



Point Of Sale / Fast Sale For MAS 90/200

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Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

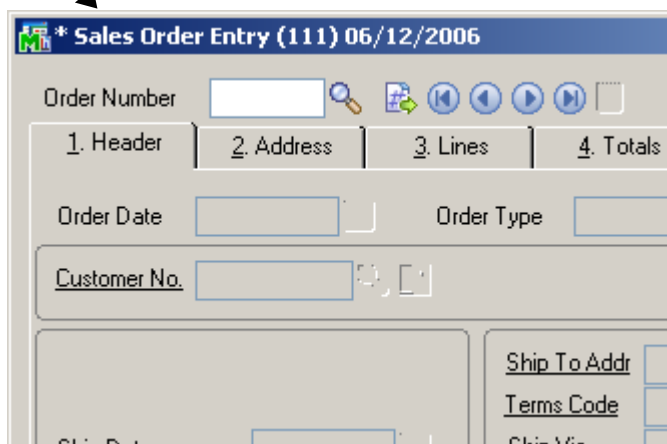
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.1	07/19/2004	AAAAAAAAAAAAAAAAA	BBBBB

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

Introduction

IIG's Point Of Sale/Fast Sale Enhancement allows user to conduct more streamlined sales transactions at working locations. Specific improvements allow quicker invoice transactions. Integration with IIG's Credit Card Processing allows fuller functionality and a wider range of payment and credit options.

Fast Sale Data Entry

Select the **IIG Fast Sale Entry** program under the **Sales Order Main** menu.

Fast Sale Data Entry (ABC) 08/17/2006

Inv. No. [] Date [] Type [] Batch 00018

S/O No. [] Customer No. []

Salesperson []

1. Lines | 2. Totals | 3. Header | 4. Address

Quick Row [0]

Item Code	Ordered	Shipped	Unit Price	Extension	Co

Description []
Warehouse []
U/M []
Back Ordered [.00]

Total Amount [.00]

Quick Print Recalc Tax Defaults... Customer... Credit... Accept Cancel Delete [] []

In this screen, the standard Sales Order/Invoice fields are rearranged to simplify data entry.

Some of the entry fields, which were originally on the **Header** tab of the **Invoice Data Entry** screen, are located at the top of the **Fast Sale Data Entry** screen.

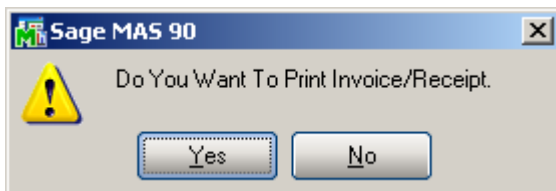
The **Quick Print**, **Customer**, **Credit** buttons are placed at the bottom of the screen.

Click the **Next Invoice No.** button to start new invoice, or select an existing Invoice Number using the **Lookup** button. If the selected Invoice refers to a Sales Order, the Sales Order Number is displayed in the **S/O No.** field, which is display-only.

If entering a new invoice, select **Customer**. Now the **Lines** tab is available for entering items. The **Lines** tab is identical to standard **Invoice Data Entry Lines** tab.

After filling out the information on the **Lines** tab, go to the **Totals** tab and Accept the invoice. Necessary changes can be made on the **Header** and **Addresses** tabs, too.

If the corresponding setting has not been changed in the Defaults (see later in the manual), when clicking the **Accept** button, a message is prompting to print invoice/receipt. Click **Yes** to print the invoice.



Default Values for Fast Sale Data Entry

Before selecting the **Invoice Number** on the **Fast Sale Data Entry**, click the **Defaults...** button (at the bottom of the Fast Sale Data Entry screen).

Fast Sale Data Entry (ABC) 08/10/2006

Inv. No. [] Date [] Type [] Batch 00014

S/O No. [] Customer No. []

Salesperson []

1. Lines | 2. Totals | 3. Header | 4. Address

Item Code	Ordered	Shipped	Unit Price	Extension	C
-----------	---------	---------	------------	-----------	---

Description []
Warehouse []
U/M []
Back Ordered [] .00

Total Amount [] .00

Quick Print Recalc Tax **Defaults...** Customer... Credit... Accept Cancel Delete

The **Default Values for Fast Sale Data Entry** screen allows for entry of the default values to speed up the entry of invoices. Several fields can be defaulted to these values, so that the user will not enter them repeatedly for each new invoice.

