Resources:

The latest version of this manual is available at http://www.extremepos.com

Our video tutorials are available at http://www.youtube.com/extremepos

Requirements:

Thunder Point of Sale is a Windows-based point of sale product. You will need Windows 7 or later; for multiple station setups, a single station will be your server and manage the database and this should be your most powerful machine. For these setups, a hardwired network will be much faster and more reliable than wireless.

ThunderPOS uses Microsoft SQL Server as a backend; it’s been tested with Microsoft SQL Server 2008 R2 Express Edition and with Microsoft SQL Server 2014 SP1 Express Edition. We recommend using one of these editions if possible.

For a typical store, you will additionally want the following hardware:

An Epson or Star compatible receipt printer

A cash drawer, with a cable intended for the receipt printer you’re using

A USB barcode scanner

You are likely to also want a compatible label printer. The requirements on these are manufacturer-specific, and so we recommend contacting sales at sales@extremepos.com or at (919) 387-7597 extension 100 for a listing of compatible printers.

Support is offered on hardware purchased from Extreme Point of Sale, Inc, and you can contact sales for information on preconfigured hardware bundles. To ensure the best experience, we recommend a full turn-key bundle, which will include the hardware above, the computer, and a monitor, as well as support from Extreme Point of Sale, Inc. Please bear in mind that we will not be able to support hardware purchased elsewhere.
Installation

Installation procedures will be different from an additional station than from the primary station. You should begin by installing on the primary station.

Install the application from your download by running the setup.exe and proceeding through the prompts. Once installed, a shortcut labeled “ThunderPOS” will be placed on your desktop.

Run this, and it is going to ask you if you need to install the server or need to connect to another station. For the primary server, you’ll want to select to install the server. This will automatically download and configure SQL Server for you; there need to be no pending updates for Windows for this to work.

If you are on a secondary station, it is important that the option is selected to connect to another station. If you set servers up on both stations, they will run independently of each other and maintain separate sales information and inventory levels.

You will be prompted to register. If you are a demo user, you’ll want to select demo and fill in your information; for full customers, simply enter your customer ID and serial number.

Once the login screen has appeared, the installation is finished.
Initial Setup Wizard

The first time that you attempt to log in, the system will detect if you have not used the software before and bring up the setup wizard. This minimal version of the settings screen will allow you to set the most important settings in the software, including an initial password, your printer settings, your company name and address, and backup settings.

You’ll need to go through this before proceeding into the software.
Dashboard

The dashboard is the first thing you will see after completing the setup wizard, or after logging in on subsequently running the software.

This features several quick reports that give you information on what is going on in the system. You can configure which of these show based on the employee by going to the tools menu, then selecting the dashboard layout option.

The available reports will change based on your employee reporting permissions.
Categories, Departments, and Vendors

These similar features are all methods of classifying items. All can be managed under the store menu, via Categories, Departments, and Vendors.

Categories and Departments are set on all items. They are not interlinked – categories aren’t specifically sub-departments or anything of that nature – but rather are ways to make it easier to search and report sales. You’ll want to decide how you want to set up your categories and departments before doing anything else, as setting these up before items will make your life far easier.

You may merge a category or department into another. Doing so will delete one category or department and move all items in it into another.

Vendors are required for doing a purchase order. You do not need to set vendors on every item, but doing so can make purchase ordering and vendor returning far more streamlined. If you intend to set up vendors, you’ll want to set them prior to setting up Items.
Items

Item Management, alongside the register, is one of the hearts of the software.

The screen shown above is the item grid. This screen can be reached from the store menu by going to items, or from the register it can be launched by clicking an items button or by hitting the F2 key.

Under default settings, you can make edits to item directly on the grid by clicking the cell you want to change and typing in the new value that you want. If you want to revert this change before hitting enter, you can press escape to cancel the edit.

Other functions are available along the bottom of the screen. Quick searching is available by typing into the text box and hitting enter. This will search the item id fields, title, and description.
You can add items by clicking add and putting in the information that you need. The Item ID is required and must be unique. You also are required to put an item name in; this does not need to be unique. You’ll want to fill in pricing information, but it will default to zeroes if you do not fill out any of the fields.

You can add new departments, categories, and vendors to set on items through their respective sections of the program.

A few of these options and settings deserve additional attention:

**On Amazon and On Website** both are related to the ecommerce addon functionality. For further information on this functionality, ask your sales representative.

**Use Serial Numbers** will cause the system to prompt for the serial number of an item if you sell it or buy it in trade

**Service Item** will cause the system to not deduct the item from inventory when you sell it.

**Preorder Item** will make the item sell as a preorder.

**Enforce Minimum Age** will provide a prompt when you sell the item to a walkin customer or one who has not had a birthdate set to ensure that the minimum age is met, or enforce based off the customer’s birthdate if available.
Editing of items or duplicating items also uses this screen; it’ll simply be filled in when you head in to begin with.

The above screen is for searching items in more specific ways than the quick search allows. Item ID, Item ID 2, and Item ID 3 will search those specific fields, rather than all 3.

Name, Manufacturer, and Descriptions 1 and 2 will all search as contains. Most of the other fields are self-explanatory.

Hit “Save Default Search” if you want to make this the default search for items going forward. Clear search will reset all fields back to blank; if doing a new search you’ll usually want to use this.
When you print labels, you will get a screen where you can modify the design you’re using as above. This will allow for you to select from a variety of templates for your printer, and then select the fields that you want to print out.

