

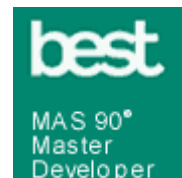


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Point Of Sale / Fast Sale For MAS 90/200

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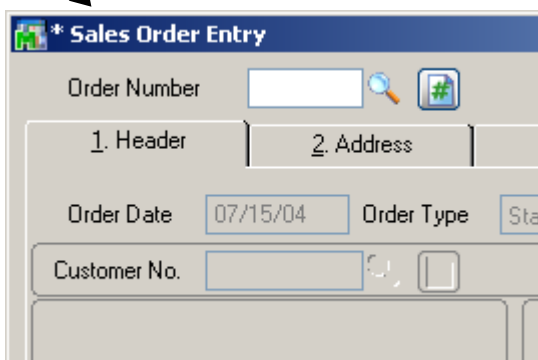
Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.



An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

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

Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Products Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.00	07/19/04	AAAAAAAAAAAAAAAAAA	BBBBBB

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

IIG Registration Form can be printed by using the **Print Registration Form** button.

Introduction

IIG's Point Of Sale/Fast Sale Enhancement allows user to conduct more streamlined sales transactions at working locations. Specific improvements allow quicker invoice transactions. Integration with IIG's Credit Card Processing allows fuller functionality and a wider range of payment and credit options.

Fast Sale Data Entry

Select the **IIG Fast Sale Entry** program under the **Sales Order Main** menu.

In this screen, the standard Sales Order/Invoice fields are rearranged to simplify data entry.

Some of the entry fields, which were originally on the **Header** tab of the **Invoice Data Entry** screen, are located at the top of the **Fast Sale Data Entry** screen.

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

Click the **Next Invoice No.** button to start new invoice, or select an existing Invoice Number using the **Lookup** button. If the selected Invoice refers to a Sales Order, the Sales Order Number is displayed in the **S/O No.** field, which is display-only.

If entering a new invoice, select **Customer**. Now the **Lines** tab is available for entering items. The **Lines** tab is identical to standard **Invoice Data Entry Lines** tab.

After filling out the information on the **Lines** tab, go to the **Totals** tab and Accept the invoice. Necessary changes can be made on the **Header** and **Addresses** tabs, too.

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

Default Values for Fast Sale Data Entry

Before selecting the **Invoice Number** on the **Fast Sale Data Entry**, click the **Defaults...** button (at the bottom of the Fast Sale Data Entry screen).

The screenshot displays the 'Fast Sale Data Entry' application window. At the top, there are input fields for 'Invoice No.', 'Date' (set to 11/09/04), 'Type' (Standard Invoice), and 'User ID'. Below these are fields for 'S/O No.', 'Customer No.', and 'Salesperson'. A set of tabs includes '1. Lines', '2. Totals', '3. Header', and '4. Addresses'. The main data entry area contains fields for 'Item / Kit Number', 'Description', 'Disc %' (0.00%), 'Whse', 'PL', 'U/M', 'Ordered' (0.00), 'Shipped' (0.00), 'Back Ordered' (0.00), 'Unit Price' (.000), and 'Extension' (.00). There are also checkboxes for 'DC', 'DS', and 'CM', and buttons for 'OK', 'Undo', and 'Add...'. A table below has columns for 'Line', 'Item Number', 'Whse', 'PL', 'U/M', 'Description', 'Ordered', 'Shipped', 'Back Ordered', 'Unit Price', 'DC', 'DS', 'CM', 'Disc %', and 'Extension'. At the bottom of the window, there are buttons for 'Quick Print...', 'Defaults...', 'Customer...', 'Credit...', 'Accept', 'Cancel', and 'Delete'. A status bar at the bottom right shows 'IIG ABC 11/9/04'.

The **Default Values for Fast Sale Data Entry** screen allows for entry of the default values to speed up the entry of invoices. Several fields can be defaulted to these values, so that the user will not enter them repeatedly for each new invoice.

Next Invoice No.

Invoice Date Print Invoices

Invoice Type Bypass Print (Y/N) prompt

Ship Date

Ship Via

FOB

Warehouse EAST WAREHOUSE

Sales Tax Schedule

Fast Sale Screen Display?

