Proxis Store Manager

for Windows 98, 2000, XP

Quick Start Guide

Store Manager Point-of-Sale System Overview

Store Manager Point-of-Sale for Windows transforms a PC into a powerful point-of-sale cash register for retail sales, service, and rental businesses. No limitations are placed on the number of products that can be stored in the system. **Store Manager Point-of-Sale** works with or without bar code equipment.

During a basic transaction, product codes are entered or scanned into the transaction and the screen instantly displays the quantity, price, and product description. When completed, the transaction is totaled, sales tax is applied, change is computed, the cash drawer is opened, a receipt is printed, and inventory and sales records are updated. Many options are available to the cashier during a transaction making **Store Manager Point-of-Sale** a complete and powerful point-of-sale system.

We can divide the **Store Manager Point-of-Sale System** into six functional areas:

- The **Store Manager Point-of-Sale Cash Register** — is used as a cash register for day to day operation and sales.

- The **Store Manager Point-of-Sale Office** — provides all the support functions. **Store Manager Point-of-Sale Office** handles system setup options, accesses the data stored by the system, provides sales and inventory reports, AR, POs, and many other functions.

- **Store Manager Data Integrator** – this is a collection of utility programs for interfacing to external data files. The Data Integrator interfaces with portable data collector files, imports inventory from vendors or other databases, imports existing customer databases, and compares or updates inventory from data collectors or vendor supplied files.

- **Code Name: Zebra Bar Code Printing for Windows** — prints bar code labels to place on items not already coded. The program prints on standard labels using a standard laser or ink jet printer.

- **Store Manager Touch Screen Version** –the Touch Screen Version is 100% compatible with the regular version of Store Manager Point-of-Sale and included with the system if you prefer to use touch screens. You may use either version or both. Networked users can use the touch screen version at one station and the regular version at another station.
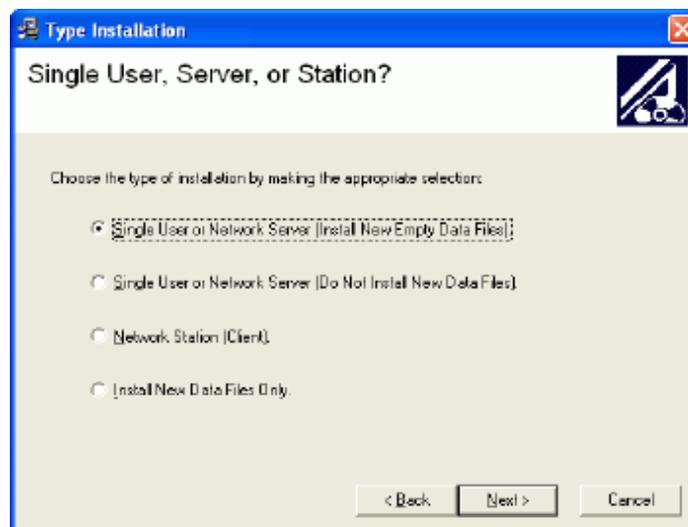
Other Sources of Information

- The full **Store Manager POS Reference Manual** (download on our Web Site manual.pdf).
- **Touch Screen Instruction Manual** (touch.pdf, touch.doc, and touch.txt).
- **MultiCharge Setup Guide** (mcmanual.pdf).
- Our Web Site at www.proxis.com contains current manuals, specific equipment instructions,. printer drives, etc.
- Support Frequently Asked Questions (FAQ) on our Web Site.

(The above mentioned information sources are also located in the Manuals_Instructions folder on the Store Manager POS CD-Rom disk.)

- # Store Manager Point-of-Sale Installation

- First close any programs that may be running on your computer.

- Select **Start, Run** and type **D:\setup** (where D is the letter representing your CD-ROM drive). For downloaded copies, simply double click the file you downloaded.

- Follow the on screen installation commands—generally choose the default selections.

- When installing the evaluation version for the first time, select **"Single User or Network Server (Install sample data files)"** which automatically loads sample test customers and products for you to use in your testing. Later you can install the "**Install New Data Files Only**" option to replace the test files with new empty files so you can begin entering your own data (see screen representation below).

- There is no difference between a Single User installation and a Network Server installation. You can begin using Store Manager as a single user, then later, easily add stations as your needs or business expands. To learn how to add a station/client, see the network setup instructions in Appendix 1 to the Store Manager POS Manual.

