

# Plexis Point of Sale Administration Guide


## Version 2.8.7.42


Updated: 12/16/2005


**Main Menu - Plexis Point Of Sale**

File Modules Setups Help

ID # 10 : ADMINISTRATOR #10 SALLY'S MARINA DELI

 F1  
LOG OUT

 F2  
CASH REGISTER

 F3  
MODULES

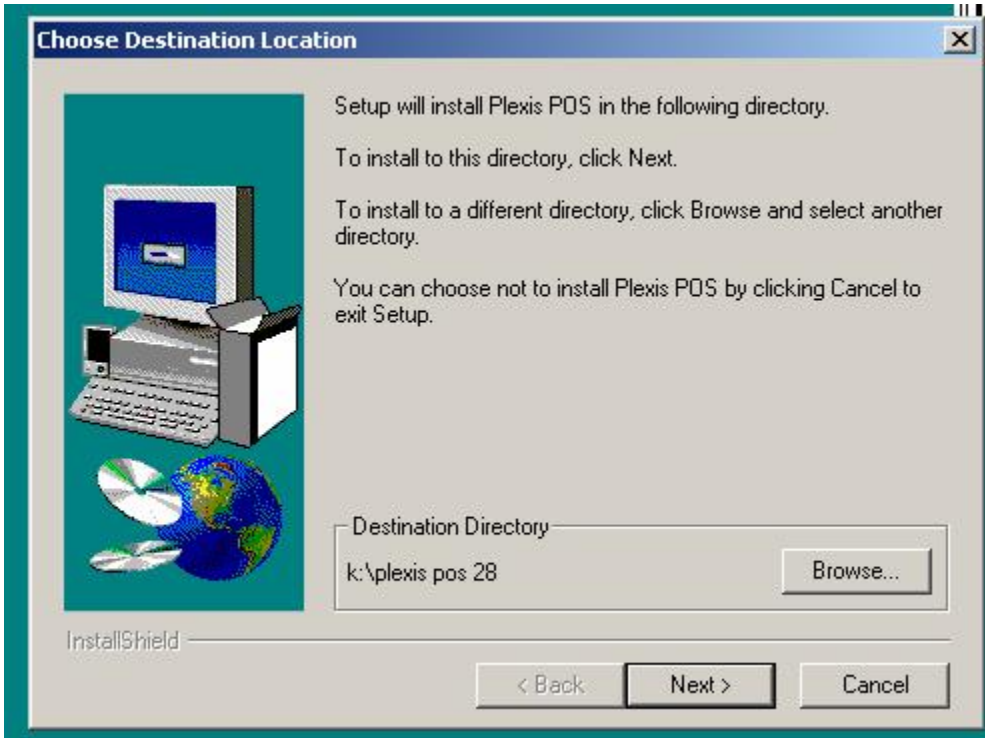
Version: 2.8.7.9 S/N: 54321

**Plexis Point Of Sale**

## Installing Your POS Software

### Single Computer (non-Network) Installation:

Insert the distribution disk in your CD drive or run the downloaded program file BT.EXE. The POS Installer will start automatically.



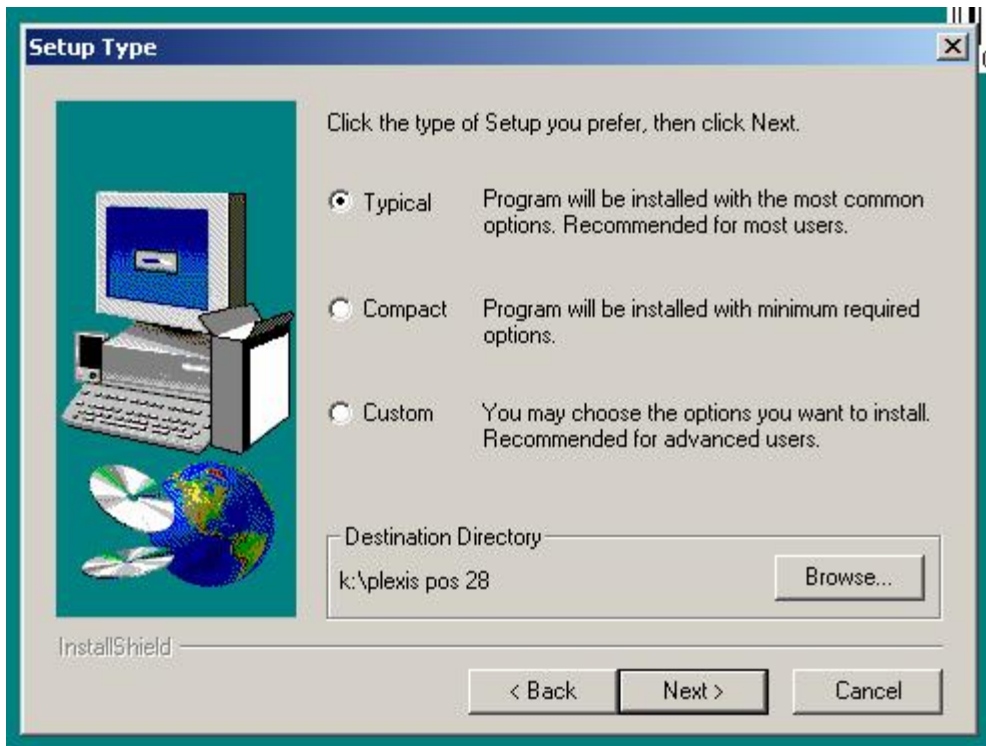
You may select an alternate folder where the POS program will reside although this is recommended for advanced users only.

Choose Next. The POS Setup will take you through a few steps and then install on your hard drive.

Choose **Typical** as the installation type.

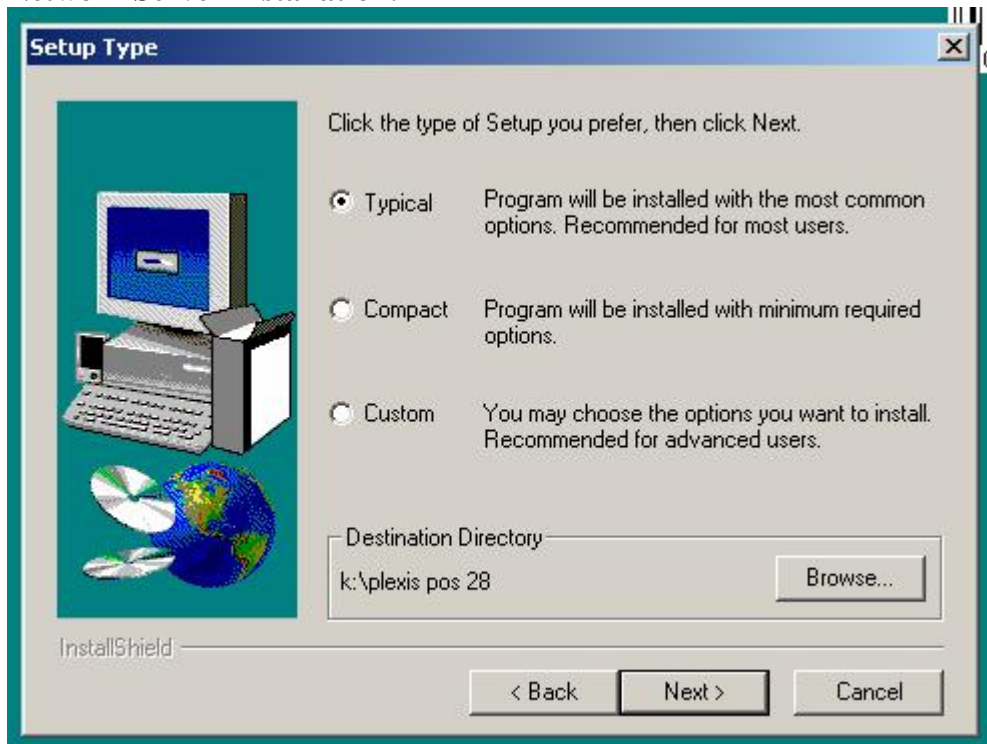
To run the POS program go to Start. Programs and choose Plexis POS.

If you want to start the POS program automatically add BT.EXE to your Start up Folder.



This is the last step you need when installing on a single non-network computer system.

## Network Server Installation:



It is recommended that these steps be followed closely. Obtain professional Networking help if required.

1. Create a partition on your hard drive that can be dedicated for use with the POS program exclusively. Try to give as much space as possible to this partition, Giga Bytes, not Mega Bytes.
2. Install the POS program on this partition. Do not use this partition for any other purpose.
3. On the Server Share this ENTIRE logical Drive partition for use by all users.

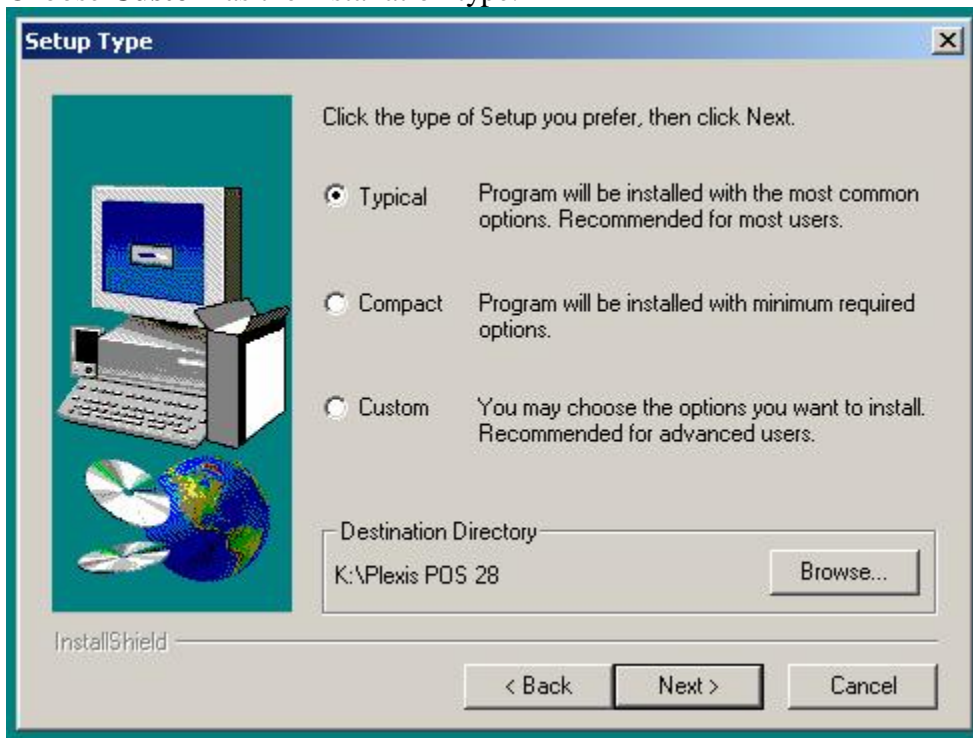
### Important note:

We recommend the machine that is used as a server NOT be used for running routine programs within your business. Dedicate the server and you will have minimal downtime and your system will run much faster. Always use POS devices on workstations only. We do not recommend using your Server as a POS workstation under any circumstances.

### Terminal / Lane / Network Workstation Installation

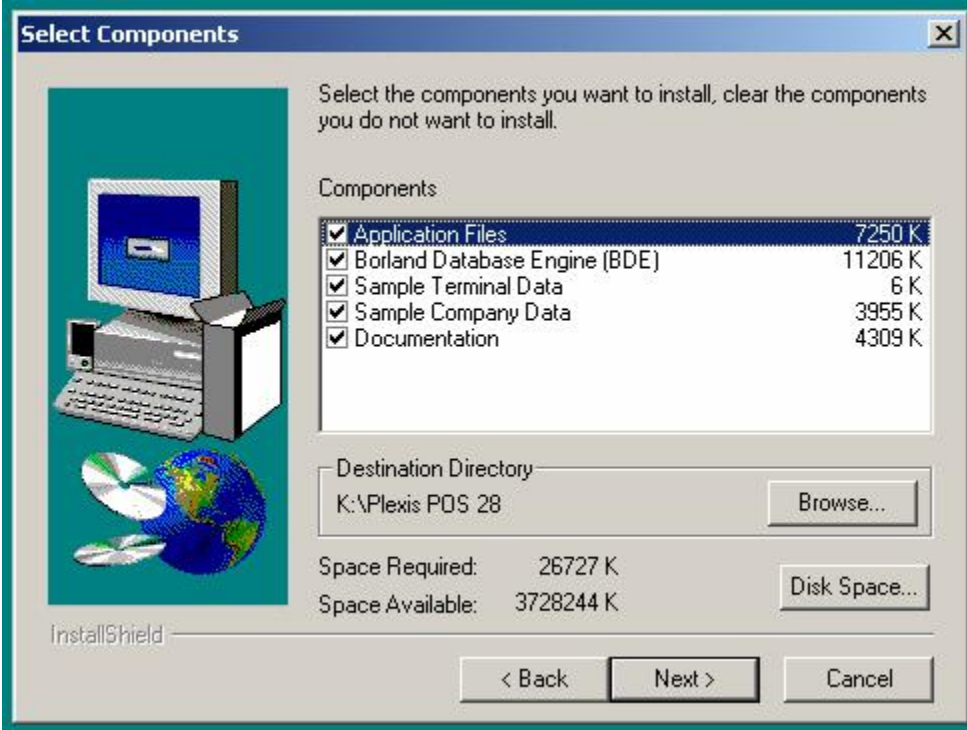
Install the POS program on the Server side ONLY. Full Read / Write access must be granted on the server otherwise the workstations will not be able to connect to the POS system. DO NOT install multiple copies of the POS program on Workstations. The POS program must be run from the mapped server drive only. Drives on Workstations MUST be mapped using the directory or folder name on the server. For example if the POS program was installed on the server on a logical drive K: - You must map workstations to something like K\$ and NOT K:\Plexis. You must install ONLY the Borland BDE on EACH workstation. To do this Insert the distribution disk in your CD drive or execute the downloaded installation file BT.EXE. The POS program Installer will start automatically.

Choose **Custom** as the installation type.



**Un-check** ALL items EXCEPT the BDE.

Perform this step for every workstation that will be accessing the POS program.



## Initializing and Configuring the POS program

### Log In To the POS program

The POS program has created a sample company with Customers, Inventory and Basic Setups already installed. The next few pages detail various setups and configuration. To test the POS program simply begin using it now. There is no need to enter further information at this time. Once you have decided to make the POS program match your company profile follow the routines below. **The default login for all screens is “1” with no password.** You may choose F3 Login, or simply press the Enter Key.

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

LOGGED OUT

View Terminals - Plexis Point Of Sale

Key:  
Red = Already Logged On  
Yellow = Available

ID	TERMINAL ID NAME
1	MINI-MART AND DELI
2	PIZZA RESTAURANT
3	C-STORE
4	LIQUOR STORE
5	DRIVE THRU
6	COFFEE SHOP
7	ANY TERMINAL
8	ANY TERMINAL
9	MANAGER TERMINAL
10	ADMINISTRATOR TERMINAL

Version: 2.8.6.19 S/N: NOT REGISTERED

Plexis Point Of Sale

NOT REGISTERED


### Turning on the Windows Task Bar:


By default Plexis POS turns off the Windows Task Bar. After logging in as a high level manager you can select from the Setups link “Task Bar”. This will toggle the task bar on and off each time you select this option.





## Terminal / Workstation Security Page # 1

Edit Workstation Security - Plexis Point Of Sale

  
F1  
EXIT

  
F2  
EDIT

  
F4  
SAVE

  
F5  
DELETE

USER ID : 1

Page # 1 | Page # 2 | Page # 3

WORKSTATION NAME:       PASSWORD:        ACTIVATE

MODULE ACCESS

- ACCOUNTING AND SETUPS
- BARCODE SYSTEM
- INVENTORY CONTROL
- ORDER ENTRY / POS
- PURCHASING
- ZIP CODES
- UTILITIES

CHANGE COMPANY

Last Company :

CLIENT ID	CLIENT NAME
A001	MINI-MART AND DELI
A002	VITO'S PIZZA-RAMA
A003	C-STORE SAMPLE
A004	LIQUOR STORE SAMPLE

Select Main System Setups, Terminal Security and choose the terminal or lane to modify. Terminal 1 and 2 should always have all features enabled and password protected. These are your system administrator ID's. Modify terminal 3 and above for your actual working sales registers.


### Module Access:


Select Edit and check to enable each function for the selected terminal. You should not password protect regular sales terminals. Select the Client Company to force this terminal to use. If you have a training company setup and want to go live select the live company to use. Selecting delete will disable this terminal ID. You should disable all terminals not being used. This will prevent anyone from un-authorized system access.





## Terminal / Workstation Setup Page # 2

Edit Workstation Security - Plexis Point Of Sale

  
F1  
EXIT

  
F2  
EDIT

  
F4  
SAVE

  
F5  
DELETE

TERMINAL ID : 10

Page # 1 | Page # 2 | Page # 3

**PRINTERS AND SCALES**

RECEIPT PRINTER NAME  
 ?

REMOTE PRINTER #1  
 ?

BLACK MARK LABEL PRINTER  
 ?

PRINTER CUTTER CMD  
 ?

WEIGHT SCALE MODEL  
 ?

WEIGHT SCALE PORT  
9600, E, 7, 1  ?

**POS HARDWARE**

CASH DRAWER NAME  
 ?

DRAWER COMMAND  
 ?

POLE DISPLAY NAME  
 ?

POLE MODEL  
 ?

KITCHEN DISPLAY SYSTEM  
 ?

**POS HARDWARE**

COIN DISPENSER PORT  
 ?

VSS DEVICE PORT  
 ?

**PORTABLE DATA TERMINAL**

PDT NAME  
 ?

PDT COM PORT  
 ?

PDT COM BAUD  
 ?

PDT PROTOCOL  
 ?

ADD NEW ITEMS AT UPLOAD

### Printers and Scales:

Receipt Printer Name: Your pre-configured POS receipt printer name.

Remote Printer #1: Your pre-configured remote / kitchen / warehouse strip printer name.

Black Mark Label Printer: Your pre-configured Label / Box printer name.

Printer Cut CMD: The printer paper cut codes as supplied by the manufacturer.

Weight Scale Model: Select ECR Mode or NON-ECR mode for your electronic scale prototype. The serial Parameters are fixed and cannot be modified. You must set you scale to match the protocol and communication Port settings.

Weight Scale Port: The weight scale port is selectable but the communications parameters are fixed. Your scale must be capable of using the fixed communication specifications.

### Cash Drawer

Cash Drawer Name: The name of your pre-configured cash drawer. If the drawer is connected to the receipt printer then select the same name as your receipt printer. If your cash drawer is stand-alone then you must pre-configure the drawer port and select the appropriate drawer port name.

Drawer Command: The drawer open codes as supplied by the manufacturer.

**Pole (customer) Display**

Pole Display Name: Your pre-configured Customer Display Unit.

Pole Display Model: The emulation mode of your pole display.

**Kitchen Video Display with Bump Bar**

Kitchen Display System: The name of the printer port that you have connected the KDS equipment to.

**Coin Dispenser**

Coin Dispenser Port: The serial RS232 port where the coin dispenser is connected.

**Video Security System:**

The port where the VSS Hardware is installed.

**Portable Data Terminals**

If you have purchased an approved PDT on the certified hardware list then this can be interfaced to the POS system. You can manage inventory using a remote device.

PDT Name: Choose one of the approved Portable Data Terminal devices to use.

PDT Com Port: The serial port where the PDT is connected.

PDT Com Baud: The Baud rate of the PDT.


PDT Protocol: The protocol the PDT is programmed to use.


Add New Items at Upload: If an item does not exist in inventory, add it using the scanned data.


## Terminal / Workstation Setup Page # 3


Edit Workstation Security - Plexis Point Of Sale

USER ID : 1

  
F1  
EXIT

  
F2  
EDIT


  
F4  
SAVE

  
F5  
DELETE


Page # 1 | Page # 2 | Page # 3

POS FUNCTIONAL OPTIONS

- INVOICE / RECEIPT COPIES
- DETAILED INVOICE PRINTING
- PRINT ORDER CLAIM TAG
- DISABLE RECEIPT PRINTING IN POS
- DISABLE REMOTE PRINTING IN POS
- DISABLE CUSTOMER TRACKING
- DRIVE THRU

POS LOG OUT LEVEL 

ORDER SCREEN LAYOUT



### POS Functional Options

Invoice / Receipt Copies: Number of copies to print. (store copy, customer copy, etc)

Detailed Invoice Printing: Landscape mode with extensive order detail shown.

Disable Receipt Printing: No receipt printing in POS.

Disable Remote Printing: No Remote printing in POS (kitchen, warehouse, etc)

Disable Customer Tracking: Bypass customer phone number and customer selection screen.

Drive Thru: This terminal is used for a Drive Through Window.

POS Log Out Level: 0 = Auto Logout Sales Staff

1 = Keep Sales Staff Logged In

2 = Act as a cash register.

3 = Act as a cash register, screen stays locked in sales mode, user can not access any other portion of the sales system.

Order Screen Layout: Touch and Key = Touch screen and keyboard use, Keyboard = Disable touch screen.