Auto default quantity ordered to 1

Auto increment invoice number

Process Sales Orders

Force for full payment

Cash Customer

Replace Customer's Default Salesperson?

User ID

The **Next Invoice No.** field displays the number to be assigned to the next invoice by clicking the corresponding button on the **Fast Sale Data Entry** screen.

The **Invoice Date**, **Invoice Type**, **Ship Date**, **Ship Via**, **FOB**, and **Warehouse** fields are similar to standard Invoice Data Entry.

The **Sales Tax Schedule** is the current Point of Sale tax schedule. Entry in this field, if any, will overwrite the customer's tax schedule.

Check the **Fast Sales Screen Display** box to simplify the look of the **Lines** tab. Only the most useful fields, necessary for lines entry, will be displayed.

Check the **Auto default quantity ordered to 1** box to automatically fill in the single quantity, pricing, and accept line when an item is selected.

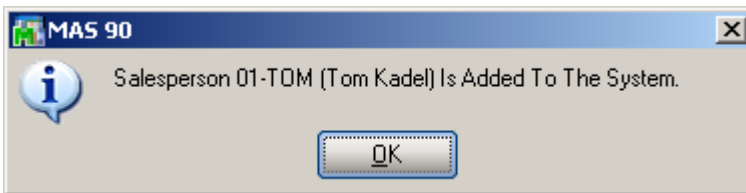
Check the **Auto increment invoice number** box to assign automatically the next available invoice number after acceptance of previous invoice.

Check the **Process Sales Orders** box to make the **S/O No.** field available to enable the user to create invoices based on the existing sales orders.

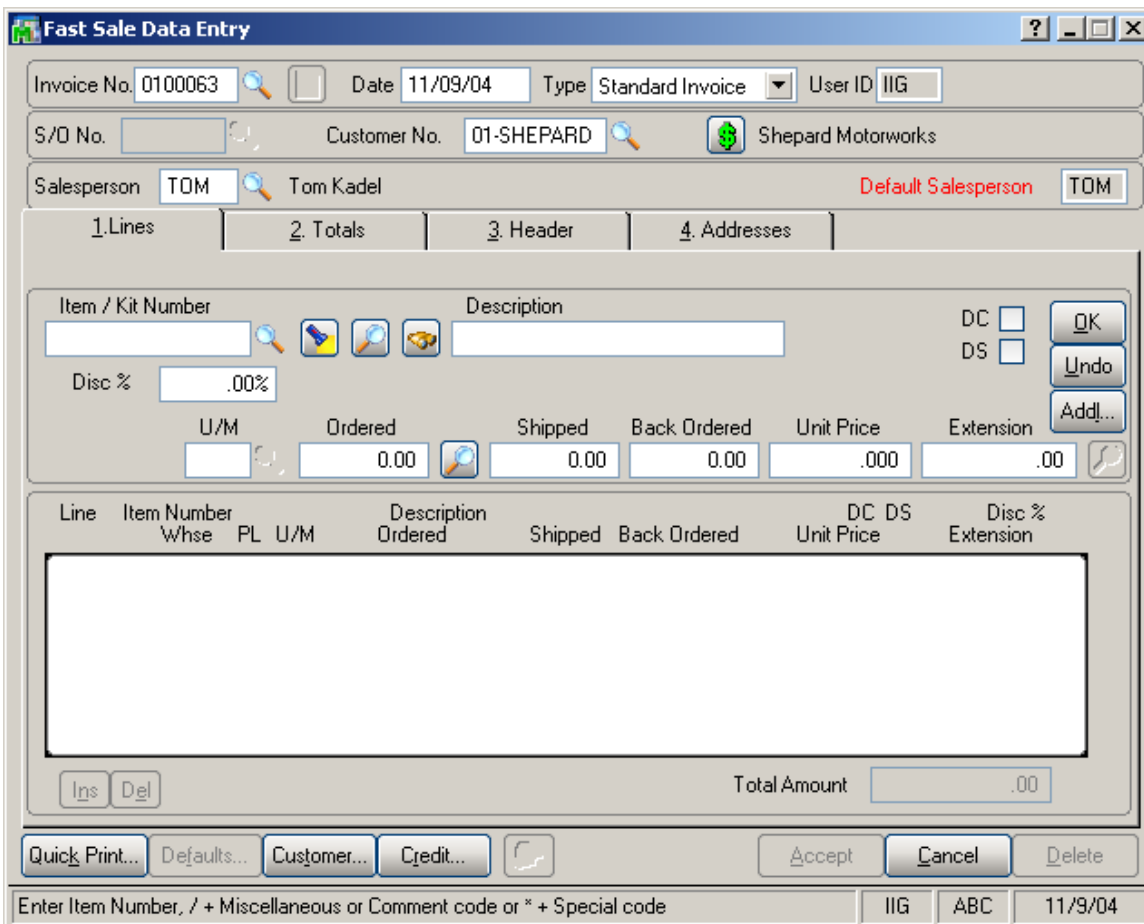
Check the **Force for full payment** box to require full payment to accept an invoice. This option works only if IIG's Credit Card Processing module is integrated with MAS 90. If this box is checked, clicking the **Totals** tab displays the **Deposit/Prepayment Entry** screen. The program will not accept the invoice till the payment is less than the entire invoice amount.

