

Using the new Features of Rocket POS Version 9.0

Using the VeriFone 1000se with Mercury.

Select the Comm. Port used by the Pin Pad. More and more computers are coming without Comm. Ports now days. We used an adapter here from USB to serial comm. Port and it worked fine. Make sure your Comm. Port settings within Windows is set to 1200 baud.

The screenshot shows the 'Stations with Credit Card Setup' window with the 'Mercury' tab selected. The 'Station' dropdown is set to 'MAIN'. The 'Pin Pad Setup' tab is active, showing the following options:

- Use Debit Cards with Mercury Payment System
- Pin Pad Type**
 - Verifone 2000 Pin Pad
 - Verifone Everest Plus Pin Pad
 - Verifone 1000se Pin Pad
- Pin Pad Comm Port**
 - Com1
 - Com2
 - Com3
 - Com4
 - Com5
 - Com6
- Debit Cash Back Sur-Charge Fee:
- Maximum Cash Back:
- Windows Comm Port Settings:
 - Bits per Second: 1200
 - Data Bits: 7
 - Parity: Even
 - Stop Bits: 1
 - Flow Control: None

A red warning message states: "Max Cash must be greater than Zero (0) to give cash back." The bottom of the window features a toolbar with buttons for Prev, Next, Add, Edit, Delete, Search, Wizard, Print, and Close.

Automatic PDF Reporting

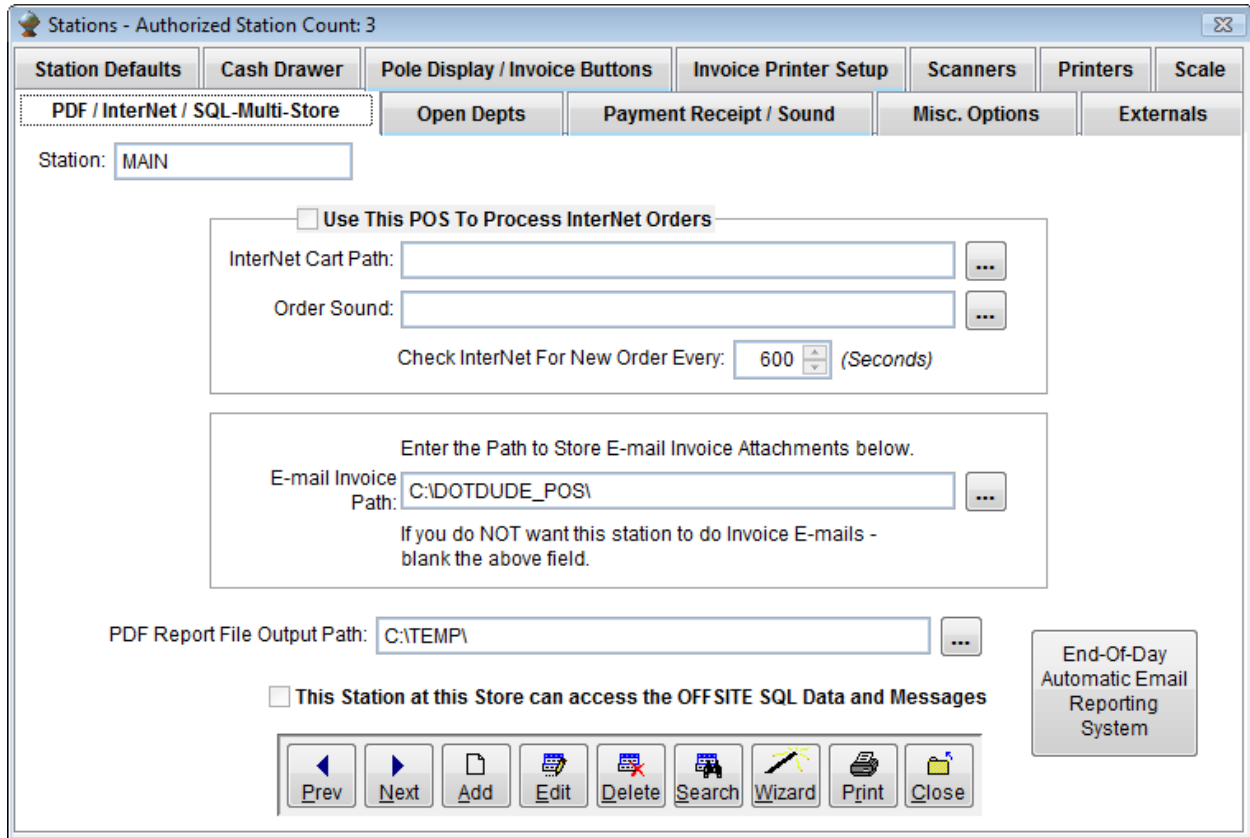
Setup an Automatic Super End of Day report that will output selected reports to PDF files. Then at a certain time you pre-define, these files are automatically emailed to an email that you pre-assigned.