After installation you will have Icons on your screen for both the standard and touch screen cash registers and for the Store Manager Office. To access other parts of the program (i.e. bar code printing program, Store Manager Data Integrator) select **Start, Programs, Store Manager POS**, then select the program you want off the menu. If you will be using these programs frequently you may create shortcuts by right clicking a program, selecting **Create Shortcut**, then dragging the shortcut onto the desktop.

Equipment

For a full discussion on supported equipment, select the Supported Equipment List link on our website. www.proxis.com

Required Equipment

- A PC with at least 64 MB of RAM
- Approximately 50 Mbytes of disk space
- Windows 98, 2000, XP
- A Pentium-Class processor

*Windows has different memory requirements for each version, unless you will be running other programs at the same time, usually the requirements for your version of Windows will suffice for Store Manager Point-of-Sale.

Optional Equipment

- Printer(s) (for receipts and reports)
- Bar Code Scanner
- Customer Pole Display
- Electronic Cash Drawer
- Magnetic Card Reader (for processing charge cards)
- Touch Screen Monitor if using the touch screen version.

The above optional equipment are nice to have items, but **NOT** required to run **Store Manager Point-of-Sale**.

Keyboard and/or Mouse Operation

Using a mouse at the cash register is a matter of preference—and **Store Manager Point-of-Sale** lets you decide. The **Store Manager Cash Register** has been specially designed to allow for easy operation with or without a mouse. Proxis has designed the *Cash Registe*r to use the function keys, arrow keys, page keys, Escape key, and Enter key to make the *Cash Register* easy to operate even in a mouseless environment. For those who will be using a mouse, mouse operation is standard. You will find the special programming for operation of these keys greatly simplifies getting around in the **Store Manager Cash Register**--with or without a mouse.
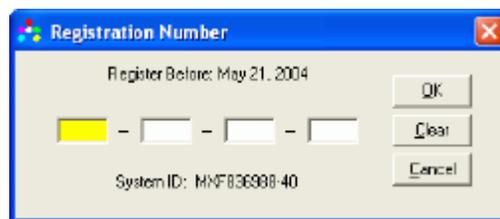
Evaluation and Registration

Evaluation Period

There are no limitations placed on the nonregistered software except for that it will last for only 45 days. After the 45 days, a registration number must be entered into the program to obtain access to the cash register. If you let it expire, nothing will happen to your data files, they will still be available for exporting and saving for future use. So if you start using Store Manager Point-of-Sale and then decide it is not for you, the time you spent setting up your inventory data base will not be wasted.

Registering

Once you decide **Store Manager Point-of-Sale** is right for your business, you may begin immediately. After purchasing the appropriate licenses, call Proxis directly. Your registration number will be emailed back within 1 business day (usually sooner during business hours).

To enter your registration number into Store Manager Point-of-Sale, select **Help** off the top line menu, then **Registration**. Enter the 16-digit code and that is it, Store Manager POS is now fully registered for use.
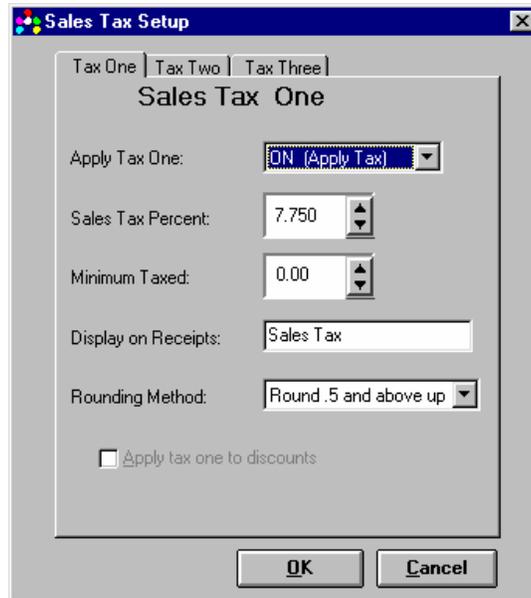

Registration Numbers

The System ID (as shown on the Registration Window) needs to be provided before receiving the registration number. If you subsequently need to move the program to another computer, there will be no charge. Simply email your old registration number and new System ID to our online support and we will supply you with a new registration number for the new machine.

