the **setup.exe** file on the CD.
3. Follow the on-screen prompts to install the program files to your computer:
   - Enter the License and Product numbers (from CD holder or provided to you by a sales agent).
   - Select **Add Client Workstation** as the installation type.
   - Accept the default installation folder (recommended). **Do not install to the Server Workstation over the network**.
4. If prompted, restart your computer.

To connect to the company data:

1. Ensure the Server Workstation is running and then start Point of Sale on the Client Workstation.
2. Point of Sale searches your network and locates the company data on the Server Workstation. If one company data file is found, you are automatically connected to it. If multiple company data files are found, a list is presented; select the correct file and select **OK**.
3. When prompted, select a workstation number for this computer.
4. Use the Hardware Setup Wizard to install hardware connected to this workstation. See the **Connect Hardware** tab.

Merging and Synchronizing Licenses

If you entered a unique license number for the Client installation, you will be prompted to merge the license with the license on the Server Workstation. You have 30 days to complete the merge, after which time only one workstation will be able to run Point of Sale at any one time.

After merging, the Server Workstation synchronizes its license with Intuit's online licensing servers. Once done, both workstations can concurrently run Point of Sale.

To merge and synchronize licenses:

1. When prompted to merge, select **Merge Now**.
2. Follow the on-screen prompts or phone agent's instructions to complete the merge.
3. On the Server Workstation, synchronize with Intuit's licensing server.
   - If Server is connected to the Internet and has previously registered, this is completed automatically. If not connected or not registered, select Manage My License from the Help menu and then:
     a) To register/synchronize online: Select **Synch License Data Online Now** and follow the prompts, or
     b) To register/synchronize by phone: Select **Buy A User License** and call the number displayed

If installing multiple Clients, you can merge/synchronize all of them with a single phone call

Getting Around in Point of Sale

Shown below is the Point of Sale home page Navigator (Pro Multi-Store level).

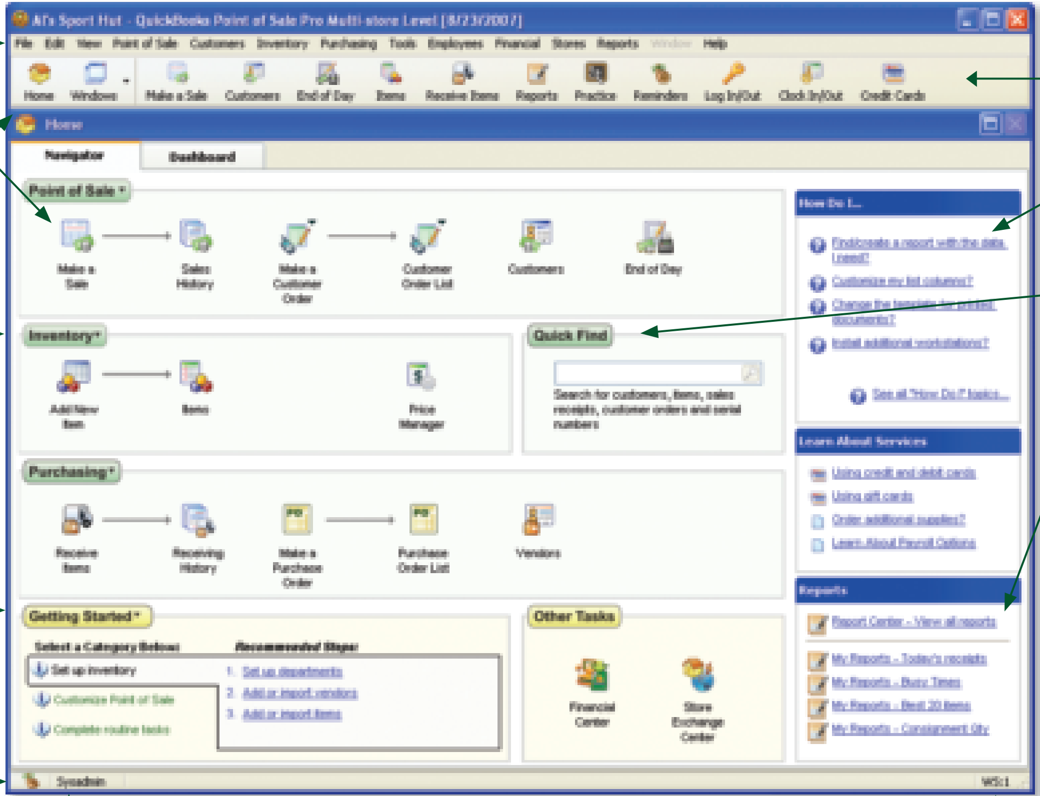
Standard text menus provide access to all areas and features.

