



Information Integration Group, Inc.

## Point Of Sale / Fast Sale For MAS 90/200

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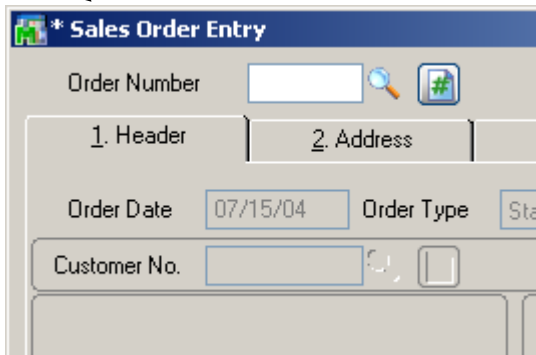
## Installation Instructions and Cautions

**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 Products 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**.

The screenshot shows the 'IIG Master Developer Enhancement Registration' dialog box. It includes the following fields and controls:

- Registered Customer:** Customer
- Registration Information:**
  - Reseller Name: [Empty]
  - Serial Number: 1111111111
  - Customer Number: 2222222222
  - User Key: 33333333333333333333
  - Product Key: CCCCC, DDDDD, EEEEE, FFFFF, GGGGG
- Enhancement Table:**

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.00	07/19/04	AAAAAAAAAAAAAAAA	BBBBBB
- Buttons:** OK, Undo, Print Registration Form, Close
- Status Bar:** ABC, 7/19/04

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.

IIG Registration Form can be printed by using the **Print Registration Form** button.

## 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.

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**, and **Customer Memos** 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).

The screenshot displays the 'Fast Sale Data Entry' application window. At the top, there are input fields for 'Invoice No.', 'Date' (set to 11/09/04), 'Type' (Standard Invoice), and 'User ID'. Below these are fields for 'S/O No.', 'Customer No.', and 'Salesperson'. A tabbed interface shows '1. Lines' selected. The main data entry area includes fields for 'Item / Kit Number', 'Description', 'Disc %' (0.00%), 'Whse', 'PL', 'U/M', 'Ordered' (0.00), 'Shipped' (0.00), 'Back Ordered' (0.00), 'Unit Price' (.000), and 'Extension' (.00). There are also checkboxes for 'DC', 'DS', and 'CM'. A table below has columns for 'Line', 'Item Number', 'Whse', 'PL', 'U/M', 'Description', 'Ordered', 'Shipped', 'Back Ordered', 'Unit Price', 'DC', 'DS', 'CM', 'Disc %', and 'Extension'. At the bottom, there are buttons for 'Quick Print...', 'Defaults...', 'Customer...', 'Credit...', 'Accept', 'Cancel', and 'Delete'. A status bar at the bottom shows 'IIG', 'ABC', and '11/9/04'.

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. 0100063 [Abs...]

Invoice Date 11/09/04 Print Invoices

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

Ship Date 11/09/04

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 Orders

Force for full payment

Cash Customer

Replace Customer's Default Salesperson?

User ID

[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.

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.

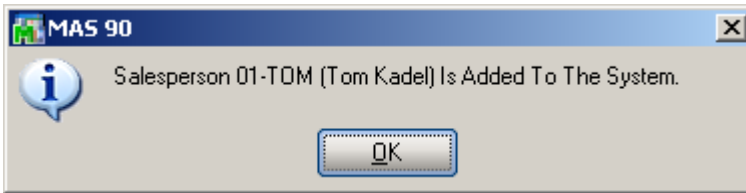
Check the **Auto increment invoice number** box to assign automatically the next available invoice number after acceptance of previous invoice.