The EPL labels are for a variety of printers, but most Zebra printers use these designs.

For further information on which label designs work for which printers, please contact support.
You can see the history of an item by highlighting it on the grid and then clicking more -> view history or by hitting control+H.

This will bring up this screen, where you can view all your new, used, transfer and ecommerce history for the item, including a summary of recent purchases and sales over the last month, quarter, year, and all-time.
Each employee can have a different layout for the item grid. This allows you to customize what’s seen to suit the employee’s needs, and to what your store needs. You can access this by clicking on ‘more’ and then Change Grid Layout.

Most fields can be edited directly on the grid by default once you put them there, allowing you to easily avoid going into the full edit screen if you don’t need to.

You can control both the fields that are on the screen and the order in which they appear here, before saving it.
Under the more button, you’ll find a variety of other functions besides the grid layout. As an example, the screen show directly above is the New Item Defaults screen. These station specific settings will autofill the fields on that station when adding a new item, or importing from a database that does not have that field available.

If you uncheck the ‘use station defaults’ box, then these settings will not be used on this station.
Another feature within the system relating to items is the concept of a ‘Bundle’. A bundle is a set of items that you can sell together by scanning a single code at the register, potentially with a discount for being purchased together.

You can reach this screen by going to the store menu and then to bundles. This will show a list of all your current bundles, and you can do a variety of things from here, including creating new bundles, editing existing ones to modify the items they contain, deleting them, showing the history for them, or printing barcodes for them.

When creating a bundle, you’ll scan in or search for the items you’re wanting to put into the bundle and then you’ll have the option to set an override price on it.
Settings

There are many settings available in ThunderPOS. Most users will not need all of these; however, this section of the manual exists as a complete reference for all of them.

The settings can be reached by having a user with appropriate permissions go to the system administration tab, then click on settings. If a user without permissions to set these is logged in, the settings option will not be visible.

Once in the settings screen, you may navigate between pages of settings through the list along the left-hand side.

We’ll go through each section and subsection in order. Subsections are reached by clicking the plus sign next to their parent’s sections, then clicking their name.

First, **Hardware**. Under this section directly, you’ll find the settings for your printer drivers in windows. If using a serial printer that is on com port 1, you can select **Direct to COM1** for the receipt printer driver. Otherwise, select the drivers for your different printer types from those you’ve installed in Windows.
The first subsection of Hardware is **Serial Printers**. This section covers commands that can be directly sent to either a **Direct to COM1** receipt printer, or one using **System fonts**.

The Cash Drawer Port allows you to point the cash drawer to a different hookup than the receipt printer than necessary, or at the point of the printer otherwise.

The Cash Drawer Command is the system command sent to the receipt printer to pop the cash drawer. The prefilled options are the most commonly used ones; if your receipt printer requires something else, you may freely type it into this box.

If using a printer with a cutter, checking the receipt cutter box and filling in the command will allow its operation. Again, the most common are prefilled; some printers may need other commands, which you will be able to find in that printer’s documentation.

If you’ve loaded a store logo into the printer’s memory, you can check logo and then select the logo command to have this print. Logo commands that are prefilled in refer to the first logo in memory; if using multiple images in the receipt printer memory, consult your printer documentation.
The final subsection of Hardware is for miscellaneous other hardware.

The Cipherlab 8000 Port and Port Speed will need to be set if you are using a Cipherlab 8000-series batch scanner. These settings will need to match the speed and port on both windows and the device itself.

Under Display Pole, you’ll find options relating to the display pole type and port that you will want to use. If you’re using one, check the box for Display Pole, and select the type. If using a serial display pole, you’ll also need to fill in the port number.
Under **Receipt**, you’ll find options relating to how your receipts print.

The first option here is for whether receipts automatically print upon completing an invoice. For prompt, the program will ask if a receipt is desired at the end of each transaction. For CC only, a receipt will be printed if the transaction was using a credit card, and otherwise will not.

**Number of Receipts** will control how many receipts are printed on the initial completion of an invoice.

**Receipt Font** will control the font that receipts are printed in if you are using a driver in windows. It will have no effect if you are using the Direct to COM1 setting. Please note that **System** is a special selection that will return control of many functions to ThunderPOS rather than operating by the driver.

**Font Size** will affect the print size for the non-system fonts. Find one that works well for your font and printer.

**Repair Disclaimer** sets the line that people will need to sign on repair estimates.

**Include Discount Information** will print promotions and line discounts that were applied under each item on the receipt.

**Print Customer Balance** will cause the customer’s account balance, if not zero, to print on the receipt. This is the current balance as of the time of printing, in the event of a reprint.
The first subsection under Receipt is for Notes. This will allow you to set up to ten lines that appear at the bottom of every receipt that is printed. The Coupons subsection is there for driver printers.
Under **Store Information**, you’ll find a place where you can set your top of receipt company information. The first line will also appear on label designs that have the company name property.

**Hours of Operation** will affect the labor scheduler and customer appointment scheduler.

**Remind Me To Make A Backup** will prompt backups to be made in the event enough time has passed since your last backup upon logging in.
Register Information contains settings related to the operation of the station that settings were opened from. Register ID is information only, telling you the internal id of the computer you are on.