The **Navigator** includes clickable links to common tasks and help resources. Click **Home** to return here at anytime.

Click the down arrows, where available, on **Navigator** section titles to access other tasks for that area.

Use the **Getting Started Guide** to help you through essential startup tasks.

Reminders icon alerts you to inventory tasks needing your attention, such as items below their reorder point.



Right-click to customize shortcut icons to your most-used tasks.

List of frequently asked questions and their answers.

Use Quick Find to locate customers, items, receipts, etc. right from the home page.

One-click access to your memorized reports. Use the **Dashboard** tabs at the top of the screen to view customizable quick reports.

The **Status bar** at the bottom of the screen indicates the logged in user's name and the workstation number. Additional information is displayed when in task windows.

Working with Lists

New records and documents are added in a form, but upon saving are added to the corresponding Point of Sale list. Shown below is an item list in collapsed format. Collapsing a list displays the list, with just key identifying fields, on the left of the screen and an information panel with key details about the selected record on the right.

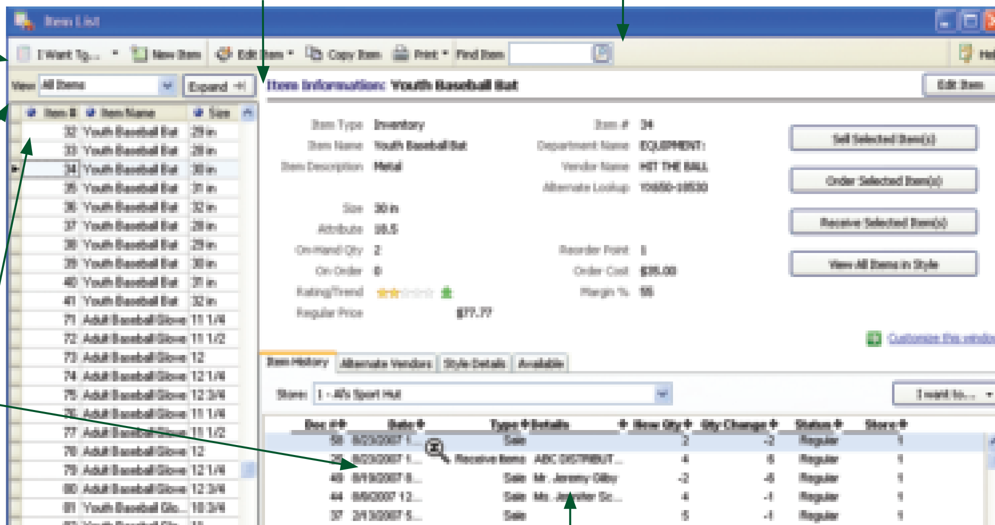
To show the list full-screen with all available fields and hide the information panel, select the **Expand** button.

Enter search keywords and press **Enter** to find a record in the list.

I **Want To...** menus provide access to other tasks related to the current window.

The **View** selector allows you to change the records currently displayed by selecting from predefined options or creating custom filters.

Click any column header in a list or report to resort the list by the values in that column. Click it again to sort in reverse order. Right-click a column header and choose **Customize Columns** to add, remove, and rearrange the columns.



Press **F1** or select **Help** for assistance with your current task.

Action buttons let you quickly edit, sell, order or receive the current item. Actions vary in other lists.

Select this link to customize the fields displayed in the summary pane.

The bottom half of the information panel displays the history of the selected record and other options (varies by Point of Sale level and list). When in a document list, the specific items included on the document are displayed.