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

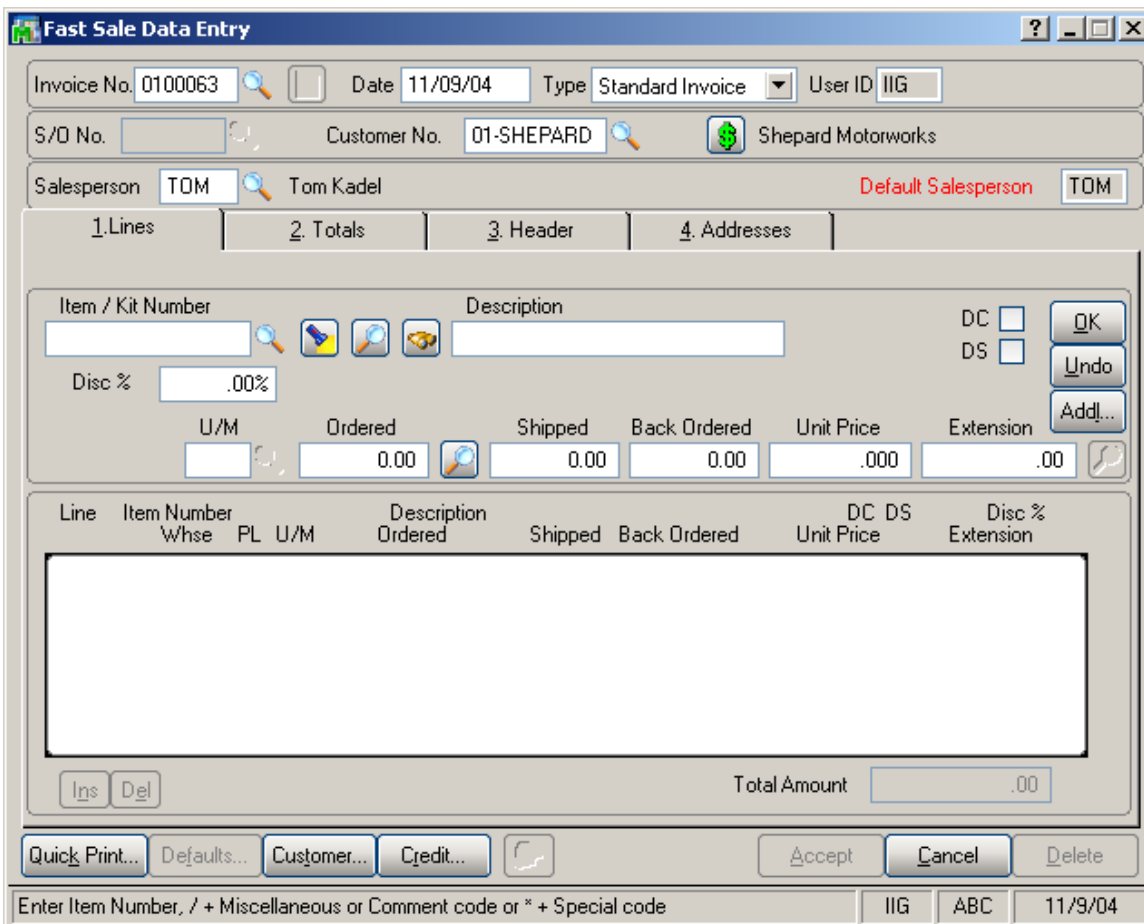
Check the **Force for full payment** box to require full payment to accept an invoice. This option works only if IIG's Credit Card Processing module is integrated with MAS 90. If this box is checked, clicking the **Totals** tab displays the **Deposit/Prepayment Entry** screen. The program will not accept 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 ID** 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 **Default Salesperson** field will display the User ID on the **Fast Sale Data Entry** screen:



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. This Printing is only character-based.

**IIG Receipt Printing**

Receipt Type to Print: All  Print Receipts Already Printed

Line 1 Message:

Line 2 Message:

Receipt Form Code: 1 Std Receipt

Selection: All Starting Ending

Invoice Number:

IIG ABC 11/9/04

Here is an example of printout:

ABC Distribution and Service Corp

( ) -  
Mon-Fri 9 to 5 Sat 10 to 2

Inv Mbr: 0100063-IN 11/09/04 01-SHEPARD  
RD

HON 2	DRAWER LETTER FLE W/O LK EACH		
	1001-HON-H252	001	
	1.00	84.000	84.00

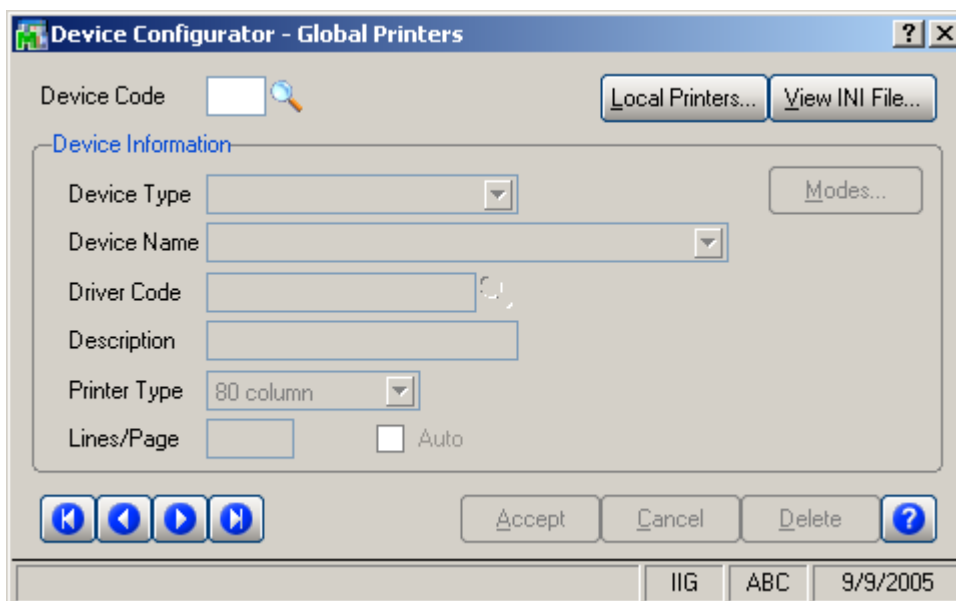
TOM	Sub-Total	84.00
	Sales Tax	.00
	Freight	.00
	Balance	84.00

Page:1

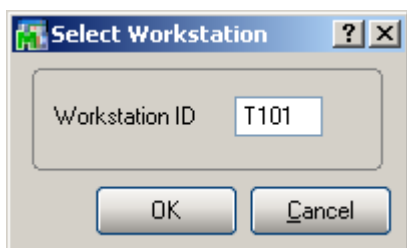
## Receipt Printer Setup

**IIG Point Of Sale/Fast Sale** supports only character based receipt printing. Graphical forms will not print. Setting up the receipt printer is a key element of satisfactory Point Of Sale operation. We recommend the following:

1. Connect the receipt printer as a local printer (directly to the workstation).
2. Go to **Library Master, Setup, and Device Configurator**.