## Creating and setting up your company

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

**F1 LOG OUT**

**F2 CASH REGISTER**

**F3 MODULES**

**View Companies - Plexis Point Of Sale**

**F1 EXIT** **F2 SWITCH** **F3 DETAIL** **F4 ADD** **FIND IT**

1 Company ID  
 2 Company Name

FOLDER NAME	COMPANY NAME
A001	MINI-MART AND DELI
A002	VITO'S PIZZA-RAMA
A003	C-STORE SAMPLE
A004	LIQUOR STORE SAMPLE
A005	COFFEE SHOP DEMO

Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** **NOT REGISTERED**

When you create a new company in the POS program all data is initially blank. You will need to enter inventory, customers and some setups. To create your company, follow these steps:  
From the Main System Menu, choose Main System Setups, Company Management.  
Choose Add (+) and enter a short 8 character or less short company identifier and press enter. This name represents the Folder on hard drive where the live company data is stored.

[Ex: MyComp]

Type the Long Description of your company. Select Save.

[Ex: My Grocery Store]

You will return to the company selection menu. Use the mouse or arrow keys and highlight the company you just created then select Switch. This will initialize the new company and then take you there.

## View / Switch Companies

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

**F1**  
LOG OUT

**F2**  
CASH REGISTER

**F3**  
MODULES

**View Companies - Plexis Point Of Sale**

**F1** EXIT **F2** SWITCH **F3** DETAIL **F4** ADD

**EIND IT**

1 Company ID  
 2 Company Name

FOLDER NAME	COMPANY NAME
A001	MINI-MART AND DELI
A002	VITO'S PIZZA-RAMA
A003	C-STORE SAMPLE
A004	LIQUOR STORE SAMPLE
A005	COFFEE SHOP DEMO


Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** **NOT REGISTERED**

The company specific information can now be entered.  
From the Main System Menu choose Main Setups, Edit Selected Company.

# Edit Your Company Information Page 1

Company Setup - Plexis Point Of Sale

		
F1 EXIT	F2 EDIT	F4 SAVE

Company Setup Page # 1 | Company Setup Page # 2 | Company Setup Page # 3 |

## REMIT / BILL TO

COMPANY NAME

SALLY'S MARINA DELI

COMPANY ADDRESS LINE # 1

1234 VIA MARINA

COMPANY ADDRESS LINE # 2

UNIT 2125

CITY

MARINA DEL REY

ST

CA

ZIP CODE

90292

PHONE NO.

310-301-6476

FAX NO.

310-555-1212

RESTOCK %

20

S.C. %

1.5

## RETURN / SHIP TO

COMPANY NAME

COMPANY ADDRESS LINE # 1

COMPANY ADDRESS LINE # 2

CITY

ST

ZIP CODE

PHONE MASK

000\~000\~0000;1;\_




**Remit / Bill To:** This is your company's billing address. This information will print on Receipts and Invoices.

**Phone Mask:** The default value is 999-999-9999. Blank this out to remove formatting restrictions.

**Return / Ship To:** This is your company's shipping. This information will print on Purchase Orders.

## Edit Your Company Information Page 2

Company Setup - Plexis Point Of Sale

		
F1 EXIT	F2 EDIT	F4 SAVE

Company Setup Page # 1 | Company Setup Page # 2 | Company Setup Page # 3

<b>LOCATION FUNCTIONALITY</b> <input type="checkbox"/> RETAIL STORE <input checked="" type="checkbox"/> RESTAURANT <input type="checkbox"/> PIZZA <input checked="" type="checkbox"/> GROCERY <input checked="" type="checkbox"/> SHOW PROFITS ON OE REPORTS	<b>DELIVERY SALES</b> <input checked="" type="checkbox"/> DELIVERY SALES <input type="checkbox"/> TRACK DRIVERS DELIVERY FEE 1.5 <input checked="" type="checkbox"/> TAXABLE <input type="checkbox"/> ENABLE DOUBLE CHECKING	<b>CREDIT CARD PROPERTIES</b> <input checked="" type="checkbox"/> MOD 10 CHECK 1 CC COPIES [ 0/1/2 ] PROCESSING PROGRAM UNICOMP / PINpad 2000 EBT PROGRAM UNICOMP / PINpad 2000 AUTHORIZATION FORMAT SALE ONLY
---	---	--

**CALLER ID**  
# OF LINES  
0

**Location Functionality:** Check all that apply. These switches will customize how the Point Of Sale system operates.

### Retail Store:

General retail without food operations. Fine tunes the sales screens for the general retail industry.

### Restaurant Sales:

Anchor item modifiers enabled. (Extra, Hold, etc)

Food menus are available in keyboard screen.

Customer Credit Card receipt copy printed. (House copy to sign, copy for the customer to keep)

Display the Dine In / Take Out button.

### Pizza Sales:

Enables Half & Half & Whole Functionality.

Enables various Pizza Restaurant functions.



**Grocery Sales:**

EBT functionality enabled.

**Show Profit on Reports:**

Check to print Gross, Net and % profit on Order Entry Sales Reports.

**Deliveries:**

Delivery module enabled.

**Driver Tracking:**

Order Tagging to drivers.

Delivery Driver Module enabled.

Gate codes, x-street displayed / printed.

**Delivery Fee:**

Auto-Insert the delivery fee on all new delivery orders.

Set the taxable flag if the delivery fee is subject to sales tax.

**Enable Double Checking:**

This module allows for the Quality Control of Delivery Orders.

**Mod 10 Check:** If checked all cards must have a valid number of digits, un-checked allows for “Free Form” entry of any card type.

**CC Copies (0/1/2):** The number of Credit Card Receipts to be printed.

0 = No CC Receipts and No Credit Card Number Entry or Storage.

1 = Store Copy Only

2 = Customer and Store Copy.

**Processing Program:** The name of the optional Real Time Credit Authorization program you have installed.

**EBT Program:** The name of the optional Real Time EBT Authorization program you have installed.

**Authorization Format:**

**Sale Only:** All Credit Card transactions will be posted as the exact amount of the sale.

**Allow Auth Only:** Displays and Enables an Authorize Only button on the Credit Card Transaction Screen. Posting Auth's for credit cards must be made manually within the credit card processing software itself and outside of the POS program.

**Force Auth: Only:** Enabling this option causes all credit cards to be authorized only and not be automatically closed as a sale. This option is used to allow the merchant the ability to modify the final price within the parameters of the merchant account agreement and industry code prior to closing the sale. For example, if you are adding tips to the sale. Posting Auth's for credit cards must be made manually within the credit card processing software itself and outside of the POS program. Failure to properly close credit card transactions may prevent sales from depositing into your bank account. Use this option only with the full understanding of its purpose. This option does not affect debit card transactions using a customer PIN. Contact your credit card software vendor and / or your merchant account provider for details.

**Over Auth Amount %:**

Values other than Zero will cause the Credit Card system to automatically increase the authorization amount to be increased by this percentage. This option is ignored unless Force Auth Only is enabled or Allow Auth Only is enabled and an Auth Only transaction has been selected. This option is used for businesses that accept tips.



**Caller ID (if installed):**

Number of Lines: Select the number of incoming lines.





Set to Zero if no Caller ID Hardware is installed.

## Edit Your Company Information Page 3:

Company Setup - Plexis Point Of Sale

		
F1 EXIT	F2 EDIT	F4 SAVE

Company Setup Page # 1 | Company Setup Page # 2 | Company Setup Page # 3

STANDARD TERMS				MONTH END		LOGO TO PRINT	
TERMS DESCRIPTION	NET	BY	% OFF	<input checked="" type="checkbox"/> AUTO ARCHIVE ACCOUNTS	\SALLY'S_LOGO.BM		MAX 72x128 
0 CASH ON DELIVERY	0	0	0	<input type="checkbox"/> Service Charges Have Been Run	13 MONTHS OF HISTORY		
1 NET 10 DAYS	10	0	0	SALES POSTING OPTIONS		LOGO TO DISPLAY	
2 NET 15 DAYS	15	0	0	<input type="checkbox"/> AUTO POST SALES	\MDR_LARGE.BMP		
3 2% 10 DAYS NET 30	30	10	2	<input type="checkbox"/> ASCII EXPORT ON POSTING	1 AUTO-INDEX LEVEL 		
4 NET 30 DAYS	30	0	0	TEXT DEFAULTS		CURRENT G/L [CAN NOT EDIT]	
5 NET INVOICE	0	0	0	\$ DEFAULT CURRENCY	ACCTG. YEAR	PER	BATCH
6 NET INVOICE	0	0	0	LB DEFAULT WEIGHT	2005	06	4
7 NET INVOICE	0	0	0	CAN NOT EDIT, FOR INFORMATION PURPOSES ONLY			
8 NET INVOICE	0	0	0	NEXT INVOICE	NEXT P.O.	NEXT CUSTOMER	NEXT VENDOR
				100004	100005	100014	100009
				NON RESETTING TOTAL			
				27.73			

**Standard Terms:** Used for Open Account (Net Terms) customers only.

**Terms Description:** This Text prints on invoices and receipts.

**Net:** Number of allowed days to pay.

**By:** Number of days to get a discount for early payment.

**% Off:** The discount percentage for all open orders if paid by early due date.

**Month End:** Automatic end of period procedures.

**Auto Archive Accounts:** All fully paid invoices are removed from the active invoice register and placed in an archive database.

**Months of History:** Number of months to save before Auto Archiving.

**Service charges have been run:** Checking forces the system NOT to apply service charges on A/R Statement Printing.

**Auto Post Sales:** Automatically posts sales and settles Credit Card batches the next business day.

**ASCII Export on Posting:** Send Posted Data to text files for importing into other accounting programs.

**Auto-Index Level:** Choice of 0, 1 or 2. This option allows for minor database maintenance to be automatically performed. As temporary files sometimes become clogged with obsolete data you can have the system “Clean Up” certain files upon restart. This function is similar to the Windows File Clean Up procedures. This function begins when you first start the POS system. If your system appears to be running progressively slower each day then select option 1 or 2, save then exit all terminals and restart the POS program.

**Text Defaults:** Sets printing and display to the desired characters.

**Default Currency:** The money symbol for your country.

**Default Weight:** LBS, KG, Etc.

**Logo to Print:** You can include a Windows Bitmap logo to print.

**Logo to Display:** You can include a larger Windows Bitmap to display as a splash Screen.

### **Non Resetting Total**

This is the accumulator for all revenue received to date. This figure never resets even on a new year.

# Sales Tax Setup

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

F1  
LOG OUT

F2  
CASH  
REGISTER

F3  
MODULES

### Sales Tax Codes - Plexis Point Of Sale

F1 EXIT F2 DETAIL F3 ADD

TAX CODE NO.	TAX # 1	TAX # 2	TAX # 3
1	8.7500	0.0000	0.0000

Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** **NOT REGISTERED**

Go to Setups, Order Entry Setups, Sales Tax, Detail, Edit.

Enter **YOUR LOCAL TAX RATE** in % (ex: 8.25 and not 0.0825).

You can have up to three tax rates defined for each tax code. These taxes are detailed in reports and the General Ledger.

## Running External Programs

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

External Program Setup - Plexis Point Of Sale

F1 EXIT F2 EDIT F4 SAVE F5 DELETE F10 TEST

	BTNLIN1	BTNLIN2	BTNLIN3	BTNLIN4	CMDLINE
RI	Run	Microsoft	Wordpad	F2	C:\Program Files\Windows NT\Accessories\wo
	Calculator			F3	%SystemRoot%\System32\calc.exe
	F4				
	F5				
	F6				
	F7				
M	F8				
	F9				

Version: 2.8.6.19 S/N: NOT REGISTERED

Plexis Point Of Sale NOT REGISTERED

Any Windows compatible program can be executed from within the POS program.

You can assign up to 11 programmable macro keys.

BTNLIN1...BTNLIN4: Type the button text to be displayed for the RUN application.

CMDLINE: Type the exact path and program name to run once the button is selected.

The Run Program selection is available after logging on to the POS Program.

## Customer Display Messages

LINE1	LINE2	DURATION
We have Great	Prices	2
Open late for	Your convenience	5
DATE	Display Date / Time	8

You can set an unlimited number of rotating customer messages to be shown on your pole display. Typing the word “DATE” in the Line1 field will show the Date and Time on the Pole Display. The Date/Time format is not adjustable.

Line #1: 20 character message for the first line of the pole display. (Can be blank)

Line #2: 20 character message for the second line of the pole display. (Can be blank)




Duration: The length of time the message is displayed. (In seconds)

Returning to the Sales Staff (employee) login screen at POS will begin the rotating message on the customer display (pole) units. This screen must be idle for at least one minute for the dialog to begin.




## Order Entry System Setups Page # 1

POS System Wide Properties - Plexis Point Of Sale

		
F1 EXIT	F2 EDIT	F4 SAVE

Page # 1 | Page # 2

<b>SALES OPTIONS</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> SHOW CUST HISTORY</li><li><input checked="" type="checkbox"/> ALLOW DISCOUNTS</li><li><input type="checkbox"/> ALLOW DISC BELOW COST</li><li><input checked="" type="checkbox"/> CREDIT OVERRIDE</li><li><input type="checkbox"/> ZERO COST ALERT</li><li><input type="checkbox"/> LOW STOCK ALERT</li><li><input checked="" type="checkbox"/> RANDOM WEIGHT</li><li><input type="checkbox"/> COMBINE QUANTITIES</li><li><input type="checkbox"/> DELETE INDIVIDUAL ITEMS</li><li><input checked="" type="checkbox"/> DELETES NOT CONFIRMED</li></ul> <p>1 SCAN LEVEL </p>	<b>RECEIPT PRINTING OPTIONS</b> <ul style="list-style-type: none"><li><input type="checkbox"/> PRINT A DETAILED RECEIPT</li><li><input type="checkbox"/> PAPER SAVER</li><li><input checked="" type="checkbox"/> USE EPSON ESC/POS PRINTING</li><li><input type="checkbox"/> ADD EPSON ESC/POS BARCODE</li><li><input type="checkbox"/> PRINT ORDER NO ON RECEIPTS</li><li><input type="checkbox"/> BREAK OUT REMOTE / KDS ITEMS</li><li><input type="checkbox"/> INCLUDE TIP LINE</li><li><input type="checkbox"/> INCLUDE TIP SUGGESTION</li><li><input type="checkbox"/> INCLUDE PICK LOCATION</li><li><input type="checkbox"/> STORE CREDIT CARD NUMBERS</li></ul>	<b>SCREEN PAUSES</b> <ul style="list-style-type: none"><li><input type="checkbox"/> DESCRIPTION</li><li><input type="checkbox"/> QUANTITY</li><li><input type="checkbox"/> % DISCOUNT</li><li><input checked="" type="checkbox"/> AGE VERIFICATION</li><li><input type="checkbox"/> REQUEST ZIP / POSTAL</li><li><input type="checkbox"/> CONFIRM ORDER IS COMPLETED</li></ul> <b>RESTAURANT OPTIONS</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> DINE IN DEFAULT</li><li><input checked="" type="checkbox"/> TABLE NUMBER</li></ul>
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### Sales Options:

**Show Cust History:** Displays the customer's most recent orders at the POS customer transaction selection screen.

**Allow Discounts:** Enable operator controlled discounting on the sales screen.

**Allow Discounts Below Cost:** Allow discounting below your cost price.

**Credit Override:** Allow a customer's credit line to be extended at the sales screen if they have gone over limit.

**Zero Cost Alert:** Pop up a display if the inventory item has no cost figure assigned, allowing the operator to make an immediate change to the inventory record.

**Low Stock Alert:** Pop up a display when the inventory quantity is less than 1.

**Random Weight:** Type 2 random barcode weight support. This option is used for barcodes that have an embedded price.

**Combine Quantities:** During sales order entry Matching items are located and the quantity is increased. With this option disabled, each item is entered individually on the sales order.

**Delete Individual Items:** If deleting an item from the sales screen, when multiple quantities exist for that item, each time delete is selected the item quantity is reduced by one. Items can be manually deleted or scan deleted. If the item is an Add On or BOM Child the item is removed from the sales screen. If deleting an anchor item ALL Add-Ons and Child BOMs are removed as well.

**Deletes Not Confirmed:** The Scan delete screen is not shown and no confirmation to delete the item is requested. The item is removed from the sales screen instantly.

**Scan Level:** 1 = Scan for UPC only.

2 = Scan for UPC, if not found then Scan for Product.

3 = Scan for UPC, if not found then Scan for Product, if not found Scan for Description.

Set scan level to 1 for the fastest mode of operation.

### **Receipt Printing Options:**

**Print a Detailed Receipt:** When selected a more extensive receipt will be printed.

**Paper Saver:** Reduces the number of spaces on the receipt printer.

**Use Epson ESC/POS Printing:** Make use of various printing enhancements such as Bold, Expanded, Etc.

**Add Epson ESC/POS Barcode:** A barcode representing the receipt number will be printed on compatible Epson ESC/POS printers.

**Print order number on receipts:** Prints “Your Order Number Is XXX” on receipt printers.

**Break out Remote / KDS items:** Prints an individual tag on remote or kitchen printers for each line item in the order. If a Kitchen Display System is installed the quantities will be combined if this option is selected.

**Include pick location:** Prints the pick location ID in the inventory record on receipt printers.

**Include tip Line:** Prints a tip line for the customer on receipt printers.

**Include tip suggestion:** Prints several tip amount suggestions on receipt printers.

**Store credit card numbers:** Saves credit card info for recall at the next order (non-cash customers only).

### **Sales Screen Pauses:**

**Description:** Pauses and prompts for the item description.

**Quantity:** Pauses and prompts for the quantity sold.

**% Discount:** Pauses and prompts for discount percentage off list price.

**Age Verification:** Pauses and prompts for birth date to be verified.

**Request Zip / Postal:** Pauses and prompts for the customer’s zip code or postal code.

**Order Complete:** Paused for you to confirm the completion of the order. This option allows for the sales total, amount tendered and change/cash back to be displayed for up to 45 seconds or until you dismiss the popup window.




### **Restaurant Options:**

**Dine In Default:** Sets the initial Order Entry Mode to Dine In Service.



**Table Number:** Pauses and prompts for the Table / Seat / Customer Name.

## Order Entry System Setups Page # 2

PDS System Wide Properties - Plexis Point Of Sale

		
F1 EXIT	F2 EDIT	F4 SAVE

Page # 1 | Page # 2

<b>RECEIPT MESSAGE</b> PUT YOUR DEFAULT RECEIPT MESSAGE HERE	<b>FIXED DISCOUNTS</b> EMPLOYEE DISCOUNT % <input type="text" value="20"/> CLEARANCE DISCOUNT % <input type="text" value="50"/>
<b>INVOICE TERMS DESCRIPTIONS</b> PUT YOUR DEFAULT TERMS AND CONDITIONS OF SALE HERE THERE IS A 50 CHARACTER LIMIT / LINE	<b>NEW CUSTOMERS</b> CREDIT LIMIT <input type="text" value="500"/> TERMS CODE <input type="text" value="1"/>  <input type="text" value="0"/> DISCOUNT CODE 
<b>POLE DISPLAY</b> POLE SIGN ON LINE 1 <input type="text" value="WELCOME TO SALLY'S"/> POLE SIGN ON LINE 2 <input type="text" value="MARINA DELI"/> POLE SIGN OFF LINE 1 <input type="text" value="THANK YOU FOR"/> POLE SIGN OFF LINE 2 <input type="text" value="SHOPPING WITH US"/>	

### Receipt Message:

3 lines of a 40 character custom message that prints on receipts and invoices

### Invoice Terms Description:

4 lines of a 60 character custom message that prints on invoices only.

### Pole Display (if installed):

Pole Sign On Line 1 and 2: The message your customer sees on the display unit when the register is activated.

Pole Sign Off Line 1 and 2: The message your customer sees on the display unit when the register is closed.

### Fixed Discounts:

**Employee Discount in %:** Creates a button on the sales discount screen for the automatic discounting for employees.

**Clearance Discount in %:** Creates a button on the sales discount screen for the automatic discounting of clearance items.

**New Customer Defaults:**

When creating a New Customer at the sales screen these defaults will be used, Right mouse click for choices:

**Default Credit Limit:** Set the limit a new customer can charge on the house account.

**Default Credit Terms:** The initial credit terms allowed.





**Default Discount Code:** The initial discount to be applied.

**Drivers Bank:**

The amount a delivery driver carries in cash in order to make change. This amount is tallied on the driver reconciliation sheet.

## Setting up Employees

Employee Edit - Plexis Point Of Sale

				SALES ID	2
F1 EXIT	F2 EDIT	F4 SAVE	F5 DISABLE		

<b>FIRST NAME</b>	OE/POS	<b>OE ACCESS</b>	9	?
<b>LAST NAME</b>	MANAGER LVL 9	<input checked="" type="checkbox"/> <b>FAST LOGIN</b>		
<b>PASSWORD</b>		<input checked="" type="checkbox"/> <b>DELIVERY DRIVER</b>		
<b>MGR KEY</b>	9999			

HOME PH		EMERG NAME		EMERG PH	
HOME ADDR1		SSN			
HOME ADDR2		NOTE1			
HOME CITY		NOTE2			
HOME ST		NOTE3			
HOME ZIP		NOTE4			

The Sales Staff / Employee screen allows you to control access and retain important information about an employee.

### **Fast Login:**

Enable to go to sales screen immediately after entering a valid employee code.

### **Delivery Driver:**

If you have the Delivery Drive Module enabled you can control and track which employees are authorized to make deliveries.