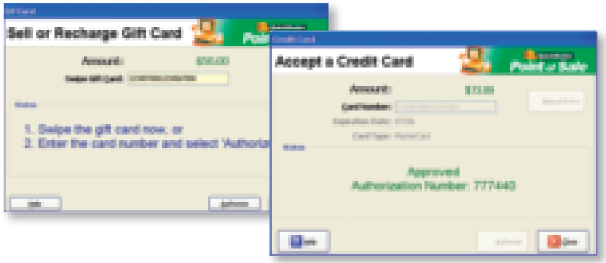
When the QuickZoom icon is displayed, click to “drill down” into additional detail.

Integrated card processing saves time and helps avoid re-keying errors

Merchant & Gift Card Services

Boost store traffic by offering the convenience of credit, debit, and gift card payments

You can authorize and process credit, debit, and gift card transactions within Point of Sale and, optionally offer cash back to customers on debit transactions, through accounts with the QuickBooks POS Merchant and/or QuickBooks POS Gift Card Services.*



Key Benefits

- Accept up to three credit cards or sell up to three gift cards per transaction
- Accepted credit cards include MasterCard, Visa, American Express, Discover, and others
- Offer cash back on PIN debit transactions
- Optionally, add your store logo to gift cards
- Never enter transactions twice; all card transactions are processed directly from your Point of Sale workstations
- Built-in activity, settlement, and balance reports
- Choice of modem or secure Internet connection to services
- Competitive card-swipe rates

Learn more about these services in the Setup Interview or call 1-800-926-6066.

* Integrated credit and debit card transactions require an account with the QuickBooks POS Merchant Service, an optional, fee-based service. Integrated gift card transactions require an account with the QuickBooks POS Gift Card Services, an optional, fee-based service. Both services are provided by Innovative Merchant Solutions, LLC, an Intuit company. See back cover for additional requirements.

FAQs

Can I use my current merchant service? Yes, you can record payments processed through another service in Point of Sale, but you won't benefit from integrated authorization, settlement and reporting.

Do I need special hardware? A card reader speeds credit and gift card processing and qualifies you for lower swipe rates on credit card sales. A PIN pad is required to process PIN debit transactions. An integrated card reader/PIN pad is available that can be used for all three transaction types.

Do I need a separate phone line? You have two connection options: 1) secure Internet connection, which eliminates the need for a separate phone line, or 2) by direct modem connection, in which case a dedicated phone line is required.

Are there built-in credit card fraud prevention features? Yes, there are address and card verification options available on manually entered credit card transactions that can help protect you against card fraud.

What if I have multiple stores? You will need to set up separate merchant and gift card accounts for each store location.
Call 1-800-926-6066 for details.

Configuring Merchant & Gift Card Services

Once you are approved and receive your account number(s), you'll need to configure Point of Sale for transaction processing.

1. Select **Preferences > Company** from the Edit menu.
2. Select **Merchant & Gift Services** from the left-side menu.
3. Enter the **Merchant Number** and/or **Gift Card Account Number** (from the e-mail you received) in the respective area of the page.
   - Make selections for other service options on this page.
4. Select **Communication Setup** from the left-side menu.
5. Select **Use this computer...** if you want all communication to the service(s) to connect through this workstation.
   - If this setting is grayed out, communication is already configured to go through this workstation. To change to another workstation, access this setting from that workstation.
6. Select **Secure Internet Connection** or **Direct-dial** (modem) as your communication method.
   - If you need assistance, select **Internet Connection Setup**. Internet connection requires you have an Internet Service Provider (ISP). A high-speed, always-on connection is recommended (such as DSL or cable).
7. Switch back to the **Merchant & Gift Services** page and select **Verify** next to your account number(s) to test your setup.
8. Select **Save**.

Accepting PIN Debit payments also requires that a PIN pad be installed. Refer to the **Connect Hardware** tab for installation instructions.

Note: If you use another merchant or gift card service, do not enter anything in the account number fields. The only settings that apply to you are the those pertaining to accepting debit card payments.

Protecting Credit and Debit Cardholder's Data

Point of Sale provides a separate Implementation Guide to help you comply with the requirements of the Payment Card Industry Data Security Standard.

Select **User Guides** from the Help menu to access this important information.