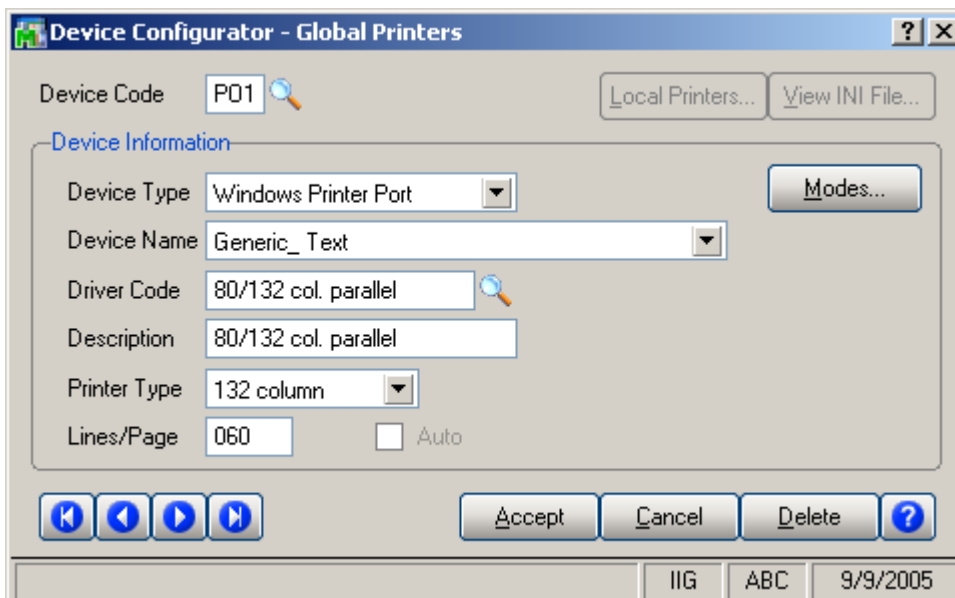


3. Click on the “**Local Printers...**” button to set up the receipt printer as a unique local printer. The program will display the terminal ID. Click OK to accept the workstation ID. We recommend configuring the receipt printer from that workstation.



4. Enter a unique printer **ID**. This printer ID must be unique for the system, not the terminal. Due to the limits of Windows, two different workstations may not have the same printer ID. This means that you can't set up LP1 as

the local workstation printer if LP1 is already used on another workstation or is set up as a Global Printer. Our recommended method is to use either “L” or “P” plus the last two digits of the workstation. In this example, it would be P01 or L01.

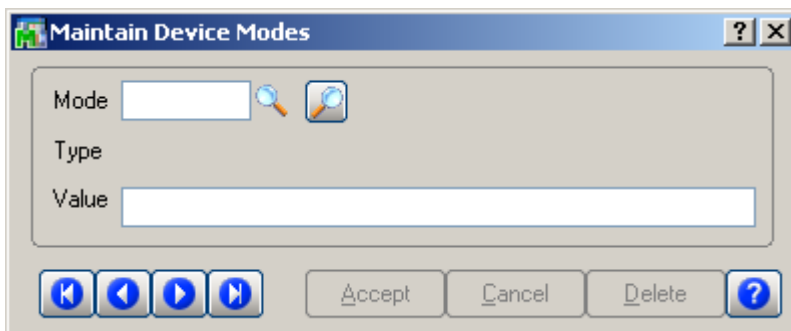


5. Device type would be Windows Printer Port. Under Windows 2000 and higher, you no longer can print directly to the parallel port. We suggest setting up a Generic Text Printer for your receipt printer. In this case, we’ve set up the printer “Generic\_text”.

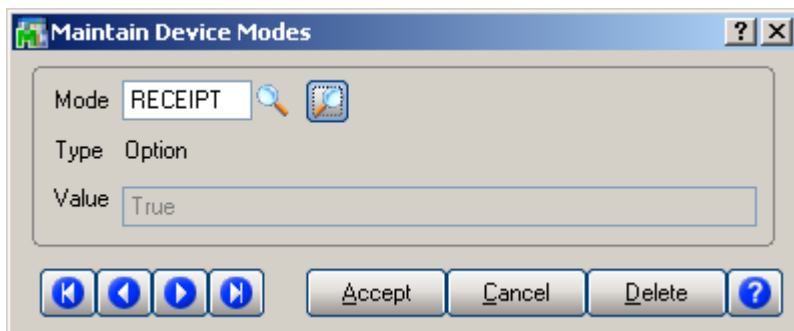
6. For **Driver Code**, use “80/132 parallel printer.”

7. Set **Printer Type** to 132 columns. Lines/Page will default to 60. This is okay.

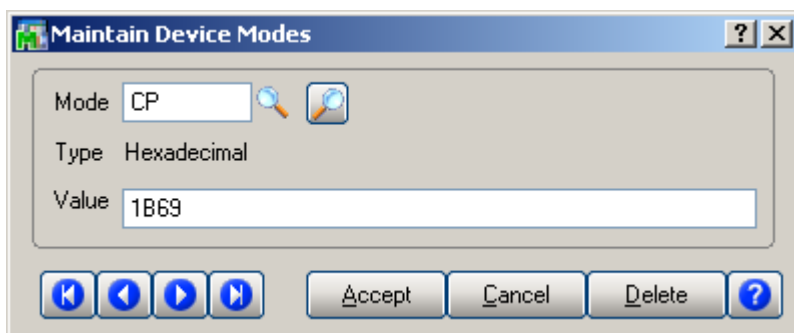
8. Now click on the **Modes...** button.