## Employee Access Levels and Security Restrictions

Employee Edit - Plexis Point Of Sale

**Employee Access Levels - Plexis Point Of Sale**

CHOOSE THE ACCESS LEVEL FOR THIS EMPLOYEE  
THE LEVEL RESTRICTS ACCESS TO THE LISTED FUNCTIONS

F1 EXIT

F1 EXIT

FIRST N

LAST N

PASSW

MGR K

HOME PH

HOME AD

HOME AD

HOME CIT

HOME ST

HOME ZIP

<b>LEVEL # 0</b>	NO ACCESS	<b>LEVEL # 5</b>	NO: CHANGE TERMS, ADD ITEMS, EDIT ITEMS
<b>LEVEL # 1</b>	NO: CHANGE TERMS, DELETES, RETURNS, TAX TOGGLE, DISCOUNTS, CHANGE QTY, ADD ITEMS, NON-STOCK, EDIT ITEMS, OPEN DRAWER, PAIDOUTS, RUN PROGRAMS, EOD, CANCEL SALE, HOLD SALE	<b>LEVEL # 6</b>	NO: CHANGE TERMS
<b>LEVEL # 2</b>	NO: CHANGE TERMS, DELETES, RETURNS, DISCOUNTS, ADD ITEMS, NON-STOCK, EDIT ITEMS, OPEN DRAWER, PAIDOUTS, RUN PROGRAMS, EOD, CANCEL SALE, HOLD SALE	<b>LEVEL # 7</b>	ADMINISTRATOR, FULL ACCESS
<b>LEVEL # 3</b>	NO: CHANGE TERMS, DISCOUNTS, ADD ITEMS, NON-STOCK, EDIT ITEMS, OPEN DRAWER, PAIDOUTS, EOD, CANCEL SALE, HOLD SALE	<b>LEVEL # 8</b>	ADMINISTRATOR, FULL ACCESS
<b>LEVEL # 4</b>	NO: CHANGE TERMS, ADD NEW ITEMS, NON-STOCK, EDIT ITEMS, PAIDOUTS	<b>LEVEL # 9</b>	ADMINISTRATOR, FULL ACCESS

### OE Access Menu

This menu allows you to set which employees have access rights to various areas of the POS system. Each time an employee attempts to access a restricted area a Manager Pop Up window is displayed. The manager must use their security code to allow a one-time access to the restricted function.

## Setting Popup Display Properties in POS

Set Pop Up Display Properties - Plexis Point Of Sale

DISPLAY	VIEWNAME	WIDTH	VIEW
ITEMS	UPC	20	True
ITEMS	UPCDES	32	True
ITEMS	PRODUCT	16	True
ITEMS	CATEGORY	20	True
ITEMS	SUBCAT	18	False
ITEMS	VENDNAME	3	False
ITEMS	CUSTOMSRT	10	True
ITEMS	LOC	5	False
ITEMS	DEPT	3	True
ITEMS	WEIGHT	3	False

**Sample Display**

UPC / SKU	DESCRIPTION	PRODUCT	CATEGORY	CUSTOMSRT	DEPT	LIST	ON HAND
01234567813	CHEESE CAKE	FOOD	DESERTS		01	5.950	1000.00
01234567820	AVACADO ROLLS	AP	FOOD		01	7.950	1000.00
01234567821	FIESTA ROLLS	AP	FOOD		01	7.950	1000.00
01234567822	THAI LETTUCE WRAPS	AP	FOOD		01	7.950	1000.00
01234567823	CREAMY DRINKS	BAR	FOOD		01	8.950	1000.00
01234567824	ORANGE CHICKEN	FF	FOOD		01	6.950	999.00
01234567825	FISH TACO	FF	FOOD		01	3.950	1000.00

This option allows for the display adjustment when requesting an inventory lookup in POS. The width and visibility can be set to any value you like. The order of the display cannot be modified.



## Touch Screen Button Setup

Sales Touch Panel Setup - Plexis Point Of Sale

**EXIT** (F1) **CHANGE** (F3) **LOAD** (F7) **UN-LOAD**

**LOADING**  
 1. Buttons  3. Font Color  
 2. Button Color  4. Image

**CATEGORIES**

ID	PANEL
1	MAIN WITH PICS
2	MAIN NO PICS
3	DESERTS
4	LIQUOR
5	SANDWICH
6	BREAD
7	CONDIMENTS
8	MEXICAN
9	TEST MENU
10	10
11	11
12	12
13	13
14	14
15	15
16	16

The grid of 25 images shows various food items including sandwiches, burgers, salads, soups, and drinks.

This menu allows for the configuration of the Touch Screen buttons and behavior of the sales screen. Button colors, fonts and images can be set here. All images should be exactly 78 Pixels wide and 62 Pixels high. Using the standard Windows bitmap (.bmp) format will display the fastest on your screen. Avoid any file size larger than 20kb in size.


The five buttons above the yellow line are your Menu Categories. You can have up to 25 menu buttons per category.


The 25 buttons below the yellow line represent your inventory items.


Click on any button to add/edit or delete the category or menu item.


# Supplemental Category Touch Button Setup

Sales Touch Category Setup - Plexis Point Of Sale

  
**EXIT**  
F1

  
**CHANGE**  
F3

  
**LOAD**  
F6

  
**UN-LOAD**  
F7





**LOADING**

 1. Buttons     3. Font Color  
 2. Button Color     4. Image

**JUMP TO PANEL ID**

BTNID	PANEL
1	MAIN WITH PICS
2	MAIN NO PICS
3	DESERTS
4	LIQUOR
5	SANDWICH
6	BREAD
7	CONDIMENTS
8	MEXICAN
9	TEST MENU
10	10
11	11
12	12
13	13
14	14
15	15
16	16

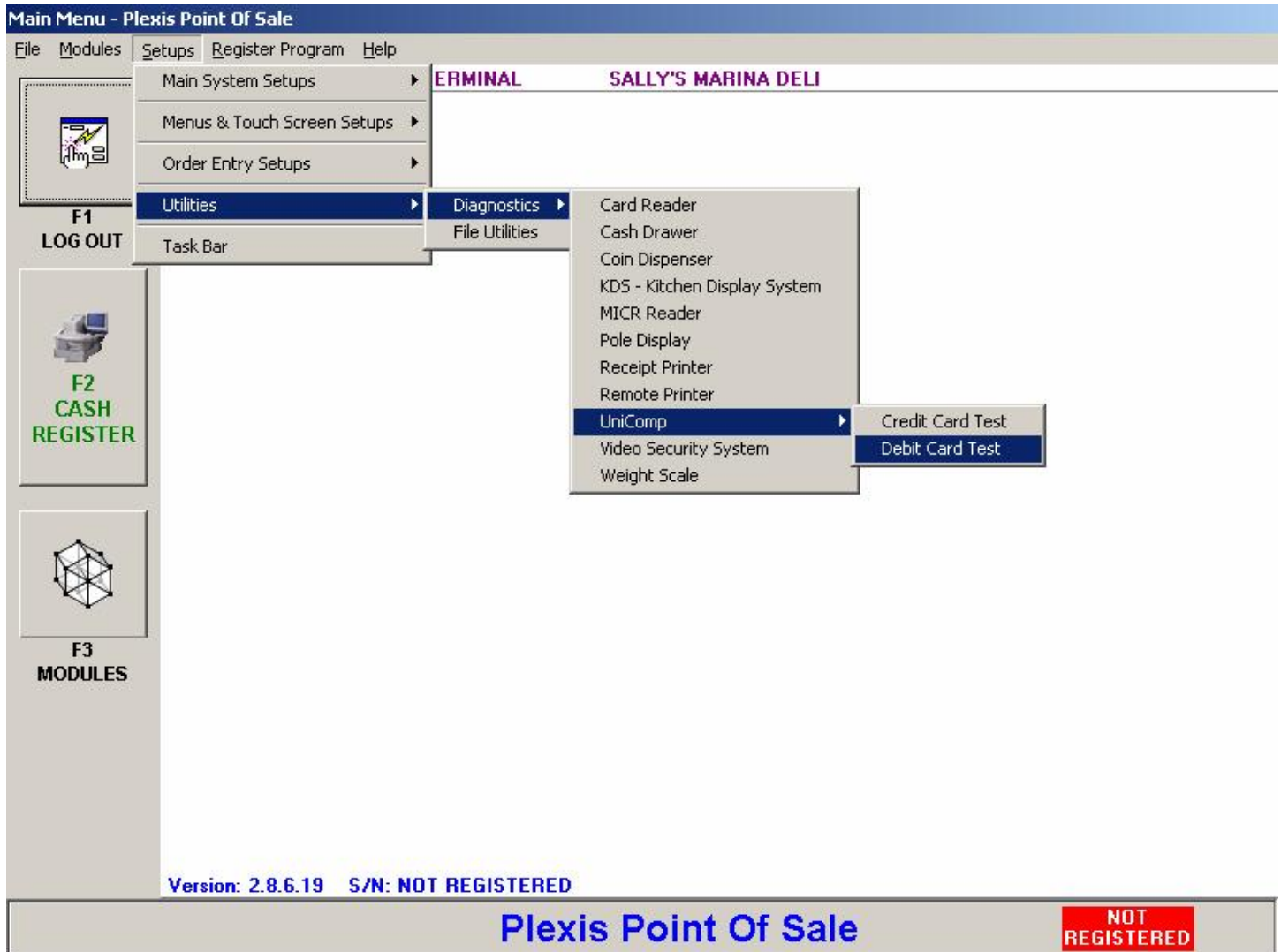
**LOAD / UNLOAD CATEGORY BUTTONS**

MAIN FOOD MENU	MAIN FOOD MENU (no pics)			
		BREAD CHOICES		
		DELICIOUS DESERTS	BEER WINE MIXED DRINKS	
BREAD CHOICES	SANDWICH			
			CONDIMENTS MUSTARD KETCHUP ETC	

This option allows you to populate the 25 most used category buttons. The touch button sales screen has an option to display this screen so you may quickly jump to one of twenty-five categories instantly.

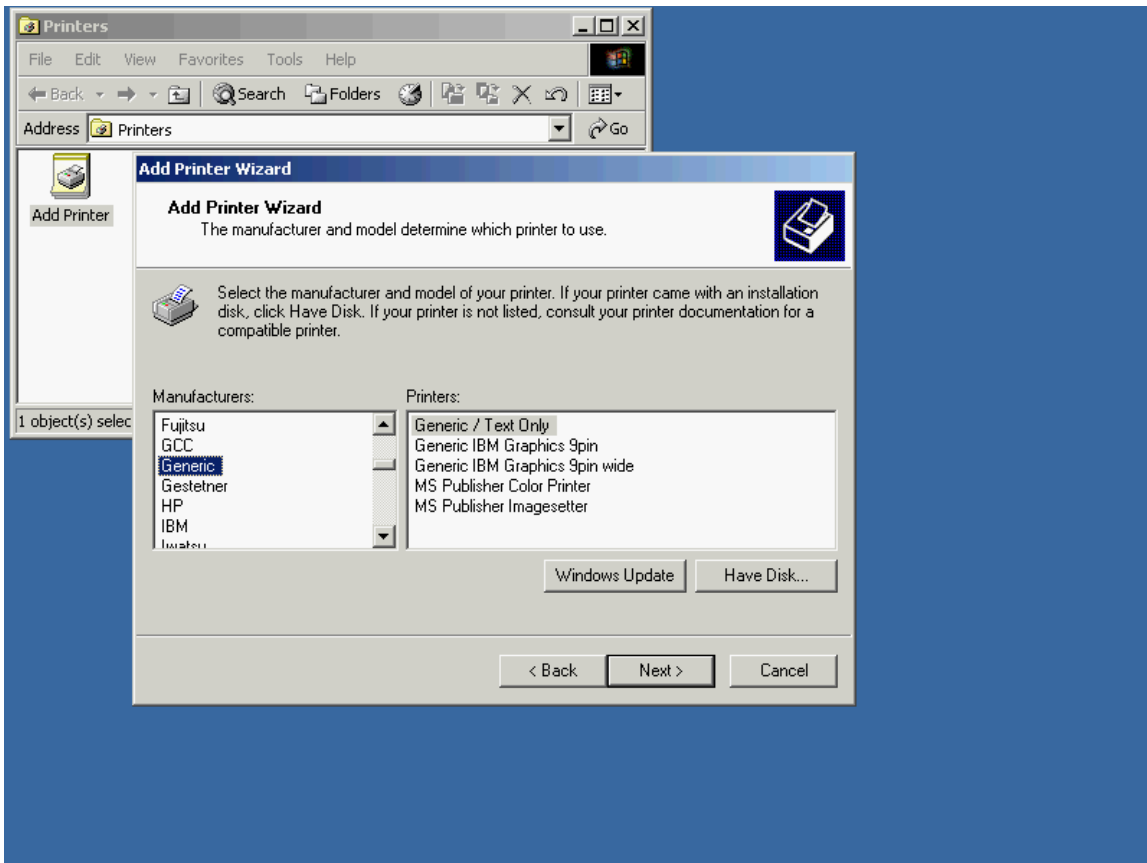
### Hardware Setup and Diagnostics:

The POS program provides hardware diagnostics for the peripheral equipment supported. Choose from the drop down list the hardware item you wish to test. If a successful test cannot be verified it can be assumed that the item will not function within the POS program. Consult your hardware vendor if you encounter problems connecting peripherals to the POS program.



## Setting Up Receipt Printers:

The POS program uses a very easy to configure method for setting up Printers. Using the Windows API system allows for virtually any Windows compatible printer to connect with the POS program. Prior to configuring the POS program to connect with your receipt printer one must be installed through the standard windows interface. Install the printer using the information provided by the printer manufacturer.



### **Note: Output Errors:**

If you are having problems such as missing or incorrect characters, try installing a Windows Text Only Generic Printer. Set the properties to "Print directly to printer" avoiding the Windows Print Spooler. Most printers work fine with this setting.

The printer can now be tested through the POS program interface. From the Main System Menu choose Utilities, Hardware Diagnostics then Strip Printer. Using the pull down list choose the strip printer name that you previously installed through Windows. Press F2 and verify you have had a successful test. Once tested choose Save.

## Receipt Printer Diagnostic and Setup

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

F1 LOG OUT


F2 CASH REGISTER

F3 MODULES

Version: 2.8.6.19 S/N: NOT REGISTERED

Plexis Point Of Sale

NOT REGISTERED



### Notes: Windows 95/98 Users:

When you choose a printer name in the POS program make sure that name is formatted properly. For example, if Windows reports a name such as: Generic Printer **on LPT1:**

Remove the wording “**on LPT1:**” so it is formatted to say “Generic Printer” ONLY.

### Output Errors:

If you are having problems such as missing or incorrect characters, try installing a Windows Text Only Generic Printer. Set the properties to “Print directly to printer” avoiding the Windows Print Spooler.

Most devices work fine with this setting.

## Cash Drawer Setup and Diagnostic

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

F1 LOG OUT

F2 CASH REGISTER

F3 MODULES

Cash Drawer Test - Plexis Point Of Sale

CASH DRAWER NAME  
Receipt

DRAWER OPEN COMMAND  
27+112+0+25+250

EXIT TEST RESET SAVE

F1 F2 F3 F4

Version: 2.8.6.19 S/N: NOT REGISTERED

Plexis Point Of Sale NOT REGISTERED

Cash drawers can be connected through the Printer or on it's own port. If your drawer is connected through your receipt printer select the same name as your printer. If connected to it's own port then create a Generic Printer in Windows and assign the proper port to the printer. For ease of setup rename the printer to "Cash Drawer 1".



## Coin Dispenser Setup and Diagnostic

The screenshot displays the main menu of the Plexis Point Of Sale software. The menu bar includes 'File', 'Modules', 'Setups', 'Register Program', and 'Help'. The user is logged in as 'ID # 10 : ADMINISTRATOR TERMINAL' at 'SALLY'S MARINA DELI'. The main menu has three options: 'F1 LOG OUT', 'F2 CASH REGISTER', and 'F3 MODULES'. A 'Coin Dispenser Diagnostic - Plexis Point Of Sale' window is open, showing a 'COIN DISPENSER PORT' dropdown menu, radio buttons for denominations (.01, .05, .10, .25, .75, .99), and four buttons: 'EXIT' (F1), 'TEST' (F2), 'RESET' (F3), and 'SAVE' (F4). The bottom status bar shows 'Version: 2.8.6.19 S/N: NOT REGISTERED' and a 'NOT REGISTERED' warning.

Install an approved and certified coin dispenser listed in the certified hardware section of our web site. Choose the serial port the changer is attached to and select test. If properly install the coin dispenser will eject the denomination selected.

Note: If you are installing a coin dispenser on a network workstation mapped to the POS server you must install the dispenser drivers. This can be done by executing the POS installer program and selecting “Custom”. Choose POS drivers to complete the installation.



## Customer Display Setup and Diagnostic

The screenshot displays the main interface of the Plexis Point Of Sale software. At the top, the title bar reads "Main Menu - Plexis Point Of Sale". Below it is a menu bar with "File", "Modules", "Setups", "Register Program", and "Help". The main window title is "ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI". On the left side, there is a vertical toolbar with three buttons: "F1 LOG OUT" (with a power icon), "F2 CASH REGISTER" (with a cash register icon), and "F3 MODULES" (with a cube icon). In the center, a dialog box titled "Customer Display Test - Plexis Point Of Sale" is open. It contains two dropdown menus: "POLE PORT NAME" with "Pole Display" selected, and "POLE MODEL" with "ULTIMATE" selected. Below the dropdowns are four buttons: "EXIT" (F1, yellow arrow), "TEST" (F2, blue and green arrows), "RESET" (F3, red circular arrow), and "SAVE" (F4, yellow S). At the bottom of the main window, it says "Version: 2.8.6.19 S/N: NOT REGISTERED". The bottom status bar features the "Plexis Point Of Sale" logo and a red "NOT REGISTERED" warning.

Pole display installation is set up just like a printer. Choose a Windows Text Only Generic Printer and name it "Pole Display" or any other name you like. Test the Pole display through the POS program interface by choosing from the Main System Menu choose Utilities, Hardware Diagnostics then Pole Display. Press F2 and verify you have had a successful test. Once tested choose Save.

The pole display can now be tested through the POS program interface. From the Main System Menu choose Utilities, Hardware Diagnostics then Strip Printer. Using the pull down list choose the strip printer name that you previously installed through Windows. Press F2 and verify you have had a successful test. Once tested choose Save.

**Important:** Your pole display must be approved to operate with the POS program.

## Kitchen Display System (KDS) Setup and Diagnostic

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

**F1**  
LOG OUT

**F2**  
CASH REGISTER

**F3**  
MODULES

**Kitchen Display System Test - Plexis Point Of Sale**

KDS PORT NAME  
KDS #1

KDS MODEL  
Micro-Plus

**EXIT** **TEST** **RESET** **SAVE**

F1 F2 F3 F4

Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** **NOT REGISTERED**

After installing a Kitchen Display System, you can test its functionality here. You must use a certified and approved KDS to be compatible with the POS System. Setup a KDS port the same was as a Generic Text Printer.

## Video Security System (VSS) Setup and Diagnostic

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

F1 LOG OUT

F2 CASH REGISTER

F3 MODULES

Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** NOT REGISTERED



After installing Video Security System, you can test its functionality here. You must use a certified and approved VSS to be compatible with the POS System. Setup a VSS port the same was as a Generic Text Printer.

# Integrated Credit Card Diagnostics

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI


**F1**  
LOG OUT

**F2**  
CASH REGISTER

**F3**  
MODULES

**UniComp Cambire Test - Plexis Point Of Sale**

Transaction Type	Account Number	Exp Date
N - Credit Card Sale	4012300500809	1208
Receipt Number	Amount	
000001	1.01	

  
Universal Payment Software  
<http://www.unicomp.com>

Send Exit

Version: 2.8.6.19 S/N: NOT REGISTERED

**Plexis Point Of Sale** **NOT REGISTERED**

If you have installed one of the optional Credit Authorization programs testing can be done to insure that the authorization program is installed correctly.

# Integrated Debit Card Diagnostics

Main Menu - Plexis Point Of Sale

File Modules Setups Register Program Help

ID # 10 : ADMINISTRATOR TERMINAL SALLY'S MARINA DELI

**F1**  
LOG OUT

**F2**  
CASH REGISTER

**F3**  
MODULES

**UniComp VeriFone Pin Pad 1000/2000 Test - Plexis Point Of Sale**

Receipt Number	Amount	Cash Back
000001	1.00	0.00

Track Data

Pin Pad Selection

- VeriFone PINpad 1000
- VeriFone PINpad 2000


STATUS

Idle

AuthResponse:

ResponseCode:

CaptResponse:

 Universal Payment Software

Cancel

Begin Exit

Version: 2.8.6.19 S/N: NOT REGISTERED





**Plexis Point Of Sale** **NOT REGISTERED**

If you have installed one of the optional Debit Card Authorization programs testing can be done to insure that the authorization program is installed correctly.

## Adding Customers Page 1

Select Modules, A/R, Customers, then choose Add to add a new customer.

