

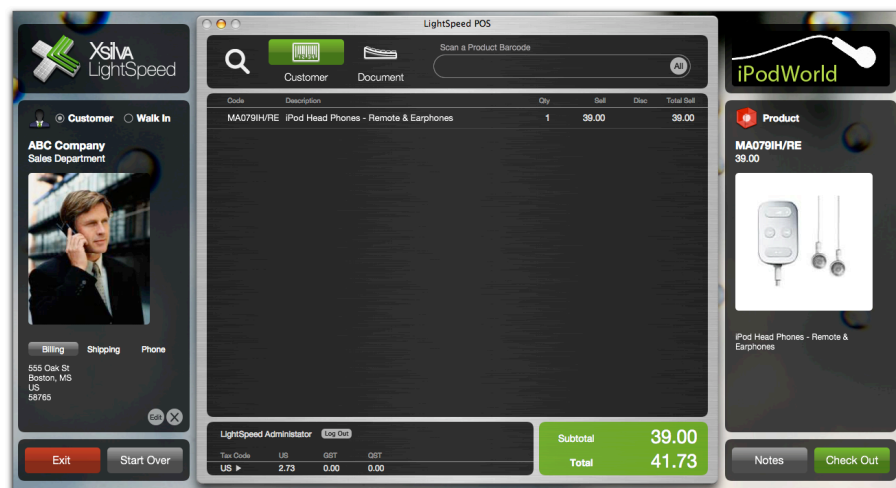
# POS

## Introduction

LightSpeed features a 'floating' Point of Sale interface that streamlines and secures front counter retail checkout.

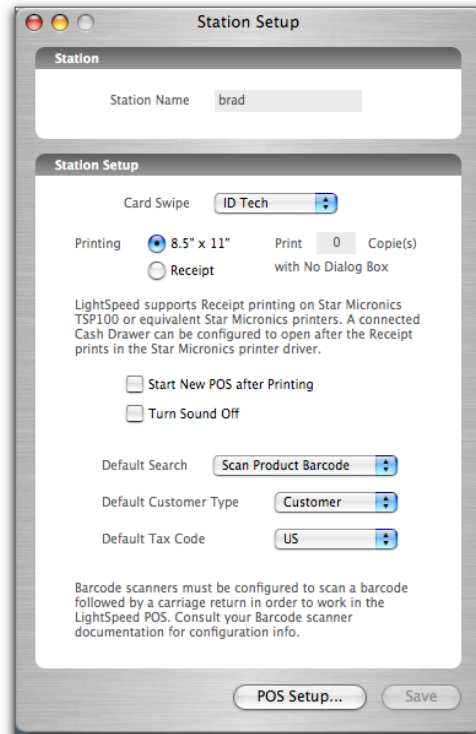
LightSpeed POS is the first Point of Sale interface that truly harnesses the power of Mac OS X and showcases its advanced Quartz graphics subsystem. It's the first POS to integrate the iSight camera right into the POS window to capture images of Products and Customers in real-time. It's also the first POS on OS X to operate in the context of a full multi-user sales workflow, powered by a high-performance SQL database.

The POS screen is made up of 3 different areas. The main POS sales register, in the middle, serves several purposes, displaying invoice information as well as the list views of product info, customers, and serial numbers. To the left is the Customer detail section, and to the right, the Product detail section.



## Station Setup

The window for establishing the settings for the POS screen can be found in the File menu, under the menu item Station Setup. This is the window where an administrator will choose settings for a particular station's POS hardware, printing configuration, and various defaults for POS screen, including tax configuration, search settings, and customer type.



### *Station Name*

This field allows you to set the name for this POS station. This name appears on receipts and can be reported on with LightSpeed's Reporting tools.

### *Card Swipe*

The Card Swipe setting is a pull-down menu which allows you to choose the supported card swipe device for credit card transactions, either "ID Tech" or "ID Tech Omni 3237".

### *Printing*

You have the choice to set your printing format to be standard, letter-sized paper, suitable for regular laser printers, or to a receipt printer. Formatting will automatically be adjusted for each size. **Note:** If the receipt printer is chosen, it will only be accessed

when printing Invoices. All other documents – Quotes, SRO's, and Orders – will be printed on 8.5" x 11" format.

You may also choose to disable the print dialog box when printing. By entering a positive value in the Print Copies field, that number of invoices will be printed without a dialog box. Again, this is only applicable to Invoices – a print dialog will appear for other documents. If the value is set to zero, a dialog box will appear for Invoices, as well.