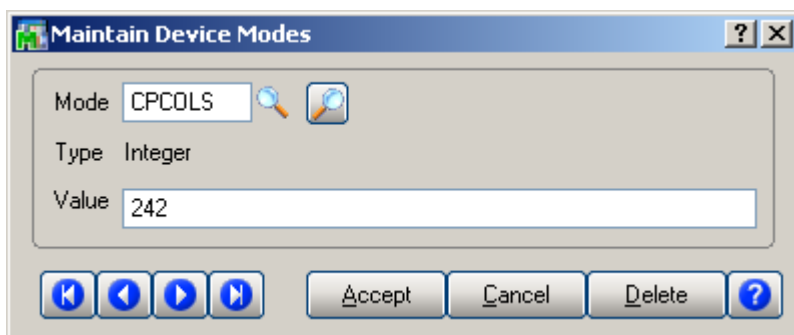
9. Add **RECEIPT** mode to this printer. This is critical for proper retail operations.



10. Change the CP mnemonic to the **Cut Paper** command for your receipt printer. See the table at the end of this document for the **Epson T88ii printer** recommended by IIG. If you are using a different printer, consult that printer's manual or that printer's manufacturer for the correct code.

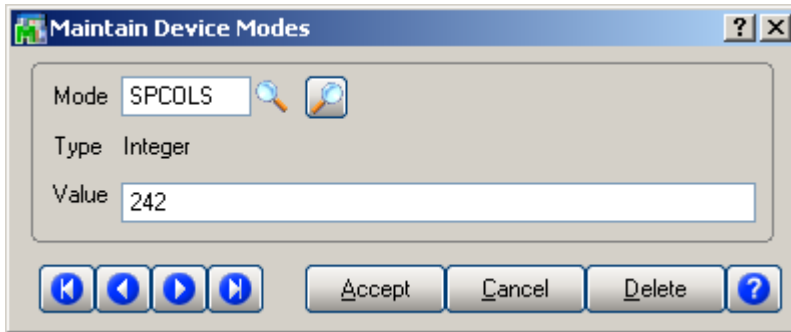


11. Change the CPCOLS setting to 242.

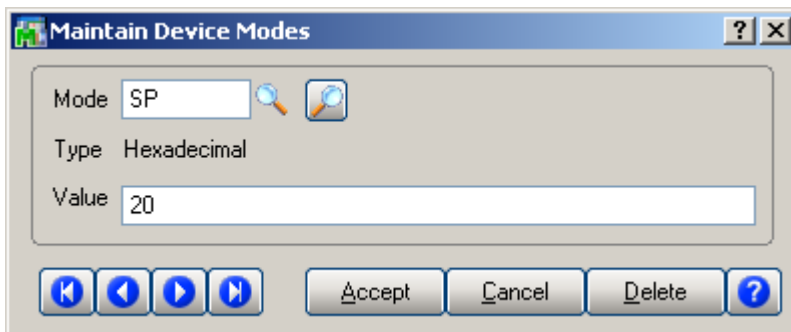


12. Change the SPCOLS setting to 242.

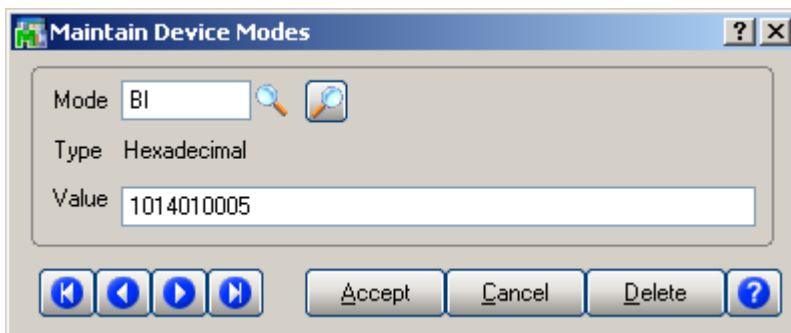




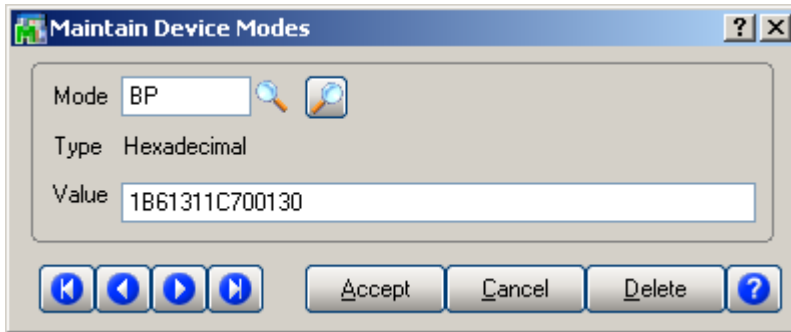
13. Delete the SP mnemonic or use 20 for the space setting.



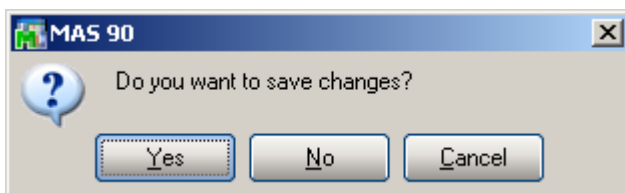
14. Add the mnemonic BI (Bee Eye) with the code to open the cash drawer (AKA the “drawer kick” code).



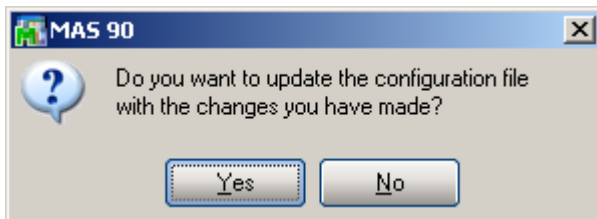
15. If you purchased the custom logo option, then add the mnemonic BP, which will instruct the printer to print the logo at the start of the receipt.



16. Click on the “X” in the upper right hand corner to exit the Maintain Device Modes



17. The program will then ask you to confirm the new changes.



18. Click **Yes** to save the changes.

19. In the next step, you will list the forms of payment acceptable at this register, and for which the cash drawer should open.

20. Go to the **IIG Credit Card Setup Menu**, and select **C/C Payment Type Maintenance**.

Payment Type  Description

Open Drawer For This Payment Type

Use Mag Stripe For This Payment Type

Default payment Amount To Balance Due