Enable Popup Keyboard and Numpad Where Available will cause the touch-compatible dialogues to pop when on a screen where they are supported.

Open Register On Login will cause the register screen to automatically pop up without clicking register after logging in.

Picture Directory is a shared folder where your pictures and other necessary files will get saved to.
Under **Taxes**, you’ll find the place to set your tax rates and descriptions of them.

Additionally, there are a few other settings that affect how taxes are collected.

**Always Round Tax Up to Next Penny** will cause all rounding to go up. This setting should be determined by consulting local tax law.

For **Do Not Charge Tax 1/2/3 on Used Items**, checking these will disable the tax on used items. This setting should only be on if you are certain this is how it is supposed to be done in your area.

For “**Sales Tax Is On Full Sales**” or “**Deduct Tradeins from Sales for Determining Tax**” you can ask a local accountant which of these is appropriate for you.
**Used Options** will allow you to set the ways that used product and tradeins are priced. **Extended Pricing** is for using Used Price 1 & 2 and Tradein Price 1 & 2 for credit and cash – a six price array. **Condition Discounts** will allow for just Tradein Price 1 and Used Price 1 to be set, and then percentages getting set.

Additionally, there are a couple of miscellaneous settings related to used and trades on this section.

**Do Not Accept Tradeins from Cash Customer** will block trade items from being selected if the default customer is selected. If enabled, you will need to select a specific account to trade from.

**Suggest Used When Available if New Copy Sold** will remind the cashier a used copy is available if they attempt to sell a new one; this will hopefully encourage selling used copies first, which tend to be higher-margin.
Under **Security**, you’ll find a few settings related to maintaining the security of your store and your data.

**Audit Quantity Changes** will require any direct changes to your stock quantity in inventory to be justified, recording who, when, and why any changes were made.

**Prompt Cashier ID** will require a login at any transaction’s completion.

**Require Password for Clock In/Out** will force the entry of the password for any employee to use the time clock, guarding against employees clocking each other in.

**Allow Only Current Date for Reports for Non-Administrators** will force non-administrators to not run any sales or transaction reports reaching back into the past.
The **Register Options** section of settings has settings that will impact how checking customers out is done.

**Prompt when selling Out of Stock Item** and **Do Not Sell Out of Stock Item** are heavily related. If neither is on, if you attempt to sell an item that is out of stock it will simply allow it, taking the quantity into negative numbers. If Prompt is checked, but Do Not Sell is not, a prompt will allow you to cancel, sell anyway into negative, or create a special order. If Do Not Sell is checked, but Prompt is not, you will simply receive an error and the item will not be added to the invoice. Finally, if both are checked, you’ll get a similar prompt but without the option to sell anyway.

**Combine Lines** will allow for quantities to auto-combine if you are selling multiple of the same item at the same condition. If this is off, scanning the same item multiple times will result in multiple lines on the invoice and receipt.

**Promotion Prices** sets whether promotions are applied or not. Automatic will have them always be on; off will always have them disabled. Manual and Manual (Default On) will allow the cashier to toggle them; manual defaults off and Manual (Default On) sets them on at the start of each transaction.

**Search Alternate Item ID When Scanning** and **Search ISBN/Third Item Number When Scanning** will allow Item ID 2 and 3 to be scanned whenever you scan a barcode at the register. If multiple matches are found as a result, you’ll need to select between them for the item you wanted.
% Added to Max Deposits allows for you to take in money above the selling price when taking down a deposit. This typically is done to cover the amount that will be charged for sales tax on pickup.

Rewards Points accumulated by will allow for you to set whether customer rewards points are gathered by dollar count or by item.

Once Street Date Reached, Continue To Create Preorders For Items will determine if items that are checked as preorders in inventory are sold as preorders after the street date, or placed on the invoice as normal items.

Print Labels For Trade-ins will, if checked, cause stickers to print for all items on the invoice that have been traded in. By default, these will print at the price of the condition they were traded in at; if you check Print Price 1/A For Trades of Any Condition then the stickers will be for condition 1 or A as set elsewhere.

Show Used Add-On Items will allow you to sell addon items as either new or used.

Print Signature Line For Trades will place a line for customers who are trading in items to sign acknowledging that the items they are trading are now the store’s property.

Apply Customer Account Payments To Invoices will, if checked, track on an invoice by invoice level what account transactions are paid for. If not checked, only an overall balance is maintained.

Autogenerate Customer IDs: If checked, when a new customer is created a random customer number will be filled in for it. Until the customer is saved, this can be changed.
Customer Rewards allows you to set the rewards that customers get, and the points threshold they need to meet. Note that a negative price here will allow you to give away coupons.

Make certain you check tax rates that need to be applied here.
Item Maintenance has options for setting up items and handling items.

Use Price Tables will enable the price table screen, allowing you to bulk set prices off retail price or cost ranges for departments.

Serial Numbers on POs will require when receiving items on a purchase order that are serial numbered that you enter the serial numbers.

Prefixes for New Item Barcodes and Used Item Barcodes both allow the labels that are printed to add whatever you set as the prefix to the front of barcodes, letting them be identified as new or used regardless of the checkbox state. Our recommendations are to set prefixes such as N or U.

Automatically Generate Item IDs will allow for the random generation of item numbers when items are created. You can change from these random digits until the item is saved.

Do Not Perform Initial Search When Loading Items Screen will prevent the default search from triggering when going into the items screen. This can be useful to speed the system up.