#### *Defaults*

**Start New POS after Printing** - If you have a high volume of invoices, you may wish to have LightSpeed automatically create a new invoice when the last one has been printed. To do so, simply check this box.

**Turn Sound Off** – This checkbox disables the sounds associated with various functions in POS.

**Default Search** – This pull-down menu allows you to set which of the four search criteria – UPC, Product Code, Description, or Document ID - to use as the default in the main POS window.

**Default Customer Type** – With this pull-down menu, you can choose the default for the Customer type – either walk-in or an existing Customer. If you do not wish to track information on your customers, choosing 'Walk In' will allow you to accelerate the speed with which you can perform a transaction.

**Default Tax Code** – This pull-down menu allows you to choose the default tax code from the list you have already set up in your Taxes Setup window. However, you can still choose another tax code for any particular Invoice regardless of this default setting.

### **POS Setup**

From the Station Setup window, click the POS Setup button located at the bottom. This takes you to a window which allows you to add your logo to the POS screen, as well as configure other settings for POS features.

#### *POS Setup*

##### *Logo*

This window allows an administrator, or another user set up with the appropriate privileges, to insert a logo which will appear on the POS screen. Drag a jpeg file with the maximum resolution of 230x80 dpi over the window, and it will be automatically added to your POS screen. **Note:** This setup window is not the same used to insert the logo that is printed on sales documents. That is to be found in Tools|Setup|Company.

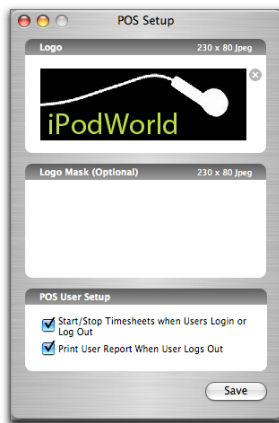
##### *Logo Mask*

A mask is a grayscale image where the gray levels (0-255) are used to represent

opacity. A gray level of 0 is an area where the image that the mask is created for becomes completely opaque, while a gray level of 255 becomes completely transparent and the image underneath the mask shows through completely. Any gray level in between will blend the masked image with any image below it. Putting a mask in allows you to create effects such as glowing edges, 'burns', and translucence.

**Tip:** To display a black and white version of your logo, save an inversed version in a paint program as a jpeg file. Drop the file into the Logo area of the POS Setup. Click Save.

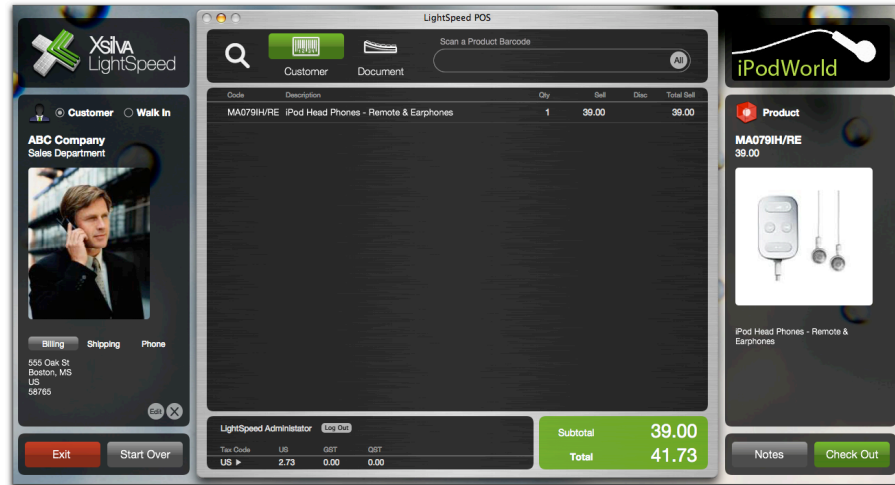
To display a color version of your logo, insert a jpeg version of your logo within the 230 x 80 dpi jpeg area as below on a black background.



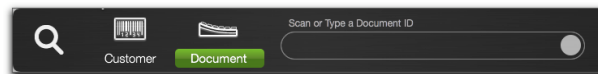
### *POS User Setup*

An administrator can set up LightSpeed to automatically start and stop Timesheets for Users when they log in and out of the POS screen in order to better track their time. Checking this box enables this feature. The Print User Report checkbox here enables a report to be printed when the User logs out of POS which shows a list of their transactions for that day, giving you a simple reference summarizing which methods of payments they handled that day and for how much.

## Sales Register



The main POS sales register has several functions, accessible with the various icons located in the search bar located at the top.



*UPC symbol* – allows you to scan the UPC code of a product, calling it up from the Products database and entering it into the Invoice.