Customer Edit Page 1 - Plexis Point Of Sale

				CUST # 100003	Balance: 0.00
F1 EXIT	F2 EDIT	F4 SAVE	F5 DELETE	YTD SLS: 0.00	Last Act:
					Last Purch:

Page #1 | Page #2

BILLING		SHIPPING		CREDIT CARD # 1	EXP
PHONE # 1		CROSS STREET		4444333322221111	1205
323-555-8888				CREDIT CARD # 2	EXP
FIRST NAME		MAP	GRID		
RHONDA				CREDIT CARD # 3	EXP
LAST NAME					
SMITH		COMPANY or NAME		E-MAIL ADDRESS	
COMPANY					
		ADDRESS #1		BIRTHDAY	SSN or ID NUMBER
ADDRESS #1		1400 HIWAY 99		__/__/__	
1400 HIWAY 99		ADDRESS #2		CLUB ID NUMBER	CUSTOM SORT
ADDRESS #2		WEST PALM BEACH			
WEST PALM BEACH		ZIP/POSTAL	CITY		
00222	WEST PALM BEACH	00222	WEST PALM BEACH	ADDED AT POS	
STATE/PROV	COUNTRY	STATE/PROV	COUNTRY		
FL		FL			

**Billing:** The customer's billing address. This will print on receipts, invoices and statements.

**Shipping:** The customers Delivery or Shipping address.

**Credit Card:** The stored credit card information for recurring invoices.

**Birthday:** For age restricted sales.

**SSN or ID Number:** Social Security or other ID (optional)





**Club ID Number:** Loyalty Club ID

**Custom Sort:** Any data you choose, this can be searched at POS

**Must Read Notes:** Prompts the sales staff to read all notes for this customer prior to proceeding with the sale.

## Adding Customers Page 2

Customer Edit Page 1 - Plexis Point Of Sale


 F1 EXIT	 F2 EDIT	 F4 SAVE	 F5 DELETE	CUST # 100003 YTD SLS: 0.00	Balance: 0.00 Last Act: Last Purch:
Page #1	Page #2				
PHONE #2 ____-____-____	TAX CODE 1	RESALE NUMBER _____	<input checked="" type="checkbox"/> 1. SERVICE CHARGE <input type="checkbox"/> 2. CREDIT HOLD <input type="checkbox"/> 3. ASK FOR P.O. <input type="checkbox"/> 4. ASK FOR SHIPPING <input type="checkbox"/> 5. NO ALCOHOL SAL <input type="checkbox"/> 6. NO TOBACCO SALE		
FAX # ____-____-____	TERMS CODE 5	TERMS CODE DESCRIPTION NET INVOICE			
	CREDIT LIMIT 500.00	BALANCE 0.00			
	DISCOUNT LEVEL 0				
	SALES TRTY % 0	COMMISH 0			


Enter all of the required information for your first customer. If this customer is NON-TAXABLE enter a "0" as the TXCD (Tax Code). Choose SAVE. The POS program automatically assigns a customer number. Press F1 to exit Customers. A detailed explanation of each field can be found in the administration manual.





## View Inventory Items


View Inventory - Plexis Point Of Sale


  
**F1  
EXIT**

  
**F2  
DETAIL**


  
**F3  
ADD**


  
**F4  
CLONE**

  
**F5  
OPTIONS**

 **F8 - ORDER BY**

01234567813





ITEM	DESCRIPTION	PRODUCT	LIST	ONHAND	DEPT	CATEGORY	SUBCAT	CUSTOM
01234567813	CHEESE CAKE	DESERTS	7.950	985.00	01	BAKERY		
01234567820	AVACADO ROLLS	SIDE ORDER	7.950	981.00	01	FOOD		
01234567821	FIESTA ROLLS	SIDE ORDER	7.950	980.00	01	FOOD		
01234567822	THAI LETTUCE WRAPS	SIDE ORDER	7.950	996.00	01	FOOD		
01234567823	CREAMY DRINKS	BAR	8.950	1000.00	01	FOOD		
01234567824	ORANGE CHICKEN	ENTRE	6.950	1000.00	01	FOOD		
01234567825	FISH TACO	TACO	3.950	997.00	01	FOOD		
01234567826	CHILI DOG	SANDWICH	2.950	996.00	01	FOOD		
01234567827	CORN DOG	CORN DOG	0.990	986.00	01	FOOD		
01234567828	FOOT LONG HOT DOG	SANDWICH	3.950	916.00	01	FOOD		
01234567829	HOME MADE FRIES	SIDE ITEM	1.780	985.00	01	A7		
01234567830	MEGA DOG	SANDWICH	4.950	961.00	01	A7		
01234567832	POLISH DOG	SANDWICH	1.950	992.00	01	A7		
01234567833	TWO DOG COMBO MEAL	COMBO	7.950	997.00	01	A8		
01234567834	BBQ CHICKEN SALAD	SALAD	9.950	994.00	01	SALAD		
01234567835	CHINESE CHICKEN SALAD	SALAD	8.950	1000.00	01	SALAD		
01234567836	SANTA FE SALAD	SALAD	6.500	997.00	01	SALAD		
01234567837	THAI SALAD	SALAD	8.950	999.00	01	SALAD		
01234567838	CHOC TRUFFEL CAKE	DESERT	5.950	990.00	01	DESERTS		
01234567839	WINE, RED, WHITE	BAR	7.950	1000.00	02	WINE		
01234567840	BANANNA SPLIT	FOOD	5.950	996.00	01	DESERTS		
01234567841	STAWBERRY ICE CREAM	ITEM	2.950	999.00	01	DESERTS		

### Detail:

Show full item detail and allows you to edit an inventory item.

### Add:

Add a new inventory item.

### Clone:

Create a new inventory item based on the currently selected item.

### Options:

Changes the display options when viewing and editing inventory items.





**Department:**

Choose the inventory department where this items is linked.

**Product Type:**

Standard: Basic item, no special sales screen handling.

Alcohol: Customer can be restricted from purchasing, age limit option available.

Tobacco: Customer can be restricted from purchasing, age limit option available.

Price to Quantity: The sales screen will calculate quantity based on purchase price amount.

Price to Quantity Trigger: The sales screen will calculate quantity based on purchase price amount and trigger a price query dialog.

**Age Restriction:**

Enter the minimum age to purchase this item. Blank or Zero if none.

**Operator Alert Message:**

Display a dialog box on the sales screen when this item is selected.

**Notes:**

The notes box allows for the display and printing during sales entry.

**Alternate KDS Description:**

Data in this field will replace the default description KDS Displays.

**Send to Remote Printer or KDS:**

Send a preparation list to the remote printer at the conclusion of the sale.

**Modifier / Add On:**

This item is a side, topping or condiment and will indent and print double sized on compatible printers.

**Case/Pack Auto Trigger:**

When checked the operator will be prompted to select the Case / Pack size during the sales process for this item. If the price is set to zero and add on is checked you will not be prompted to enter a price.

**Auto Weigh:**

Popup a Weight dialog or trigger a weight scale dialog when this item is selected.

**Disable Combining:**

Forces the POS system NOT to add item to an existing item quantity. Enabling this feature will create a separate line item on the order. Use this option when item modifiers may differ for each anchor item.

**EBT:**





EBT approved item.

**Hide on Receipt and Popup:**


Do not show this item on the POS browse screens or print on receipts.

## Adding Inventory (Pricing)

Inventory Edit - Plexis Point Of Sale







01234567813      CHEESE CAKE


 PTD Sold: 10  
 YTD Sold: 10  
 Last Sold: 08/19/2004  
 Last Act.: 08/19/2004

F6 - CHANGE ITEM NUMBER

Main Page | Pricing | Touch Buttons | Item Alias | Modules

**UNIT COST**  **UNIT PRICE** **EXTRA PRICE**  
 3.5000      7.9500     

**PK NAME 1**    **PK QTY 1**    **PK PRICE 1**  
 2 PACK            2            13.95

**PK NAME 2**    **PK QTY 2**    **PK PRICE 2**  
 4 PACK            4            29.95

**PK NAME 3**    **PK QTY 3**    **PK PRICE 3**  
 6 PACK            6            44.95

TAX 1     TAX 2     TAX 3  
 DISABLE TAX ON TAKE OUT / DRIVE THRU

REDEMPTION OR DEPOSIT ID

**CUSTOMER DISCOUNTING**  
 PRICE 1    PRICE 2    PRICE 3    PRICE 4    PRICE 5    PRICE 6  
 PRICE 7    PRICE 8    PRICE 9    PRICE 10    PRICE 11    PRICE 12  
 USE PERCENTAGES     NEVER DISCOUNT

**ON-SALE PRICING**  
 STARTS ON    GOOD THRU    NETPRICE  
 8/19/2004    8/19/2004     QUANTITY DISCOUNTING  
 F7 - ACTIVATE    F8 - CLEAR    F9 - QTY DISC

LOOKUP	DEPT	DESCRIP	VALUE
100	02	CRV. PLASTIC	0.03
200	02	CRV. GLASS	0.05
400	02	16 OZ BOTTLE	0.10

### Pricing:

Unit Cost: What the item costs your store to buy.

Unit Price: The price the customer for the item.

Extra Price: If the customer requests extra amounts of an item, this is the additional price they will be charged. This option allows for a first item free, second item pay rule. Note: this functionality is available if the store type is set to Restaurant or Pizza only.

### Case / Pack Control:

A choice of three sizes are available.

PKName 1..3: The title of the Case / Pack size.

PKQty 1..3: The number of items in the Case / Pack.

PK Price 1..3: The total price for the entire Case Pack.

**Tax 1..3**

Check to enable taxation of up to three tax rates.

**Disable Tax On Take Out / Drive Thru:**

All taxes are disabled on take out and drive thru order for this item.

**Redemption Lookup:**

Redemption value for recycled products.

**Automatic Customer Discounting:**

Set the dollar or percentage amount for discounting of this item.

**Use Percentages:**

Converts the numeric value entered into percentage discount off list price.

**Never Discount:**

Never allow discounting of any kind to this item.

**On-Sale Pricing:**

Set the beginning, ending dates and final price of the discounted item.

### Quantity Discounting:

Apply discounting based on quantity. This can be used for example, 2 for \$4.00, 3 for 3.50, etc. Use this type of discounting to such as: 2 for 1.50, 3 for 3.00, etc.

QTY @ EA	DISC % EA	PRICE EA
2.00	0.00	5.0000
10.00	0.00	3.0000

**Line Discount Statistics**  
UPC / 01234567813  
CHEESE CAKE  
LIST PRICE: 7.9500  
**\$7.95 Each or \$2 For 10.00**

QUANTITY    \$ PRICE EACH    % DISC EACH  
0            0            0

F1 - EXIT    F2 - ADD    F4 - SAVE  
F5 - REMOVE    F6 - CLEAR

Choose F2 ADD

Enter a quantity trigger and discount percentage or a new selling price for the item. Once the trigger has been reached all items from that point forward will be sold at the discounted price. Prices must be for each unit, not the total of all units.

Example # 1: Suppose the unit price of a single item is \$7.95 and you want to give your customers a special price of \$10.00 if they buy two units. You would set the Quantity to 2 and the Price Each to 5.00. When two units are rung up the system will calculate  $2 \times \$5.00 = \$10.00$

Example #2 : Suppose the unit price of a single item is \$7.95 and you want to give your customers a special discount of 10% if they buy two units. You would set the Quantity to 2 and the Disc % Each to 10. When two units are rung up the system will calculate  $2 \times \$7.95 \times .90 = \$14.31$

The system will continue to discount at the lowest price until the next threshold is reached. For example, if the regular price is \$0.99 and you have a special of 2 for \$1.50( discounted to 75 cents each) and the customer purchases 3 units, the 3<sup>rd</sup> unit will be sold at the 75 cent price.

Use even numbers to avoid rounding errors.





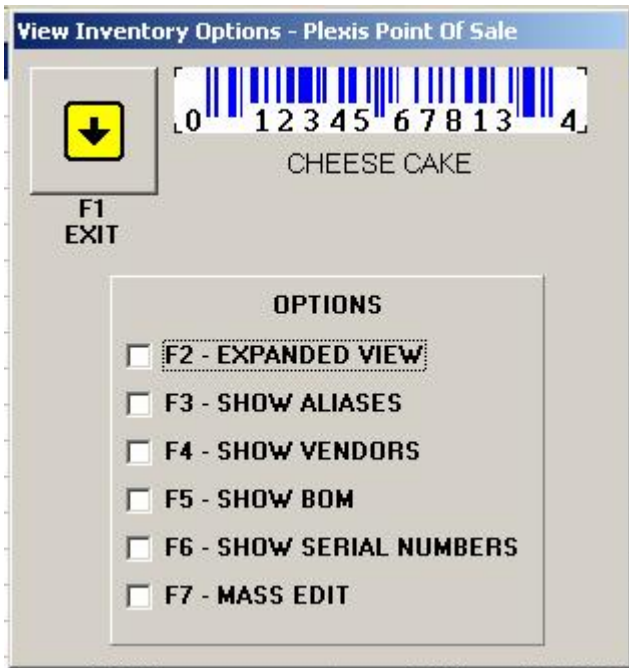






## Mass Edit Inventory Items

To enter the mass edit mode select Inventory, Items, Options and check the Mass Edit Box.




After selecting mass edit every row and column can be edited. You can multi-select items to delete.

Warning: Edits and deletes are immediately executed and can not be reversed. There are no confirmations, warnings or validations. Use this option with extreme care.

# Mass Inventory Edit Screen

View Inventory - Plexis Point Of Sale



**F1  
EXIT**


◀

▶

-

✕


↺



**F5  
OPTIONS**

**F8 - ORDER BY**

NO PICTURE



0 1 2 3 4 5 6 7 8 2 6 4

ITEM NUMBER	DESCRIPTION	PRODUCT	LIST	ONHAND	DEPT	CATEGORY	SUBCAT	CUSTOM
01234567813	CHEESE CAKE	DESERTS	7.950	975.00	01	BAKERY		
01234567820	AVACADO ROLLS	SIDE ORDER	7.950	983.00	01	FOOD		
01234567821	FIESTA ROLLS	SIDE ORDER	7.950	995.00	01	FOOD		
01234567822	THAI LETTUCE WRAPS	SIDE ORDER	7.950	1000.00	01	FOOD		
01234567823	CREAMY DRINKS	BAR	8.950	1000.00	01	FOOD		
01234567824	ORANGE CHICKEN	ENTRE	6.950	999.00	01	FOOD		
01234567825	FISH TACO	TACO	3.950	995.00	01	FOOD		
01234567826	CHILI DOG	SANDWICH	2.950	1000.00	01	FOOD		
01234567827	CORN DOG	CORN DOG	0.990	989.00	01	FOOD		
01234567828	FOOT LONG HOT DOG	SANDWICH	3.950	995.00	01	FOOD		
01234567829	HOME MADE FRIES	SIDE ITEM	1.780	972.00	01	A7		
01234567830	MEGA DOG	SANDWICH	4.950	989.00	01	A7		
01234567832	POLISH DOG	SANDWICH	1.950	998.00	01	A7		
01234567833	TWO DOG COMBO MEAL	COMBO	7.950	999.00	01	A8		
01234567834	BBQ CHICKEN SALAD	SALAD	9.950	997.00	01	SALAD		
01234567835	CHINESE CHICKEN SALAD	SALAD	8.950	997.00	01	SALAD		
01234567836	SANTA FE SALAD	SALAD	6.500	1000.00	01	SALAD		
01234567837	THAI SALAD	SALAD	8.950	999.00	01	SALAD		
01234567838	CHOC TRUFFEL CAKE	DESERT	5.950	998.00	01	DESERTS		
01234567839	WINE, RED, WHITE	BAR	7.950	1000.00	02	WINE		
01234567840	BANANNA SPLIT	FOOD	5.950	999.00	01	DESERTS		
01234567841	STAWBERRY ICE CREAM	ITEM	2.950	999.00	01	DESERTS		

This screen allows for tabular editing of all inventory items. The navigation bar above allows for positioning the cursor at the beginning and end of the inventory database. You may also delete and refresh the screen with the navigation bar.

Warning: Edits and deletes are immediately executed and can not be reversed. There are no confirmations, warnings or validations. Use this option with extreme care.

## Barcode and Inventory Part Number Setup:

### UPC-A



UPC-A is an abbreviation for ‘Universal Product Code-A’. It is the most commonly used bar code on retail products in North America.

Although many retailers in North America use the UPC-A symbol for scanning books, the EAN Bookland bar code symbology is the one intended for the retail bar coding of books.

UPC-A encodes a 12-digit numeric bar code. The first digit identifies what type of UPC-A code is being used:

<i>Digit(s)</i>	<i>Use</i>
0	regular UPC code
1	reserved
2	random weight item; the item and its weight are encoded by the bar code; the scanning system can determine a price if the cost per weight for that item is stored in the scanning system’s database
3	code used as a National Drug Code or National Health Related code
4	in-store use of the UPC code
5	coupon; discount information is encoded by the bar code
6	regular UPC codes
7	regular UPC codes
8	reserved
9	reserved
10 (5 digits)	manufacturer’s identification; this number, along with the appropriate first digit, is assigned by the Uniform Code Council (UCC) in Dayton, Ohio
11 (5 digits)	product number of the goods to which the bar code is affixed; 100,000 (#00000-#99999) different product numbers can be encoded by a given manufacturer
12	modulo-10 checksum digit

<b>UPC Bar Code</b>	<b>RIGHT</b>	<b>WRONG</b>
0 12300 70321 5	01230070321	012300703215
0 12345 67890 5	01234567890	012345678905
0 41540 56400 3	04154056400	041540564003
0 41548 87076 7	04154887076	041548870767

## Type 2 Random Weight Barcode Support

The POS program follows Universal Product Code standards for reading the item price. The scale should be programmed to issue a bar code in the following format:

**2ABBBBCDDDE**

where

**2** = The Number System Character

**A** = Package Code (this digit is output by the scale; refer to documentation by the scale manufacturer for specifics)

**BBBB** = Item identifier

**C** = Price Check

**DDDD** = Price

**E** = Modulo Check

The Item ID stored in the Inventory item record must be the Package Code and the item identifier (ABBBB) must be 5 digits exactly; that is, you must use zeroes before 3-, 2-, and 1-digit Item Ids.

UPC ID Field

Package Code	Item Identifier	RIGHT	WRONG
0	468	04680	4680
9	1000	91000	1000
8	356	80356	8356
7	25	70025	725
6	2	60002	62

When the Type 2 bar code is scanned at the point of sale, 5-digit item code is extracted and the POS program looks for the item. If the item record is found, the item is entered into the transaction at the price embedded in the bar code (DDDD) When the transaction is completed, the price for the item is divided by the Base Price in the item record to determine how much of the item was sold.

Notes on Random Weight / Type 2 Bar Codes

If the item can also be sold by weight without an Embedded Price bar code, the item must have a weight profile assigned and the Base Price set to the weight unit price.

To track the inventory movement of an item sold with Embedded Price bar codes, the Base Price must be set to the weight unit price.

If the Base Price is left blank or is zero, a quantity of 1 (one) will be subtracted from the Quantity On Hand for each package sold.





When an Automatic Item Discount or Prompt for Price Override is applied to an item that is labeled with an Embedded Price bar code, the price entered will be applied as the price per unit (such as pound) and will be multiplied by the weight as calculated from the embedded price.

## How to set up a Random Weight Barcode item


Define the 5-digit Weight Based lookup Item Number:

Example: **19434** (note: the first digit is a package code produced by your scale)

Inventory Edit - Plexis Point Of Sale

**19434**      **SHRIMP, RAW, LARGE**



PTD Sold: 0  
 YTD Sold: 0  
 Last Sold:                       
 Last Act.:

F1 EXIT      F2 EDIT      F4 SAVE      F5 DELETE      F6 - CHANGE ITEM NUMBER

---

Main Page | Pricing | Touch Buttons | Item Alias | Modules

**ITEM DESCRIPTION**

SHRIMP, RAW, LARGE

**PRODUCT**      **CATEGORY**

SHELL FISH      SEA FOOD

**SUBCATEGORY**      **CUSTOM SORT**

GROC     

**UNIT**      **WEIGHT**      **LOCATE**      **QTY ON HAND**

EACH                1000.0000

**ON ORDER**      **ORDER POINT**      **ORDER QTY**

0.0000      0.0000     

**DEPARTMENT**      **PRODUCT TYPE**      **AGE LIMIT**

02      STANDARD     

**DEPT**      **DESCRIP**

01	TX DEPARTMENT - 01
02	NTX DEPARTMENT - 02
PD	DEPARTMENT - PAID OUTS
PUR	DEPARTMENT - PURCHASES

**OPERATOR ALERT MESSAGE**

**NOTES**

**INVOICE / RECEIPT MESSAGE**

**ALTERNATE KDS DESCRIPTION**

SEND TO REMOTE PRINTER OR KDS  
 MODIFIER / ADD ON       CASE/PACK AUTO TRIGGER  
 EBT       AUTO WEIGH  
 DISABLE QTY COMBINING  
 HIDE ON RECEIPT       HIDE ON POPUP

### Minimum Requirements:

You *must* know what the scale will produce as the Package Code for the first digit of the part number.

Set the Quantity and Per Unit Base Cost and List prices for the item.

Choose that proper department and on Page # 3 Set the unit Tax Switches.

Save the item.