Disable Editing Items On Grid will keep items from being edited, even by those with permission, from the grid search view.
After Adding, Automatically Search for Item and After Editing, Automatically Search for Item both work quite similarly. These are mostly useful if you are adding or changing items and immediately want to print receipts or instant purchase order them afterwards.

Under Automatic Pricing, you’ll find the settings for automatically setting your used prices from your new price, or your trade prices from your used price 1. Note that these are percentage of the price you’re generating from; for example, setting 75% when your new price is 10 would be 7.50, not 2.50.

While these settings need to be on for any items to have autogenerated pricing, you may still set whether specific items use these percentages or not within item basis.
Under **Cost Options** you can set a few options for your New Cost and Used Cost fields in items. **Average Cost for New** and **Average Cost for Used** determine whether, as operations such as purchase orders and trade ins happen to bring items into inventory, the cost will be adjusted to be an average. For example, with Average Cost for Used on, if you have two of an item in stock used at $5.00, and take a third in trade for $2.00, then the weighted average will cause the used cost for that item to become $4.00.

**Automatically Generate Cost from Retail Price** will allow you when initially creating an item to create the cost from the retail price and the vendor’s discount percentage.
Display has station specific options for how things are shown on screen.

Show Notes When Selecting a Customer and Show Notes When Scanning Item are very similar; when an item is selected or a customer is selected for the invoice, if the option is on and the item or customer has notes will pop up.

Show Category and Department by name or number will determine in the various dropdown selection screens whether the shorter number or the description is what’s displayed.

Show Vendor by does the same, for Vendors.
Reports

Reporting is one of the more important functions within the software. You can access the list of primary reports through the “Reports” menu from the back-register screen.

Below is a list of reports and their function:

### Sales Reports
- **Totals**: Sales figures for the period selected. Optionally, an itemized breakdown of all items sold in that period as well.
- **By Category**: Sales breakdown by category
- **By Department**: Sales breakdown by department
- **By Employee**: Sales breakdown by the completing cashier
- **By Hour**: Sales breakdown by the hour of the day
- **By Day of Week**: Sales breakdown by the day of the week
- **By Customer**: Sales breakdown by the customer
- **By Primary Vendor**: Sales breakdown by primary vendor
- **Daily Payment Types**: Daily tender type totals (i.e. cash, check, etc.)

### Items Reports
- **List**: A list of all items in inventory, with options for grouping or filtering
- **Audit Quantity**: A list of quantity changes made and reasons why, if the Audit Quantity Changes option is enabled.
- **Reorder Report**: Shows items that are below the reorder level.
- **Top Sellers**: A list of top selling items in the period selected.
- **Total Value**: A display of the total quantity and cost-based value of your inventory.
- **Street Date**: A list of items filtered by street date; useful for showing upcoming or recent releases.
- **By Category**: A list of items within a specific category
- **By Department**: A list of items within a specific department
- **By Vendor**: A list of items with a specific vendor set
- **PO Serial Numbers**: A report of your serial numbers used for purchase order items, if the option to collect them is enabled.
- **Idle Items**: A list of items with no activity since a specified date that are presently in stock. Separated for new and used on the same items.
- **Purchase Ordered**: A report of items purchase ordered during a timeframe, either through full or instant POs

### Transactions
- **Invoice Totals**: A list of transactions in the period specified, the amount tendered, and the total price and cost
- **Serial Numbers**: A list of serial numbered items returned, traded, and sold
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Audit Activity</strong></td>
<td>Shows discounts and price changes at register, as well as post-transaction voids, and who performed them</td>
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<tr>
<td><strong>Account Transactions</strong></td>
<td>Shows transactions done through the customer accounts for the period specified</td>
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<tr>
<td><strong>Suspended Transactions</strong></td>
<td>Lists suspended transactions that are currently waiting for completion, as well as the suspend ids.</td>
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<tr>
<td><strong>Traded Items</strong></td>
<td>Lists items traded in during a timeframe</td>
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<tr>
<td><strong>Customers</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Account Balances</strong></td>
<td>Shows all customers and their account balances. Can filter out inactive customers</td>
</tr>
<tr>
<td><strong>Account Statement</strong></td>
<td>Show a statement for the specified customer</td>
</tr>
<tr>
<td><strong>Sales History</strong></td>
<td>Show the items purchased by customers during a</td>
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<tr>
<td><strong>Address List</strong></td>
<td>Lists customers, their addresses and phone numbers</td>
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<tr>
<td><strong>Discount Cards</strong></td>
<td>Lists discount cards. Can filter out expired cards.</td>
</tr>
<tr>
<td><strong>Wish Lists</strong></td>
<td>Shows items on customer wish lists</td>
</tr>
<tr>
<td><strong>Rewards Points</strong></td>
<td>Shows customer rewards points balances</td>
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<tr>
<td><strong>Store Information</strong></td>
<td></td>
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<tr>
<td><strong>Department List</strong></td>
<td>Shows the department names and numbers</td>
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<tr>
<td><strong>Category List</strong></td>
<td>Shows the category names and numbers</td>
</tr>
<tr>
<td><strong>Vendor List</strong></td>
<td>Shows the vendors and their information</td>
</tr>
<tr>
<td><strong>Gift Card Balances</strong></td>
<td>Shows gift cards and their balances</td>
</tr>
<tr>
<td><strong>Rentals</strong></td>
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<tr>
<td><strong>Current</strong></td>
<td>Lists currently outstanding rentals</td>
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<tr>
<td><strong>Past Due</strong></td>
<td>Lists past due rentals</td>
</tr>
<tr>
<td><strong>Items In Store</strong></td>
<td>Lists rental items that are not currently rented</td>
</tr>
<tr>
<td><strong>History</strong></td>
<td>Shows transaction history for rental items</td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Hours Scheduled</strong></td>
<td>Shows the hours employees have been scheduled to work, if using the labor scheduler</td>
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<tr>
<td><strong>Hours Worked</strong></td>
<td>Shows the hours and shifts employees have worked, if using time clock</td>
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<tr>
<td><strong>Repairs</strong></td>
<td>Lists repairs in progress or completed</td>
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<tr>
<td><strong>Repair Notes</strong></td>
<td>Lists the notes on repairs</td>
</tr>
<tr>
<td><strong>Special Orders</strong></td>
<td>Shows special orders in progress or completed</td>
</tr>
<tr>
<td><strong>Employee Metrics</strong></td>
<td>Shows employee metrics, based on time they have spent clocked in, for all employees</td>
</tr>
<tr>
<td><strong>Employee Activity</strong></td>
<td>Shows employee activity for a specific employee. This includes shifts worked, sales as a cashier, sales while clocked in, and audit information for them.</td>
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Physical Inventory