*Keyboard symbol* – allows you to manually enter the product code or description of a product, including partial strings, calling it up from the Products database and entering it into the Invoice. As you type, the list will automatically be filtered to reflect the appropriate matches to the entered text. When you find the product you're searching for, click it once to enter it into the Invoice. Clicking the "All" button at the far right will list all Products.

*Customer* – allows you to manually enter a customer name or telephone number, including partial strings, calling it up from the Customers database. When you find the Customer, click it to enter it into the Invoice, displayed in detail to the left. Clicking the "All" button at the far right will list all Customers.

*Document* – allows you to enter the reference number of an existing sales document, including a Quote, an SRO, an Order, or an Invoice. If it is a Quote, SRO, or an

Order, the products will appear on the Invoice for processing. If it is an Invoice, you will be asked if you wish to complete a return on the specified Invoice. See below for more details.

Clicking the All button will give a list display for all items of the search criteria selected. For example, if you click All when the UPC symbol is highlighted, you will see a list view of all products in the database, including their prices and quantity available in stock. If the Customer label is highlighted, you will get a list view of all Customers and their telephone numbers. Occasionally, an “X” icon will appear in this top section. Clicking it will clear the list view and return you to the main Invoice screen.

Clicking one of the items in the list view will appoint it to the appropriate part of the Invoice: if it is a Customer, the Invoice will be assigned to it; if it is a Product, it will be added to the Invoice’s sales register; if it is a Serial Number, it will be pulled from the pool of available serial numbers and attached to the Invoice, displayed in gold text.

In the Invoice view, the headings include the Product Code, the Description, the Quantity, the Sell Price, any Discount, and the Total Sell price per item (ie extended price). Under the description, you will also see any Serial Numbers attached to the Invoice under their product description.

Code	Description	Qty	Sell	Disc	Total Sell
MA005LL/A	iPod nano (4GB white)	3	409.53		1228.59
	XBRNW4G107				
	MA004LL/A				
	XBRNW4G105				
▲ MA079IW/N	iPod Wheel - Nano	1	49.00		49.00
MA079IH/NV	Head Phones - Nike Vapor	1	24.95		24.95
MA079IH/BO	Head Phones - Bang & Olufsen	1	159.00		159.00

### Creating an Invoice

When you log into the POS screen, a blank Invoice will automatically be created, ready for editing.

#### *Choosing or Editing a Customer*

To begin with, assign a Customer to the Invoice. If the Invoice is small, you may wish to choose “Walk In” in the left area of the POS screen. This will not use a Customer ID and make it more difficult to track the Invoice later on without having the Invoice number. If it is a new Customer whom you wish to add to the database, click the “+” icon near the bottom of the Customer area of the left section of the POS screen. You can then add the information in the Customer screen that pops up, and once you click Save, you will be returned to the adjusted Invoice. If the Customer is already in the

Customer database, you can simply type a few letters of the Customer name into the search field at the top of the middle section of the POS window and choose it from the list of possible choices that will appear by clicking the name once. If you need to edit the information, click the “Edit” button, make your changes in the Customer window, and click Save to return to the POS screen. It will ask you if you wish to reload the Customer information with these new changes, or if you prefer to leave the Customer information on the POS screen as originally entered.

To add a new Customer’s photo to their profile, enter all the information as described above, and click the Save button. Choose Yes when asked if you wish to reload this new information onto the Invoice. Then, click the photo area in the Customer Detail area of the POS screen and it will automatically take their photo with your iSight camera. If the Customer already exists, but does not have a photo, or you want to change their photo, simply click on the photo area in POS and the iSight will take the new image and it will be pasted directly into their profile.

### *Adding Products*

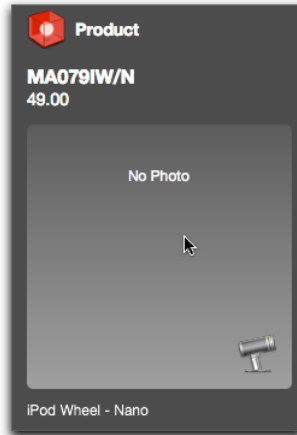
To add Products to an Invoice, you may scan its UPC barcode, and, if it is in the Products database, it will be called up and added to your Invoice. Another way to call up a Product is by typing a few letters from its product code or description when the Keyboard icon is selected. You may also choose your Product from the list view by choosing the UPC or Keyboard icons and clicking “All”. Click a product from the list that comes up and it will be added to your invoice. If the Product you have chosen requires a serial number, a list of available serial numbers will appear. You may then scan the serial number from the Product, or choose the matching entry from this list.