Include This Payment Type In Bank Dep.

User Defined Payment Data Entry Field 1

User Defined Payment Data Entry Field 2

User Defined Payment Data Entry Field 3

User Defined Payment Data Entry Field 4

Bank Code To Use For Payment Deposit  Security Pacific Checking

Debit Payments To G/L Account  Cash in bank - Reg. checking

Preauthorization Expiration Period (Days)

Current Period:	1	Period To Date	Year To Date
Payments Received:	<input type="text" value="1,704.81"/>	<input type="text" value=".00"/>	<input type="text" value=".00"/>
Payments Refunded:	<input type="text" value=".00"/>	<input type="text" value=".00"/>	<input type="text" value=".00"/>

IIG ABC 9/9/2005

21. In **C/C Payment Type Maintenance**: check the **“Open Drawer for this Payment Type”** option for each payment code representing a payment type you will accept cash or receipt tickets that requires opening the cash drawer.

22. In the **Credit Card Options** screen, under the **Credit Card Setup** menu, check **Register Processing**. This is required for cash drawer processing.

23. Under the **Credit Card Options** menu, select **Terminal Control Options**.

**IIG C/P Terminal Record Maintenance**

**Terminal**

Terminal ID: T101    Description: POS Example

Register ID: T101    Location: Front Counter

Credit Card Allowed in Sales Order:     Credit Card Allowed in HTI POS:

Credit Card Allowed in Invoicing:     CC Swipe Reader Installed:

Default Merchant Code (Swiped): 0001    Global 1

Default Merchant Code (Keyed): 0001    Global 1

Merchant Code Gift Cards:

**IIG POS/Fast Sale Setup**

Receipt Printer Only?