The Physical Inventory process allows you to scan all items in your store, either in specific categories and departments or in the entire store, and generate a discrepancy report for marking down shrunken inventory, then set your stock quantities to what you have scanned.

As such, it’s a very powerful tool, and should be restricted to trusted employees or administrators.

The first step, as seen above, is to select which items you are performing an inventory of. Note that only items that are within both departments and categories selected will be inventoried.

Once you have started, you have a few ways you can proceed: You can scan at the register using your normal barcode scanner, you can export a spreadsheet from the system and change quantities there with a program such as excel, or you can utilize a supported batch scanner such as the Cipherlab 8000 series to upload batches of scanned items. You can also use a combination of these, though you will want to take care to not double-count items.

To scan using the normal scanner, you’ll click continue counting, and be taken to a screen where you can perform scans or searches. Be careful to correctly select new or used for these items.
To export to a spreadsheet, click the export button. Importing back will need you to click the import button and browse to your saved spreadsheet file.

For the Cipherlab batch scanner, you’ll want to have the items scanned in that you are uploading and the device set in the cradle before clicking import. See the documentation included with the scanner for further details on configuration. We recommend uploading batches somewhat frequently, and if not using barcode prefixes make certain you separate new and used items into different batches.

Once you’ve finished counting, you should run a discrepancy report to make certain there are no obvious errors, such as missed or double-counted shelves.

Once that is done, hitting finalize and update inventory will make a final discrepancy report and then adjust all items in the selected departments and categories based on scans. Please note that any items you do not scan will go to 0 quantity in stock.

If you want to abandon the inventory in progress, click “Cancel Inventory Process”.

You may leave the inventory screen and come back later to resume if you do not click either Finalize and Update nor Cancel Inventory Process.
While optional, many stores will find maintaining their customer data critical. There are tools in ThunderPOS that will allow you to do reporting on and maintain contact with your customer base, but to use that, you’ll need to make certain you’re selecting and configuring them for invoices.

To get to customer management, you can go through the store menu and then click on customers, you can click the customers button on most registers, or you can hit the F3 key at the register.

Once there, you can search customers either quickly using the search box under the grid or with an advanced search in the lower left-left side in the screen.

You can add a new customer by clicking the add button, or edit an existing one by highlighting them and hitting view/edit.
When adding or editing a customer, there are only a few fields that are required: A customer ID, a first name, and a last name. The other fields are optional, though the more you fill out, the more that you will have to work with later.

One highlight to point out is the Scan License button. When using a compatible barcode scanner with driver’s license parsing, this will allow you to scan the customer’s driver’s license to automatically fill in many of the fields, including the name, address, date of birth, id number, and potentially height, weight, hair color and eye color depending on the state the ID was issued from. This can save quite a bit of typing; if interested, be certain to ask Sales about compatible scanners.

If you want to allow a customer to carry a balance, even if it’s just negative for trades, make certain you check the ‘account active’ box.

Once you’ve set up the customer to your liking, hit save to save them or the changes made.
You can manage your promotions that are active by going to Store and then to Promotions. These are discounts and specials that will get applied at the invoice screen automatically for your customers.

There are a few things that you can set regarding each promotion. First, you can set the promotion title. This will appear on the receipt if you have discount information printing on the receipt, as well as on the register screen in the item grid.

Under **Promotion Given To** you can either have all customers get the promotion, or restrict it to specific customers and discount cards. If you want a customer to have access to the promotion at all times, you would assign the customer to it; if you want a discount card to have the promotion to apply to cardholders, then that will be set in the item edit screen of item maintenance.

Under **Times Promotion Given** you can select from three options. **Always** indicates the promotion is available constantly. A date range will allow you to set a specific date range for the promotion; for example, it may be available from December 12th to December 19th, 2018. Finally, you can have the promotion be available on specific days of the week, such as on Tuesdays and Thursdays. If using this option, you can additionally choose to have it available only during specific hours.
Next, you’ll want to select what the promotion gives. There are currently five types of promotions; four are for use when selling items, and one is for taking in trades.