Versatile Cash Register Screen Preferences

Versatile cash register screen preferences allow for function key icons, standard mouse icons, an on-screen customer display, or touch screen interfaces.

Standard Screen

Mouse Interface Screen

Customer On-Screen Display

Touch with Numbers Only

Touch Programmable Menu

Touch Screen with Letters

Setting Your Sales Tax Rate

- Click on the **Store Manager Office** Icon to enter the **Store Manager Office.**

- Select *Setup/Sales Tax Setup* from the **Store Manager Office** menu.

- On the *Tax One* Tab set the first line to *ON (Apply Tax)*. If your area is not subject to sales tax, set the option to *OFF* and exit the setup utility.

- Enter your state's sales tax rate (we entered *7.75).*

- For most states, leave the Minimum Taxed field at zero.

- Move down to the line that reads "Display On Receipts:" enter *"Sales Tax"*, or whatever you wish to call the tax. Some like to enter the rate, such as *"7.75% Sales Tax",* it's up to you. Your choice will precede the sales tax on the screen and on your receipts. The choice is not permanent, you may return here and change it whenever you like.

- Select how you want your sales tax to round. We selected "Round .5 and above up".

- Select OK to return to the **Store Manager Office** menu.

- If the Cash Register was open (on the task bar), it must be closed (File, Exit) and reopened to pick up these new tax settings.
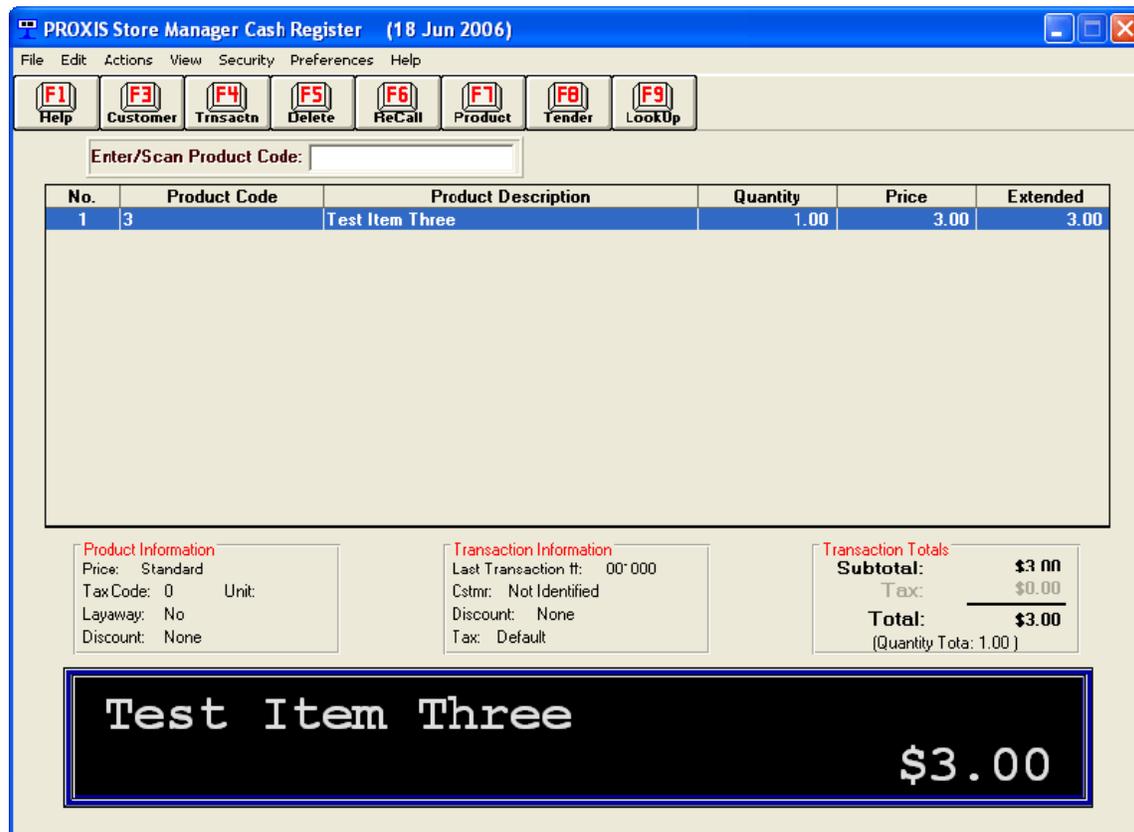
Your First Transaction

The Basic Transaction

- Click on the **Store Manager Cash Register** Icon to start the **Cash Register.**

- If you did not install the test data with Store Manager Point-of-Sale, then you will need to go to the next section to enter some products in your database for testing.