The "Automatically print and save receipt upon approval" setting allows you to concentrate on servicing your customers

Setting Up Multiple Stores

Review this information and then follow the setup procedures in this guide at each store, starting with your Headquarters store.

Overview

With the Pro Multi-Store level of Point of Sale, you can effectively manage up to ten stores from one location, with features like centralized purchasing, transfers of merchandise, exchange of information between stores, and company reporting. The managing location is called the ***Headquarters*** and all other stores are ***remote stores***.

All stores share one inventory, but Point of Sale tracks item quantities by store and, if integrated with QuickBooks financial software, profit and loss by store can be tracked using the class tracking feature.

Store Exchange

The exchange of information between remote stores and Headquarters is called Store Exchange. Store Exchanges are done through the Server Workstations in your stores via one of five methods:

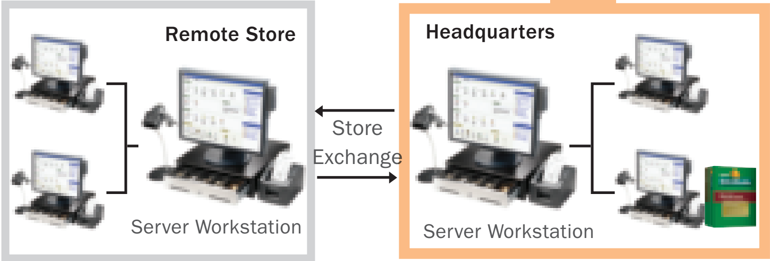
- **Desktop e-mail**, using your default Windows e-mail client
- **Web-based e-mail**, such as Yahoo® Mail and MSN Hotmail
- **Removable media**, such as a USB memory stick
- **Network file transfer** over a VPN, WAN, or LAN
- **Exchange** over the Internet with the **Intuit Service**

To learn more about how a Multi-Store configuration works, read Section 8 in the Point of Sale User's Guide.

Choosing a Headquarters Store

Selection of a Headquarters is important, because only Headquarters:

- Can add, edit, or delete items, departments, and vendors
- Set or edit item prices (remote stores can give discounts)
- Create regular purchase orders (remotes can do special orders)
- Consolidate data from all stores and run company reports
- Define company-wide preferences
- Enter transactions for other stores
- Exchange data with QuickBooks financial software



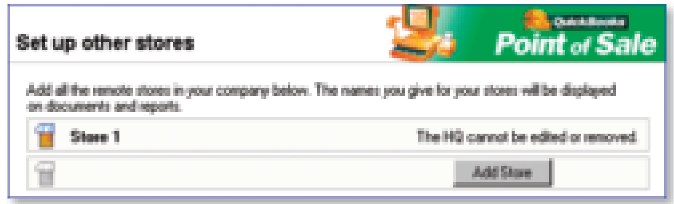
Install and Configure at Headquarters

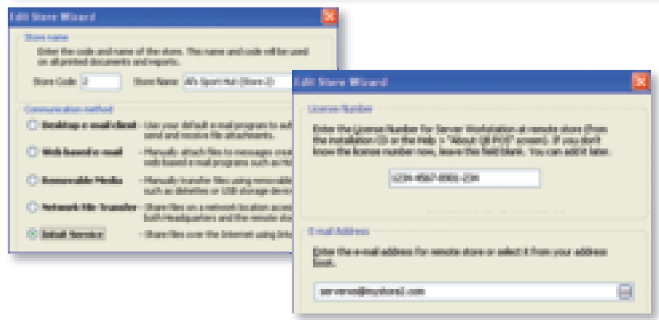
1. Follow the **New Installation** instructions to install the Server Workstation, create your company data (select **Headquarters** as Store type), and start the Setup Interview.
2. At the **Other Stores** section of the interview, select **Add Store** to open the Edit Store Wizard and enter information for your first remote store:
   - A 1-3 character store code and a store name
   - A communication method for sending Store Exchange files to the store
   - The Point of Sale license number from the remote Server Workstation
   - E-mail address, removable media drive or port, or file transfer path for the selected method
3. Repeat for each remote store.
4. Select **Change Password** and enter a password to encrypt Store Exchange files. This same password must be entered when setting up each remote store.
5. Complete the interview to configure other options.
6. Set up departments, sales taxes, price levels, etc. as needed and enter or import items, vendors, and customers. Refer to the other tabs of this guide for instructions.
7. When Step 6 is done and after remote stores have installed, select **Store Exchange > Send Files** from the Stores menu to send each remote store a file with your company data (inventory, preferences, etc.).