Receipt Printer Test: P01    Receipt Printer

Receipt Form Code: 1    Std Receipt

Navigation: [Home] [Back] [Forward] [End]    [Accept] [Cancel] [Delete]

Status: IIG    ABC    9/9/2005

a. If you are on the terminal that will be printing the receipts, click on the terminal icon to select the correct terminal.

b. In the **IIG POS/Fast Sale Setup** section, you may check **“Receipt Printer Only”**, which will only allow printing to the receipt printer.

c. Select the **Receipt Printer** from the list that shows in the drop box for that station. The program will verify that the printer selected is a receipt printer based on the printer setup done in step four.

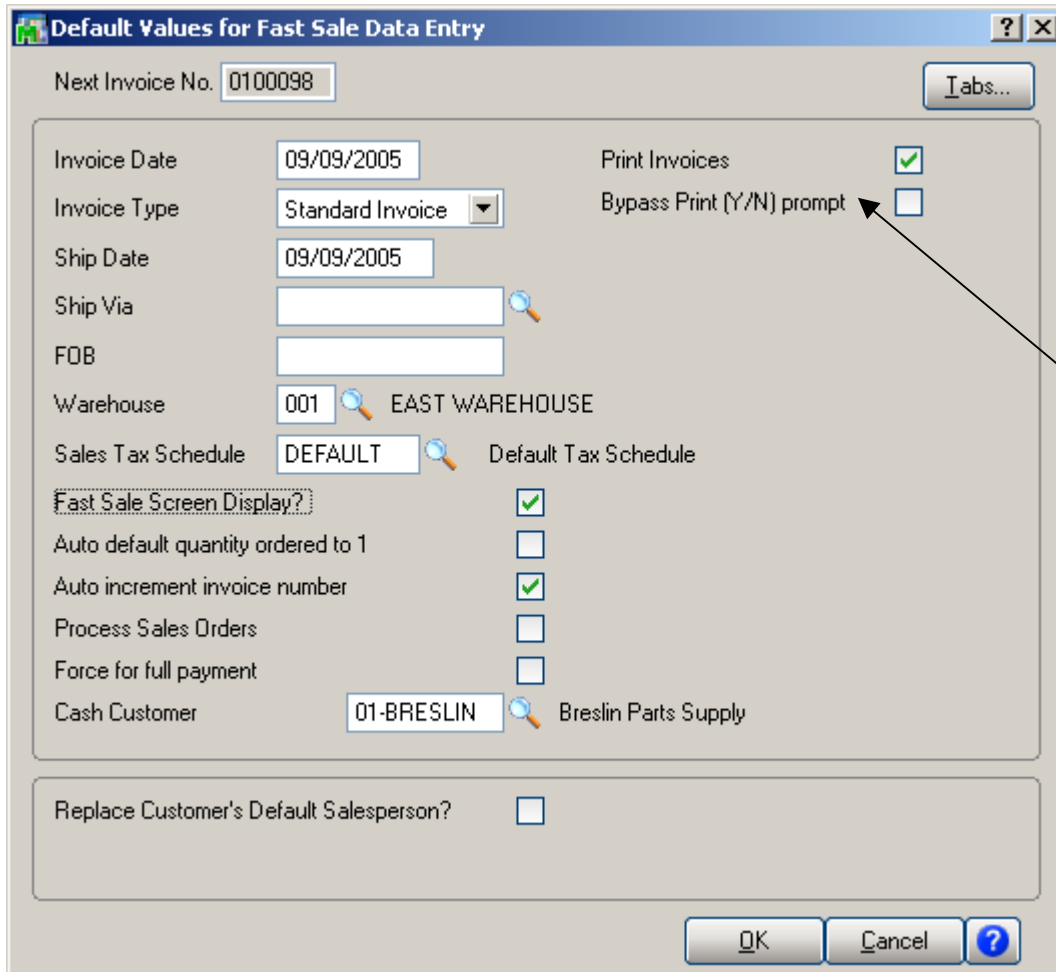
d. Select the **Receipt Forms Code**. Receipts are **Character** forms only at present, due to fact that Crystal does not understand continuous tape printers.

e. Click Accept to save these changes.