Default Values for Fast Sale Data Entry

Next Invoice No. 0100163

Invoice Date 08/10/2006 Print Invoices

Invoice Type Standard Invoice Bypass Print (Y,N) prompt

Ship Date 08/10/2006

Ship Via

FOB

Warehouse 001 EAST WAREHOUSE

Sales Tax Schedule

Fast Sale Screen Display?

Auto Default Quantity Ordered to 1

Auto Increment Invoice Number

Process Sales Order

Force For Full Payment

Cash Customer

Replace Customer Default Sales Person

OK Cancel ?

The **Next Invoice No.** field displays the number to be assigned to the next invoice by clicking the corresponding button on the **Fast Sale Data Entry** screen.

The **Invoice Date**, **Invoice Type**, **Ship Date**, **Ship Via**, **FOB**, and **Warehouse** fields are similar to standard Invoice Data Entry.

The **Sales Tax Schedule** is the current Point of Sale tax schedule. Entry in this field, if any, will overwrite the customer's tax schedule.

Check the **Fast Sales Screen Display** box to simplify the look of the **Lines** tab. Only the most useful fields, necessary for lines entry, will be displayed.

Fast Sale Data Entry (ABC) 08/10/2006

Inv. No. 0100165 Date 08/10/2006 Type Standard Invoice Batch 00014

S/O No. Customer No. Salesperson

1. Lines 2. Totals 3. Header 4. Address

Quick Row 1

	Item Code	Ordered	Unit Price	Extension
1		.00	.000	.00

Description Warehouse U/M Back Ordered

Total Amount .00

Quick Print Defaults... Customer... Credit... Accept Cancel Delete

Check the **Auto default quantity ordered to 1** box to automatically fill in the single quantity, pricing, and accept line when an item is selected.

Check the **Auto increment invoice number** box to assign automatically the next available invoice number after acceptance of previous invoice.

Check the **Process Sales Orders** box to make the **S/O No.** field available to allow the user to create invoices based on the existing sales orders.

Check the **Force for full payment** box to require full payment to accept an invoice. This option works only if IIG's Credit Card Processing module is integrated with MAS 90. If this box is checked, clicking the **Totals** tab

displays the **Deposit/Prepayment Entry** screen. The program will not accept the invoice till the payment is less than the entire invoice amount.

Select the default **Cash Customer**. To select this default Customer for the current invoice on the Fast Sale Data Entry screen, click the \$ (dollar) button next to the Customer No. field.

Check the **Replace Customer's Default Salesperson** box to activate the **User Logon** field. Select the User, which will replace the Salesperson for all the Customers not having Primary Ship To. The user will be added as new Salesperson to the system. The Salesperson Name field will contain 28 characters: 14 from the User's first name and 14 from the last name.

Default Values for Fast Sale Data Entry

Next Invoice No. 0100169

Invoice Date 08/10/2006 Print Invoices

Invoice Type Standard Invoice Bypass Print (Y,N) prompt

Ship Date 08/10/2006

Ship Via

FOB

Warehouse 001 EAST WAREHOUSE

Sales Tax Schedule

Fast Sale Screen Display?

Auto Default Quantity Ordered to 1

Auto Increment Invoice Number

Process Sales Order

Force For Full Payment

Cash Customer

Replace Customer Default Sales Person

User Logon TST Salesperson Name FirstNameUserTST LastNameUserTST

OK Cancel ?

The **Default Salesperson** field will display the User Logon on the **Fast Sale Data Entry** screen:

Fast Sale Data Entry (ABC) 08/10/2006

Inv. No. [] Date [] Type Standard Invoice Batch 00014

S/O No. [] Customer No. []

Salesperson [] Default Salesperson TST

1. Lines 2. Totals 3. Header 4. Address

Quick Row 1

Item Code	Ordered	Shipped	Unit Price	Extension	Co
-----------	---------	---------	------------	-----------	----

Description []
Warehouse []
U/M []
Back Ordered []