Install and Configure at Remote Stores

1. Follow same procedure as Headquarters to install a Server Workstation, except choose **Remote Store** as the store type.
2. In the **Other Stores** section of the Setup Inteview, enter the requested information for the **Headquarters** store.
3. Select **Store Exchange > Receive Files** from the Stores menu to process the initial Store Exchange file from Headquarters.
4. Select **Preferences > Company** from the Edit menu and review store-specific settings, such as the default tax location and default price levels for your store.

You now have access to inventory and can carry out all normal Point of Sale activities.





Each store must install one Server Workstation, and can add up to nine Client Workstations

Integrating with QuickBooks Financial Software

Overview

Point of Sale (POS) is designed to be integrated with QuickBooks financial software.* Point of Sale tracks your daily retail activities: purchasing, receiving, sales, and related inventory activities, while your financial software tracks your financial information.

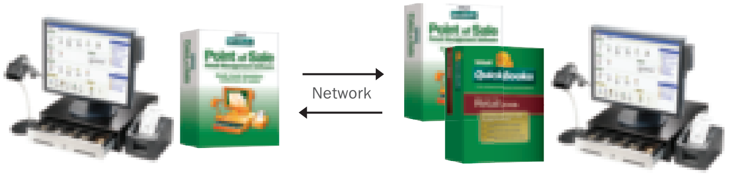
Exchanging data between the two programs, referred to as Financial Exchange, can significantly reduce your workload because you can transfer your daily Point of Sale transactions to your financial software and, if you already have existing data in your financial software, it can be imported into Point of Sale.

Several options are available to customize the way data is exchanged between the programs, such as the account mappings, level of detail, and data formatting.

You do not have to integrate the programs immediately; integration can be accomplished at any time in the future, if preferred.

For more information about how data is exchanged, read Section 7 of the Point of Sale User's Guide or search the in-program help index using keyword **financial exchange**.

Typical Network Configuration:



Point of Sale Client Workstation
- POS program files
- Typically at front register

Point of Sale Server Workstation
- POS program & company file
- Financial program & company file
- Typically in back office

Division of Activities after Integration

Activity	POS	Financial
Add and track inventory items	X	
Order and receive merchandise	X	
Ring up sales & collect sales tax	X	
Point of Sale reports	X	
Add customers and vendors	X	X
Track cost of goods sold and expense		X
Pay bills and sales tax		X
Invoice customers		X
Process payroll		X
Financial reports		X
Banking activities		X

POS = Point of Sale, Financial = QuickBooks finanical software

* **Requirements of Integration**
- QuickBooks financial software, Pro or Premier Editions (2005-2008) or Enterprise Solutions (5.0 - 8.0), sold separately.
- QuickBooks financial software company file set up and configured for exchanges (see below)
- If applicable, a properly configured network with mapped drives as appropriate

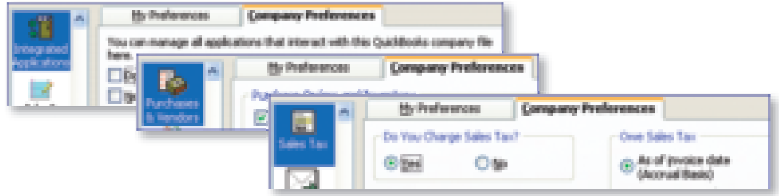
QuickBooks Installation Options

1. **QuickBooks installed only on the POS Server Workstation.** Only option if you have only one workstation and the typical choice on a network. The POS Server Workstation and QuickBooks could be in a back office or at a front register.
2. **QuickBooks installed on both the POS Server Workstation and another networked computer.** Typical when the POS Server Workstation is at a front counter, but you want your QuickBooks financial file in a back office; the copy of QuickBooks on the Server Workstation does not have to be run there.
3. **QuickBooks installed only on another networked computer (not on the POS Server Workstation).** This more advanced option, called Remote Data Sharing (RDS), uses server and client applications to send information across your network.