Once you install the new version of Rocket POS – go to the Stations screen and then the PDF tab – select the folder you want the POS to store your PDF files into. I suggest making a separate folder within the NICKEL folder. This setting is what turns on the PDF output routine as a default. If you do not want your reports to go to a PDF file, erase this Output Path.

In order to see PDF output files you will need Acrobat Reader which is free at the following web address

<http://www.adobe.com/products/acrobat/readstep2.html>

Once you have a PDF file path setup, click the large button shown to the right.



By clicking the End-Of-Day button you will go to the screen below.

Click on which reports you want sent to you at the end of the day. The POS system will remember these settings even if you close this screen.

Click the checkbox if you want to use the PDF system.

You can have the POS delete the PDF reports sent from this screen after they are emailed to you.

If you have clerks coming in and out of the POS several times a day, you may want the POS to ask if the reports should be sent so you are not sent the same report several times a day.

You may enter a password to protect your reports from being viewed by other people.

Set the time of day you want the reports sent to you. If time is past the time of day you have set here and a clerk EXITS the POS system, your reports will be emailed to you automatically. We suggest setting a time just before you close.

Enter the email address you want the reports sent to. In the example below, you can have reports sent to more than one email account by separating them with a semicolon.

For this system to work, you must have the email settings within the Company setup screen setup and working.

All reports can now be sent to a PDF file format. Reports can also be saved as Excel CSV files for viewing in MS-Excel or other spreadsheet software.

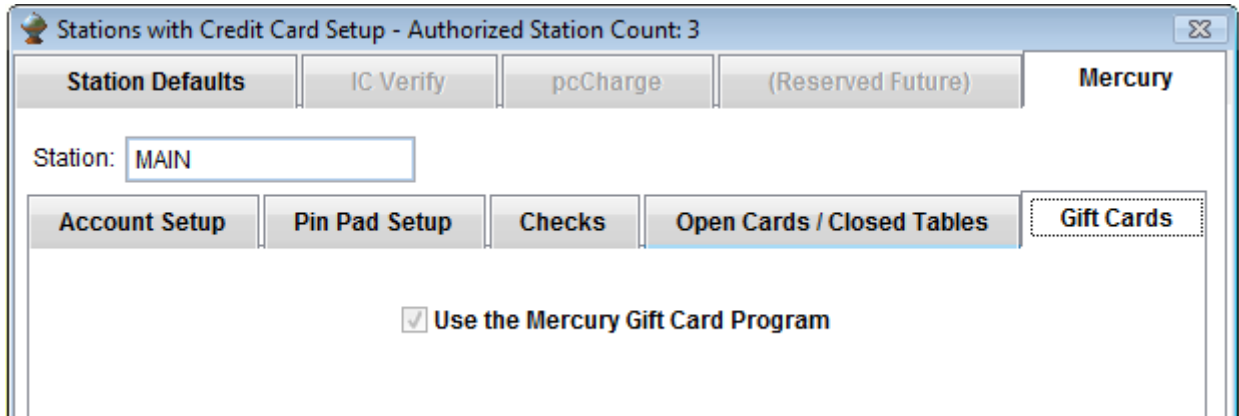
When CSV files are created and sent out by email, they are placed into a ZIP file. You can optionally have the files remain locally or erased off the local drive once they are sent out.

Some of the field names may be a little cryptic at first but once you start comparing the field names with the reports, you will be able to determine which fields are fields you will want to record.

Gift Cards (GC) with Mercury. If you want to use gift cards and you are using Mercury as your processor, check the box as seen below.

