Point Of Sale / Fast Sale
For Sage 100 ERP

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Installation Instructions and Cautions

PLEASE NOTE: SAGE 100 ERP must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.
Once SAGE 100 ERP 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 SAGE 100 ERP 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.
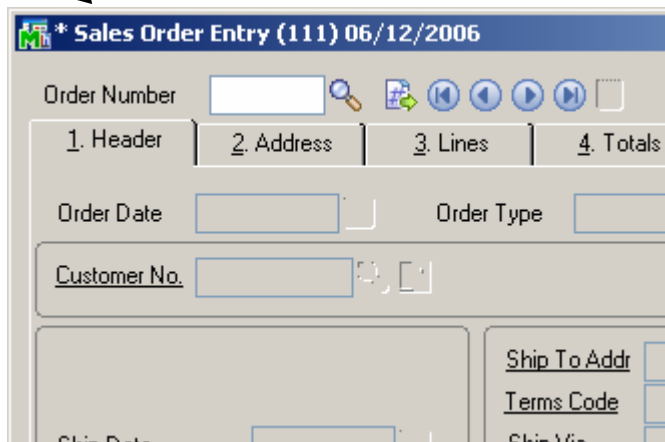
An *asterisk* in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

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

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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 SAGE 100 ERP.

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**.


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.
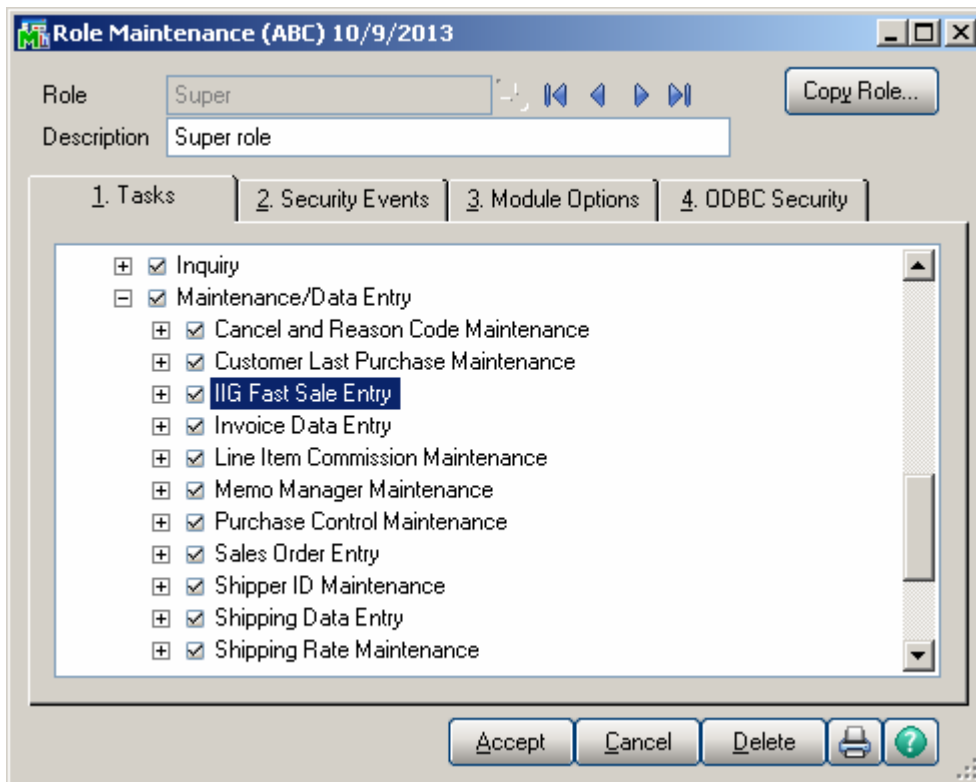

ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.
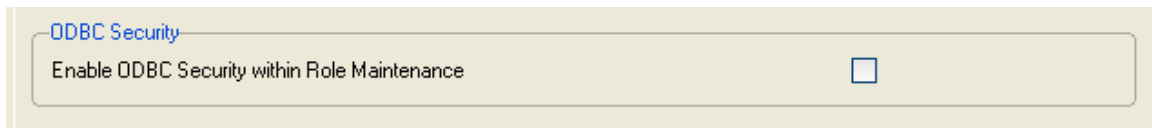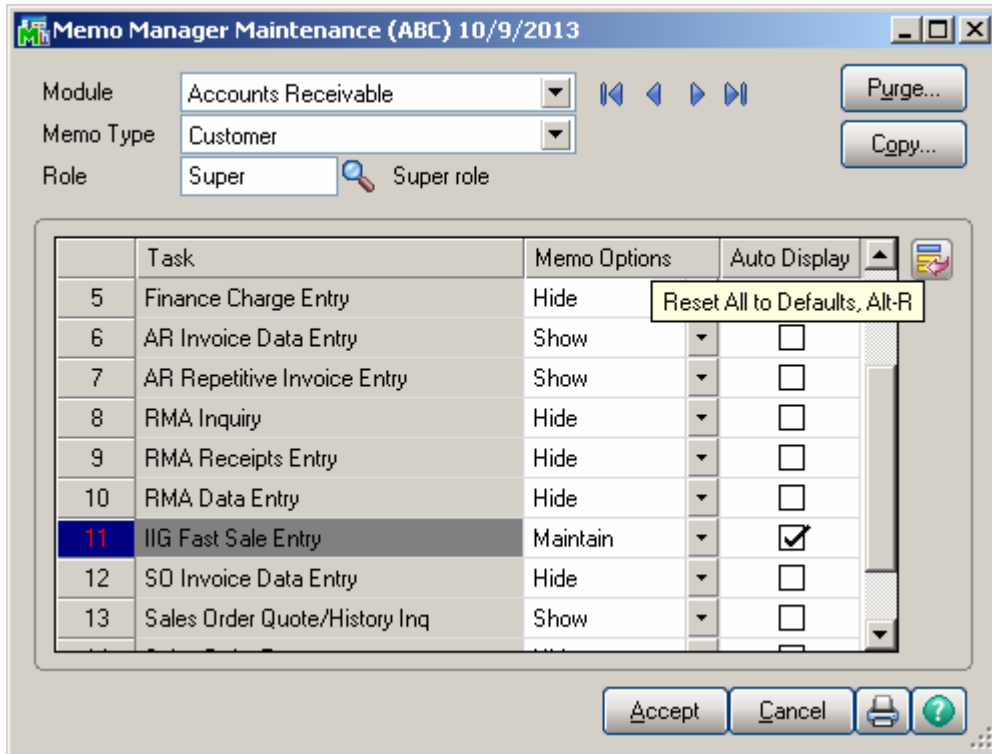

Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.

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*Note: In the Memo Manager Maintenance the user may have to reset the Task list by pressing the **Reset All to Defaults** button at the right top of the grid to show the IIG Fast Sale Entry option.*

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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.

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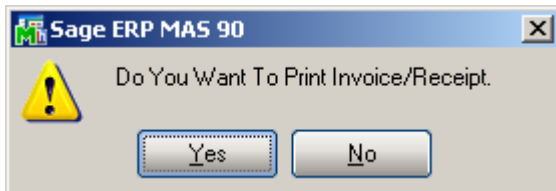
The **Quick Print**, **Customer…**, **Credit…** buttons are placed at the bottom of the screen.

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.

When 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 as well.

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

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The **Fast Sale Data Entry** program allows running the following functionality with the keyboard shortcuts, to facilitate the entry process.

Pressing the **F5** key will start new Invoice assigning the **Next Automatic Invoice Number**.

Pressing the **F8** key will take you to the **Totals** tab.

Pressing the **F9** key will select, for the current Invoice, the **Cash Customer** specified in the **Defaults Values for Fast Sale Data Entry** (same as clicking the **Cash Sales** button).

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Search in Detail/Grid file for selected Item Code.

The **Item Code** field has been added on the **Lines** tab of **Fast Sale Data Entry** to be used for scanning.

The program works depending on the **Auto Default Quantity Ordered to 1** check box.

If the **Auto Default Quantity Ordered to 1** option is on, then if the Item being scanned is already present in the grid, the Quantity Shipped is increased. Otherwise if such item is not present in the grid, the Item will be entered at the end of grid lines and the line's color will be changed to blue.

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If the **Auto Default Quantity Ordered to 1** option is on and the Invoice has at least one line, the **Item Code** field, caption, and lookup will be enabled.

If the **Auto Default Quantity Ordered to 1** option is off, the **Item Code** field, caption, and lookup are disabled.

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Default Values for Fast Sale Data Entry

Before selecting the **Invoice Number** on the **Fast Sale Data Entry**, click the **Defaults…** button.

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.

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.

On the Default Values for Fast Sale Data Entry screen:

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 and the Terms Code selected on the Header tab matches the one selected in the C/P Options. If this box is checked, clicking the **Totals** tab displays the **Deposit/Prepayment**

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Entry screen. The program returns a message and don't allow accepting the invoice until it is fully paid:
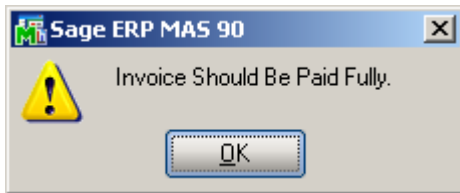
Select the default **Cash Customer**. Click the **$** (dollar) button next to the **Customer No.** field to select this default Customer for current invoice on the Fast Sale Data Entry screen.

Check the **Replace Customer's Default Sales Person** 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.

The **Default Salesperson** field on the **Fast Sale Data Entry** screen will display User Logon information of the **Default Values** for **Fast Sale Data Entr**y screen:

Select the **Print Invoices** check box to print the current batch of invoices when accepting them. Clear this check box if you do not want to print invoices. The value is defaulted for the **Print Invoice** check box in the **Fast Sale Data Entry**.

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** (graphical form) program has been added under the **Sales Order Main** menu.

The **Paperless Office Output** field will be shown when the fields of **Form Maintenance** are filled in. **Form Maintenance** is available from **Paperless Office -> Setup** menu.

Here is an example of printout:

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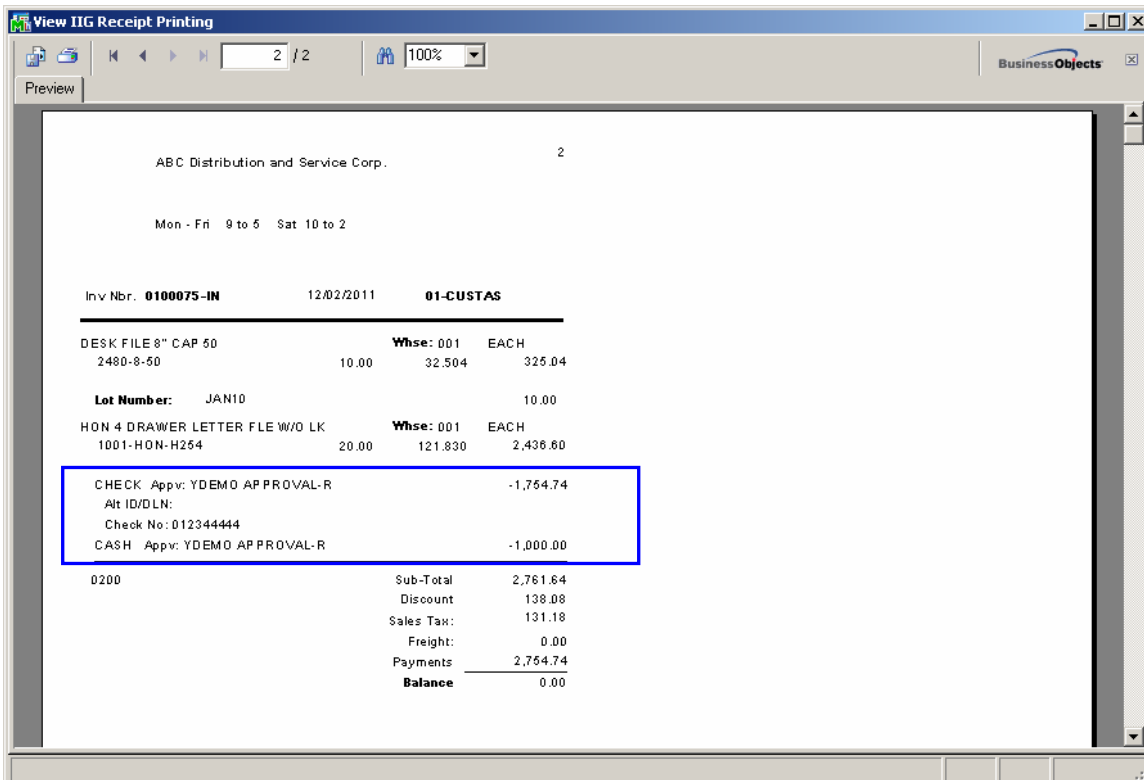
Receipt Printer Setup