Total Amount [] .00

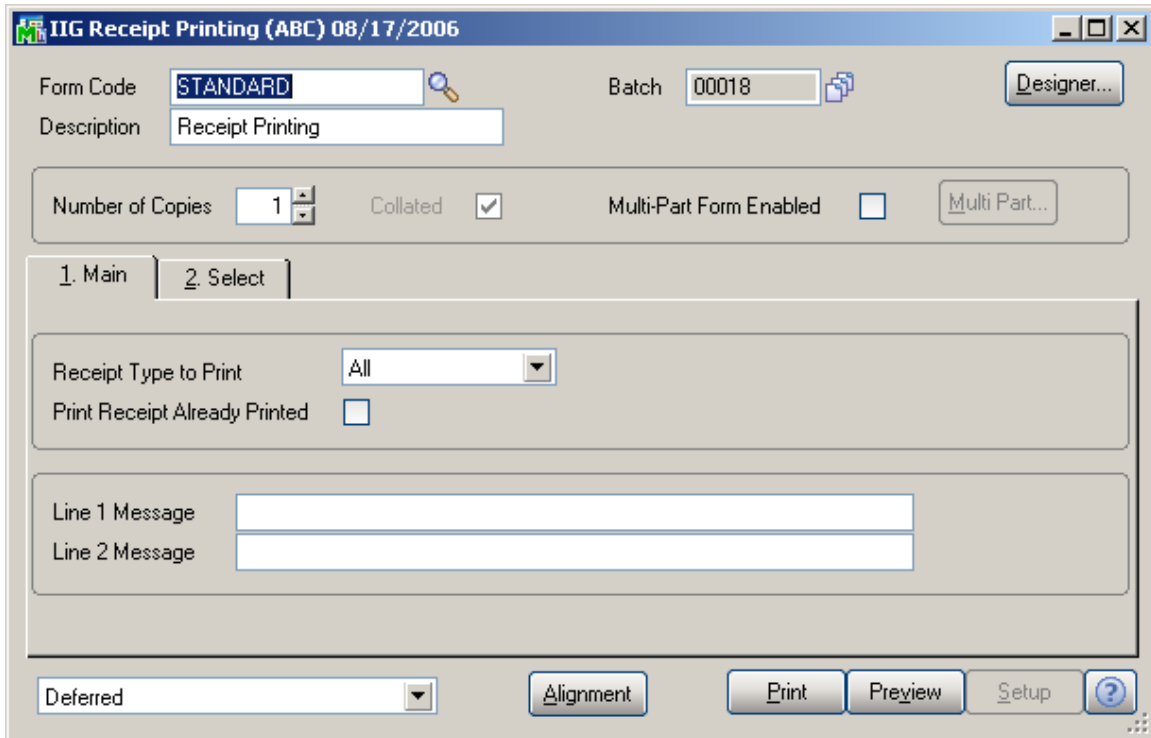
Quick Print Recalc Tax Defaults... Customer... Credit... Accept Cancel Delete

Check the **Print Invoices** box to print the invoices when accepting them.

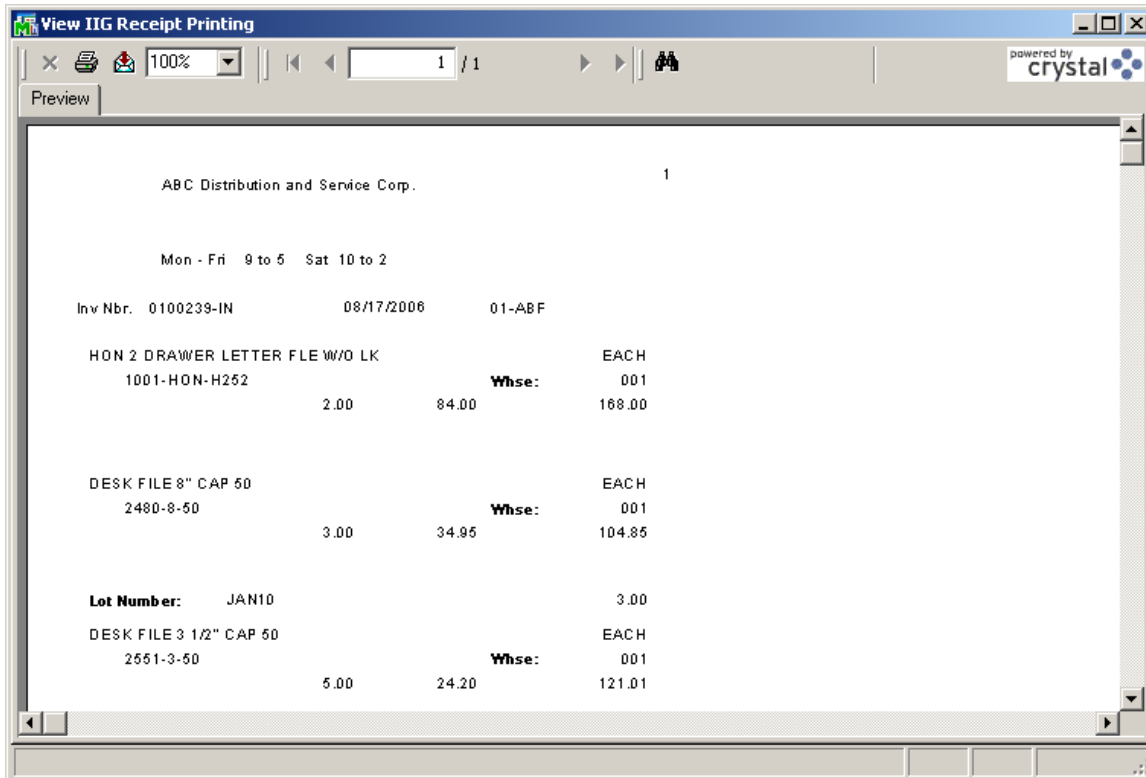
If the **Print Invoices** box is checked, the **Bypass Print (Y/N) prompt** box can be checked to print documents without asking for confirmation.