For trades, the option available is an additional percentage boost on those trade items. This can apply on cash trades, credit trades, or both; if you want to do different percentages for cash and credit this would be accomplished through setting up two promotions for different amounts.

For sales, you can have any of the following apply to new, used, or both. First, there is a flat percentage off the normal price. Second, you can have a dollar amount discount from the normal price. Third, you can do a buy x get y % off type promotion. These are very flexible and can range from things like simple buy 1 get 1 free to more complex promotions like buy 2 get 3 25% off. Finally, you can do a promotion where items are set to a specific price.

Last, you’ll need to set what items the promotions are applied to. You can do this in two ways – through adding departments and categories to include items for, or through adding specific items that should be included. You can also specifically exclude items, so if you’re wanting to do all but one item in a category, you would include the category but exclude the item you don’t want discounted.

Note that only one promotion will get applied to any item. In the event multiple promotions would get applied, the system will select which promotions apply, attempting to do so in a favorable method for the customer. Also note that promotions only get applied if they are turned on – see the register options section of settings for further details.
For the security-minded user, proper configuration of employee permissions is the place to start. It does very little good to set up auditing and other controls if you give everyone access to logging in as an administrator, after all.

To reach employees, you’ll need to go under system administration and then go to Employees. Note that this will only be visible if you are logged in as an administrator.

To create new employees, you’ll hit the add button in the lower left. To edit an existing employee, you’ll hit edit there.

When creating a new employee, you’ll need to fill in a cashier id and the password, as well as confirming the password. Passwords are case sensitive and must be at least seven characters long. When editing an employee, if not changing the password just leave those boxes blank.

Other fields in the top half of the screen are largely informational, and are simply there for your convenience for tracking employees. Many reports will show the first and last name if available.

In the bottom half of the screen, you’ll find the settings for permissions for employees. By far the most important of these is the Administrator checkbox. A user who is an administrator automatically has all
other permissions, and additionally certain top-level functions, such as restoring a backup of the database or editing employees, can only be done by an administrator. In the event that you ever have set all employees to not be administrator, the 01 ID will automatically be granted administrator once again.

Going down each column in order, under **Store Management** the settings primarily relate to setup options for the store. Store Settings will grant access to your options set under system administration and then settings. Departments / Categories will allow the user to create new departments and categories; Vendors will do the same for vendors. Physical Inventory will grant access to the physical inventory function of the software, described in its chapter in this manual. Purchase Orders, Instant Purchase Orders, and Vendor Returns grant access to those forms of inventory management.

Under **Reports**, an employee can either have access to all reports or you can set their access on a report by report basis. If doing the latter, by default they will not have access to any of the reports. You’ll need to click the button next to this option to bring up a screen where you may set the reports you want this employee to be able to run.

Under **Sales Transactions**, the permissions primarily relate to activity at the register itself. Change Prices will allow the user to set a discount percentage or change the price directly. Price Change Limit will prevent this from being by more than a certain amount. Delete Items allows them to remove items that have been placed on the invoice from the invoice. Open Cash Drawer will allow them to use the open cash drawer button to pop it outside of transactions. Please note that even without open cash drawer, the cash drawer will still pop at the end of a transaction when it otherwise would.

Under **Items**, there are settings related to the Item Maintenance section of the program. All employees can access the search and select functions of the grid, as this is necessary for register operation. View grants them permission to see further details on the individual items. Add allows them to create new items. Update allows them to edit items and make changes to most fields. If updating, Change Quantities sets whether they can change the stock level fields and Change Costs sets whether they can change the Cost fields.

Under **Customers**, there are settings related to customer maintenance. All employees can access the search and select functions of customers. Add allows them to create new customers. Edit allows them to modify customers. Transactions allows them to perform account transactions with the customers, such as making a payment against the amount due or doing a balance adjustment. Adjust rewards points allows them to change the customer’s number of bonus points.

Finally, under **Miscellaneous**, there are options that don’t really fit elsewhere. Print Barcodes allows the employee to print item and customer labels. Void Past Invoices allows the employee to use the voiding function, though even with this permission it is limited to the current day’s transactions only. Adjust Gift Card Balance allows the employee to adjust the balance of store gift cards.
Purchase Orders

Purchase orders are one of the most useful tools for tracking your incoming inventory. These can be accessed by an employee with appropriate permissions through the Activities menu, then the Purchase Orders option.

Once there, you’ll be presented with a list of your previous purchase orders. You can filter this list using the dropdown boxes in the lower right for Status and From Vendor. If you’re wanting to edit an open purchase order, highlight it and click Edit. If you’re wanting a new purchase order, click New.

In either case, you’ll be taken to the following screen:
The above is a purchase order with a few items filled in already. You’ll need to select what vendor you’re ordering from using the Vendor ID dropdown box. Other fields are optional, but recommended for your own information.

To add items to the purchase order, you can either search (using Lookup) or scan the item into the Add Item box. If scanning, you should check “Used” or not, as appropriate.

Once an item is on the purchase order, it will appear in the grid. If a search grid is on screen at the same time, it will be in the bottom half of the screen, as pictured above. Fields that are in blue text – the # ordered and the cost per – can be directly edited on the grid. If you need to remove an item from the order entirely, click the delete button in the second column on that line. If you need to make edits to the item in inventory, such as to update the title or pricing, click Edit.