For more information on these options, search the POS in-program help index using keyword ***financial exchange, installation options.***

Preparing your QuickBooks Company File

1. If necessary, install QuickBooks according to one of the options above and begin a new financial company file, following the instructions included with QuickBooks.
2. Ensure your QuickBooks company preferences (from the Edit menu, select **Preferences**) are set as follows:
   - **Integrated Applications**: Ensure the checkbox for ***Don't allow any application to access this company file*** is NOT selected.



   - **Purchases & Vendors** (called **Items & Inventory** in QuickBooks 2007): Ensure the checkbox for ***Inventory and purchase orders are active*** is selected.
   - **Sales Tax**: Select **Yes** if you collect sales tax.
3. From the Company menu, select **Chart of Accounts** and ensure that the following accounts are present. Select **Account > New** and add them if necessary:

Account Name	Account Type
Cost of Goods Sold	Cost of Goods Sold
Accounts Payable	Accounts Payable
Accounts Receivable	Accounts Receivable
Undeposited Funds	Other Current Asset
Inventory Asset	Other Current Asset
Sales Tax Payable	Other Current Liability

Connecting to QuickBooks Financial Software

You can establish the connection with QuickBooks during the Point of Sale Setup Interview (select the **Setup Interview** tab for instructions) or at anytime by selecting **Financial Center** from the POS **Financial** menu. QuickBooks must be running and your financial company file open during the initial connection.

Help & Support Resources

Point of Sale offers both self-help and assisted support to ensure you can find the answers you need!

Self-Help Options

Quick in-program help for your current task:

- Press **F1** on your keyboard
- Select the **Help** button on a window or message
- Click a blue help text link

For more information:

- Select **Help Contents** from the Help menu, and then:
  - Browse through the "books" in the **Table of Contents** on the left side of the Help window
  - Click on the **Index** or **Search** tabs, and enter a search keyword
- Select **Help & Support** from the Help menu for a full listing of online and phone support options
- Read the Point of Sale **User's Guide**

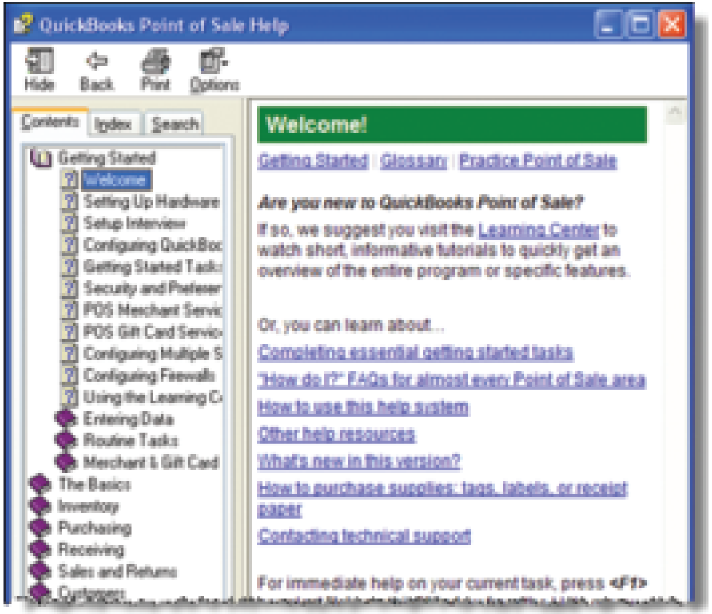
Free online help: (Internet connection required)

- Select **User Community** from the Help menu to connect with other Point of Sale users and experts to ask questions and share advice
- Visit www.quickbooks.com/support to search our Knowledge Base of frequently asked questions, learn about available updates, or research other support options

Learning Center

Master the basics of Point of Sale or train new employees by watching short, informative tutorials.

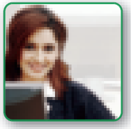
- Select **Learning Center** from the Help menu
- Most tutorials include sound and are best watched on a computer equipped with a sound card and speakers



Assisted Support Resources

Get help from an expert or find a local resource to help you install, set up, and use Point of Sale.

