BUSINESS plus ACCOUNTING TOUCH POINT OF SALE

Quick Start Guide

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Initial System Startup

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

Select A Company	
RESTAURANT PROFESSIO	ING
Select The Company You Would	Like To Work With
ID Company Name	Name:Paul's Wing ShackStreet:334 Marshall WayCity:LaytonState:UTZip:84041Phone:(801)-336-3303Fax:(801)-336-3313
Company ID:	Vise Selected Company

Defining Employees

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

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

Define Empl EMPLOYEE #: ,	loyees	×
EMPLOYEES		
Employee Information Commissions Work History Payroll Information Payroll Tax Information	Define Employee Employee Information Employee #: 5656 Last Name: Doe First Name: John Sale Person ID: JOHN Street: Ful/Part Time: City: Allow Non-approved Clock Out State: Require Clock In To Access PO Zip: Allow Cashout In Restaurant P Email: Web Site:)S
	Commissions Use Commission Levels Commission % on Sales: Commission % on GPM: Work History Hire Date:	-
Pic <u>k</u> -F8 <u>T</u> op <u>P</u> rev	Next Bottom Eind Print	3 Cancel Delete Exit

Creating Your Sales Menu

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

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

Adding Product Information to Your System

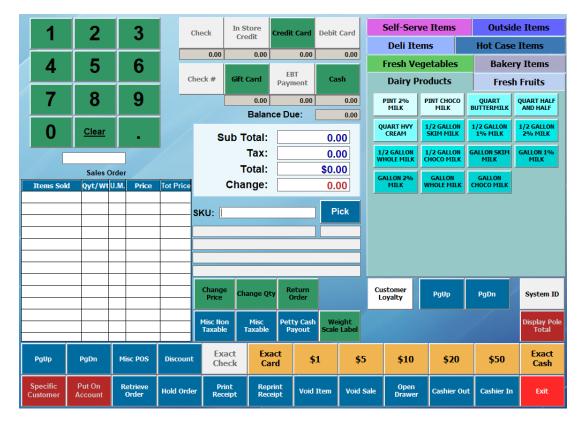
Anything that may possibly be sold in the system should be defined as a product. To create the product, perform the following steps:

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

PRODUCT #:			×	
PRODUCTS			<u>C</u> reate a Co	ру
Product Information Pricing & Cost	Define Product Product Information		-	^
Inventory Information Point of Sale Options	Product/Service: LARGE PIZZA UPC Code: Description 1: Large Pizza	Tax	ales Taxable Group: Sales Tax ax Included In Price	
Coupon Options Scale Options	Description 2: Description 3: Department:		oods Taxable ax Dine In	
Other Information Internet Options	Product Type: PIZ Product/Service: P	Bar 1	Tax Dine Out Tax %: 0.000 ue Tax%: 0.000	
Product Notes & Picture	Product is Active Pricing & Cost	₩ P	rint Delivery Label	
	Price Level 1 (Dine In): 5.950 Price Level 2 (Dine Out):	Happy Hour Price: Lunch Price: Other Price:	Sunday Price: Monday Price: Tuesday Price:	
	Price Level 4:	Member Price:	Wednesday Price: Thursday Price: Friday Price:	~
Pic <u>k</u> -F8 <u>T</u> op <u>P</u> rev	Next Bottom Find Print		Save-F3 Cancel Delete Ex	t

Changing Menu Tab Names

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



To change the tab names, perform the following steps:

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

HHH	ASSIGN MENU NAMES			
	DEFAULT MENU NAME	YOUR MENU NAME	ACTIVE	^
Þ	Menu 1	Dairy Products	Y	
	Menu 2	Fresh Fruits	Y	
	Menu 3	Fresh Vegetables	Y	
	Menu 4	Bakery Items	Y	
	Menu 5	Deli Items	Y	
	Menu 6	Hot Case Items	Y	
	Menu 7	Self-Serve Items	Y	
	Menu 8	Outside Items	Y	
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Γ				
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t				
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1		····•••		
ì				×
?1	=HELP F3=DONE			