Gift Cards are available for purchase from Mercury at www.MercuryPay.com

By checking the checkbox below, an Inventory record is created with the SKU **GIFTCARD** and a UPC number of **GC999999** – this will be an open department item sold by price, an initial quantity on hand of 10000, non-taxable. These settings should NOT be changed for the GC to work correctly.



The four main features of Gift Cards are Issue, Sale, Return and Balance.

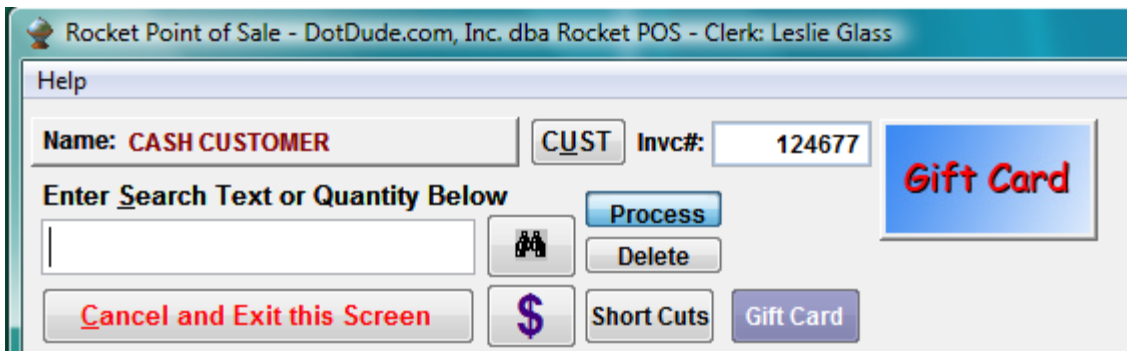
Issue – this is when you sell a customer a GC and place a value on it. The value is not kept on the card itself but the Mercury server out in cyberspace.

Sale – this is when a customer buys something and uses their GC to pay for it.

Return – a customer returns something to your store and the value is added to their GC

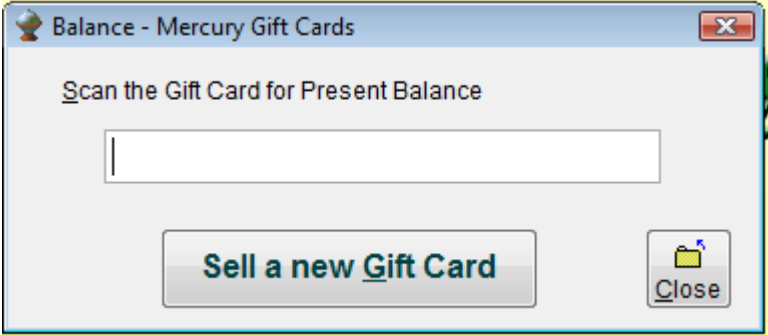
Balance – this function will check the present value balance on the GC.

Selling a Gift Card

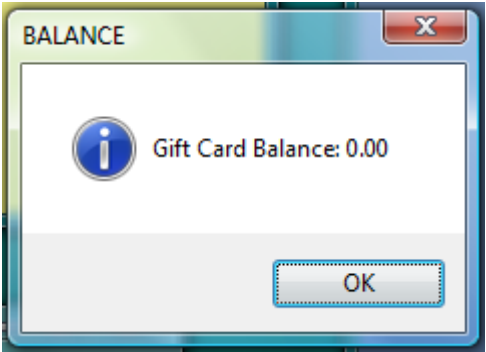


GC can ONLY be sold through the Pro-Invoice screen. A small button will appear to the right of the Short Cuts button. This is to check balances and to sell cards.

Scan a card in the screen shown below for a balance or click the Sell a New Card button. Notice we also setup a Main invoice button for selling GC directly from the Pro-Invoice screen.



Once a GC is scanned, a balance window will open to show you what balance the customer has on this GC.



GIFT CARD

Enter The Price:

10	20	50	100
7	8	9	Clear Price
4	5	6	Close
1	2	3	
0	.	00	

If you click the **Sell a new Gift Card** button, a screen opens directly like the one above so you may key in or select what price and value you are placing on this GC. If you click the set amount buttons, it will add to the Price each time you click the button.

Once you go to the Tender screen the below screen opens to allow you to scan the card to have the value placed on it.