**Selling a Random Weight Barcode item at the register:**

Example:

Item No: 19434

Base Price Per Lb: 9.99

Weight: 0.37 lbs

Your Stand Alone Barcode printing Scale should produce a barcode in the following format:



where

**2** = Random Weight Trigger

**19434** = Your Base lookup Item Number (includes package code as the first digit generated by the scale)

**1** = Reserved (generated by the scale)

**0370** = The Price per Unit / 100

**0** = Modulo Check (generated by the scale)

Scan this at the POS Terminal and you will get:

<u>Description</u>	<u>Weight</u>	<u>Total Price</u>
Shrimp, Large, Raw	.37	3.70
9.99 / lb		



# Random Weight Sales Screen Example

SALES REGISTER # 10

**SALE TOTAL**

**10.99**

SALE

**SALLY'S MARINA DELI**

F11

F12

F2 - ITEMS

←

→

MAIN WITH PICS

CATGRY

+++

MULT

NO ADD

+

XTRA

#

F1 - PAD

F3 - CASH

F4 - CREDIT

F6 - PAY

F7 - CASE/PK

F8 ACTIONS

F10 OPTIONS


SHRIMP, RAW, LARGE	1	9.99	T
--------------------	---	------	---


7	8	9		OK
4	5	6	HLD	T-O
1	2	3	0	CLR


NON-TAX 0.00	DISCOUNT 0.00	TTL TAX 1.00	SUBTOTAL 9.99	LAST TND 5.50	LAST CHG 0.00	F9 - MENUS OFF	4:58:18 PM
-----------------	------------------	-----------------	------------------	------------------	------------------	----------------	------------

# Logging in as Sales Staff


Order Entry Login - Plexis Point Of Sale

  
F1  
EXIT



  
F2  
PRC CHK



**SALLY'S MARINA DELI**  
1234 VIA MARINA  
MARINA DEL REY, CA 90292  
310-301-6476



**LOGIN WITH ID #1**

7	8	9
4	5	6
1	2	3
0		

F3 CLEAR      F10 ACCEPT

LAST TEND  
20.00

LAST CHANGE  
0.85

LINE #001 IDLE
LINE #002 IDLE
LINE #003 IDLE
4 / 800-883-0814 ANDERSON ALLEN
LINE #005 IDLE
LINE #006 IDLE
LINE #007 IDLE
LINE #008 IDLE





















**11:24:17 AM**

Logon with your sales ID. If password protected you will be prompted to enter a password. Choose Help for a list of available sales staff. The default Demo Login ID is "1" with no password.

Note: This screen is shown with the Optional Multi-Line Caller ID Installed.

## Select Transaction Type

Select Customer - Plexis Point Of Sale

 <p><b>LAST TEND</b> 20.00 <b>CHANGE</b> 0.85</p> <p><b>ENTER NEW SALE</b> == F2 ==</p> <p> F1 - EXIT</p>	<p>ENTER PHONE NUMBER OR CHOOSE SALE</p> <p>_____ - _____</p> <table border="1"> <tr> <td data-bbox="402 447 516 562"></td> <td data-bbox="532 447 646 562"></td> <td data-bbox="662 447 776 562"></td> </tr> <tr> <td>F3 CUSTMR</td> <td>F4 CLUB</td> <td>F10 ACCEPT</td> </tr> </table>				F3 CUSTMR	F4 CLUB	F10 ACCEPT	<table border="1"> <tr> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>0</td> <td> CLEAR</td> <td> OK</td> </tr> </table>	7	8	9	4	5	6	1	2	3	0	 CLEAR	 OK	<p>TOUCH NUMBER</p> <p>_____</p> 
																					
F3 CUSTMR	F4 CLUB	F10 ACCEPT																			
7	8	9																			
4	5	6																			
1	2	3																			
0	 CLEAR	 OK																			
<p> F5 - OPTIONS</p> <p> F9 - ANSWER LINE</p>	LINE #001 IDLE	LINE #002 IDLE	LINE #003 IDLE	Line # 004 800-883-0814 ANDERSON ALLEN																	
	LINE #005 IDLE	LINE #006 IDLE	LINE #007 IDLE	LINE #008 IDLE																	
<p>Logged On:1 - SALLY S. <b>11:24:36 AM</b> <b>Plexis Point Of Sale</b></p>																					

F1: Exit to Sales Staff Login.

F2: Enter a sale without selecting a customer.

F3: View or Search customers.

F4: Scan / Enter Customer's Club Card

F5: Display an option panel for additional sales staff functions.

F6: Run any external program.

F9: Answer incoming call. Use this option if you do not have a Touch Screen system.

F10: Accept Customer phone number or Club Card.

F11: Delivery, shows open / pending deliver orders. (If installed)

F12: Tagging, assigns orders to drivers. (If installed)

Note: This screen is shown with the Multi-Line Caller ID Installed and Customer Selection option.

## Running an External Program

Select Customer - Plexis Point Of Sale

ENTER PHONE NUMBER  
OR CHOOSE SALE

TOUCH NUMBER

7 8 9

4 5 6

LAST TEND  
6.00  
CHANGE  
0.55

ENTER  
NEW SALE  
== F2 ==

F1 - EXIT

F5 - OPTIONS

Run External Program - Plexis Point Of Sale

Run Microsoft Wordpad  
F2

Calculator  
F3

F4

F5

F6

F7

F8

F9

F10

F11

F12

Sally's  
MARINA DELI

Logged On:1 - SALLY S.  
**12:59:21 PM**  
**Plexis Point Of Sale**

From the Transaction Select Options, then screen select “RUN”.

Choose any pre-configured applications to run.

This open can also be selected inside a sales screen by first selecting Options then Run.



## Sales Staff Option Buttons

Select Customer - Plexis Point Of Sale

ENTER PHONE NUMBER  
OR CHOOSE SALE

7 8 9

4 5 6

TOUCH NUMBER

LAST TEND  
0.00  
CHANGE  
0.00

ENTER  
NEW SALE  
== F2 ==

F1 - EXIT

F5 - OPTIONS

Sally's  
MARINA DELI

Sales Option - Plexis Point Of Sale

F1 EXIT

F2 PRC CHK

F3 LAST RCPT

F4 OPEN

F5 PD OUT

F6 Z-OUT

F7 ZZ-OUT

F8 TURN IN

F9 RUN

F10 POST

Logged On:1 - OE/POS M.  
**6:29:03 PM**  
**Plexis Point Of Sale**

F1: Exit to the Sale Selection Screen.

F2: Price checks an inventory item.

F3: Print the last receipt entered on this terminal.

F4: Open Cash Drawer.

F5: Paid Out Key. Used if you are taking money out of the cash drawer without entering a sale.

F6: Print Z-Register

F7: Print ZZ-Register

F8: Cash Drawer Turn in.

F9: Run and External Program

F10: Post Daily Sales to G/L

The Z-Register, ZZ-Register and Cash Drawer reports contents for the logged on terminal only. If you need these reports for all terminals at one time access these reports from the POS Main Menu.

## Sales Screen with Text Buttons

SALES REGISTER # 10

**SALE TOTAL**  
**22.50**

SALE

MAIN NO PICS

CHEESE CAKE 1 7.95 T  
CHILI DOG 1 6.00 T  
SANTA FE SALAD 1 6.50 T

7 8 9 OK  
4 5 6 HLD T-O  
1 2 3 0 CLR

**SALLY'S MARINA DELI**

CATGRY MULT NO ADD XTRA

MAIN FOOD MENU	DELICIOUS DESERTS	BEER WINE DRINKS	SANDWICH	CONDIMENTS MUSTARD KETCHUP ETC
CHEESE CAKE	AVACADO ROLLS	FIESTA ROLLS	THAI LETTUCE WRAPS	CREAMY BAR DRINKS
ORANGE CHICKEN OVER RICE	FRESH FISH TACO	CHILI DOG	CORN DOG	FOOT LONG HOT DOG
HOME MADE FRENCH FRIES	MEGA DOG WITH EVERYTHING	POLISH DOG	TWO DOG COMBO MEAL	BBQ CHICKEN SALAD
CHINESE CHICKEN SALAD	SANTA FE SALAD	THAI SALAD	CHOC TRUFFEL CAKE	WINE RED OR WHITE
BANHANA SPLIT ICE CREAM	STAWBERRY ICE CREAM	VANILLA ICE CREAM	CREAMY MIXED DRINK	BEER

NON-TAX 0.00 DISCOUNT 0.00 TTL TAX 2.05 SUBTOTAL 20.45 LAST TND 5.50 LAST CHG 0.00 F9 - MENUS OFF 4:58:57 PM

F1 - PAD  
F3 - CASH  
F4 - CREDIT  
F6 - PAY  
F7 - CASE/PK  
F8 ACTIONS  
F10 OPTIONS

### Entering items at the sales screen

Enter or scan items in any order.

When all of the items are entered select the PAY button.

### Supplemental category buttons

This option allows for the display of the 25 most used categories.

### Modifier Keys

The Mult key (+++) allows you to multiply the quantity by any amount.

The modifier keys (-) and (+) will allow you to quickly increase or decrease and **Anchor** item's quantity by one or Tag an **Add On** item as "Extra" or "Hold Item".

## Paid Out Functionality

Select Customer - Plexis Point Of Sale

ENTER PHONE NUMBER  
OR CHOOSE SALE

PAID OUT AMOUNT

TOUCH NUMBER

LAST TEND  
0.00  
CHANGE  
0.00

ENTER  
NEW SALE  
== F2 ==

F1 - EXIT

F3 Sales  
CUSTI

F5 - OPTIONS

Sally's  
MARINA DELI

7 8 9  
4 5 6  
1 2 3  
0 00 -  
F1 - EXIT F3 - CLEAR F10 - ACCEPT

6:31:26 PM  
Plexis Point Of Sale

The Pay out function allows you to take cash from the till and record the transaction. Use this function if you wish to keep accurate drawer tallies. You can also select this function inside the sales screen.



## Selling by Weight (electronic weight scale installed)

The screenshot displays a POS interface for 'SALLY'S MARINA DELI'. A 'Weight Scale - Plexis Point Of Sale' overlay is active, showing 'SHRIMP, RAW, LARGE' with a yellow bar for 'TOTAL WEIGHT' and a green bar for 'TOTAL PRICE'. The background shows a sales register with a total of 16.4 and various function buttons like F1-PAD, F3-CASH, F4-CREDIT, F6-PAY, F7-CASE/PK, F8-ACTIONS, and F10-OPTIONS. The bottom status bar shows: NON-TAX 0.00, DISCOUNT 0.00, TTL TAX 1.50, SUBTOTAL 14.99, LAST TND 5.50, LAST CHG 0.00, F9 - MENUS OFF, and 4:59:55 PM.

### Electronic Scale Operation:

All weight-based items can be automatically entered into the sales system by selecting the Weight button on the sales screen. Selecting “Auto Weigh” in the inventory record can automatically trigger the weight Scale interface. Once the scale is stable and a valid weight is read the Accept Button will be enabled.

### Tare Out:

Tare the scale by placing the empty contained on the platform, then select Tare. This is not to be confused with the Zero command.

### Zero Scale:

Calibrate (Zero) the scale by removing all items from the platform and select Zero.

## Sales Screen Actions Buttons, Selection #1



**Back:** Move back to previous screen.

**Pay:** Select payment method such as Cash, Credit, Debit, Etc.

**Case/PK:** Case Pack control. Sell Six Packs, 12 Packs, Cartons, Etc.

**New QTY:** Change the quantity to be sold.

**Weight:** Weight Item, Manual or Automatic if a scale is installed.

**Discounts:** Line Item discount control. Discount by % or modify price.

**Tax Y/N:** Line Item Tax toggle.

**Delete:** Delete selected Line Item.

**Comment:** Add a comment to the sale.

**Return:** Return the selected Line Item.

**No Charge:** Charge 0.00 for the selected Line Item.

**More:** Continue to the next set of Action Buttons.

## Sales Screen Actions Buttons, Selection #2



**Back:** Move back to previous screen.

**Pay:** Select payment method such as Cash, Credit, Debit, Etc.

**Pole TTL:** Displays the current total sale amount on a Pole Display, if installed.

**Edit Item:** Edit Current Line Item. The edit is on the sales screen only and will not affect inventory.

**Non-Stock:** Sell an item that is not in the inventory database.

**Add Item:** Add a new item to the Inventory Database.

**PDT U/L:** Portable Data Collector Upload. Create a sale from collected data from a portable.

**Tag Order:** Tag existing orders to Delivery Drivers, if installed.

**Deliveries:** View pending deliveries, if installed.

**Cancel Sale:** Cancel the entire sale. **Warning:** No confirmation is given cancellation is immediate.

## Sales Screen Option Buttons

SALES REGISTER # 10

**SALE TOTAL**  
**16.49**  
SALE

**SALLY'S MARINA DELI**

MAIN WITH PICS    CATGRY    +++ MULT    NO ADD    XTRA

F11    F12

SHRIMP, RAW, LARGE

Sales Options - Plexis Point Of Sale

F1 - BACK    HOLD SALE F2    F3 - REPRINT    F4 - DRAWER

F5 - TAKE OUT    F6 - RUN    F8 - PAID OUT

F9 - TURN IN    F10 - LOG OUT

F1 - PAD    F3 - CASH    F4 - CREDIT    F6 - PAY    F7 - CASE/PK    F8 ACTIONS    F10 OPTIONS

7	8	9	HLD	T-O					
4	5	6	0	CLR					
1	2	3							

NON-TAX 0.00    DISCOUNT 0.00    TTL TAX 1.50    SUBTOTAL 14.99    LAST TND 5.50    LAST CHG 0.00    F9 - MENUS OFF    5:00:22 PM

**Back:** Move back to previous screen.

**Hold / Recall Sale:** Hold / Suspend the current sale.

The sale can be recalled at a later time or transferred to another Terminal / Lane.

**Reprint:** Reprint last receipt.

**Drawer:** Open the cash drawer.

**Take Out:** Flags order as a takeout and sets sales tax filtering.

**Run:** Run External Programs.

**Paid Out:** Pay cash out of the till. (Non-Sale)

**Turn In:** Turn in your cash drawer now.

**Log Out:** Cancel Sale, log out of the POS system.

## Hold / Suspend / Recall Sales

Hold Orders - Plexis Point Of Sale

F1 EXIT	F2 RECALL	F3 VIEW ALL	F4 SCAN TAG	F5 TRANSFER	F6 DELETE	F11 PRIOR	F12 NEXT

ORDER HOLDS							
TERMINAL	HOLD #	INVDATA	PHONE1	COMPANY	FNAME	LNAME	BALANCE
10	100002	11/10/2004	000-000-0000	CASH COUNTER SALES	CASH	CASH	5.73

SOLDBY	HOLDNO	CUSTNO	ITEMNO	DESCRIP	QTY	NETPRICE	EXTPRICE	TX
1	100002	CASH	01234567828	FOOT LONG HOT DOG	1	3.95	3.95	
1	100002	CASH	101	KETCHUP	1	0	0	
1	100002	CASH	102	MUSTARD	1	0	0	
1	100002	CASH	106	DILL PICKL	1	0	0	
1	100002	CASH	105	- NO ONIONS	0	0	0	
1	100002	CASH	01234567829	HOME MADE FRIES	1	1.78	1.78	

After a Sale has been Suspended or Held it may be recalled at any time. In order to recall a suspended sale the sales order screen must be empty of all items.

### Recall Sale:

Choose to sale to be recalled by using the arrow keys or Touch Buttons, then select Recall. When a sale is recalled it is immediately deleted from the Hold Sale register and transferred to the sales screen for processing. If you do decide not to process the recalled order you must choose Hold sale again to send it back to the Hold Order Register.

### View All:

You will be able to see and recall orders taken at any terminal or lane.

### Scan Tag:

Scan or Enter the Hold Tag Number. This will recall the sale even if it was entered on another terminal or lane.

### Transfer Sale:

Choose to sale to be transferred to another station by using the arrow keys or Touch Buttons, then select Transfer.

**Delete:**

Choose to sale to be deleted by using the arrow keys or Touch Buttons, then select Delete.

Note: Recalling a sale will delete that transaction from the held database and make it active in the sales window. At this point if the sale is cancelled it can not be recovered. Always place the order back on hold unless you are concluding the transaction.



# Choose Payment Type

SALES REGISTER # 10

**SALE TOTAL**  
**16.49**  
SALE

**SALLY'S MARINA DELI**

Enter Payment Type - Plexis Point Of Sale

<b>REMAINING</b> 16.49	<b>CHANGE</b> 0.00	<b>APPLIED</b> 0.00
---------------------------	-----------------------	------------------------

F11 (Up Arrow)    F12 (Down Arrow)

CASH F2	CREDIT F3	DEBIT F4	CHECK F5	ON ACCT F6
BACK F1	EBT F7			ACCEPT F10

BEG BAL	AMT PAID	BALANCE	PMTTYPE	DINETYPE

7 8 9  
 4 5 6  
 1 2 3 0 CLR

F3 - CASH (img alt="Cash icon")  
 F4 - CREDIT (img alt="Credit card icon")  
 F6 - PAY (img alt="Shopping cart icon")  
 F7 - CASE/PK (img alt="Case/PK icon")  
 F8 ACTIONS (img alt="Actions icon")  
 F10 OPTIONS (img alt="Options icon")

NON-TAX 0.00	DISCOUNT 0.00	TTL TAX 1.50	SUBTOTAL 14.99	LAST TND 5.50	LAST CHG 0.00	F9 - MENUS OFF	5:00:44 PM
-----------------	------------------	-----------------	-------------------	------------------	------------------	----------------	------------





You can pick a common tender from the sales screen or choose Actions, Pay for more payment choices. Choose the appropriate payment type. Split Tenders or multiple payment types are supported. Once payment has been verified the system returns to the ready state for the next order.

The transaction can be placed on "Hold" to be recalled at a later time as well.



## Cash Payment

Cash Payment - Plexis Point Of Sale

<b>BEGINNING BALANCE</b> 22.94	7	8	9
AMOUNT TENDED	4	5	6
<b>BALANCE REMAINING</b> 22.94	1	2	3
QUICK TEND	0		
<b>\$ 5</b> F2	<b>\$ 10</b> F3	<b>\$ 20</b> F4	<b>\$ 40</b> F5
<b>50</b> F6	<b>\$ 60</b> F7	<b>\$ 80</b> F8	 F9 EXACT
<b>TENDER \$23.00</b> F11			
	 F1 BACK		 F10 ACCEPT

Enter the cash amount to be tendered. The POS program will calculate any change due to the customer. Decimal points are not used, for example if the tendered amount is \$10.25, enter 1025. Quick tender buttons are provided for the most common denominations. The F9 Exact button uses the sale amount if the customer has exact change. The F11 Tender button rounds up to the nearest dollar amount.

## Bank Check Payment



Check Payment - Plexis Point Of Sale

<b>BEGINNING BALANCE</b> 22.94	7	8	9
<b>AMOUNT TENDED</b> 2294	4	5	6
<b>BALANCE REMAINING</b> 0.00	1	2	3
<b>CHECK INFO</b> 12345	0	F3 - CLR	ENTER
<b>D/ L or ID NO.</b> E22-66-88786543	F1 BACK	F5 EXACT	F10 ACCEPT
SHOW ALPHA PAD			

Enter the Bank Check amount to be tendered. The POS program will calculate any change or cash back due to the customer. Decimal points are not used, for example if the tendered amount is \$10.25, enter 1025. Enter the check info, such as the check number and Drivers License or ID number associated with the customer. The F9 Exact button uses the sale amount if the customer writes the check for the exact amount.

## EBT Transactions (Manual)

EBT Payment - Plexis Point Of Sale

<b>EBT BALANCE DUE</b> 0.00	7	8	9
<b>EBT AMOUNT TENDED</b> <input type="text"/>	4	5	6
<b>BALANCE REMAINING</b> 22.94	1	2	3
<b>EBT</b>	0		
		F3 CLEAR	
	F1 BACK		F10 ACCEPT

Electronic Benefits Transfer (Food Stamps) transactions will cause the POS system to break out any EBT qualified items from the sale and calculate the total price. EBT items are Tax Exempt and Redemption Value Exempt. The taxes will be reversed for these items. If there are EBT and Non-EBT items in the order then split tendering will be required.

# Pizza Restaurant Sales

**SALES REGISTER # 2**

**SALE TOTAL**  
**11.72**  
**SALE**

**VITO'S PIZZA-RAMA**

TOPPING #1

Main Menu	Toppings #2			
Anchovies	Basil Pesto	Sausage	BBQ Chicken	Black Olives
Canadian Bacon	Cheddar Cheese	Deep Dish Crust	Extra Cheese	Garlic
Mushrooms	Spinach	Tomatoes	Garlic Chicken	Garlic White Sauce
Green Olives	Green Peppers	Ground Beef	Thin Crust	Jalapeno Peppers
WHOLE	HALF #1	HALF #2		

14" LARGE PIZZA 1 8.95 T  
 VW JALAPENO PEPPERS 1 0.50 T  
 H1/ CANADIAN BACON 0.5 0.25 T  
 H1/ FRESH MUSHROOMS 0.5 0.25 T  
 H1/ EXTRA CHEESE 0.5 0.25 T  
 H2/ GARLIC WHITE SAUCE 0.5 0.25 T  
 H2/ GARLIC CHICKEN 0.5 0.25 T  
 H2/ BLACK OLIVES 0.5 0.25 T

7 8 9 OK  
 4 5 6 HLD T-O  
 1 2 3 0 CLR

NON-TAX 0.00 DISCOUNT 0.00 TTL TAX 0.77 SUBTOTAL 10.95  
 LAST TND 0.00 LAST CHG 0.00 F9 - MENUS OFF 5:02:37 PM

F1 - PAD #  
 F3 - CASH  
 F4 - CREDIT  
 F6 - PAY  
 F7 - CASE/PK  
 F8 ACTIONS  
 F10 OPTIONS

## Half & Half Pizza Topping Selection

Whole: When a half & half pizza is ordered the “Whole” button applies the topping to both sides.

Half #1: Apply toppings to the first half of the selected item.

Half #2: Apply toppings to the first half of the selected item.