IIG Point Of Sale/Fast Sale supports only graphical form receipt printing.
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 -> Device Configurator**.
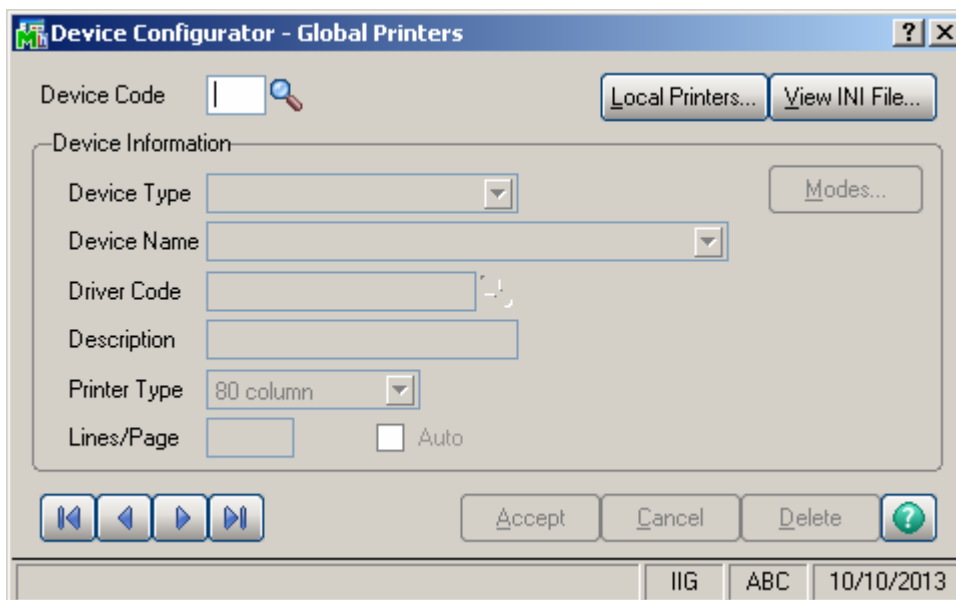
3. Click on the **"Local Printers…"** button to set up the receipt printer as a unique local printer. The Workstation name will be automatically displayed for the Workstation ID. Click **OK** to accept the workstation ID. We recommend configuring the receipt printer from that workstation.
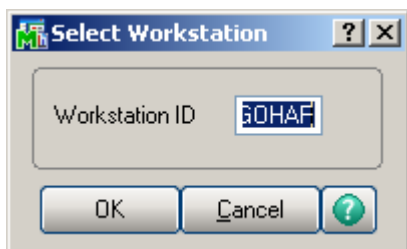
4. Enter a unique printer **ID**. This printer ID must be unique for the system, not the terminal. Due to the limits of Windows, two different workstations may not have the

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.
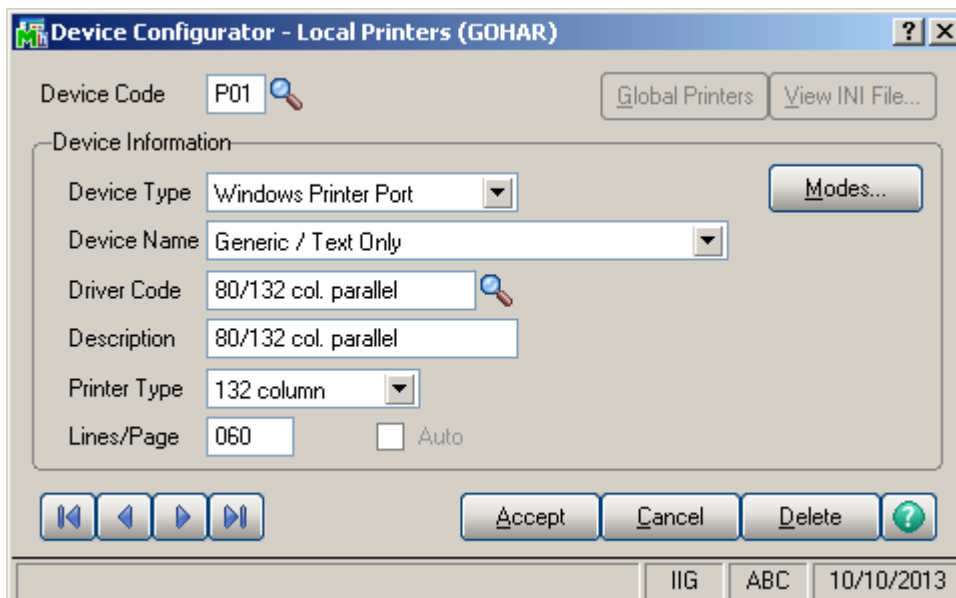
5. Device type would be Windows Printer Port. We suggest setting up a Generic Text Printer for your receipt printer. In this case, we've set up the printer "Sage PDF Converter".
6. For **Driver Code**, use "80/132 parallel printer."
7. Set **Printer Type** to 132 columns. Lines/Page will default to 60. This is okay.
8. Now click on the **Modes…** button.
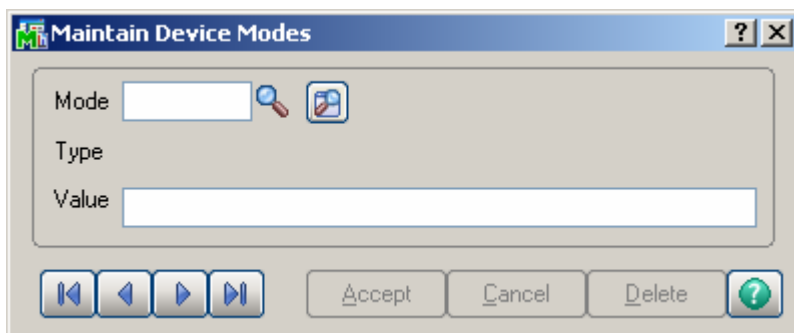
9. Add **RECEIPT** mode to this printer. This is critical for proper retail operations.