Scan a new Gift Card and Add Value to the Gift Card

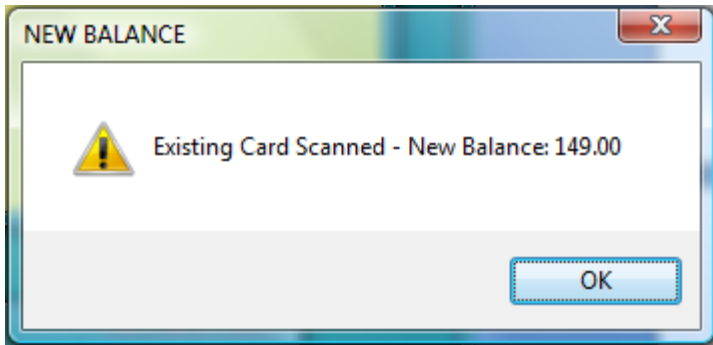
Issue a Gift Card
Amount: 50.00

Scan the new Gift Card Now to Add the above Value

Delete This Gift Card from Ticket

If you are selling multiple cards on one invoice, the screen will stay up till you select and swipe all cards sold. If a problem arrives during this procedure, the card is dropped from the invoice and no value is added to the card. You may also manually decide to drop a card from the invoice by clicking the **Delete This Gift Card from Ticket** button.

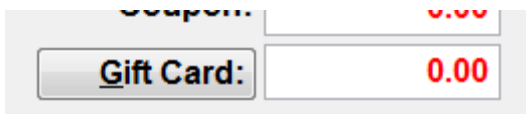
If you slide a card with a present value on it, the new value will be added to the current value. A screen like shown below will now open up.



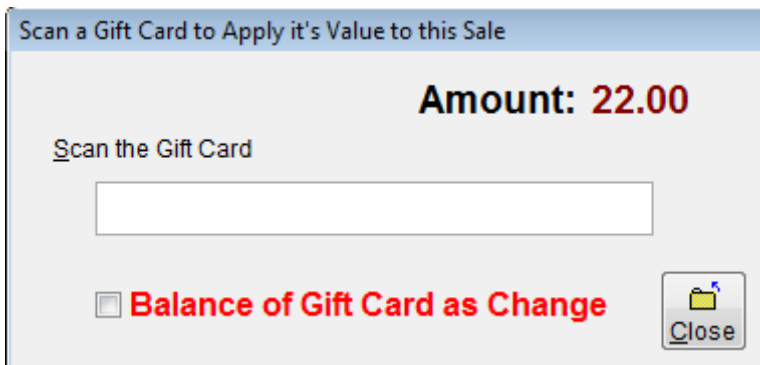
Now just tender out the ticket like before when doing a sale. All the GC information will show up on the printed invoice or ticket.

Tendering with a Gift Card

If a customer wants to pay using a GC, after the sale is finished and you are at the Tender screen, click the Gift Card button.



The below screen will now open.



The amount to charge the GC will be picked up by the balance due on the Ticket. If in the case above you know the GC has a \$25.00 balance and the customer wants the \$3.00 back as cash, click the **Balance of Gift Card as Change** checkbox.

If the customer has multiple GC and wants to use them, click the GC tender once, scan that GC, if more balance is still due, click the GC button again on the tender screen and scan the next GC. You can do this as many times as necessary.

12737717	22.00	Balance 127.00
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Once a GC is scanned, you will see the approval number, the amount applied and any balance left on the GC.

Again, all of this information is printed on the Invoice or Ticket. The same information can also be seen at the Invoices tab on the main customer screen by double clicking on the proper invoice number.

If you are in **Return Mode**, you can apply the refund to the customers GC by tendering it at the time of the Return.

Keep old GCs. They can be resold over and over.

