

GET STARTED GUIDE

Step 1: Enter Employees

Go to Point of Success Office > Select Staff > Add New Staff Member

Enter information on the Name and Address tab and the Position 1 tab. Make sure to enter information for additional positions if applicable.

Note: when entering staff names, make sure to use UPPER CASE for the first letter of the name and lower case for the rest of the name. For example, do not type "jane doe," instead type "Jane Doe."

Once staff is entered, go to Tools > Company Information > Personal Identification Numbers.

To use Fingerprint Login, select "Register Fingerprint" and follow instructions.

To use scan cards, click in the "Employee PIN" field and swipe the card through the MSR card reader.

To use login numbers, enter a number in the "Employee PIN" field.

GET STARTED GUIDE

Step 2: Enter Discounts

Go to Point of Success Office >
Tools > Payment and Tender Set
Up > Discounts

Select "Add new Discount" and
enter information in the Discount
Entry screen. Make sure to read
through each option on the Dis-
count Entry screen and select/
enter information accordingly.

Discount List		
	Code	Description
<p>Add new discount...</p> <p>Edit this discount...</p> <p>Delete this discount</p> <p>Find discount</p> <p>Customize View...</p>	12"EMPLOYE	12" Employee Pizza
	14"EMPLOYE	14" Employee Pizza
	16"EMPLOYE	16" Employee Pizza
	2MED3TOP	19.99 Two 12" 3 Topping
	YOU&KIDS	23.99 12"Gourmet14"Pepperoni
	2LARGE2TOP	24.99 Two 14" 2 Topping
	25%OFF	25% OFF 2nd Pizza
	FAMFEAST	28.99 14", Wings, Ssalad, soda
	40%OFF	40%OFF
	50%OFF	50%OFF
	DELVRY	Free Delivery - \$\$

Discount Entry

Code:

Description:

Discount Type

Any Product Quantity

Specific Product Combination

Any product can receive the discount

Amount Is

A Percent Amount:

Dollars Off Each Item

Dollars Off All Items

A Target Price Ask Amount

Purchase Minimum:

Limit: Service Type:

Show this discount on selection list

This discount cannot be combined with any other discount

Discount Entry - Dates and Times

Set the dates, times and day of the week when this discount applies.

Dates This Discount Begins and Expires

Start Date:

End Date:

Note: If this discount never ends, leave the End Date blank.

Time of Day When This Discount Is Active

Start Time:

End Time:

Note: Blank times indicate that this discount is available all day

Discount Applies on Days of the Week

Sunday Thursday

Monday Friday

Tuesday Saturday

Wednesday

Help Save Cancel

GET STARTED GUIDE

Step 3: Enter Sales Tax

Go to Point of Success Office > Tools > Accounting and Business Information > Sales Tax

Enter tax rates for location. If deliveries are done in a destination-based sales tax state, it is important to enter tax rates for each delivery location. For more information on destination-based sales tax, check out your state's Department of Revenue.

Product Type and Sales Tax Setup

Product Types

- Product Charge, inventory
- Product Charge, non-tax
- Service Charge
- Service Contract
- Finance Charge
- Shipping Charge
- Alcoholic Beverage
- Product, Always Taxed
- Delivery Charge
- Comment

Location 1 | Location 2 | Location 3 | Location 4 | Location 5

Description: 98252 Granite Falls 3107 - 8.6%

	Tax Rate	
WA State:	8.6	%
Tax 2:		%
Tax 3:		%
Total Tax Rate:	8.6	%

Always charge sales tax for this product type. This will override the Service Type tax setting.

This type is included when counting inventory.

Optional Tax Methods (cannot be used in combination)

Price Includes Tax
Note: Will recalculate the price for every item, according to the tax amount.

Dual Rate Tax (Ontario - applies to all Product Types)

	Minimum Taxable Amount	Minimum Tax Percent
WA State:		%
Tax 2:		%
Tax 3:		%

Use Bracket-style Tax (Maryland - applies to all Product Types)
Note: Fractional cents will be rounded up to the next cent.

Choose which tax to use:

No tax on orders totaling less than \$0.00

For orders totaling \$0.00 charge \$0.00 sales tax

For orders over the above amount use % sales tax

Set Product Type Description | Set Tax Names | Help | Close

GET STARTED GUIDE

Step 4: Open Business

Go to Point of Success Order Program
> Manager > Tills and Banks

Select New , click on Opening Cash
button and enter the opening amount
of money for the corresponding till.

Click on the Staff button and select
the employee to assign.

For locations with more than one cash
drawer, select appropriate cash draw-
er number.

Add any additional tills, driver banks
or server banks as needed.

New Till

Open:

Opening Cash:

Staff:

Cash Drawer:

You are  for business!

GET STARTED GUIDE

Step 5: Close Business Day

Ensure all tickets are closed. Go to View Tickets and close any tickets that are open.

Go to Point of Success Order Program > Manager > Tills and Banks

Select till to close from tills and banks list. Select “Close” and confirm.

A Till Reconciliation report will print—staff turns in amount based on report.

Select till and select “Reconcile.”

Choose Balanced, Over or Short depending on the amount turned in with the till.

Reconcile Till 6683 for Ryan Cornell

Till is: **Balanced** Over Short

By the amount of: \$0.00

OK Cancel

If you have any questions or concerns, call us at 877.767.3430, option 1