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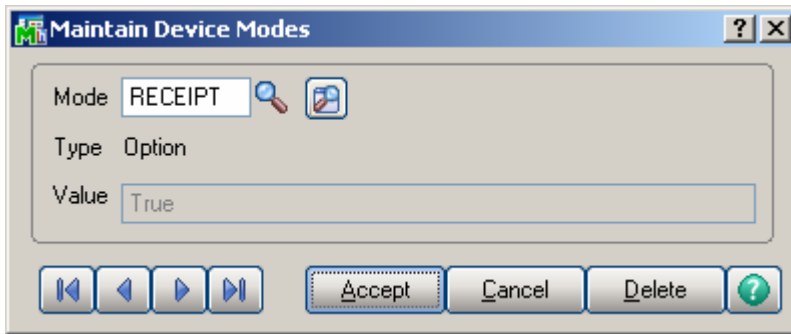
10. Change the CP mnemonic to the **Cut Paper** command for your receipt printer. See the table at the end of this document for the **Epson T88II printer** recommended by IIG. If you are using a different printer, consult that printer's manual or that printer's manufacturer for the correct code.
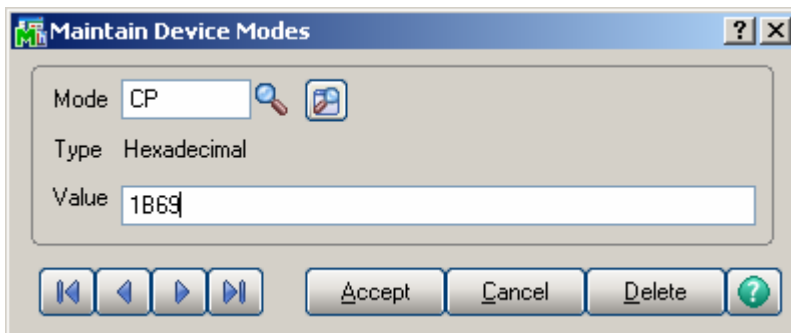
11. Change the CPCOLS setting to 242.
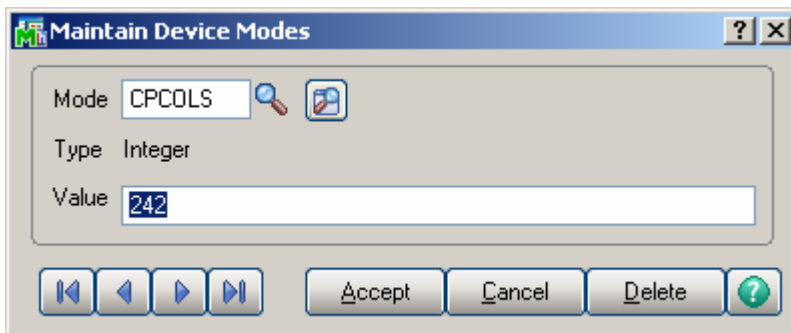
12. Change the SPCOLS setting to 242.
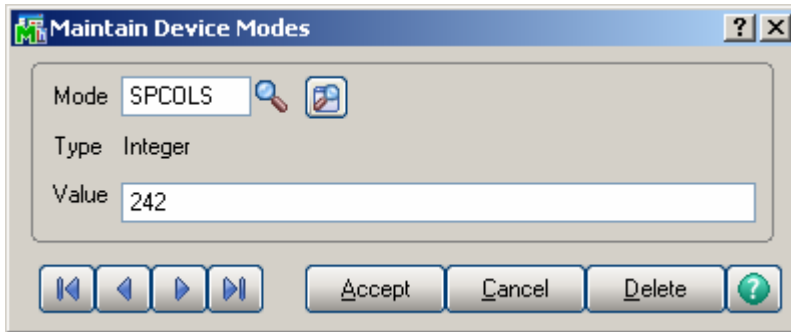
13. Delete the SP mnemonic or use 20 for the space setting.
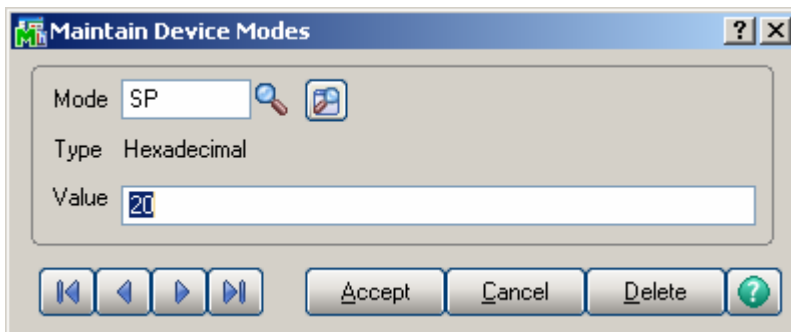
14. Add the mnemonic BI (Bee Eye) with the code to open the cash drawer (AKA the "drawer kick" code).
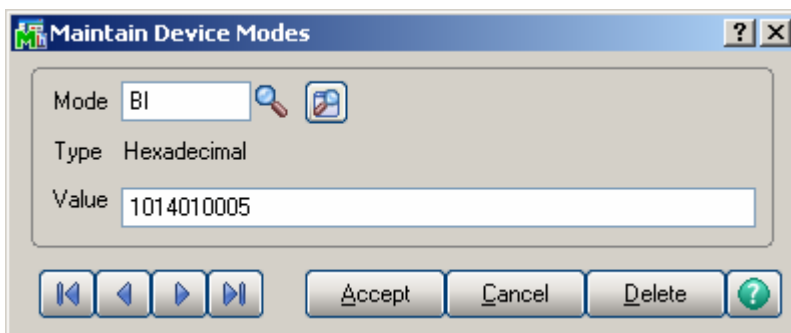
15. If you purchased the custom logo option, then add the mnemonic BP, which will instruct the printer to print the logo at the start of the receipt.