### Functionality:

Selected Whole, Half #1 or Half #2 will immediately apply to the currently selected topping. If no topping has yet been selected then the next topping selected will be applied to the button choice.





### Remove a topping:

To remove a topping select from the sales screen the same topping, you will then be prompted to confirm the removal of the topping.

Half side toppings are prices at ½ of the full topping price automatically.

## Voiding Invoices

Void Unposted Invoices - Plexis Point Of Sale

				<input checked="" type="radio"/> 1 Invoice No
<b>F1 EXIT</b>	<b>F2 PRINT</b>	<b>F5 VOID</b>	<input type="text"/>	<input type="radio"/> 2 Cust No
				<input type="radio"/> 3 Company

INVNO	CUSTNO	INVDATE	DUEDATE	FNAME	LNAME	COMPANY	PHONE	TXSUB	NTXSUB	TAX	\$
▶ 100001	CASH	08/27/2003	08/27/2003	CASH	CASH	CASH COUNTER SALES	000-000-0000	24.80	0.00	0.00	


**VOIDED INVOICES**

INVNO	CUSTNO	LNAME	FNAME	COMPANY	INVDATE	BEGBAL	BALANCE	SOLDBYNAME	
▶									

This option allows voiding of invoices. Once voided the invoice cannot be recovered. All voided invoices are logged in a voided invoice register.


## End of Shift / Day Procedures

Select Customer - Plexis Point Of Sale




**LAST TEND**  
60.80  
**CHANGE**  
0.00

**ENTER NEW SALE**  
== F2 ==



F1 - EXIT



F5 - OPTIONS

ENTER PHONE NUMBER  
OR CHOOSE SALE

\_\_\_\_ - \_\_\_\_ - \_\_\_\_


7 8 9

TOUCH NUMBER


\_\_\_\_\_

**ally's**  
MARINA DELI


**Cash Drawer - Plexis Point Of Sale**




F1  
EXIT




F2  
PRINT




F3  
OPEN



F6  
Z-OUT



F7  
ZZ-OUT



**TERMINAL ID # 10**  
CLOSE OUT NOW

F10

TERMINAL TOTALS

Startup Cash	100.00	E.B.T.	0.00
Cash	98.34	Paid Outs	-5.20
Bank Checks	0.00	Change Given	1.40
Credit Cards	0.00	Cash Back	0.00
Debit Cards	18.32		
Total In Dwr	211.46		

Logged On:1 - OE/POS M.  
**5:38:48 PM**  
**Plexis Point Of Sale**

### Cash Drawer Balancing

To close the Cash Drawer first log on as a valid employee.

**Print:** Prints a Cash Drawer Tally Sheet.

**Open:** Opens the Cash Drawer.

**Z-Out:** Print the Z-Register

**ZZ-Out:** Print the ZZ-Register

**Close Out Now:** Drawer: Prints a Tally Sheet and Zeros out the drawer.

Note:

If you have configured your terminal as "Cash Register Mode Locked" the Turn in button is located on the Sales Option Screen.



## Detailed Sales Register and Z-Reports

Order Entry Main Menu - Plexis Point Of Sale

File Delivery Orders On Hold Orders End Of Day Enter Sales Invoices Sales Reports

- ZZ Register (Short) ▶
- Z-Register (Detailed) ▶
- Detailed Sales Register ▶
- Top Sellers (un-posted) ▶
- All Cash Drawers ▶
- Sales by Department ▶
- Voided Invoices ▶

F1  
EXIT

F2  
POS

F12  
DRIVERS

Plexis Point Of Sale

Various sales reports and “Snap Shots” of current activity can be printed prior to posting sales. Once the sales are posted these reports are zeroed out and will accumulate data during the next sales cycle.



## Delivery Module

Select Customer - Plexis Point Of Sale

ENTER PHONE NUMBER  
OR CHOOSE SALE

510-999-8888

7 8 9 TOUCH NUMBER

4 5 6

LAST TEND  
0.00  
CHANGE  
0.00

EN  
NEW  
== F

F1 -

Select Sale type - Plexis Point Of Sale

# 100004 OTB 1000.00

**BILL TO:**  
DODGER, ROGER  
510-999-8888  
DODGER STADIUM  
1200 HIGHLAND  
LOS ANGELES, CA  
90035

**DELIVER TO:**  
DODGER STADIUM  
1200 HIGHLAND  
LOS ANGELES, CA  
90035  
X  
GATE CODE

F1 - EXIT F2 - SALE F3 - NEW CUST F5 - CHNG DELIV F6 - DELIVERY

F5 - OI

F9 - ANSWER LINE

LINE #005 IDLE LINE #006 IDLE LINE #007 IDLE LINE #008 IDLE

04

Logged On:1 - SALLY S.  
1:23:43 PM  
Plexis Point Of Sale

If you have the optional Delivery and QA module installed, delivery orders can be taken.

Deliveries require first selecting an existing customer or entering a new customer's phone number. If the customer does not exist a new record will be created and you will be prompted to enter the delivery location information.

Enter the order as you would for any counter sale, choose the payment type and the order will be stored in the system.

## Delivery Order Recall

Select Delivery Orders - Plexis Point Of Sale

						SCAN / ENTER TAG NO. <input type="text"/>
F1 EXIT	F2 RECALL	F3 PRINT	F4 CHK OUT	F5 VOID ORD	F6 ADD ORD	

PENDING DELIVERIES								
ORDER #	PHONE	DATE	TIME	FNAME	LNAME	COMPANY	TOTAL	PAY BY
100001	323-555-8888	12/26/2003	9:28:46 AM	RHONDA	SMITH		7.51	CASH

DEPT	KITCH	ITEM	DESCRIPTION	PRODUCT	QUAN	+ - %	NET EACH	EXTPRICE	TX
----	False	DELIVERY FEE	DELIVERY FEE		1	0	2.990	2.99	Y
01	True	01234567828	FOOT LONG HOT DOG	SANDWICH	1	0	3.950	3.95	Y
01	True	102	MUSTARD	C	1	0	0.000	0.00	Y
01	True	101	KETCHUP	C	1	0	0.000	0.00	Y
01	True	106	+XTRA PICKLES, DILL	C	2	0	0.000	0.00	Y

PROCESSED DELIVERIES								
ORDER #	PHONE	DATE	TIME	FNAME	LNAME	COMPANY	TOTAL	PAY BY

To recall a delivery order, log on as a valid sales person and then select Delivery.

### Recall Order:

Recalling will allow you to Add, Edit or Delete items from the order.

### Re-Print Order:

Reprint existing order.

### Check Out:

Complete the order. (See QA and Track Driver Option)

### Void Order:

Cancel the order completely. (Sends to voided order register)

## Double Check Order (QA)

SOLD BY:SALLY -- SMITH, RHONDA 1400 HIWAY 99 WEST PALM BEACH, FL 00222 PHONE - 323-555-8888

SALLY'S MARINA DELI

**TOTAL TAX** 1.43  
**SALE TOTAL**  
18.82

SALE

F-11

F-12

1	DELIVERY FEE	2.99	T
1	AVACADO ROLLS	7.95	T
1	FOOT LONG HOT DOG	3.95	T
1	MUSTARD	0.00	T
1	KETCHUP	0.00	T
2	+ XTRA. PICKLES, DILL	0.00	T
0	- NO ONION SLICES	0.00	T
0	BIRTHDATE 01/01/1980	0.00	T
1	BEER	2.50	T

**F7  
ACTIONS**

NON-TAX  
0.00

SUBTOTAL  
17.39

DISCOUNT  
0.00

LAST TEND  
8.00




LAST CHANGE  
0.49

4:46:35 PM

The QA Module allows for you to verify that each and every item to be delivers is correct. If this option is enabled barcodes will be printed on the receipt tags and the remote printer items (kitchen). The barcodes will allow you to quickly scan a delivery tag, bring up the order and scan (or manually check off) each item in the order. Each time an item is checked it is removed from the QA screen. Once all items are double checked the order moves to the final payment screen.

# Delivery Driver Assignment






Order Tagging - Plexis Point Of Sale

 EXIT F1					 UN-TAG F2					 REFRESH F3				
<b>ORDERS READY FOR DELIVERY</b>										<b>DRIVERS</b>				
ORDER #	PHONE	LAST NAME	FIRST	COMPANY		ID	LAST NAME	FIRST						
100001	323-555-8888	SMITH	RHONDA			1	SMITH	SALLY						
						2	MANAGER LVL 9	OE/POS						
						3	MANAGER LVL 9	OE/POS						
						4	MANAGER LVL 9	OE/POS						
						5	MANAGER LVL 9	OE/POS						
<b>PENDING ORDERS</b>														
ORDER #	PHONE	LNAME	FNAME	COMPANY	ADDR1	CITY								

When the order is ready to take to the customer the Delivery Driver screen appears (if Driver Tracking is enabled). Assign an available driver to the order.

# Delivery Driver Drops

Driver Drop - Plexis Point Of Sale

 EXIT F1	 LOGIN F2	 RECALC F3	 PRINT F4	 DROP F5	ID <input type="text" value="1"/>	FNAME <input type="text" value="SALLY"/>
						LNAME <input type="text" value="SMITH"/>
<b>CASH</b>			<b>BANK</b>		<b>TOTAL</b>	
<input type="text" value="7.51"/>			<input type="text" value="20.00"/>		<input type="text" value="27.51"/>	
<b>CREDIT CARDS</b>						
<input type="text" value="0.00"/>						

The Delivery Driver logs on to the Driver Drops menu.

Tally sheets can be printed and the driver reconciles the payments received during the delivery cycle. This procedure can be used at any time during the shift and as often as needed.

## Posting Daily sales to the General Ledger

Order Entry Main Menu - Plexis Point Of Sale

File Delivery Orders On Hold Orders End Of Day Enter Sales Invoices Sales Reports

F1  
EXIT

F2  
POS

F12  
DRIVERS

**Post Daily Sales - Plexis Point Of Sale**

Select Reports to Print

- "ZZ" REPORT SHORT (On Receipt Printer)
- "Z" REPORT LONG (On Receipt Printer)
- DETAILED "Z" REPORT (On Report Printer)
- TOP SELLERS (On Report or Receipt Printer)
- DETAILED ORDER REGISTER (On Report Printer)
- SALES BY DEPARTMENT (On Report Printer)
- SALES BY DEPARTMENT (On Receipt Printer)
- VOIDES (On Report Printer)
- SETTLE CREDIT CARD TRANSACTIONS

F1 - EXIT F2 - POST

**Plexis Point Of Sale**

### Posting Reports:

Various reports are generated during the posting process. You must have a standard report printer configured.

### Posting Sales to Accounting:

In order for the accounting system to be updated sales must be posted regularly. We suggest each day at a specific time sales to be posted. This updates the G/L, A/R, Inventory, Taxes, Etc. Checking the appropriate boxes will produce various posting reports.

**Note:** Once the sales are posted some data is aggregated in totals, therefore if a particular report is not printed at the time of posting some detail data will be lost.



## General Ledger View

View General Ledger - Plexis Point Of Sale



F1  
EXIT

FIND YEAR

< 2004 >

PERIOD

01	02	03	04	05	06
07	08	09	10	11	12

09

G/L YEAR TO DATE

DATE	NTXSALES	TXSALES	ITEMS SLD	YTDEBT	REDEEM	TAX # 1	TAX # 2	TAX # 3	TOTAL TAX	GROSS	ARPMTS	YTDDISC	OPEN A/R	CO
▶ 09/19/2004	0.00	39.47	39.47	0.00	0	3.454	0.000	0.000	3.45	42.92	42.92	0.00	0.00	

G/L PERIOD TO DATE

DATE	NTXSALES	TXSALES	ITEMS SLD	PTDEBT	REDEEM	TAX # 1	TAX # 2	TAX # 3	PTD TAX	GROSS	ARPMTS	PTDDISC	OPEN A/R	CO
09/30/2004										0.00				
09/30/2004										0.00				
09/30/2004										0.00				
09/30/2004										0.00				
▶ 09/19/2004	0.00	39.47	39.47	0	0	3.454	0.000	0.000	3.45	42.92	24.60	0.00	0.00	

G/L BATCH DETAIL

BATCHDATE	NTXSALES	TXSALES	ITEMS SLD	EBT	REDEEM	TAX # 1	TAX # 2	TAX # 3	SALESTX	GROSS	ARPMTS	DISC	OPEN A/R	C
▶ 09/17/2004		16.85	16.85			1.474	0.000	0.000	1.47	18.32	18.32	0.00	0.00	
09/19/2004		22.62	22.62			1.979	0.000	0.000	1.98	24.60	24.60	0.00	0.00	

The General ledger module contains you Profit and Loss Balance sheets, Sales Tax data and other important financial information.

### G/L Year to date:

Totals for all current year periods (months).

### G/L Period to date:

Detail for all current year periods (months).

### G/L Batch Detail:

Details for each posting run in each period (month).



# General Ledger Reporting

General Ledger - Plexis Point Of Sale

File Reports Utilities

Any General Ledger Year

Current Year Reports ▶



F1  
EXIT



F2  
VIEW

## G/L Balance Sheets for any year:

G/L Reports - Plexis Point Of Sale

2005

FIND YEAR

< 2005 >

1 G/L Year       4 Sales Tax

2 G/L Period     5 Aged A/R

3 G/L Detail

Choose the any year or the current year, check any of the reports you need then select “To Screen” or “Print”.

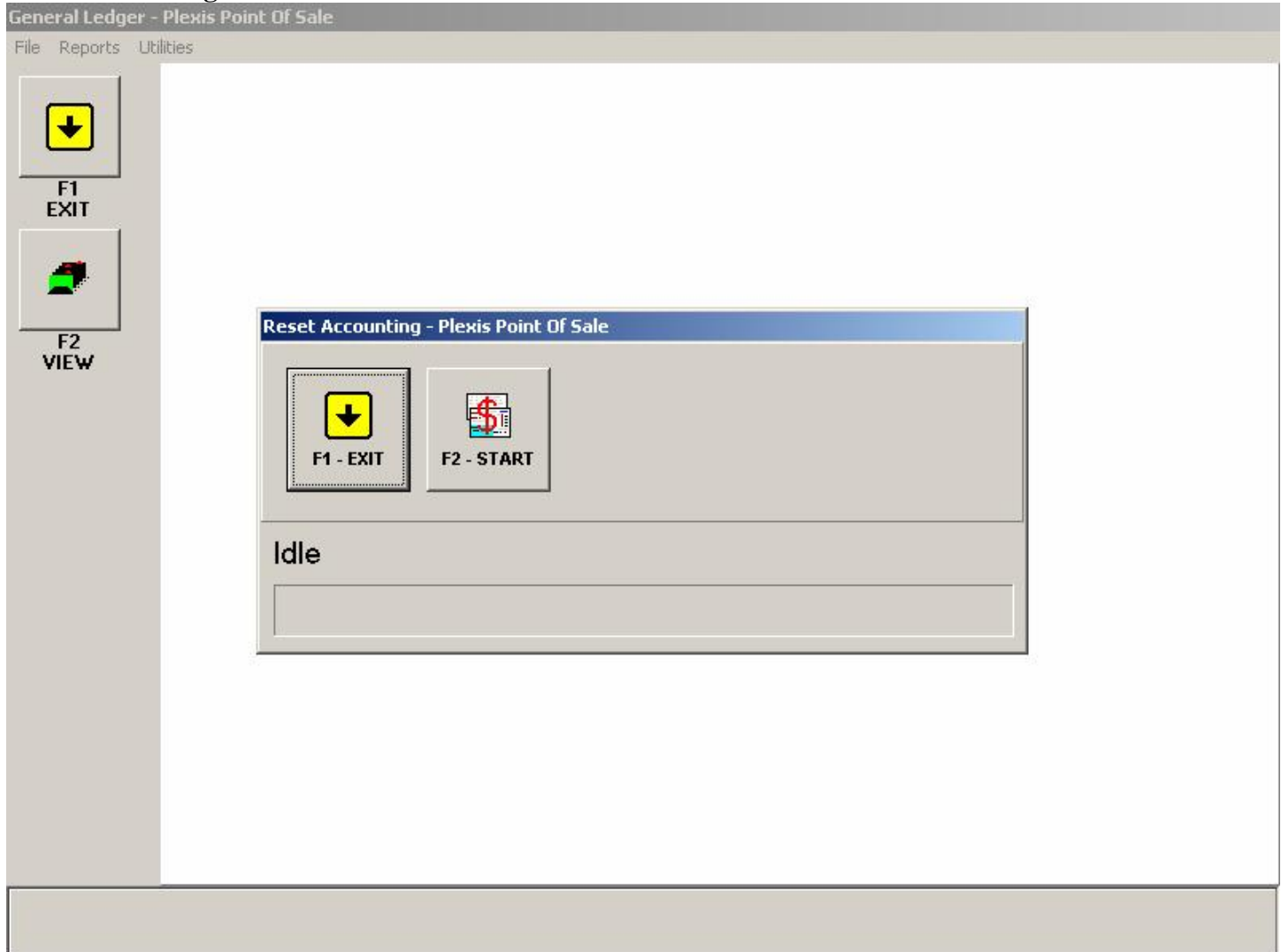
### Sales Tax Reports

The Sales Tax report gives you an up to date listing for your Sales Tax liability by Month and Year.

### Aged A/R

The Aged Accounts Receivable report produces all open account balances for all years up to a given year.

## Reset Accounting



This feature resets all accounting data to zero. Use this feature if you need to reset the accounting system after your live training or you simply want to start the accounting system from scratch. Once started the reset feature cannot be stopped or reversed. It is advisable for you to back up your data prior to using this function. Do not allow unauthorized employees access to this feature by disabling the accounting security tab for those employees.

## Accounts Receivable Module

### Accounts Receivable - Plexis Point Of Sale

File Customers Returned Checks Invoices Enter Payments Reports Statements



F1  
EXIT



F2  
CUST



F3  
INVOICES

**Customers:**

**Returned Check Register:**

**Invoices:**

**Entering Payments on Invoices:**

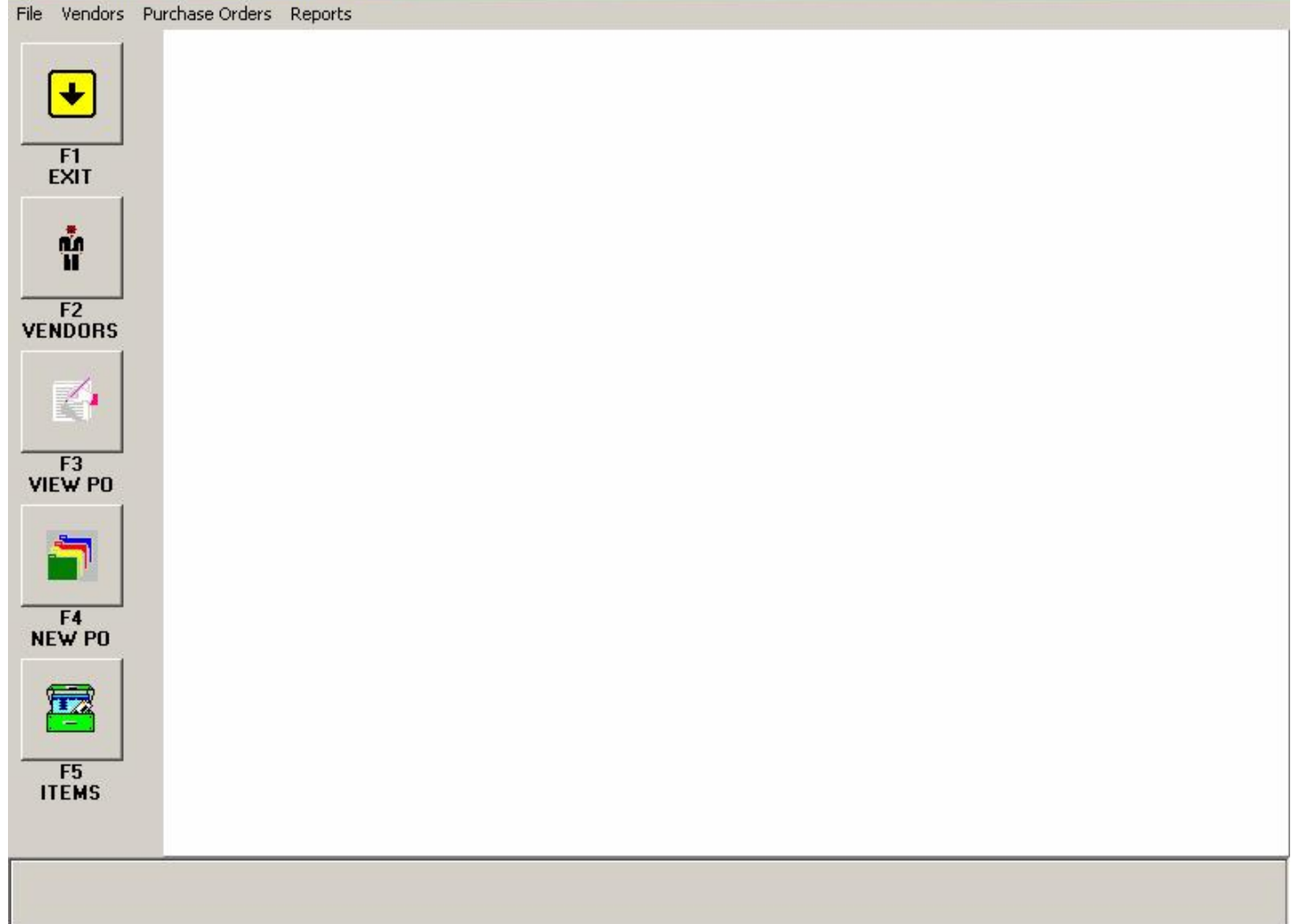
**Customer Mailing Labels:**

**A/R Reports:**

**Customer Statement Generation:**

## Purchase Order Module

### Purchasing Main Menu - Plexis Point Of Sale



#### **Vendors:**

Add/Edit Vendors

#### **View PO:**

Allows you to View / Print / Edit purchase orders.