Select the default **Cash Customer**. To select this default Customer for the current invoice on the Fast Sale Data Entry screen, click the \$ (dollar) button next to the Customer No. field.

Check the **Replace Customer's Default Salesperson** box to activate the **User ID** field. Select the User, which will replace the Salesperson for all the Customers not having Primary Ship To. The user will be added as new Salesperson to the system:



The **Default Salesperson** field will display the User ID on the **Fast Sale Data Entry** screen:

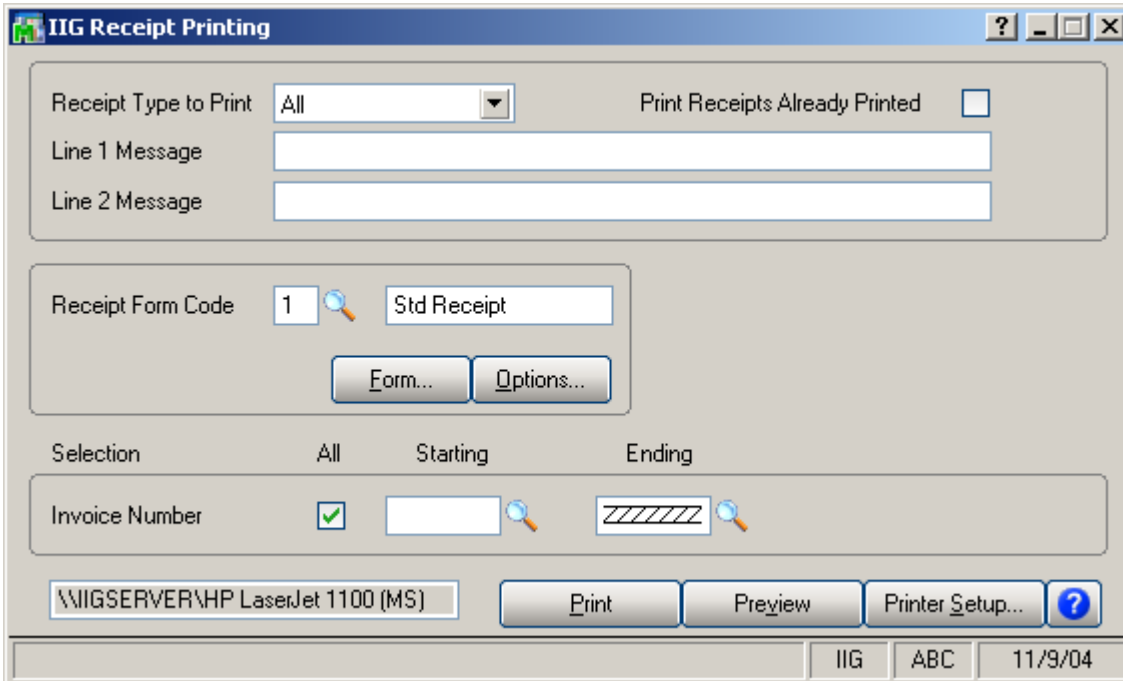


Check the **Print Invoices** box to print the invoices when accepting them.