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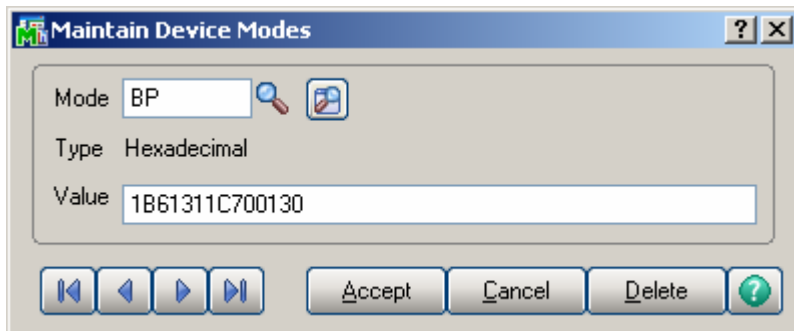
16. Click on the "X" in the upper right hand corner to exit the Maintain Device Modes, and then click **Accept**, then **Yes** to update the new printer setup.
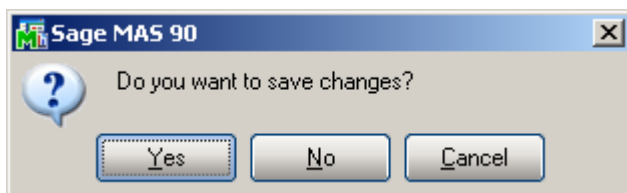
17. The program will then ask you to confirm the new changes.
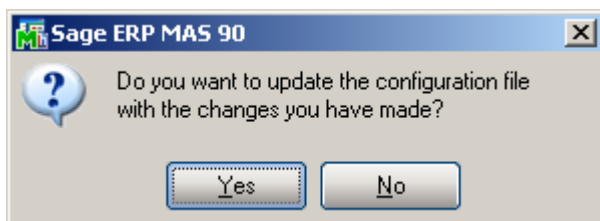
18. Click **Yes** to save the changes.

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**.

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.

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22. In the **Credit Card Options** screen, under the **Credit Card Setup** menu, check **Register Processing**. This is required for cash drawer processing.
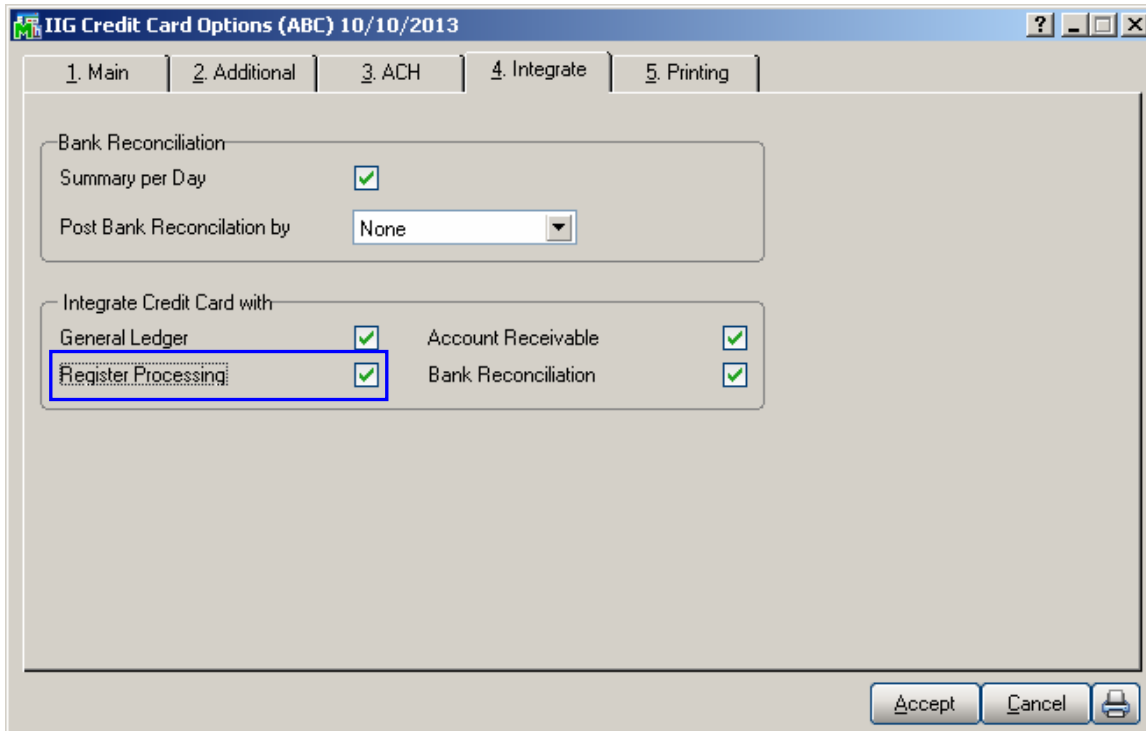
23. Under the **Credit Card Options** menu, select
Terminal Control Maintenance.