Cloning a Security Setting

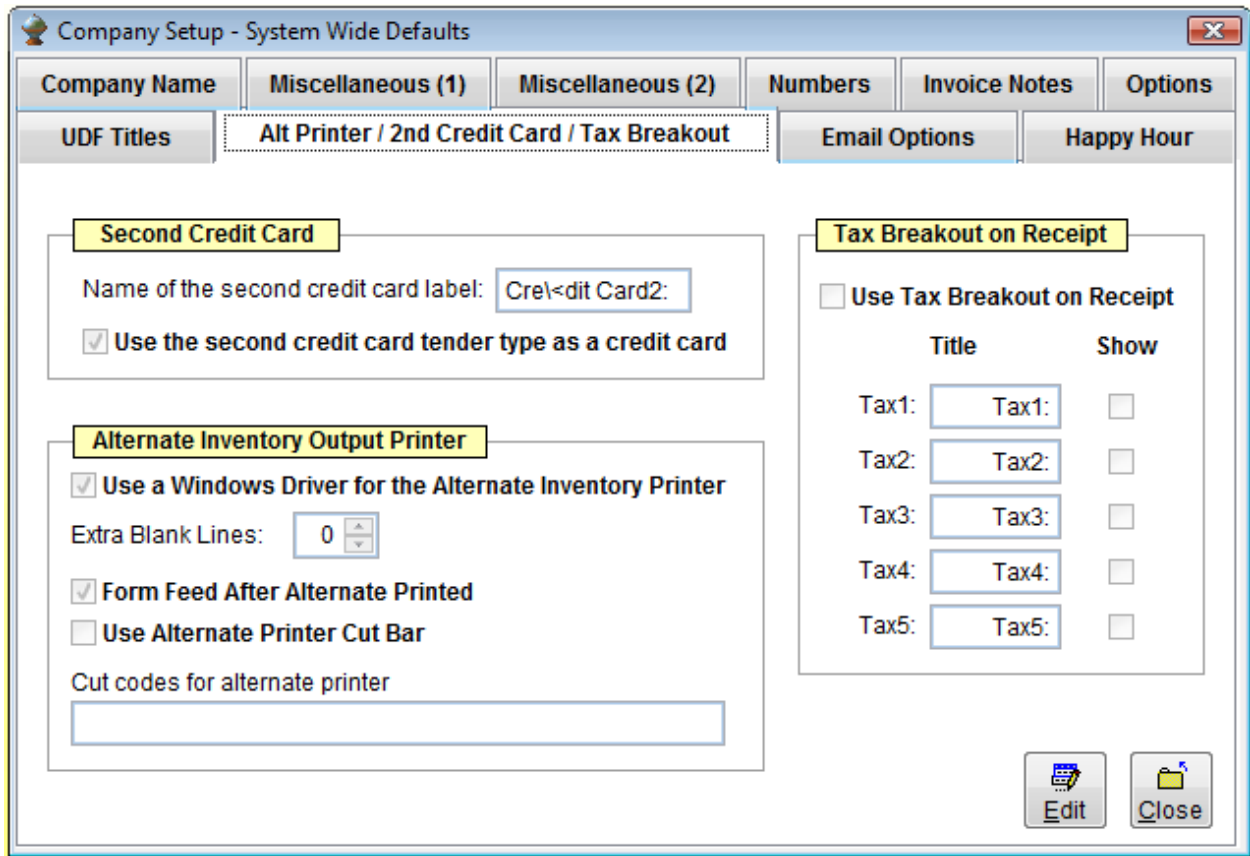
General	Customer	Vendor	Sales	Inventory	Other
<input checked="" type="checkbox"/> This Salesperson Screen	<input checked="" type="checkbox"/> Import / Export / Update Options	<input checked="" type="checkbox"/> Bad Check Setup	<input type="button" value="Clone Security Settings"/>		
<input checked="" type="checkbox"/> Data File Maintenance	<input checked="" type="checkbox"/> Exit This Program	<input checked="" type="checkbox"/> Can Do Backups			
<input checked="" type="checkbox"/> System Defaults	<input checked="" type="checkbox"/> Manage Time Clock	<input checked="" type="checkbox"/> Can Edit Serial#'s			
<input checked="" type="checkbox"/> Minor Data Tables	<input checked="" type="checkbox"/> Reports Main Menu	<input type="checkbox"/> Can Change Store Number			
<input checked="" type="checkbox"/> Single Item Report	Report Level Security: <input type="text" value="Z"/>	<input checked="" type="checkbox"/> Can Write Checks			
<input checked="" type="checkbox"/> Must Clock In / Out	(A - Low Z - High)	<input checked="" type="checkbox"/> Can Email Customers			
<input checked="" type="checkbox"/> Can Take Cash from Drawer to cover Tips		<input checked="" type="checkbox"/> Can Create Special Orders			
<input checked="" type="checkbox"/> Can Select Customer from Invoicing Screen		<input checked="" type="checkbox"/> Can Add New Vendor Coupons			

If adding a new salesperson, select the Clone button to clone the security settings from an existing clerk to the new clerk.