Double-clicking a Product in the Invoice view will call up its details, including its image and Related Products, in the Product detail section at the right. Click any of these Related Products to add it to the Invoice.

Since the availability quantities displayed in LightSpeed should reflect what is actually in stock, it is unlikely that you will try to Invoice a Product that isn’t showing in inventory. However, there may be exceptions, and these will appear with a red warning triangle on the Invoice, and before Checking Out, you will be asked to confirm whether or not you wish to continue.

**Note:** You may increase the quantity you wish to Invoice, but if the Product uses serial numbers, you will be required to enter a serial number for every serialized Product you are invoicing.

To add or change a photo of a Product, click the photo area of the Product in the Product Detail area. The iSight will automatically take a photo and the image will be added to the LightSpeed database.



### *Setting Prices*

When you enter a Product Code or scan a UPC code, a Sell Price will populate in the Invoice for the Product you've added. If you want to give the Customer a discount for the Product, enter a value into the Discount column beside the Product. Entering a number will discount the Product Sell Price by that many dollars. Entering a percentage sign after the number will discount the Product Sell Price by that percentage.

Along the bottom of the middle section, you will see the Product Subtotal, the Total, and the various tax totals for the Invoice (as defined in Tools|Setup|Taxes). If you are sending product outside of your region, you are able to click the Tax Code to cycle through the Tax Codes you'd set up and easily change the taxes charged for any particular Invoice.

### **Logging In and Out**

Because in sales environments there is often more than one sales person using the same POS station, it is important to be able to track the sales representatives assigned to an Invoice for reasons of commissions, accountability, and coverage. When a sales person finishes an Invoice and leaves the POS station, they are able to log out quickly so that the next sales person is able to log in.

There is a Log Out button in the section where the applicable taxes are listed, at the bottom of the middle section of the main POS screen. Clicking this button will log the current User out of the POS screen. A dialog box will appear asking you if you wish to Print a Payment Report, which lists the totals for that User's transactions that day, and if you wish to stop the Timesheet for that User's session. Once you click OK, you will be taken to a list of all Users, and POS will be ready for the next User to log in.

Information that had been on the POS screen will not be lost when a User logs out.



## Navigation

The navigation buttons are laid out along the bottom of the POS screen, located underneath the Customer and Product Detail sections. These buttons change function between the Sales Register and the Payment screens.

### *Sales Register Screen*

#### *Exit*

This button will take you back to the LightSpeed browser. You will have the choice of 2 check boxes – Print My Payment Report, which prints a list of your transactions for the day, and Stop Timesheet. You will also have the choice to switch the information on the POS screen to a full Invoice in the Administration layout of LightSpeed. Clicking OK will simply take you back to the browser.

#### *Start Over*

Pressing this button clears your unsaved POS screen, discards the information, and creates a new Invoice.



#### *Notes*

This allows you to enter notes in two fields – “Printed Notes”, which will be printed on the Invoice, and “Internal Notes”, which will be only visible to Users. Printed Notes are useful for terms and conditions specific to that sale, while Internal Notes can be a useful reference in the future, particularly for other sales representatives and administrators requiring further information about the invoice.

#### *Check Out*

When you have finished entering product onto the Invoice, and you are ready to register its payment, you press this button to save the Invoice and advance to the Payment screen. The Invoice will now have a unique ID number, visible at the top of the Payment screen.



### *Payment Screen*

#### *Go Back*

This button takes you back to the Invoice view of the POS screen, allowing you to edit your Invoice.

*New*

This button create a new Invoice in POS.

*Notes*

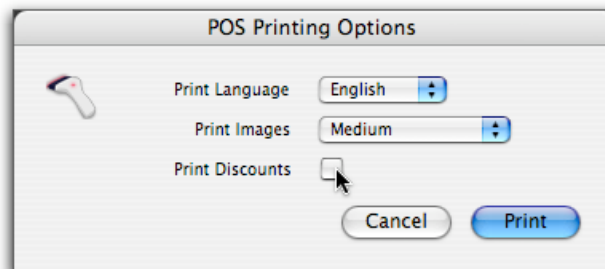
This button remains the same.

*Print*

When all changes have been made to the Invoice, and you are ready to print, click button.

**Printing**

A dialog box will appear with three choices. First, you are able to specify the language the Invoice is printed with – English, French, or Spanish – using terms you’ve specified in the Tools|Setup|Field Translations menu option. Second, if you want to print Product images on the Invoice, their size, or if you only want to print an image for the first item (and its size). Last, whether or not you wish to include any discounts on the printed Invoice – otherwise, the Customer will only see the adjusted totals.