#### **New PO:**





Create a new purchase order.

#### **Items:**

View Inventory Items.

## Edit Vendors

Edit Vendor - Plexis Point Of Sale

				<b>VENDOR / 100000</b>	
<b>F1 EXIT</b>	<b>F2 EDIT</b>	<b>F4 SAVE</b>	<b>F5 DELETE</b>		
COMPANY	<input type="text" value="WILSON BAR SUPPLY"/>	PHONE2	<input type="text" value="310-555-1212"/>	WWW	<input type="text" value="SAMS@SAMS.NET"/>
CONTACT	<input type="text" value="SAM WILSON"/>	FAX	<input type="text" value="310-555-1212"/>	E-MAIL	<input type="text" value="SAM@WILSONSUPPL"/>
TITLE	<input type="text" value="OWNER"/>	TERMS CODE	<input type="text" value="1"/>	CUST SERVICE	<input type="text" value="310-555-1212"/>
ADDR1	<input type="text" value="1234 HI HO ROAD"/>	TERMS DESCRIP	<input type="text" value="NET 10 DAYS"/>	TAXCODE	<input type="text" value="0"/>
ADDR2	<input type="text" value="UNIT 2100"/>	LIMIT	<input type="text" value="5000.00"/>	<input type="checkbox"/> TAX DUE TO VENDOR	
ZIP	<input type="text" value="90035"/>	BAL	<input type="text" value="0.00"/>		
CITY	<input type="text" value="LOS ANGELES"/>	TAX ID #	<input type="text" value="123-45678-00"/>		
STATE	<input type="text" value="CA"/>	PTDQTY	<input type="text" value="100"/>		
PHONE1	<input type="text" value="310-555-1212"/>	YTDQTY	<input type="text" value="500"/>		
		LDATE	<input type="text" value="12/29/2003"/>		

This option allows for the modification of the vendor record.



## Create New Purchase Order

Create New Purchase Order - Plexis Point Of Sale

100000      WILSON BAR SUPPLY      1234 HI HO ROAD  
 SAM WILSON                      LOS ANGELES,CA  
 310-555-1212                      90035

ON DOCK BY

AUTO EDIT ITEMS

02/28/2004

USE REORDER QTYS

ENTER ITEM

ITEMNO	VENDITEM	DESCRIP	PRODUCT	CUSTOM	QTYORD	COST	EXT COST	TX
01234567813	AJ-123	CHEESE CAKE	DESERTS		10.00	3.500	35.00	N
101		KETCHUP	C		48.00	1.590	76.32	N
200		WHEAT BREAD	B		24.00	1.250	30.00	N

TAXABLE	NON-TAX	SUBTOTAL	SALES TAX	TOTAL
0.00	141.32	141.32	0.00	141.32

**FINALIZE    FIND ITEM    COMMENT    NONSTOCK    EDIT    ADD ITEM    DLT ITEM    \*\*\*    TAX    CANCEL**

F1      F2      F3      F4      F5      F6      F7      F8      F9      F10

### Adding Items to a new purchase order:

This operation is similar to entering a sale. Add items, quantities and costs to the new PO.

## Viewing Open Purchase Orders:

View Purchase Orders - Plexis Point Of Sale

					<input type="text" value="FIND IT"/>	<input checked="" type="radio"/> 1. P.O. No <input type="radio"/> 2. Vendor No <input type="radio"/> 3. Company <input type="radio"/> 4. Phone No	SORT OPTIONS <input checked="" type="radio"/> 6 Open P.O. <input type="radio"/> 7 Closed P.O.
F1 EXIT	F2 PRINT	F3 RECEIVE	F4 EDIT	F5 DELETE	<input type="checkbox"/> Cancelled PO's		

### PURCHASE ORDERS


PO NO	VENDNO	VEND INV #	COMPANY	PHONE	PODATE	BALANCE	ORDBY	LASTDATE
▶ 100001	100000		WILSON BAR SUPPLY	310-555-1212	12/29/2003	287.60	1	

### P.O. DETAIL


ORD	REC	DUE	ITEM	DESCRIPTION	COST	LIST	EXTENDED	TX	LAST ACT
▶ 100	0	100	000	NAVEL ORAGES	0.45	1.00	45.00	N	
250	0	250	200	WHEAT BREAD	0.50	0.00	125.00	N	
48	0	48	01234567813	CHEESE CAKE	2.45	5.95	117.60	N	

## Label / Shelf Tag Printing Module


Price and Barcode Labels - Plexis Point Of Sale




F1  
EXIT



F2  
PRINT



F3  
PDT-UL



SORT BY

1 UPC


2 DESC

3 DEPT

SELECT ITEMS TO PRINT

5 BY RANGE Start

6 PICK ITEM End



LABEL TYPE

1 5260 1x2 5/8 (30 Count)

2 5267 1/2x1 3/4 (80 Count)

3 1.00" x 2.00" (40 Count)

OUTPUT OPTIONS

PREVIEW MODE

ADD BAR CODE

QUANTITIES OF EACH LABEL

USE ON HAND QTYS

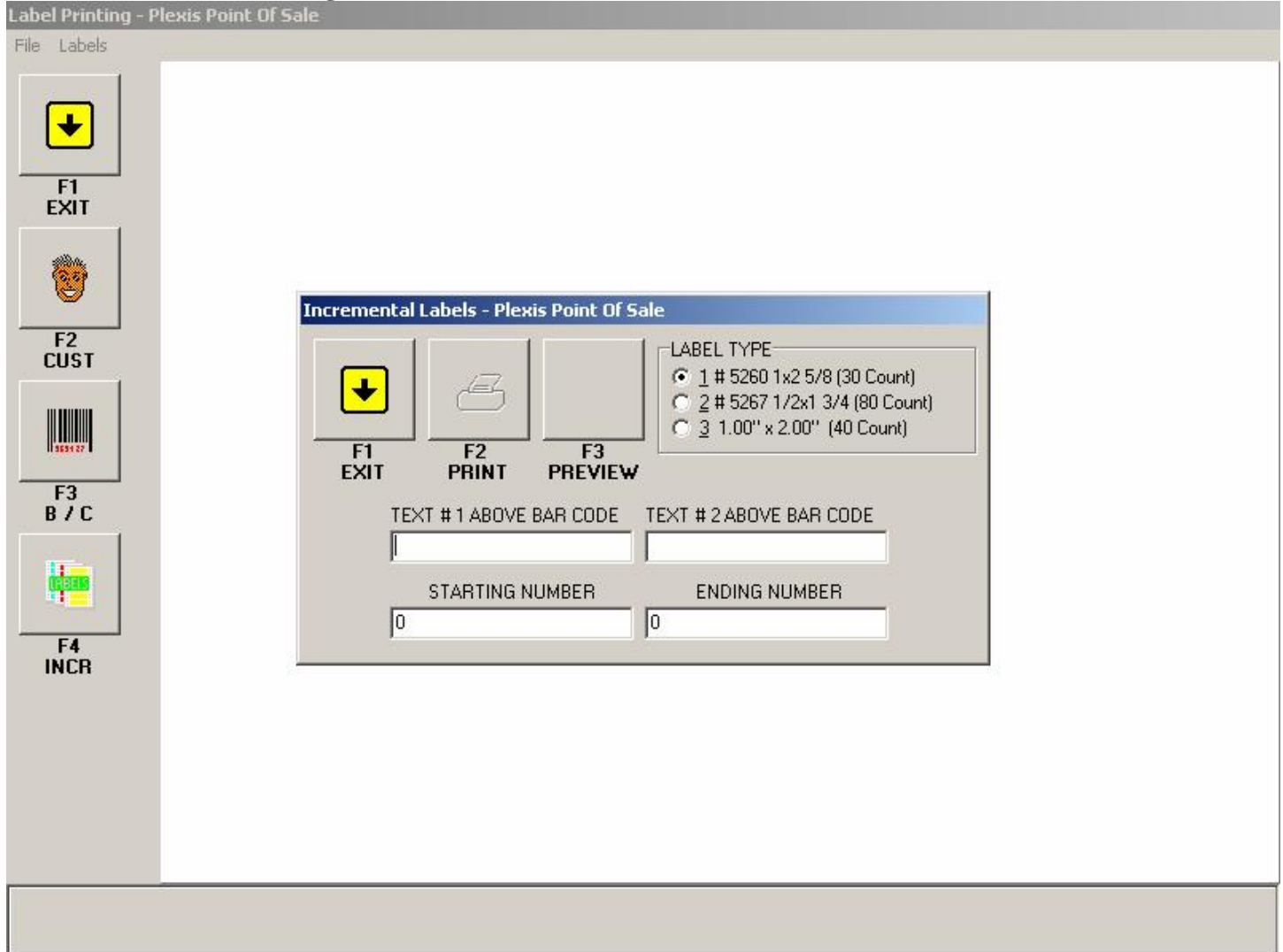
SPECIFY

Total To Print

0

This module allows for the printing of Shelf Tags and Barcode Labels. You can select a range or individual items to print. The POS program allows for several popular choices on label size.




# Incremental Label Printing



Use this option to print a sequential range of labels. This is option is useful when printing serialized items.

## Customer Address Labels

Customer Address Labels - Plexis Point Of Sale



1. PHONE  
 2. COMPANY  
 3. LAST NAME

Enter Output Range

Start

End

AVERY LABEL TYPE

# 5260 1x2 5/8 (30 Count)  6. POST NET

PHONE1	COMPANY	FNAME	LNAME	ADDR1	CITY	ST	ZIP
000-000-0000	CASH COUNTER SA	CASH	CASH	1234 VIA MARINA	MARINA DEL REY	CA	90292
310-555-1212		SAM	PUBLIC				
323-555-8888		RHONDA	SMITH	1400 HIWAY 99	WEST PALM BEACH	FL	00222
510-999-8888	DODGER STADIUM	ROGER	DODGER	1200 HIGHLAND	LOS ANGELES	CA	90035

This option allows for the printing of customer address labels. USA Post net barcodes are supported.

## Zip Code Database

The screenshot displays the 'View Zip / Postal Codes - Plexis Point Of Sale' window. At the top, the main menu shows 'Main Menu - Plexis Point Of Sale' with a menu bar containing 'File', 'Modules', 'Setups', and 'Help'. Below this, the user information is displayed as 'ID # 1 : ADMINISTRATOR LEVEL' and 'SALLY'S MARINA DELI'. The window features a toolbar with four function buttons: 'F1 EXIT' (down arrow), 'F2 DETAIL' (magnifying glass), 'F3 ADD' (plus sign), and 'F4 PRINT' (printer icon). To the right of these buttons is a 'FIND IT' button and a search input field. Below the search field are three radio buttons for search criteria: '1 ZIP / POSTAL CODE' (selected), '2 CITY', and '3 STATE / PROVINCE'. The main area of the window contains a table with the following data:

ZIP	CITY	STATE	COUNT	LDATE
00222	WEST PALM BEACH	FL		
90035	LOS ANGELES	CA		

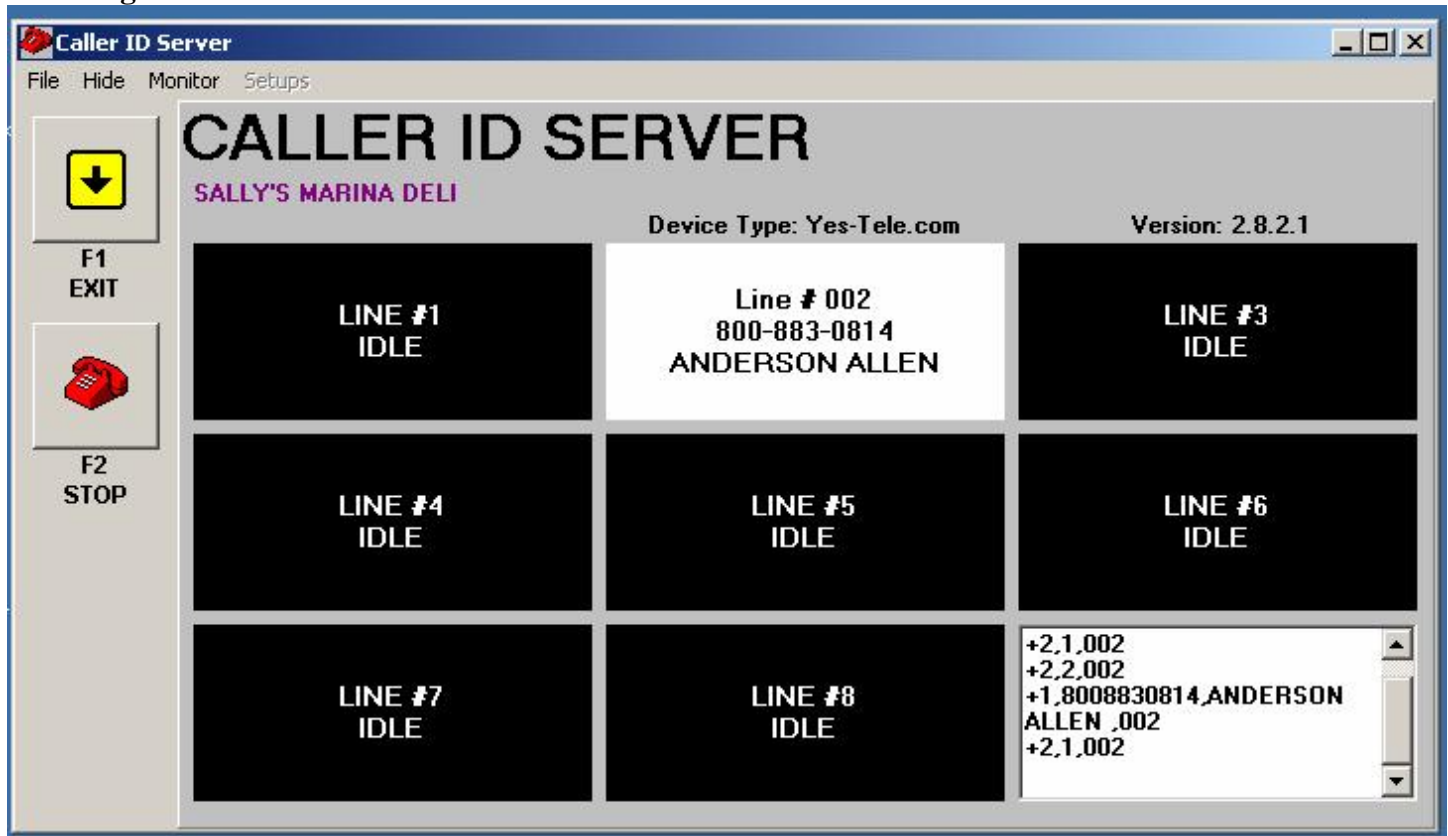
At the bottom of the window, there is an 'F6 SELECT' button and a text field containing 'NOT SET UP'. The version number 'Version: 2.8.5.3' is displayed in the bottom left corner. The bottom of the screen features a blue banner with 'Plexis Point Of Sale' and a red 'NOT REGISTERED' watermark.

### Automatic Zip Code System:

The POS program will store the Zip / Postal code, City and State for later use. This feature allows for the quick entry of Customer and Vendor addresses. The Zip Code database can be edited at any time.



## Installing the Caller ID Server Module



The Caller ID Server can be installed on a Single Computer or Network Server. Hardware required to run the Caller ID Server must be physically connected to the machine that the software is running on. The Caller ID Server software requires that you purchase compatible hardware designed for use with this module. Please contact your reseller for more information.

### Monitor:

Places the Caller ID Server software in a polling mode that checks the telephone lines for caller activity.

### Setups:

Device Type: Selects the make and model of your Caller ID hardware.

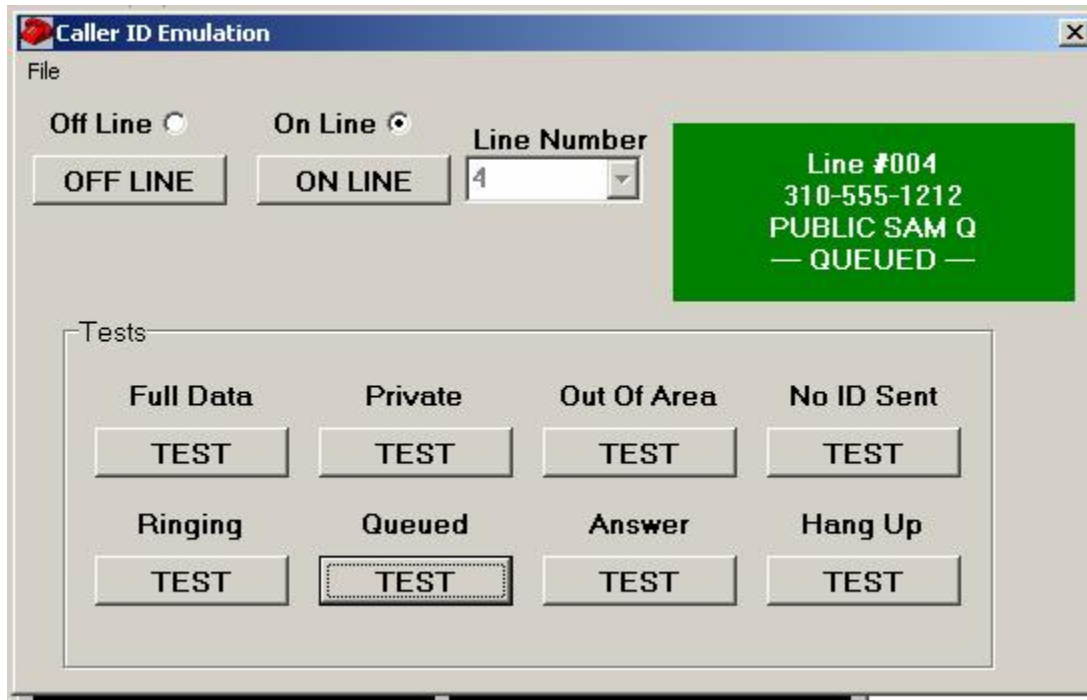
Communication Settings: The port and baud rate of your Caller ID hardware.

Diagnostics: Test your hardware and software.

Reset Device: Resets your Caller ID hardware to factory defaults.

Emulator: Simulate an installed Caller ID controller.

## Caller ID Simulation



Use this module to test the Caller ID Server with your POS Application. Setup the POS application as though you have installed Caller ID hardware. Use this emulator to test the behavior of the POS application under calling conditions. This module can be used on a stand-alone system or on a network. The emulator is useful for both testing and training purposes.

## Caller ID Diagnostics

The screenshot shows a software window titled "Caller ID Test" with a menu bar containing "File" and "Settings". Below the menu bar, there are two buttons: a yellow button with a downward arrow labeled "EXIT" (F1) and a blue button labeled "STOP" (F2). To the right of these buttons, the text "Device Type: Yes-Tele.com" is displayed. The main area of the window is divided into two columns. The left column is titled "CONVERTED CALLER ID DATA" and contains a table with two columns: "Line # 004" and "800-883-0814". Below this, the name "ANDERSON ALLEN" is displayed. The right column is titled "UN-FILTERED DATA RECEIVED" and contains a list of data entries. The data in the left column is as follows:

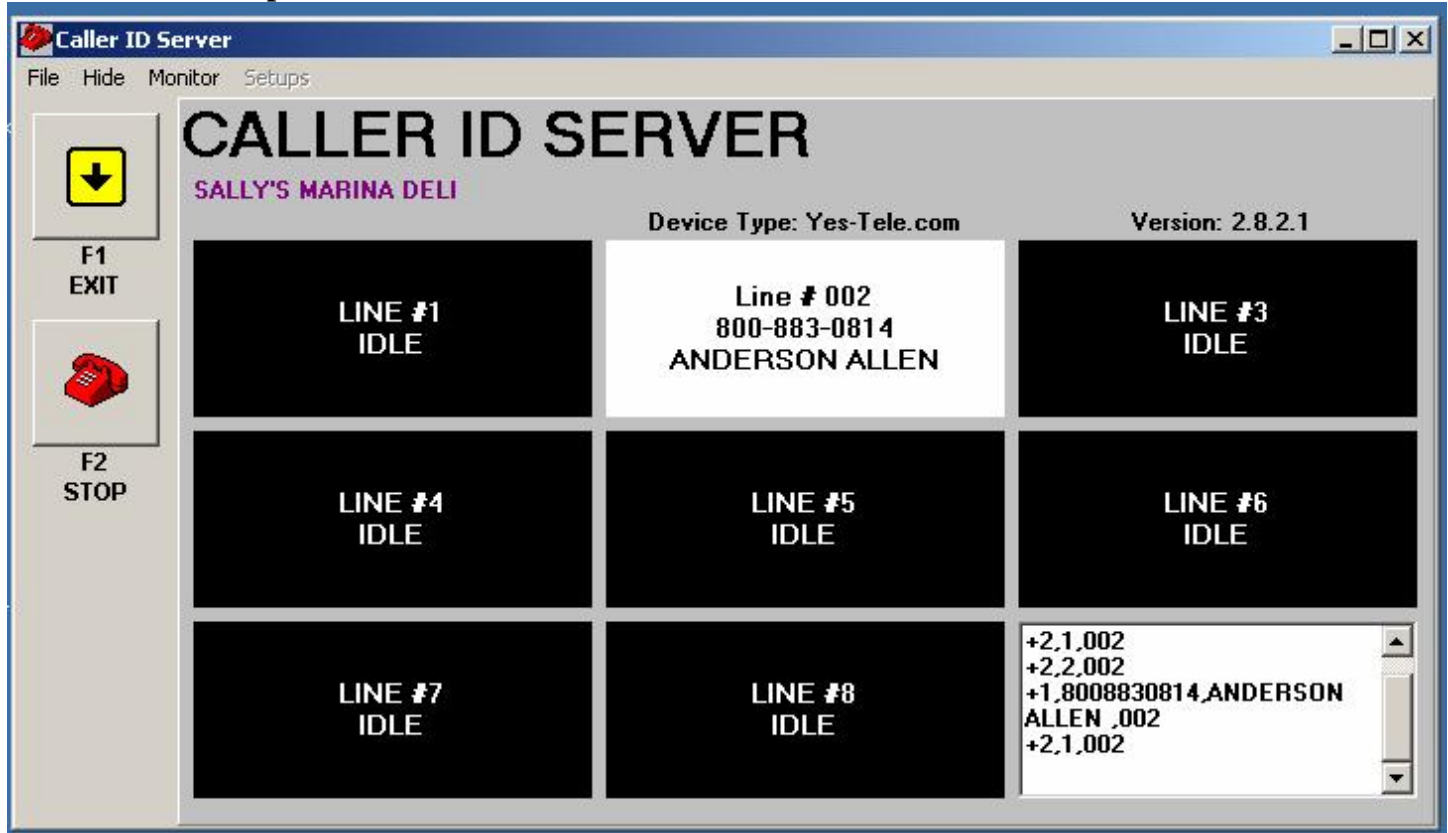
Line #	Number
004	800-883-0814

The data in the right column is as follows:

- +3,2,4440115,01
- +2,1,004
- +2,2,004
- +1,8008830814,ANDERSON ALLEN ,004
- +2,1,004
- +2,2,004

Provides data for troubleshooting your Caller ID system.