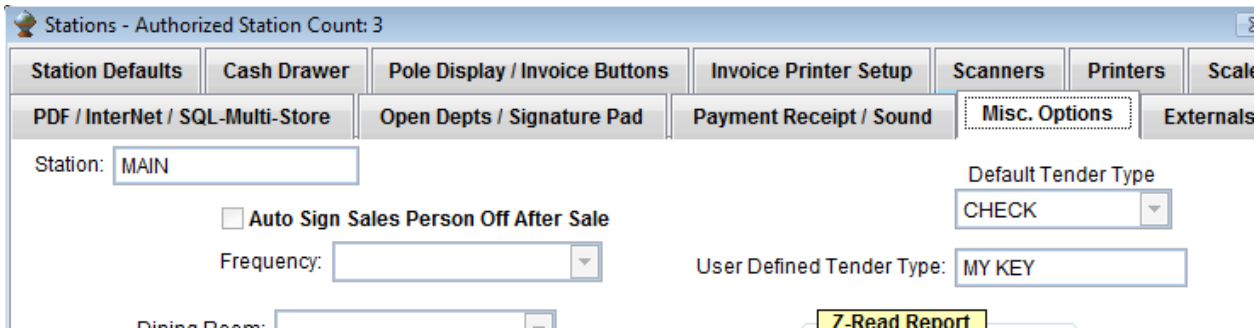
Tax Breakout

Using the new tax breakout feature you can list each separate tax on the receipts or invoices. To setup the tax breakout feature go to Company Setup and then the Alt Printer / 2nd Credit Card / Tax Breakout Tab.

Check the checkbox on the option Use Tax Breakout on Receipt and then you can also name the taxes so they appear on the Receipt or Invoice by a certain title. Also, check the checkbox for the taxes you want to show on the Receipts or Invoices.



Using the User Default Tender Key



Within the screen above, set the name of the key you want as tendering, in this case I call it My Key. When you go to the tender screen within the Pro-Invoice screen, an extra key will show with your tender name. See below

You will notice a tender key called MY KEY is now there. This will also add an extra field to the Daily Money report and Z-Read reports.

Cash:	<input type="text" value="0.00"/>	<input type="button" value="UP"/>	Grand Total:	<input type="text" value="5.00"/>
<input type="button" value="Check:"/>	<input type="text" value="0.00"/>		Balance:	<input type="text" value="5.00"/>
<input type="button" value="Credit Card1:"/>	<input type="text" value="0.00"/>		Change:	<input type="text" value="0.00"/>
<input type="button" value="Debit Card"/>	<input type="text" value="0.00"/>	<input type="button" value="PO#"/>	<input type="button" value="Notes"/>	<input gift="" icon"="" type="button" value="Gift
<input type="button" value="Travel Ck:"/>	<input type="text" value="0.00"/>	<input type="button" value="Return To Sales Screen"/>		<input e-mail="" icon"="" type="button" value="E-Mail
<input type="button" value="Coupon:"/>	<input type="text" value="0.00"/>	<input type="button" value="7"/>	<input type="button" value="8"/>	<input type="button" value="9"/>
<input type="button" value="Gift Card:"/>	<input type="text" value="0.00"/>	<input type="button" value="4"/>	<input type="button" value="5"/>	<input type="button" value="6"/>
MY KEY:	<input type="text" value="0.00"/>	<input type="button" value="1"/>	<input type="button" value="2"/>	<input type="button" value="3"/>
<input type="button" value="\$5"/>	<input type="button" value="\$10"/>	<input type="button" value="\$20"/>	<input type="button" value="Clear All"/>	
			<input type="button" value="Close Out"/>	

You can run up to 4 different commands from the Pro-Invoicing screen now. You will have to contact the POS manufacturer for the design of these special keys you may want designed.

See additional manual online for using the new Customer Loyalty feature.

This ends those features recently added that needs explained.