Adding Buttons To Your Sales Menu

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

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

ïne Menu Items								
ENU ITEMS							Create	e a Co
Product Selection			Product Inform	ation	Menu	I Button P	icture	_
Product Code (SKU): Description: Description: Description:	CRUSHED ICE Crushed Ice		Price Level 1: Price Level 2: Price Level 3: Price Level 4: Price Level 5:	2.00		No Im Select	_	
Menu Item Options Select Menu:	Self-Serve Items					Select Pic	ture]
Button Text Top: Button Text Bottom: Allow Custom Price:	Crushed Ice							
Allow Custom Credit: Prompt For Quantity:	N							
Auto Calculate Qty:	N (i.e. Gallons Of	Gas)						
Pick-F8 Top	<u>P</u> rev <u>N</u> ext	Bottom	Eind	Save-F3	<u>C</u> ancel	Delete	E <u>x</u> it	

You have now successfully added products to your sales menu.

Adding Sales Tax

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

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

🦆 Define Sales Tax F	Rates	
	Customer Sales Tax Rates	Product Tax Reporting Groups
	are defined they are given a sales tax table num able number will have the same sales tax rate.	mber. That table number corresponds to a sales tax rate. All customers
	o assign tax rates to the tax table numbers. To c in the tax table. For exempt customers create a	change a sales tax rate for a group of customers you only have to a 0.0 tax rate.
If you have produ rate using produc		from your standard sales tax rate, you can specify their tax unique tax
Sales Tax	TAX CODECITY - COUNTY	STATE TAXRATE ^
	1 Your City	UT 6.0000
	2	0.0000
	3	0.0000
	4	0.0000
	5	0.0000
	6	0.0000
	7	0.0000 🗸
	Sales Tax name to print on invoices:	Sales Tax
	Minimum Sales Amount for Sales Tax In Restaurant POS (If Applicable):	\$ 0.00
GST Tax	Goods And Services Tax Rate (Used In Canada	uda): 0.000
	Goods & Services Tax name to print on invoice	ices: GST
		Save and Exit Cancel

Clocking In and Out of the Time Clock

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

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

Employee Login Succe	ssful			_	7
Emplo	yee Login Succ	essful			ок
Employee:	1 @ 16:18				
SUNDAY	08/30/2020 08/31/2020				
TUESDAY	09/01/2020 09/02/2020	0.00	HRS		
FRIDAY	09/03/2020 09/04/2020	0.00	HRS		
	09/05/2020		HRS		
WEEKLI TO	IAL. 0.00 HK	6			
	25	_			

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

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

Employee Logout Succ				
Emplo	yee Logout Su	cessiu	1	ок
Employee:	1 @ 16:19			
SUNDAY	08/30/2020	0.00	HRS	
MONDAY	08/31/2020	0.00	HRS	
TUESDAY	09/01/2020	0.00	HRS	
WEDNESDAY	09/02/2020	0.00	HRS	
THURSDAY	09/03/2020	0.00	HRS	
FRIDAY	09/04/2020	0.01	HRS	
SATURDAY	09/05/2020	0.00	HRS	
WEEKLY TO	FAL: 0.01 HR	s		
	26			1
				_

How to Create an Order

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

To create an order, perform the following steps:

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

	1	T	2	1	3		Che	eck	In Store		Card	Debit	Card		Self-Serv	/e Items	Outsic	le Items
			4		<u> </u>		City		Credit			Debie			Deli Ite	ms	Hot Case	e Items
	4		5		6			0.00	0.00		0.00		0.00	Dairy Products			Fres	h Fruits
	<u> </u>			╞	-		Che	ck #	Gift Caro		EBT \$2.77 UALIFIES	Cas	sh		Fresh Ve		Bake	ry Items
	7		8		9	-			0.	.00	0.00		0.00	Г	1/4 SHEET	1/2 SHEET	ROUND CAKE	CUSTOM
	_	╞		┢					Ва	lance	Due:		0.00		CAKE	CAKE		CAKE
	0		<u>Clear</u>					Sul	b Tota	al: [2.7	7	1	DOZEN ASST DONUTS	DOZEN GLZD DONUTS	APPLE FRITTER	BAVARIAN CRM DONUT
									Та	x: [0.1	17	c	AKE DONUT	CHOCOLATE BAR	CRUMB DONUT	FRENCH CRUELLER
			Sales O	rder					Tota	al:		\$2.9	94		GLAZED	JELLY FILL	LEMON FILL	
	Items So		Qyt/Wt		Price	Tot Pric		С	hang	e:		0.0	00		DONUT	DONUT	DONUT	MAPLE BAR
E -	INT 2% MILI INT CHOCO	-	1.00 I	EA EA	0.89 0.99			KU :] Pi	ck		POWDERED	RAISED DONUT	APPLE PIE	CHERRY PIE
А	PPLE FRITT	ER	1.00	EA	0.89	0.8	9					, <u> </u>			BANANA	CHOCOLATE	BLUEBERRY	CHEESE
-								AK_DONUT	_	RITT			0.89		CREAM PIE	CREAM PIE	BAGEL	BAGEL
ŀ								PLETRIT	EK						NION BAGEL	PLAIN BAGEL	STRAWBERRY	DOZEN
																T EFUIT EFUE	BAGEL	COOKIES
								Change Price	Change	e Qty	Return Order			_	ustomer Loyalty	PgUp	PgDn	System ID
								Misc Non Taxable	Mis Taxa		Petty Casl Payout		ight Label					Display Pole Total
	PgUp		PgDn	Mi	isc POS	Discou	nt	Exac Chec		Exact Card	- (63	\$5	5	\$10	\$20	\$50	Exact Cash
	Specific Customer		Put On ccount		etrieve Order	Hold Or	der	Print Receip		Reprin Receip		Item	Void	Sale	Open Drawer	Cashier Ou	ıt Cashier In	Exit

How to Close a Sale

To close a sale, perform the following steps:

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

	4	T	2	1	2	1	-		In Store				.[]		Self-Serv	e Items	Outsid	e Items	
	1		2		3		Che	eck	Credit	Car	d	Debit Ca	rd		Deli Ite	ms	Hot Case	Items	
			-		~			0.00	0.00		0.00	0	.00		Dairy Pr	o du ete	Fuerk	Fruits	
	4		5		6					EBT					Dairy Pr	oducts		Fruits	
		┢		╞	-		Cheo	ck # (ift Card	\$2.7 QUALI		Cash			Fresh Ve	getables	Baker	y Items	
	7		8		9	-			0.00		0.00	0.	.00		1/4 SHEET	1/2 SHEET	ROUND CAKE	CUSTOM	
		╞		╞					Balar	ice Due	e: [0	.00	L	CAKE	CAKE		CAKE	
	0		Clear										,	D	OZEN ASST	DOZEN GLZD	APPLE	BAVARIAN	
	U		olour		•			Sub	o Total:			2.77		H	DONUTS	DONUTS	FRITTER	CRM DONUT	
					1				Tax:			0.17		c	AKE DONUT	CHOCOLATE	CRUMB DONUT	FRENCH	
			Sales (Irdo					Total:			\$2.94]			DAK		CROLLER	
	Items Sok	d	Qyt/Wt			Tot Pric	.e	с	hange:			0.00	i I		GLAZED DONUT	JELLY FILL DONUT	LEMON FILL DONUT	MAPLE BAR	
P	INT 2% MILK		1.00		0.89			-				0.00	1	H					
P		1ILK	1.00	EA	0.99	0.9	9 SK	(U:				Pick		F	POWDERED DONUT	RAISED DONUT	APPLE PIE	CHERRY PIE	
A	PPLE FRITTE	R	1.00	EA	0.89	0.8	9												
_									_APPLEFRIT	T		0	.89	(BANANA CREAM PIE	CHOCOLATE CREAM PIE	BLUEBERRY BAGEL	CHEESE BAGEL	
H								PLE FRITT	ER					E			STRAWBERRY	DOZEN	
F							- _							0	NION BAGEL	PLAIN BAGEL	BAGEL	COOKIES	
┢									1			1		-					
Ē								Change Price	Change Q		turn der				ustomer .oyalty	PgUp	PgDn	System ID	
F							- -			_			_						
								1isc Non Taxable	Misc Taxable		/ Cash /out	Weigh Scale La						Display Pole Total	
	PgUp		PgDn	м	lisc POS	Discou	int	Exac Chec		act Ird	\$3	3	\$5		\$10	\$20	\$50	Exact Cash	
	Specific Customer		Put On ccount		letrieve Order	Hold O	'der	Print Receip		orint eipt	Void 1	ítem V	/oid Sa	ale	Open Drawer	Cashier O	ut Cashier In	Exit	