24. Now, go to the **Sales Order Main Menu**, and select **Fast Sale Entry**. If Fast Sale is set for Auto Increment

Invoice Number, you will need to cancel the invoice to enable the Defaults screen.

25. In the **Fast Sale Defaults**, uncheck the **“Bypass Print”** box.



Select or create a transaction, and process it through until the print dialog appears. Select the local printer you defined for this workstation and print the receipt document. Now go back into **Fast Sale Defaults**, and check the **“Bypass Print”** box again. The receipt printer will stay selected for future use. Codes used for the Epson TM88II printer:

Printer Mode	Description	Hex Code
BP	Print logo	1B61311C700130
BI	Open cash drawer	1014010005
CP	Cut paper	1B69

## Customer Open Sales Printing

The **Customer Open Sales Printing** has been added under the **Sales Order Reports** menu.

The report prints expected payments and deposits information for the selected Customers.

The screenshot shows a dialog box titled "Customer Open Sales Printing". It features a "Selection" section with "All" selected, and "Starting" and "Ending" fields. The "Starting" field contains "00-" and the "Ending" field contains "99-//////". There are search icons next to these fields and a "Form..." button. Below this are four checked options: "Print only customers with debts", "Include Updated Deposits", "Exclude Applied Invoice", and "Sum Up Payments". An "Include Deposit Starting From" field contains "10/10/04". At the bottom, there is a printer selection field showing "\\IIGSERVER\HP LaserJet 1100 (MS)", and buttons for "Print", "Preview", and "Printer Setup...". A status bar at the very bottom shows "IIG", "ABC", and "11/9/04".

You can choose to print or not customers not having any debts, already applied invoices, deposits on already updated invoices, and also choose to print all the payments of the order summed up or separately. Deposits can be printed starting from the specified date, that is, deposits of the dates before the specified will not be taken into account.

Here is an example of the printout:

Source	Trans Number	Trans Date	Amount	Apply-To	SO Dep Ref	So Dep	Balance
<b>01-ABF American Business Futures</b>							
SO	0000171	5/1/03	859.32			0.00	859.32
SO	0000153	5/11/03	485.06			0.00	485.06
SO	0000115	5/18/03	7,856.10			0.00	7,856.10
SO	0000176	11/8/04	5,100.00			130.00	4,970.00
SO-PMT	0000176	11/8/04	0.00			0.00	-130.00 **
<b>Total Sales Orders</b>							<b>14,170.48</b>
SO-INVC	0100060	11/8/04	84.00			14.00	70.00
SO-PMT	0100060	11/8/04	0.00			0.00	-14.00 **
<b>Total SO Invoices</b>							<b>70.00</b>
AR-INVC	0000122	1/31/03	0.00			0.00	850.00
AR-INVC	0100054	3/1/03	407.40			0.00	407.40
AR-INVC	0000141	3/31/03	0.00			0.00	1,178.69
AR-INVC	0000190	4/30/03	0.00			0.00	85.00
AR-F/C	APR0001	4/30/03	0.00			0.00	43.89
AR-C/M	0100055	5/10/03	0.00			0.00	-81.48
AR-INVC	0100033	5/15/03	613.05			500.00	613.05
AR-PMT	0100033	5/15/03	0.00			0.00	-500.00 **
AR-INVC	0100034	5/15/03	2,467.61			0.00	2,467.61
AR-INVC	0100048	5/30/03	130.00			0.00	130.00
AR-INVC	0100041	5/31/03	38.20			0.00	38.20
<b>Total AR Invoices</b>							<b>5,732.36</b>
<b>Total Balance Due 01-ABF</b>							<b>19,972.84</b>

## 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.