Please note that simply placing an item on an order will not modify your quantity in stock in inventory. To do that, you must receive the item. You can do this in one of three ways.

First, you can receive line by line, by clicking the receive button on that line. This will prompt for the quantity that you are receiving.

Second, you can utilize a batch scanner, similarly to physical inventory, to scan the quantities of items you are receiving. If an item is scanned through this that is not already on the order, it will attempt to
add it to your purchase order at the default cost, then receive it. To get to this function, go through the more menu, then ‘receive from device’.

Finally, you can Receive All through the more menu. This will automatically set ALL ITEMS on the purchase order to have the received quantity be equal to the quantity ordered.

When leaving a purchase order, there are three ways to do so. The cancel button will discard all changes to the order. The save button will save the changes and update inventory if items were received, but leave the purchase order open. Finally, the finalize button will save the changes, update inventory, and close out the purchase order, preventing any further changes.

Instant purchase orders are a similar function for a single item. You can reach this through the Items screen’s more button, and all you need to fill out is a cost per, a quantity, optionally a vendor, and check used if doing a used purchase order. This can be much quicker for small numbers of items, but is less efficient for large orders.
Vendor Returns

Vendor returns are very similar to purchase orders. These are used to remove item quantities from your stock levels, rather than add them. The primary difference is that the quantity does not need to be received; instead, whenever you Finalize the return, all quantities on the return will be removed from your inventory.
The transaction list allows you to view and search past transactions, as well as access functionality to do returns or voids off those transactions.

To access the transaction list, go through store and then transactions, or click the transactions button on the register. This will bring up the transactions that were most recently done in reverse chronological order.

Searching in the bottom left will offer a screen through which you can set different filters to find transactions you need to view.

Other than simply viewing the totals of the transactions, you can perform three main actions here once you’ve found the transaction you want.

First, if you want to void the transaction, that is done using the void button in the bottom right of this screen. Only transactions which were done on the current date can be voided, and only if the employee who is logged in has permission to do so. Voiding transactions is logged to the audit activity log.
Second, if you have an email account configured in settings for sending emails, you may send a receipt to an email address of your choice by highlighting a transaction and clicking ‘Email’. Type the address you wish to send to in the prompt window, and the receipt will be emailed.

Last, and most commonly, you can view the details of the transaction, which will bring up the below screen:

![Transaction Screen](image)

This screen will give a line by line breakdown of the transaction that you want to see, and there are a few things you can do here. First, you can reprint the receipt. Second, you could reprint the receipt without prices.

Finally, you can do a return on the item, which will automatically place it on the current transaction at a negative quantity, at the same price that it was sold at on the transaction that you are taking it from.
Backing Up and Restoring the Database

These critical functions will allow you to make a backup of the database, and to restore a backup of a database.

The backup function can be accessed by all employees. We recommend making backups frequently. This is visible under system administration and then backup database. You can browse to a file location to create the backup in by clicking browse. **Please note that regardless of the station you trigger the backup from, the location that the backup is made to will be on the server station.** Clicking execute will attempt to make the backup.

Restoring a database is done very similarly, but can only be performed by an administrator on the system. For administrators, the function is found under System Administration, then Restore Database. You will want to browse to the file, then execute.
Label Utility

The label utility is used to mass print labels, either from a purchase order or from labels queued either through the vendor databases or through the Enterprise system.

If you want to mass print labels based on a search, that can be done through the items screen; perform the search you want and then go through more and then mass print labels.

Select the circle next to purchase orders or queued labels. If doing a purchase order, select the purchase order you want to print, and then select either received quantities or ordered quantities.

Click print in the bottom right to print the labels based on your selections.
Gift Cards

You can manage and view your store level gift cards through the Store menu and then Gift Cards. This will list out your cards.

Searching the cards can help you find the one you’re looking for. Once you have, you can do one of three things:

You can view the history of the gift card, so you can see all transactions where money was put on or taken off.

You can make an adjustment to the gift card, adding to or deducting from the balance. You cannot reduce the balance of a gift card below zero. This function is restricted by the Adjust Gift Cards permission of the employee.

Finally, you can reprint a gift receipt, giving a slip with the gift card number on it that the customer can use to redeem it.
Register

The register screen is where your employees will spend most of their time. The version pictured above is our Standard template, modeled after previous versions of the software. There are several different template options available, which will change the look and layout of the register. These can be selected from under System Administration and then Register Layout.

Items

Items can be added to the invoice in one of several ways. First, for designs with the “Enter Item ID” box, you can scan items into that box and they will if found be added. Second, you can go through the Items screen by hitting the Items box here or pressing the F2 key. On this screen, if you highlight an item and hit select, it will be added to the register.
If you have set up Quick Items, you can go through the quick items button to add one of your quick items to the invoice.

**Changing Items**

If you are using a Touch layout, you will see your touch screen menus, configured through the system administration menu. These will allow you to add items to the invoice as well.

Please note that the used checkbox, the condition, the trade-in checkbox, and the trade-in type dropdown are for items about to be scanned. If you want to change an item that is already on the invoice, you’ll need to hit the Change More button.

You can also modify pricing for items on the invoice. To do this, you’ll want to highlight the item on the grid for changing, and then you can either hit Change Price to set a specific price, Change Discount to do the change by a percentage, or Change Quantity to change the number that you are selling.