## Caller ID Server Operation



**Monitor:** Poll Caller ID data from incoming lines.

**Stop:** Shut down the Caller ID Polling Monitor.

**Hide:** Send the Caller ID Server to the system tray. Note: **RIGHT** mouse click over the icon to display a menu choice. Double click the icon to restore to the screen.

In order to for the Caller ID Software to operate you must specify a working company folder at the command line.

The format is: Application Folder | Program Name | Active Company Folder

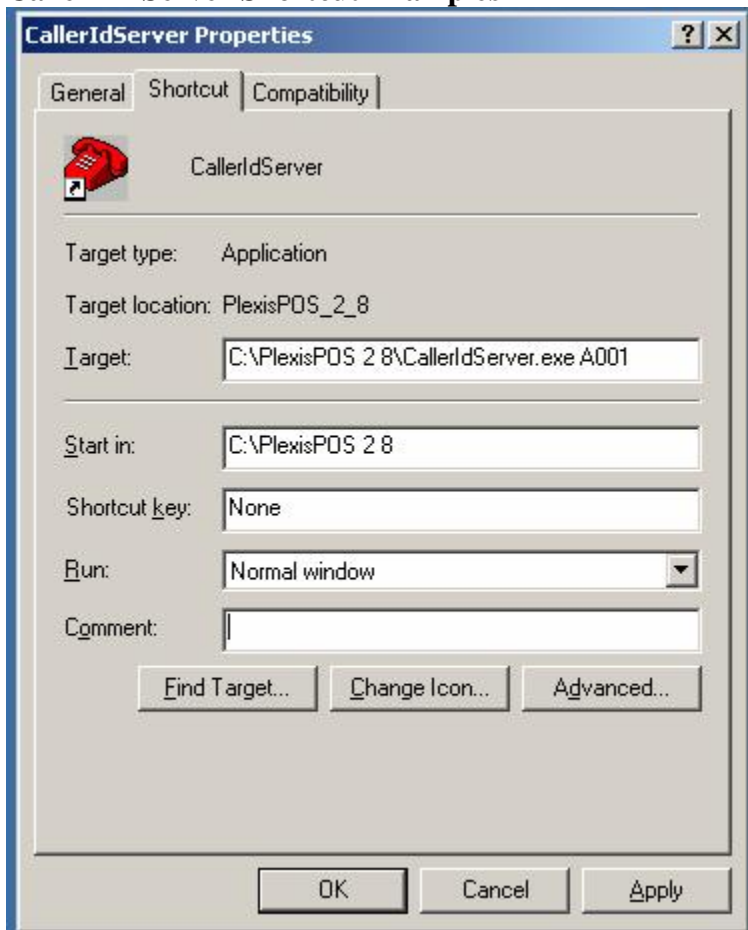
Example #1: c:\PlexisPOS 2 8\CallerIdServer.exe A001

To Auto start and send the Caller ID Server to the system tray enter the following commands:

Example #2: c:\PlexisPOS 2 8\CallerIdServer.exe A001 AUTOSTART

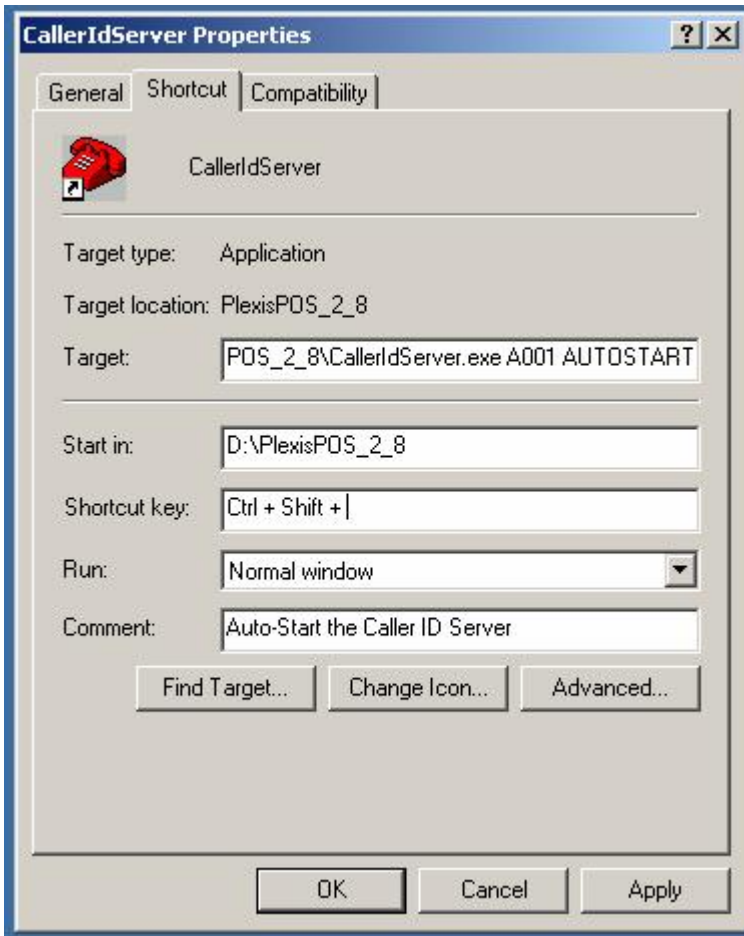
All commands must be separated by spaces.

## Caller ID Server Shortcut Examples



This example shows how to assign a working company folder to the Caller ID Servers command line.

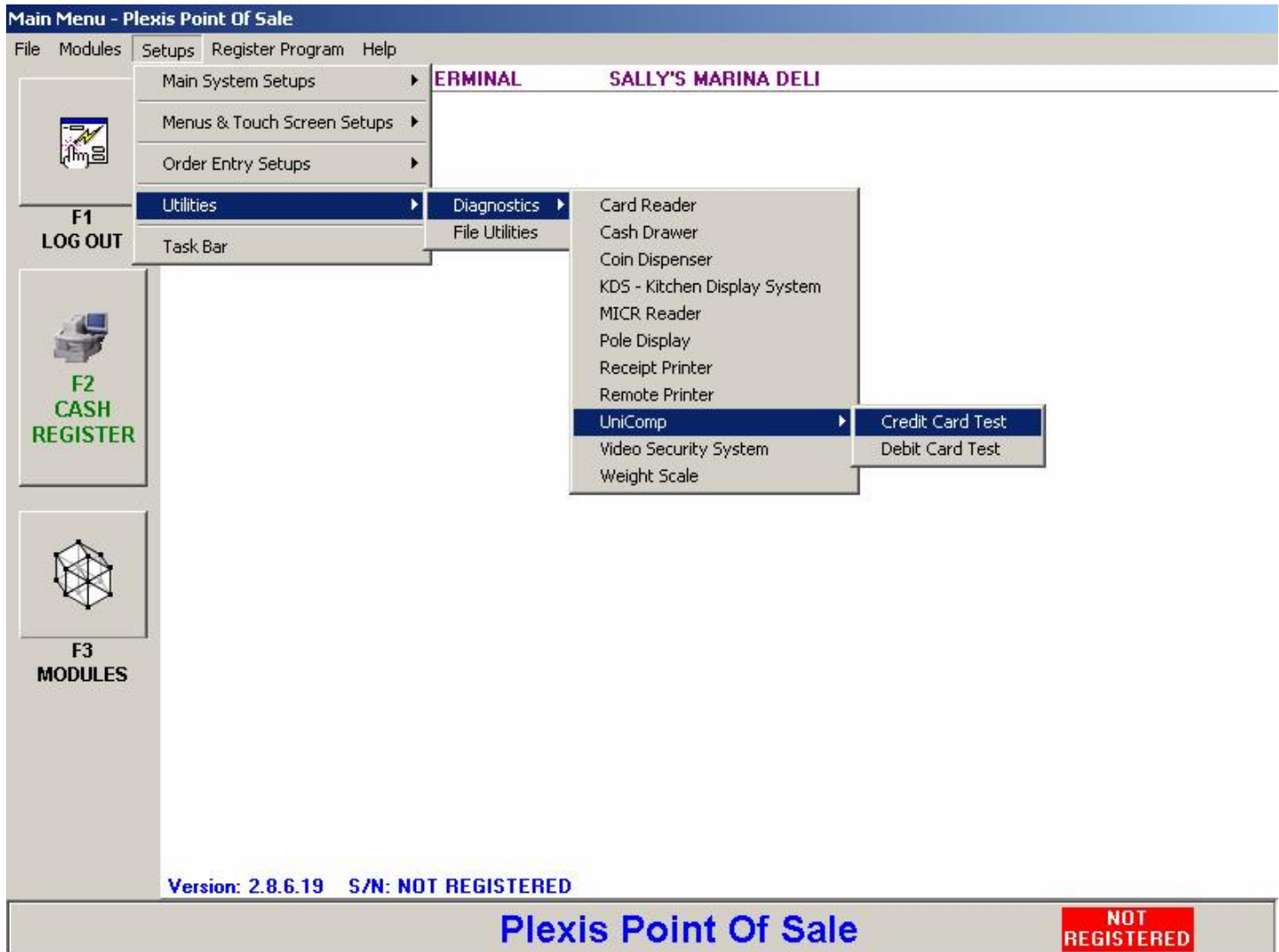
## Caller ID Shortcut with Auto-Start





## Integrated Credit Card Processing:

From the UniComp.com web site you can download the latest version of the UniComp Credit Processing software. This Credit processing software is a fully functional demo program. You can test it by placing a Credit Card payment under \$10.00. Amounts over \$10.00 can be tested as well, which will produce a “Decline”. The Demo does NOT actually process any payments until you register with UniComp. After installing and configuring the UniComp software you may test it using the POS program diagnostic.



### Pre-requisites:

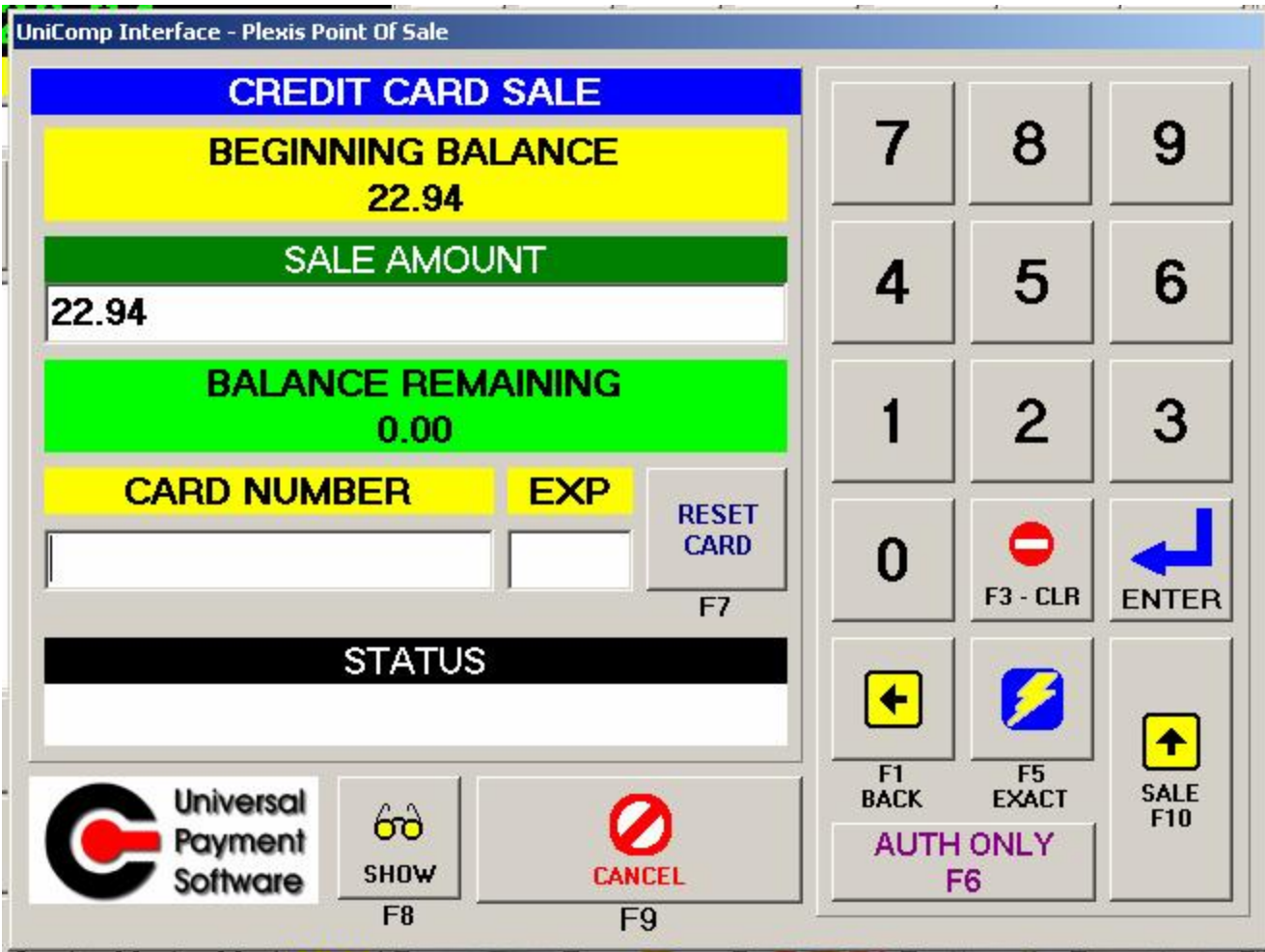
The UniComp Cambire must be properly configured and running when performing these tests.

### Credit Card Payments (UniComp Integration)

UniComp / Cambire integration has been suspended and is not currently available.

The following information is provided as backup information only.


This feature may be resumed in the future.



The Credit Card amount will automatically be filled in for you. Swipe the card or enter the card number and expiration date. The F8 Show button un-masks the card number so you can see all digits entered. The F7 Reset Card button will clear the card number and expiration date. The F9 Cancel button returns you back to the payment selection screen. Choose Sale to process the card. If the customer has added a tip choose Auth Only. If Auth Only was used then you will need to manually close that sale in the credit card processing software during your end of day procedures. Contact UniComp or your Merchant Account provider for details on this process.

## Debit Card Payment (UniComp Integration)

Debit Card Payment - Plexis Point Of Sale






<b>DEBIT CARD SALE</b>			
<b>BEGINNING BALANCE</b> 22.94			
<b>SALE AMOUNT</b> 2294			
<b>BALANCE REMAINING</b> 0.00			
<b>CASH BACK</b>			
\$ 20 F2	\$ 40 F4	\$ 60 F6	OTHER F8
Idle			
 Universal Payment Software		CANCEL F9 - CANCEL	


7	8	9
4	5	6
1	2	3
0	CLEAR	ENTER
F1 BACK	F5 EXACT	F10 ACCEPT

The Debit Card amount will automatically be filled in for you. Swipe the card or enter the card number and expiration date. Quick Cash Back buttons are provided for the most common denominations. A Customer PIN is required for debit card transactions.

### EBT Card Payment (UniComp Integration)

EBT Card Payment - Plexis Point Of Sale

<b>EBT CARD SALE</b>	7	8	9
<b>BEGINNING BALANCE</b> 7.77	4	5	6
<b>AMOUNT PAID</b> 	1	2	3
<b>BALANCE REMAINING</b> 7.77	0		
<b>STATUS</b> 			

 **Universal Payment Software**

**CANCEL**  
F9 - CANCEL

F1 BACK      F5 EXACT      F10 ACCEPT

The EBT Card amount will automatically be filled in for you. Swipe the card or enter the card number and expiration date. A Customer PIN is required for EBT card transactions.

## UniComp Configuration

**Cambire Parameters**

COM Options:

Modem 1: **Generic 56K HCF Data Fax Modem** COM3 Options

Modem 2: Options

Modem 3: Options

UPA Pollit Port: Baud Rate:

Port: Baud Rate: Dial Parameters

Switches

<input checked="" type="checkbox"/> Display Status	<input type="checkbox"/> Delay Authinfo Writes	<input type="checkbox"/> Auto Capture Trans
<input checked="" type="checkbox"/> Display Status Detail	<input type="checkbox"/> Virtual Authinfo File	<input type="checkbox"/> Startup Window
<input checked="" type="checkbox"/> Log Status	<input type="checkbox"/> Authinfo File Diagnostics	<input type="checkbox"/> Restore Window Password
<input checked="" type="checkbox"/> TAPI Modem Detail	<input type="checkbox"/> Dynamic Terminal IDs	
<input type="checkbox"/> Display Auth Socket Detail	<input type="checkbox"/> Reverse Unacked Authorizations	Terminals: 10

Max Diagnostics Restore Password Starting Term: 0

OK Cancel Font

Select and set in Cambire engine: Parameters, Cambire, Terminals = 10 and Starting Term = 0.

## UniComp Pin Pad Installation:

Pin Pads supported are the VeriFone Pin Pad 1000 and Pin Pad 2000 only.

The screenshot shows a 'Device Parameters' dialog box with the following settings:

- Card Reader:** Card Reader Type: None
- Receipt Printer:** Printer Type: None, Printer Port: (empty), Printer Baud Rate: (empty)
- Pin Pad:** Pin Pad Type: Verifone 301, Pin Pad Port: COM1
- Check Reader:** Check Reader Type: None, Check Reader Port: NONE, Check Reader Baud Rate: (empty)
- Check RDR and MSR, Format Code: (empty)

Select and set in Cambire engine: Parameters, Devices.

If installing a VeriFone Pin Pad 1000 or 2000 configure the Cambire engine to Pin Pad Type = VeriFone 301. After making changes to the Cambire configuration, Shutdown Cambire, shutdown the POS system, restart Cambire then restart the POS system.

If you have detailed questions regarding the Cambire Engine or Cambire Auth, contact UniComp directly.

UniComp  
220 Continuum Drive  
Fletcher, North Carolina 28732  
Telephone: 1-800-526-5999  
Fax: 828-684-3474

## **Technical Support Updates and Upgrades**

We are constantly improving this program. The Plexis POS Web Site contains any additional information that was not available at the time this guide was published. Please

Visit <http://www.PlexisPOS.com>

## **Support ON-LINE**

You may reach us on line at [www.PlexisPOS.com](http://www.PlexisPOS.com)

## **Support By Phone**

Telephone support contracts are available. Please visit [www.PlexisPOS.com](http://www.PlexisPOS.com) for more information.

## **System Serial Number and Version Number**

You **MUST** provide the system serial number when making any inquiries regarding this program. Without the system serial number we cannot provide you with support. Messages by E-MAIL, phone, FAX or mail will not be responded to without your serial number. The serial number is displayed on the opening screen of this program and in the ABOUT Box.

### **Note:**

Plexis Software Systems does not sell or support computer systems, networks POS Peripherals or any other hardware. We can provide support for our software applications only. Please do not ask our support staff for help regarding hardware problems, as they are not equipped to answer these types of inquiries. It is your responsibility to properly install and maintain your own computer system.

## **Customization**

Plexis Software Systems provides customization of this program at an additional charge. If you require special functions not supported in the production version we can make changes for you to fit your purpose.



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### **Manufacturer:**

**Plexis Software Systems**

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