Free Support for 30 Days*



Free support is available for 30 days from registration when you submit your questions online. Submit your question online at www.quickbooks.com/contactme.

We will respond by e-mail or phone, usually in 30 minutes or less. You won't have to wait on hold, and we'll be better able to route your issue to the appropriate support team.

Support Plans*

Intuit offers a variety of support plans, providing expert assistance when and as often as you need it; one-time or for an unlimited number of issues. (Fees apply.)

Learn more about QuickBooks Support Plans at www.quickbookspos.com/plans.

Already have a Support Plan?

Submit your question online at www.quickbooks.com/contactme. We will respond by e-mail or phone, usually in 30 minutes or less. You won't have to wait on hold, and we'll be better able to route your issue to the appropriate support team.

For a fee, support is also available by calling **1-800-348-0254**.

Find a Local Expert

Get local, onsite help from an expert certified by Intuit on Point of Sale (fees apply and are set by the expert).

Certified QuickBooks Point of Sale ProAdvisors® can provide accounting advice tailored to your business needs.
Visit: www.FindAProAdvisor.com/posadvice

Certified Point of Sale Retail Solution Providers are your local retail business and technology experts that can help you with any retail technology questions.
Visit: www.quickbooksgroup.com/pos_form.html

Sales Specialists

To get information about additional products, services, or hardware available for your Point of Sale system, call **1-866-379-6636**.

How are we doing?

You are the retail expert and the Point of Sale team wants to hear from you. How can we improve the product to better meet your needs? Find a program bug? Is help not helping? Let us know! While we can't promise a personalized response to every submission, we do read all feedback and use it to improve future releases of Point of Sale.

- Select **Send Feedback** from the Help menu, choose a category, and enter your comments or suggestions

*Fees, hours of operation, and terms and conditions apply and may vary for assisted support options. Visit www.quickbooks.com/support/pos for details.

Help us help you...let us know how we can make Point of Sale even better!

Helpful Tips

Did you know you can...?

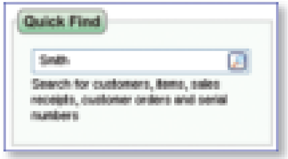
- Add your store logo to printed sales receipts
- Add, remove, or rearrange the order of columns in lists
- Rename item description fields to better reflect the merchandise you sell
- Customize the main toolbar with the task buttons you use most
- Restrict employee access to features or sensitive data
- And select from many other customization options

To learn more, from the Help menu select **Help Contents** and explore the options in the **Customizing Point of Sale** folder.

Quick Tips

- Point of Sale allows you to open multiple windows at one time. You can view, switch between, or close all open windows at one time from the **Windows** menu.
- Keyboard entry is often the fastest way to navigate the program. From the Help menu, select **Keyboard Shortcuts** to view a list of the keyboard commands for your current area.
- When working in Point of Sale lists, many frequently used tasks can be quickly accessed by **right-clicking** in the list.
- Lists can be sorted by another value by clicking the column header for that value. To sort a list by multiple values, from the **View** menu select **Sort List > Sort on Multiple Columns**.

Find it Now!



The Quick Find field, on the Point of Sale home page navigator, allows you to search across items, customers, and sales transactions without having to open the related list first...saving you and your customers time.

Scan or type a document number or bar code, item number or description, or enter a customer name and all related records are found and displayed.

Protecting Your Data

Your company data is valuable and you should take steps to protect it. We recommend at a minimum that you:

- Install and keep up-to-date anti-virus and firewall software
- Make daily backups of your data, preferably to removable media that you store off-site
- Assign and require passwords for employees to log in
- Install an uninterruptible power supply (UPS) and reboot your computers at least once a week; power losses and infrequent rebooting can lead to corruption in any database

For more information, browse the topics in the **Working with Company Data** folder in **The Basics** area of the in-program help contents.

Tips for Lists

- Edit records directly in a list (similar to working in a spreadsheet) by selecting **Turn List Edit On** from the Edit menu. When done, select **Turn List Edit Off** to avoid inadvertent edits.
- Perform basic operations, such as printing, deleting, or adding items to a document, on multiple list records by selecting them all before choosing an action:
  - Hold down your **Ctrl** key and click each record to select
  - To select a series of records, click and hold your left mouse button down on the first record and drag to the last record OR hold down the **Shift** key and click the first record and then the last record
  - To select all displayed records, press Ctrl+A on your keyboard

Why is a Feature Unavailable to Me?