- Enter from the keyboard, scan with a bar code reader, or use the *"Lookup"* feature to enter test product code: *1*

- Now enter test product codes *2* and *3*. Your screen should appear as above (this will vary by tax options you've made). Continue entering more products if you desire.

- Press F8 or click the *"Tender"* Icon to tender/total the transaction.

- The **Tender Window** appears, enter a cash amount or select the *Exact Cash* Icon (or press F3) from the tool bar. Select *OK* or press **ENTER**.

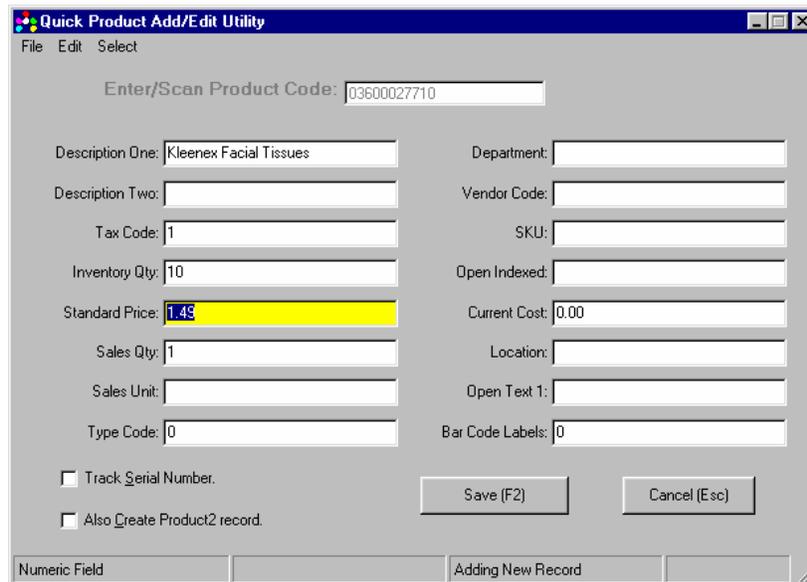There are many, many possible variations to this **Basic Transaction,** however, most transactions will be as simple as this.

Entering A New Product

There are several methods to enter new products into the product (inventory) database. We will use the utility specially designed to make entering new products fast and easy. This form can be adjusted so that just the fields you will be using can be visible. Products can also be entered "On-the-Fly" in the cash register, directly into the database grid (spreadsheet style), or imported from an existing database. Our example uses Kleenex Facial Tissues as the new product, you may enter one of your own:

- From the **Store Manager Office** menu select *Utilities*, then *Quick Product Add/Edit.*
- In the *Enter/Scan Product Code* box, enter the bar code number for the Kleenex Tissues, **03600027710**, then press *Enter*.
- Enter *"Kleenex Facial Tissues"* in the *Description One* box.
- We entered *10* in the *Inventory Qty* box.
- We entered *1.49* in the *Standard Price* box*.*
- Enter a *Tax Code* of *1* to make it taxable.
- Select *Save* (F2). Either *Cancel* to exit or add some more products.

That's all there is to it. Now go to the cash register and try it out. You can use the lookup feature, scan a bar code, or enter the product code right from the keyboard.

Endless Reports and Data Access

The database grid provides a spreadsheet style access to all databases maintained by the Store Manager Point-of-Sale system. For those of you familiar with Microsoft Access, this grid is very similar. All databases have full query (SQL) capabilities so you can update data and design the reports you need.

The grid lets you design reports by simply dragging the columns into the order you want, then hiding the columns you don't want. After a report is designed, that format can be saved and recalled whenever necessary. There is no limit to the number of reports you can design. The system comes with many common reports already pre-designed

A large portion of the Store Manager Point-of-Sale Manual is dedicated to using this grid.