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

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

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

	1	Í	2	Í	3		Che	eck	In Store		Card	Debit	Card	1	Self-Serv	e Items	Outsid	le Items
	<u> </u>		4		<u> </u>		Circ		Credit						Deli Items		Hot Case	Items
	Λ		5		6			0.00	0.	00	0.00		0.00		Dairy P	roducts	Fres	n Fruits
	4		ວ		0		Che	Check # Gift Card \$2.77				Ca	sh		Fresh Ve			y Items
	7		8		9						UALIFIES				1	-		CUETOM
	1		0		9					00	0.00		0.00		1/4 SHEET CAKE	1/2 SHEET CAKE	ROUND CAKE	CUSTOM
	_	1-		╧					Ba	ance	e Due:		0.00					
	0	9	Clear		•			Sut	o Tota	d: [2.7	77		DOZEN ASST DONUTS	DOZEN GLZD DONUTS	APPLE FRITTER	BAVARIAN CRM DONUT
									Та			0.′	17	(AKE DONUT	CHOCOLATE BAR	CRUMB DONUT	FRENCH CRUELLER
			Sales O)rder					Tota	l:		\$2.9	94					
Ite	ems Sold	Q	yt/Wt	U.M.	Price	Tot Prie	e	С	hang	e: [0.0	00		GLAZED DONUT	JELLY FILL DONUT	LEMON FILL DONUT	MAPLE BAR
	2% MILK		1.00		0.89	0.8	_								POWDERED	RAISED		
	сносо м		1.00		0.99	0.9	_ 3r	KU: 🗌				P	ick		DONUT	DONUT	APPLE PIE	CHERRY PIE
APPLE	FRITTER	{	1.00	EA	0.89	0.8		AK DONUT		DITT		1	0.89		BANANA	CHOCOLATE	BLUEBERRY	CHEESE
		-						PPLE FRITT	_				0.03		CREAM PIE	CREAM PIE	BAGEL	BAGEL
														C	NION BAGEL	PLAIN BAGEL	STRAWBERRY BAGEL	DOZEN COOKIES
<u> </u>		_					$-\Box$											
		+						Change Price	Change	e Qty	Return Order				ustomer Loyalty	PgUp	PgDn	System ID
								Misc Non Taxable	Mis Taxal		Petty Cas Payout		ight Label					Display Pole Total
Pg	Up	Pg	jDn	м	isc POS	Discou	int	Exac Chec		Exac Card		3	\$!	5	\$10	\$20	\$50	Exact Cash
	cific omer		t On count		etrieve Order	Hold O	rder	Print Receip		Reprin Receip		Item	Void	Sale	Open Drawer	Cashier Ou	ut Cashier In	Exit

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