If there is a feature you would like to use, but you are unable to access, it could be for any of the following reasons:

- Feature doesn't apply to your level of Point of Sale
- You don't have the security right to use the feature
- The feature is disabled in company preferences (access from Edit menu)
- A necessary field or button is not currently displayed in a list or on a taskbar to complete the task

For more information, explore the options in the **Customizing Point of Sale** folder from the in-program help contents.

Point of Sale License Number________________________________

____

Merchant Service Account Number ________________________

____

Gift Card Account ___________________________________

____

Point of Sale Product Number_________________________________

____

____

____

____

____

____

____

Point of Sale 7.0 System Requirements

- Microsoft Windows XP (Service Pack 2 or higher), Windows Vista[1], Windows Server 2003, Windows Server 2008.

	Windows XP/Server 2003		Windows Vista/Server 2008	
	Minimum	Recommended	Minimum	Recommended
Single User/Client CPU Speed	1.8 GHz	2.0 GHz	1.8 GHz	2.0 GHz
RAM	256 MB	512 MB	512 MB	1 GB
Disk Space	1 GB	1 GB	1 GB	1 GB
Mult-User/Server[2] CPU Speed	2.0 GHz	2.8 GHz	2.0 GHz	2.8 GHz
RAM	512 MB	1 GB	1 GB	1 GB
Disk Space	1 GB	1 GB	1 GB	1 GB

- Chart shows initial disk space requirements. Disk space required grows as data file grows and with use of certain advanced features. Additional space is needed for other required software: 70 MB for Internet Explorer 6.0 and 50 MB for Microsoft .NET 2.0 (all provided on CD).
- 4x CD-ROM drive
- Optimized for 1024 x 768 screen resolution
- QuickBooks-approved retail hardware (optional)[1]

Integration with Other Software (sold separately)

- Financial software integration requires QuickBooks Pro or Premier Editions[3] 2005 – 2008, or Enterprise Solutions Version 5.0 – 8.0
- Data import/export and Microsoft Office integration requires Microsoft® Excel and Microsoft® Word 2000, 2002, 2003, or 2007.

[1] Point of Sale will run on 32-bit and 64-bit processors running Windows Vista. However, not all POS hardware devices will work on 64-bit operating systems. It is recommended that you contact the device manufacturers for more information before installing hardware devices on 64-bit operating systems.

[2] Applicable to the Server Workstation when multiple networked computers concurrently run Point of Sale.

[3] Not all versions of QuickBooks financial software will run properly on Windows Vista. Please visit www.quickbooks.com/support/vista for the latest information on running QuickBooks and QuickBooks Point of Sale on Windows Vista.

Multi-User & Multi-Store Configuration

- Multi-user (2–10 workstations in one store) is optimized for Windows Server 2003/Windows Server 2008 client-server networks, and Windows XP/Vista peer-to-peer networks.
- Each workstation concurrently running Point of Sale must have a separately purchased user license, and every copy of Point of Sale must be the same version and level.

QuickBooks POS Merchant Service

- Optional fee-based service, additional terms & conditions apply.
- Requires a merchant account through QuickBooks POS Merchant Service, provided by Innovative Merchant Solutions, LLC.
- Application approval and fees apply. Details available at www.quickbooksms.com/posms.
- Credit card reader recommended and printer required for credit and debit transactions. PIN pad required for PIN debit transactions. Hardware sold separately.
- Internet connection or modem and phone line required.

QuickBooks POS Gift Card Service

- Optional fee-based service, additional terms & conditions apply.
- Requires a gift card service account through QuickBooks POS Gift Card Service, provided by Innovative Merchant Solutions, LLC. Application approval and fees apply. Details available at www.quickbooksms.com/posgcs.
- Card reader recommended; sold separately.
- Requires QuickBooks POS Service gift cards, sold separately.
- Internet connection or modem and phone line required.

PN 310894