The primary inventory database is the Product1 database table. To open it with the grid, in the Store Manager Office select *File, Open Database Table*, then select *Product1*. The Product database can also be selected using the P1 icon on the toolbar.

Product1 Database Table

File Edit Format Records Query POs Preferences Help

Product Code	Description One	Tax Code	Inventory Qty	Standard Price	ReOrder Point	Sales Unit	Type Code
00458992003	BIO CHEM BEADS	1	2	10.45	4		
00598906002	CORAL	1	5	10.59	4		
00598910237	HEATER 150W 12	1	0	10.59	2		
00808981100	CAT TRACK	1	11	10.8	0		
01016897101	DOG SWEATER RED SHAKER 4	1	0	10.16	3		
01050896023	PARROT FOOD 2.5#	1	0	10.5	4		
01188894110	DOG SCOOP	1	9	11.88	6		
01195894500	MUZZEL	1	5	11.95	5		
01299962004	WOOD PERCH 7/16X13 2 PK	1	2	1.29	6		
01440894400	SUPER NAIL CLIPPER	1	4	14.4	6		
01500896100	BIRD TOY	1	0	15	6		
01558969005	BAMBOO FINCH NEST	1	8	1.55	4		
01598662006	WOOD PERCH 7/16-16	1	2	1.59	4		
01658970775	CANARY SONG FOOD	1	7	1.65	4		
01689327003	TREAT CUPS	1	27	0.16	24		
01698960335	LAVA STONE 2 OZ	1	3	1.69	0		
01698962005	AQUARIUM GLASS CLEANER	1	2	1.69	2		
01758950334	PUMP REPAIR KIT	1	15	1.75	6		
01798962003	WOOD PERCH 7/16X18	1	2	1.79	4		
01800931006	BROAD LEAF PLANT ASSORT	1	1	1.8	4		
01899932003	TETRACYCLENE	1	15	1.89	12		
01899963436	WOOD PERCH 7/16X19.25	1	3	1.89	0		
01968962555	FISH NET	1	25	1.96	3		
01988961035	SEA FAN	1	1	1.98	0		
02058942800	PEBBLES LT BLUE 5#	1	28	2.05	4		
02058944021	NO FISHING SIGN 4	1	4	2.05	1		
02068931002	GREEN WATER CONTROL	1	1	2.06	12		
02259896135	ZEMA FLEA TRAP	1	5	22.59	1		
02299976076	FINCH NEST	1	5	2.29	1		
02388942574	CONK SHELL	1	0	2.38	3		
02458941453	PUMP REPAIR KIT	1	7	2.45	10		
02668945467	CAT TOY	1	0	2.66	5		

Row: 3   00598910237   HEATER 150W 12

Store Manager Point-of-Sale Features List

- Works with Windows 98, 2000, and XP
- Includes Standard Version and Touch Screen Version
- Databases compatible with MS Access
- Interfaces to MultiCharge, X-Charge, & PC-Charge
- QuickBooks Interface
- Second Monitor can act as a customer display
- Advertising slide shows on second monitor
- Spreadsheet-style database access
- Directly interfaces to charge card software
- Inventory tracking
- Automatically generated purchase orders
- Import existing databases
- Mailing Labels
- Bar Code Labels/Price Labels
- Supports POS or standard printers
- Versatile receipt/invoice formats (40 & 80 columns)
- Customer pole display interface
- Cash drawer interface
- Customer database
- Customer history files
- Customer pricing
- Customer billing/statements
- Accounts receivable
- Quantity pricing
- Promotional sale pricing
- Split tenders
- Item discounts
- Transaction discounts
- Multiple sales taxes
- Tax exempt tracking
- Kits
- Tag Along/Carry Along Items
- Automatic inventory bulk breakdowns (to 3 levels)
- Gift certificates
- Food stamps
- Serial number tracking
- Rentals with auto check-in
- Consignment sales
- List Price/Your Price type receipts
- Display product image
- Departments
- 100 password levels
- Layaways
- Employee database
- Employee commissions
- Custom reports
- Sales reports, profit reports
- Departmental reports, daily/monthly/annual reports
- Interfaces to Portable Data Collector Files
- Full database SQL capabilities

- Work orders/repair orders/service orders/open orders
- Easy to learn and use
- Great price
- Many other features