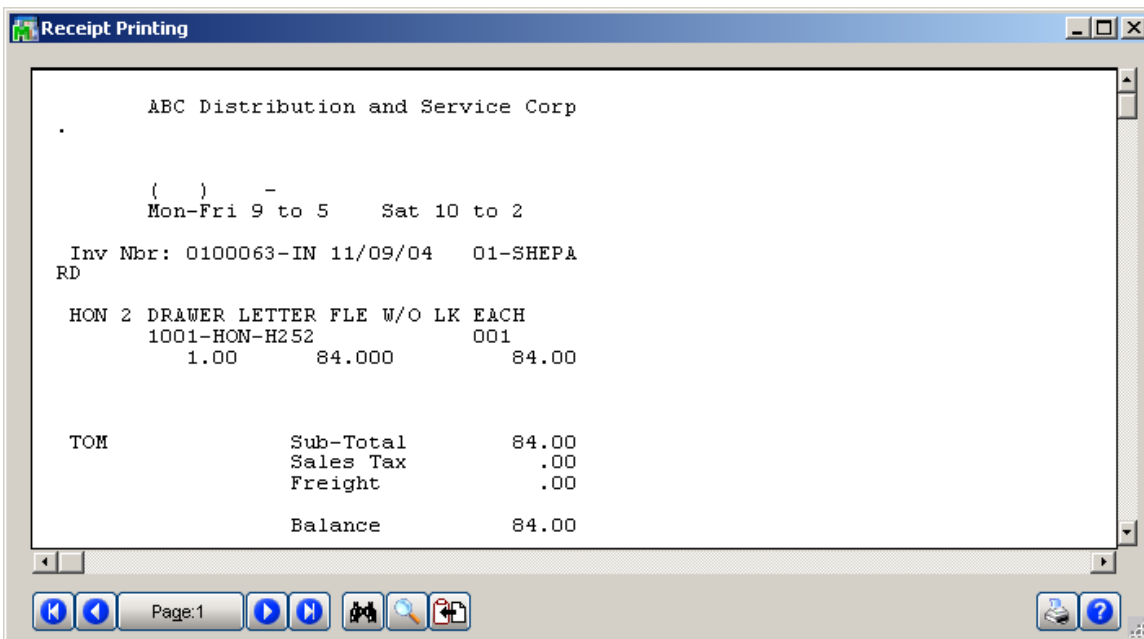
If the **Print Invoices** box is checked, the **Bypass Print (Y/N) prompt** box can be checked to print documents without asking for confirmation.

Fast Sale Receipt Printing

The **IIG Fast Sale Receipt Printing** program has been added under the **Sales Order Main** menu. This Printing is only character-based.



Here is an example of printout:



Customer Open Sales Printing

The **Customer Open Sales Printing** has been added under the **Sales Order Reports** menu.

The report prints expected payments and deposits information for the selected Customers.

The screenshot shows a dialog box titled "Customer Open Sales Printing". It features a "Selection" section with "All" selected, and "Starting" and "Ending" fields. The "Starting" field contains "00-" and the "Ending" field contains "99-//////". There are search icons next to these fields and a "Form..." button. Below this are four checked options: "Print only customers with debts", "Include Updated Deposits", "Exclude Applied Invoice", and "Sum Up Payments". An "Include Deposit Starting From" field contains "10/10/04". At the bottom, there is a printer selection dropdown showing "\\IIGSERVER\HP LaserJet 1100 (MS)", and three buttons: "Print", "Preview", and "Printer Setup...". A status bar at the very bottom shows "IIG", "ABC", and "11/9/04".

You can choose to print or not customers not having any debts, already applied invoices, deposits on already updated invoices, and also choose to print all the payments of the order summed up or separately. Deposits can be printed starting from the specified date, that is, deposits of the dates before the specified will not be taken into account.