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.

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

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

25. In the **Fast Sale Defaults**, uncheck the "**Bypass Print"
(Y,N) prompt** box.
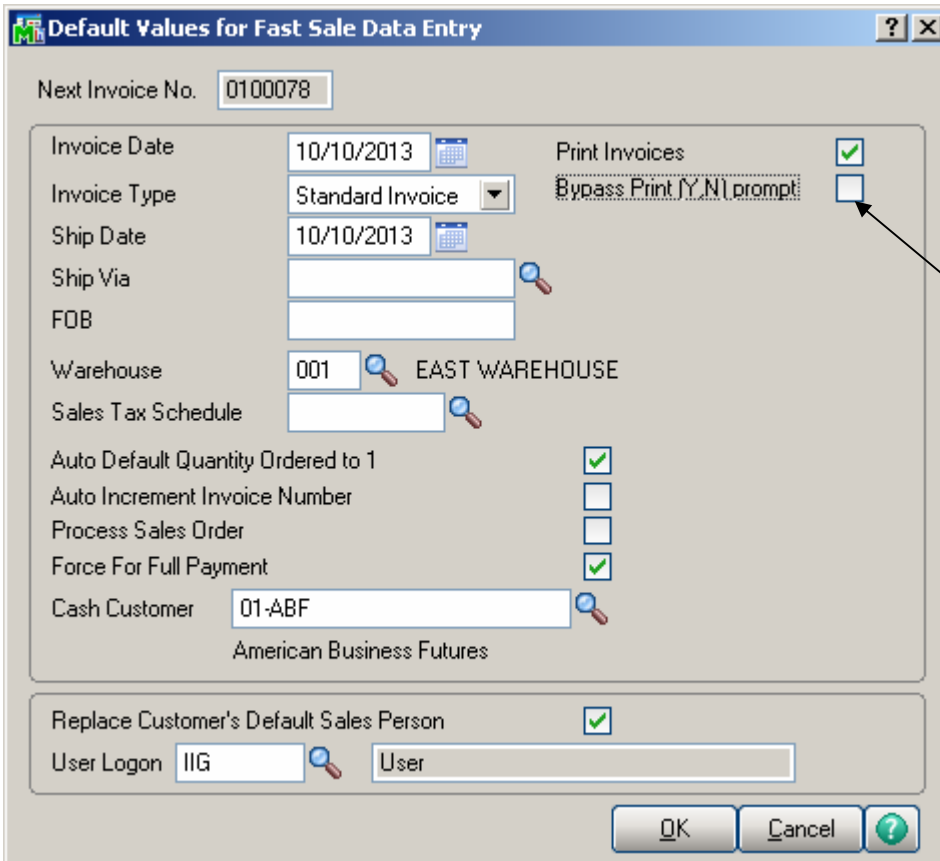
Select or create a transaction, and process it through until
the print dialog appears. Select the local printer you defined
for this workstation and print the receipt document. Now
go back into **Fast Sale Defaults**, and <u>check</u> the **"Bypass
Print"** box again. The receipt printer will stay selected 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

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Register Only Terminal processing

The **Pos/Register Terminal** check box has been added to the **Terminal Control Maintenance** program of IIG Card Processing Setup menu.

The **POS/Register Terminal** check box is only available, along with the **Register ID** field, if the **Register Processing** is enabled in the system.

The **POS/Register Terminal** box can be checked only if the **Receipt Printer** is configured for current **Terminal** in the **IIG C/P Terminal Control Maintenance.**

The "**Print Receipt Message?**" check box, **Receipt Message File** field, and **Select Receipt Message File** and **Show Text** buttons are available in the **IIG C/P Terminal Record Maintenance**.

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Select the "**Print Receipt Message?"** check box to activate the **Receipt Message File** field with **Select Receipt Message File** button. The **Select Receipt Message File** defaults to showing files with the extension of ".txt". When a file is selected the **Show Text** button is enabled to allow opening the selected .txt file.

*Note: the user must use **Notepad** or a similar text editor. Using Microsoft **Word**, **WordPad**, or **Excel** will create an invalid file.*

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Here is an example of ".txt" file opened:
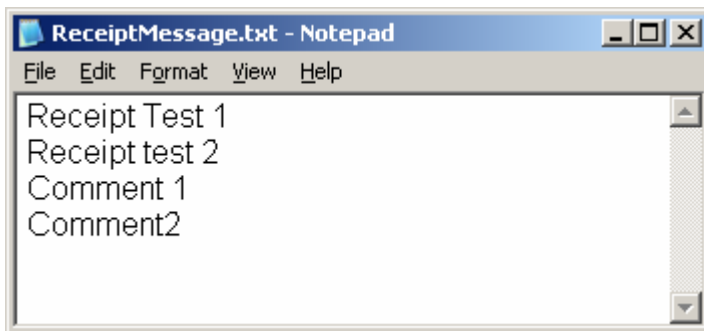
Note: This file's information can be any length, but should be formatted for the receipt printer (e.g. should be no more than 40 characters wide for each line). There can be a different text file for each company and terminal.