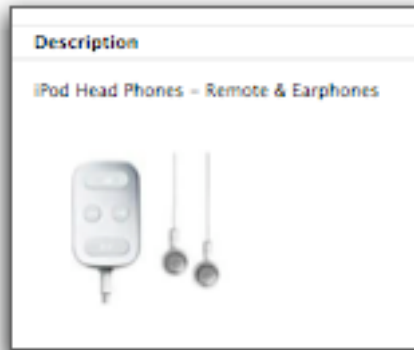


When your Invoice is printed, information you have set up or customized will appear.

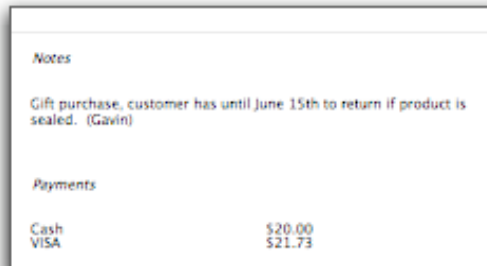
At the top right, the Invoice number, as well as its barcode equivalent, will appear. Underneath you will find the date the Invoice was created, and the date any modifications were made.



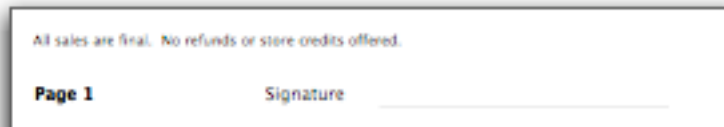
In the Product section, you will see the description, as well as the image stored in LightSpeed's Product database. If you have not selected images to be printed, you will only see the description.



Any notes you have entered in the Printed Notes field will appear after the Products, and underneath that will be the details on Payment Methods.



At the bottom left of the Invoice, you will see any terms or conditions you have set up in Tools|Setup|Company in the Invoices field.



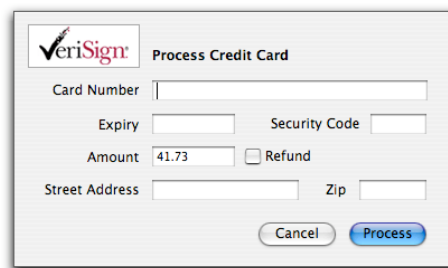
## Payments



### Methods of Payment

In the Payments view, you will see a button for every method of payment you have set up in the Setup Tool (Tools|Setup|Payment Methods). Pressing a button will bring up the details for that payment. The amount tendered will automatically show the balance owing on the Invoice, but this can be edited for partial payments.

LightSpeed integrates with VeriSign for fast, simple, accurate processing of credit card transactions. At time of purchase, you are able to enter the Customer's credit card information, and click Process to send the encrypted information to Verisign. If the transaction fails, you will be notified immediately. Likewise, if it is successful, a confirmation number will be logged into the Invoice, and the Save button must be clicked to register the payment to the Invoice. LightSpeed will automatically access Verisign for any method of payment specified as "Credit Card" in the Tools|Setup|Payment Methods menu option.



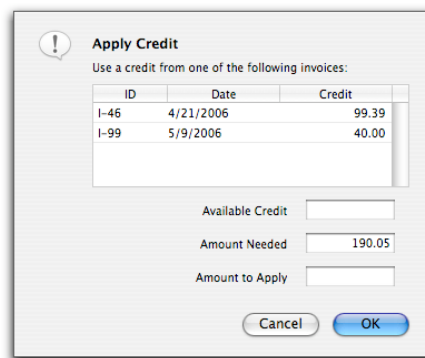
If the Customer is using more than one method of payment, you are able to modify the amount tendered to reflect the division of payment. Save the payment and click another button for the next payment method. In some cases, the customer may choose to use the same method of payment, but from a different source – a different

credit card, for example, even though they are both Visas. All of these different payment methods will be laid out separately on the printed Invoice.

Pressing the Save button for a Payment saves it to the Invoice and it is irreversible except by authorization by an Administrator.

### *Credits*

If the Customer has a credit from a previous Invoice, that can be applied as a method of payment. Pressing that button will call up a list of all the Customer's available credits. Choose one and specify how much of it you wish to apply. If a Customer has more than one credit you need to apply, you must choose each one separately and save it as its own method of payment. Click OK to return to the Payments view of the POS screen.



**Apply Credit**  
Use a credit from one of the following invoices:

ID	Date	Credit
I-46	4/21/2006	99.39
I-99	5/9/2006	40.00

Available Credit

Amount Needed

Amount to Apply