Here is an example of the printout:

Source	Trans Number	Trans Date	Amount	Apply-To	SO Dep Ref	So Dep	Balance
01-ABF American Business Futures							
SO	0000171	5/1/03	859.32			0.00	859.32
SO	0000153	5/11/03	485.06			0.00	485.06
SO	0000115	5/18/03	7,856.10			0.00	7,856.10
SO	0000176	11/8/04	5,100.00			130.00	4,970.00
SO-PMT	0000176	11/8/04	0.00			0.00	-130.00 **
Total Sales Orders							14,170.48
SO-INVC	0100060	11/8/04	84.00			14.00	70.00
SO-PMT	0100060	11/8/04	0.00			0.00	-14.00 **
Total SO Invoices							70.00
AR-INVC	0000122	1/31/03	0.00			0.00	850.00
AR-INVC	0100054	3/1/03	407.40			0.00	407.40
AR-INVC	0000141	3/31/03	0.00			0.00	1,178.69
AR-INVC	0000190	4/30/03	0.00			0.00	85.00
AR-F/C	APR0001	4/30/03	0.00			0.00	43.89
AR-C/M	0100055	5/10/03	0.00			0.00	-81.48
AR-INVC	0100033	5/15/03	613.05			500.00	613.05
AR-PMT	0100033	5/15/03	0.00			0.00	-500.00 **
AR-INVC	0100034	5/15/03	2,467.61			0.00	2,467.61
AR-INVC	0100048	5/30/03	130.00			0.00	130.00
AR-INVC	0100041	5/31/03	38.20			0.00	38.20
Total AR Invoices							5,732.36
Total Balance Due 01-ABF							19,972.84

Appendix

Gift Certificate Processing in IIG Credit Card and IIG POS

Processing Gift Certificates requires tracking the liability the store has generated by accepting payments in advance, which is really what a gift certificate is. There are several methods, with pros and cons for each.

One issue that we must stress is that Gift Certificates have a fairly long life. There are both Federal and State statues that cover how long these must honored, and what the merchant may do to limit the liability. We suggest that you consult an experienced business attorney for your store (or stores) area on what requirements you must meet for gift certificates.

Preprinted Gift Certificates:

These are generally in fixed denominations in logical steps (5, 10, 20, 25, 50, etc.) with a certificate number that is sequential. These are loaded into the system as a serial number item (ex: GIFTC05, serial number A000152). This allows you to see all non-issued certificates.

When sold at the register, the operator selects the correct certificate denomination and the serial number on the sheet. She would sell as many as the customer needed.

When the certificate was redeemed, it would be treated as a miscellaneous payment type of GIFTC. To redeem:

1. Set up a GIFTC payment type, and use the Gift Certificate number as the check/account number.
2. Use a different Bank or G/L code to reconcile at the end of the week or month.
3. Any balance remaining on the certificate would be paid out in cash.

Some issues to consider:

- With today's printers and scanners, it is easy for criminals to forge US currency, let alone something simple like a gift certificate. You will need to keep tight control over the number of gift certificates you have in circulation.
- The same holds true internally. Gift Certificates are just like checks, and just like checks, you must keep track of what was issued and what is remaining.
- Gift certificates cost money to print, process, and redeem, in the form of labor and the certificates themselves. We suggest that you keep a close eye on these costs, because in most retail markets, there isn't a whole lot of room in the margin.

On Demand Gift Certificates:

These are generated using the Sales Order Invoice function, and using a custom form to print the certificate. We recommend printing on check stock, where the lower third is the gift certificate, and the upper two sections (stubs) would print a duplicate receipt of the monies received. Unlike the pre-printed gift certificates, you must process these individually, because the invoice is the certificate.

Because these are generated “on demand” you won’t be able to track them as serialized inventory. So you would use either a generic item number (GIFT CERT) or a miscellaneous item or charge.

Redeeming them is the same as with pre-printed gift certificates.

Some issues to consider:

- We strongly suggest that you turn on the Retain Detailed Invoice/Shipping History, Retain Deleted Invoices, and Retain Comment Lines in History as a precaution.
- Periodically review the value of sold gift certificates versus redeemed gift certificates. This is your Open Gift Certificate Liability.

Special Gift Certificate Programming

IIG can assist you with programming to meet your specific industry and business needs, and we are also happy to assist you or your reseller in setting up Gift Certificate Processing.

Gift Card Processing:

Gift card processing is quite different from Gift Certificates. Gift Cards fall into two categories:

- Rewritable, which requires special equipment to write the value of the amount and the amount remaining on the card.
- Gift processor, which the gift card is treated like a credit card through the credit card software.

Both of the above require special setup. Contact IIG for more information.