The **IIG Fast Sale Receipt Printing** program allows for printing the selected file's lines at the end of the Receipt Printing form.

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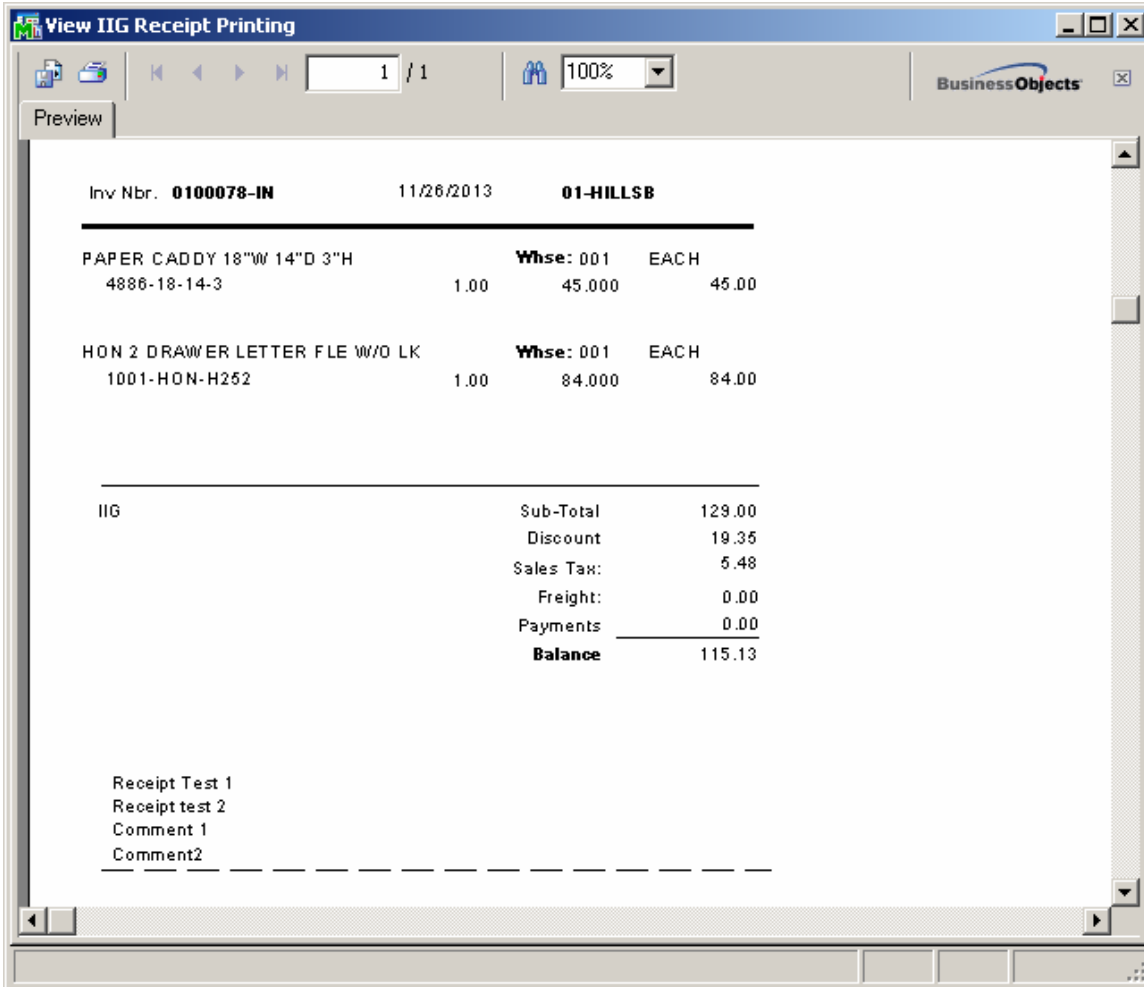
The **PRINT RECEIPT MESSAGE** and **RECEIPT MESSAGE FILE PATH** columns have been added to the Terminal Control Listing.

View C/P Terminal Control Listing

Preview

C/P Terminal Control Listing
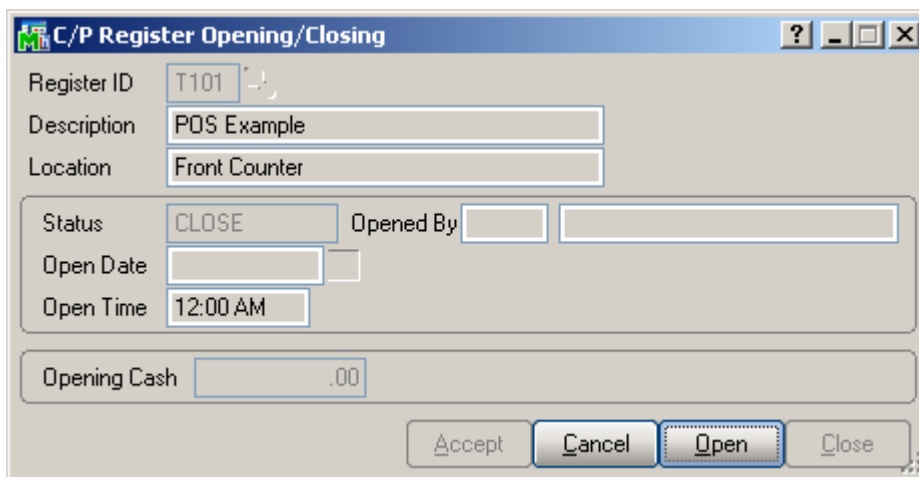
ABC Distribution and Service Corp. (ABC)