Fast Sale Receipt Printing

The **IIG Fast Sale Receipt Printing** program has been added under the **Sales Order Main** menu.



Here is an example of printout:



Appendix

Gift Certificate Processing in IIG Credit Card and IIG POS

Processing Gift Certificates requires tracking the liability the store has generated by accepting payments in advance, which is really what a gift certificate is. There are several methods, with pros and cons for each.

One issue that we must stress is that Gift Certificates have a fairly long life. There are both Federal and State statues that cover how long these must honored, and what the merchant may do to limit the liability. We suggest that you consult an experienced business attorney for your store (or stores) area on what requirements you must meet for gift certificates.

Preprinted Gift Certificates:

These are generally in fixed denominations in logical steps (5, 10, 20, 25, 50, etc.) with a certificate number that is sequential. These are loaded into the system as a serial number item (ex: GIFTC05, serial number A000152). This allows you to see all non-issued certificates.

When sold at the register, the operator selects the correct certificate denomination and the serial number on the sheet. She would sell as many as the customer needed.

When the certificate was redeemed, it would be treated as a miscellaneous payment type of GIFTC. To redeem:

1. Set up a GIFTC payment type, and use the Gift Certificate number as the check/account number.
2. Use a different Bank or G/L code to reconcile at the end of the week or month.
3. Any balance remaining on the certificate would be paid out in cash.

Some issues to consider:

- With today's printers and scanners, it is easy for criminals to forge US currency, let alone something simple like a gift certificate. You will need to keep tight control over the number of gift certificates you have in circulation.
- The same holds true internally. Gift Certificates are just like checks, and just like checks, you must keep track of what was issued and what is remaining.

- Gift certificates cost money to print, process, and redeem, in the form of labor and the certificates themselves. We suggest that you keep a close eye on these costs, because in most retail markets, there isn't a whole lot of room in the margin.

On Demand Gift Certificates:

These are generated using the Sales Order Invoice function, and using a custom form to print the certificate. We recommend printing on check stock, where the lower third is the gift certificate, and the upper two sections (stubs) would print a duplicate receipt of the monies received. Unlike the pre-printed gift certificates, you must process these individually, because the invoice is the certificate.

Because these are generated "on demand" you won't be able to track them as serialized inventory. So you would use either a generic item number (GIFT CERT) or a miscellaneous item or charge.

Redeeming them is the same as with pre-printed gift certificates.

Some issues to consider:

- We strongly suggest that you turn on the Retain Detailed Invoice/Shipping History, Retain Deleted Invoices, and Retain Comment Lines in History as a precaution.
- Periodically review the value of sold gift certificates versus redeemed gift certificates. This is your Open Gift Certificate Liability.

Special Gift Certificate Programming

IIG can assist you with programming to meet your specific industry and business needs, and we are also happy to assist you or your reseller in setting up Gift Certificate Processing.

Gift Card Processing:

Gift card processing is quite different from Gift Certificates. Gift Cards fall into two categories:

- Rewritable, which requires special equipment to write the value of the amount and the amount remaining on the card.
- Gift processor, which the gift card is treated like a credit card through the credit card software.

Both of the above require special setup. Contact IIG for more information.