By Terminal ID

Terminal ID	Description / Location	POS Register	Merchant Codes	CC Swipe Reader	CC Processing In			Terminal Register ID	Receipt Printer	Form Code	Print Receipt Message
					POS?	S/Os?	INV?				
									Receipt Message File Path		
T101	Main Terminal	Yes	0001 0001 0001	No	No	Yes	Yes	T101	Yes		Yes
									\\Gohar\Gohar_D\MAS\MAS450\CCP_POS\MAS90\Home\TextOut\Receipt Message\ReceiptMessage.txt.txt		
T102	ARMEN ARMEN-500	No	0001 0002 0002	No	No	Yes	Yes		No		No

Register Open/Close
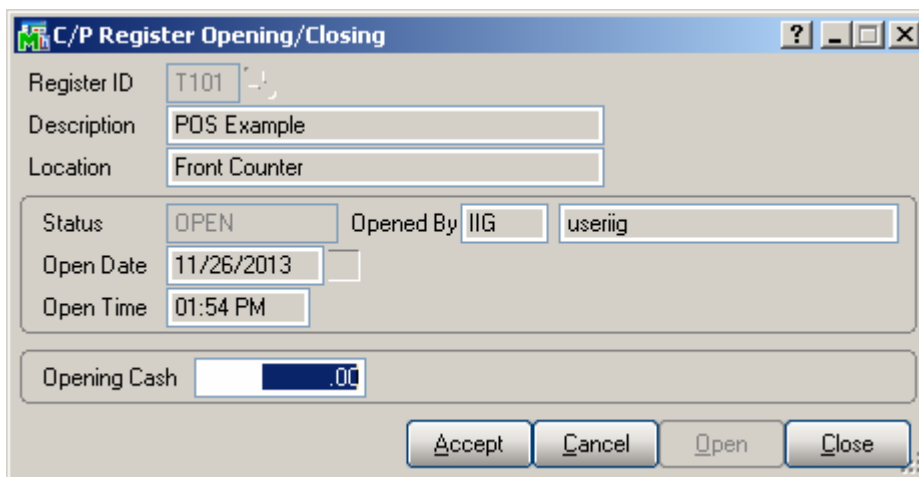
The **Register Open/Close** program has been modified to run when **Fast Sale Entry, Sales Order Entry**, **Invoice Data Entry** is first run for the day.

If the Register is closed, click **Open** to open the register and launch the **Fast Sale Entry, Sales Order Entry, Invoice Data Entry, Customer Payment Entry** and **AR Invoice Entry.**
The Open button is disabled for open register.

After the Register is opened the user is returned to the corresponding entry.
The **Accept** button is disabled for closed register.
If the Register is open, click **Close** to close the register. The program will generate a summary receipt and open the cash drawer.

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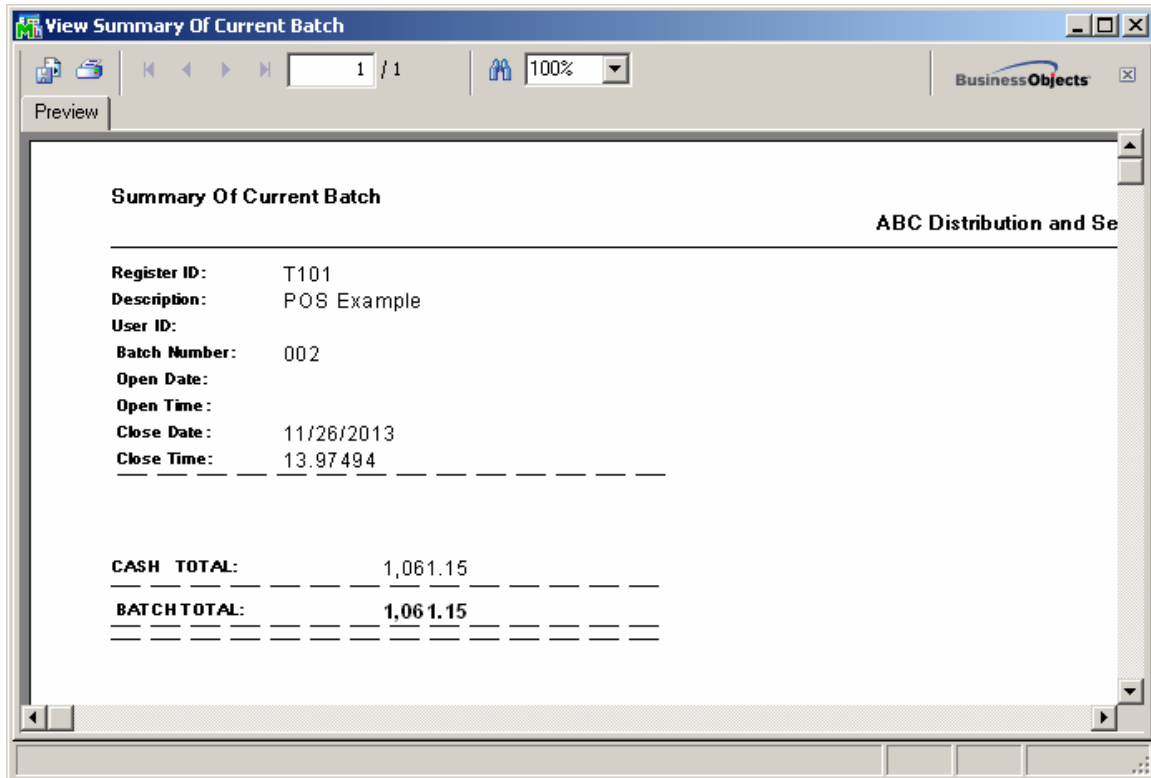
The **Open/Close All Registers** and **Supervisor Close Register** programs have been modified to process only **Terminals** specified as **POS/Register Terminal** in the **Terminal Control Maintenance**.

The **Daily S/O Payment Deposit Journal**, **Daily A/R Payments Journal** and **Open A/R Payment Journal** programs have been modified to process only Terminals specified as POS/Register Terminal in the Terminal Control Maintenance.

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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.