You can remove an item from the invoice by highlighting it and either hitting the delete button, or pressing the delete key on the keyboard.

**Transaction Changes**

If you are wanting to change transaction-level discounts or tax exemption, click change in the bottom right of the screen. That will bring up the below:
If the box is filled in, that means it is enabled. For example, in the above screenshot, tax exempt is off and promotions are on. If an invoice is tax exempt, it will be recorded in total as tax exempt and the sales tax will be 0%.

If promotions are set to manual, they can be toggled here. If they are disabled, all promotions will not be applied; if they are enabled, all promotions will be applied.

The discount will be applied to each line. This is multiplicative with all other discounts; if a line has a price of $10, a 10% line discount, and then another 10% is applied at the invoice level, it will be discounted to $9.00 and then to $8.10.

**Customers**

![Customer Walk-In Customer](image)

Similar to the items, there are multiple ways to select a customer for the invoice. The default customer will be the Walk-In Customer, as shown above. If you know the ID of the customer you want to select, you can hit Lookup By ID, then type in or scan the barcode for the customer.

Lookup discount card can do the same, and then find the customer who holds that discount card.

Finally, you can hit F3 or the customers button on the left to bring up the grid; search for the customer you want, then hit select.

**Gift Cards**

To sell a Gift Card on the receipt, you can click the Gift Card button, or enter a item ID of GC. This will bring up the following screen:

![Gift Card](image)
You’ll want to scan the gift card into the Gift Card ID button, then in Amount fill in the amount you want to sell the gift card for. This will place it onto the invoice.

**Special Orders**
You can also place items on order by hitting Special Order and selecting the item you want to place on the invoice. The special order deposit screen is shown below:

![Special Order Deposit Screen](image)

The maximum deposit is affected by the setting to take a percentage above the price. See settings for more details.

A non-Walk In customer must be selected for the invoice to place a special order.

**Completing Transactions**
Once you are ready to complete the transaction, you have a few options for how to do so.

First, hitting “Cancel Transaction” will reset the screen and discard the transaction in process. This does get recorded as a canceled transaction.

Hitting “Complete Transaction” will bring up the payments screen, pictured below.
The buttons on the left-hand side can be clicked; the effect will depend on the tender type. For Cash, it will select and highlight the cash amount, to allow you to type in a new amount.

For check, or for credit with Express Manual, clicking will automatically fill in the remaining amount due.

For Credit with an integrated payment type, clicking will initiate a credit card processing. If an account is open, clicking account will fill the amount to their balance available. Gift will create a redemption.

Once you’ve filled in sufficient payments, clicking OK will finalize the transaction. Cancel will return you to the primary register screen, where you will be able to make edits.

Please note that once a transaction is completed, it may not be altered in any way other than through voiding. Also note that voiding may only be done the same day as the transaction that is being voided.
For those using a touch register, you will want to customize your touch menu items. This can be done by an administrator through System Administration and then the Touch Layout option.

Here, you’ll get the ability to configure a set of groups, which will be a single row or column of buttons on your touchscreen that lets you see different lists of items in most of the space.

The left of this screen will list your groups by their “Display As” property. In the example screenshot above, there are not any existing groups. The buttons next to this leftmost box will allow you to add, edit, or delete groups.

Groups can be based on one of three things — items in a category, items in a department, or a list of items that you select individually. This can allow for you to easily create groups if you have small, orderly departments and categories, or for you to craft a list in the exact order that you need.

You can customize the color that the group button, and all item buttons within that group, will be by clicking the Select Color box in the top right. Once you’re finished with the group, click Save Group.

You will need to save all changes in the lower left before exiting the screen or no changes will be made to any group in the program.
Configuring Quick Items

Quick items are an alternative to the full touch screen layout. Using this allows you to hit the “Quick Items” button on many of the register designs to pop up a screen with a list of items that you can add to the invoice.

As opposed to the full touch screen layout, Quick Items does not take up space on the normal register. It is more suitable for stores where you expect to use a scanner for most items, but still have a few where a barcode is not suitable.

As an example, many users have space for people to rent for short periods of time – typically in half an hour to hour long increments. While there is an inventory item for this, there is nothing to attach a barcode sticker to. Making an item like this a quick item will give ready access to it, without keeping it front and center at all times.
Time Clock

The time clock feature of the software can be accessed from under the Store menu.

For the average employee, it will look as above. The admin functions button in the center of the screen will only be available if logged in as an employee with Administrator privileges.

The time clock within the software is designed for simplicity. Employees who are currently logged in will appear in a list on the right-hand side, under the heading of “Clocked In”. Employees who aren’t will be on the left under the heading “Clocked Out”. Highlighting one you want to clock in or out, then clicking the button, will clock them in or out.

There is a setting which requires the entry of a password in order to clock an employee in or out. See the settings section of the manual for details.

From the admin functions, you’ll find a full list of shifts in the system.
Additionally, you’ll find buttons below the display of shifts that allow for full control of existing and missed shifts. These will allow you to add, edit, or delete any shifts that have been worked. For this reason, and many others, make certain that those who have administrator permissions are trustworthy.

Note that using the time clock within the system is necessary for certain reports to provide useful data, as they may key off of sales done while an employee is clocked in.
The labor scheduler built into the software is a simple but flexible tool for laying out your employee’s hours. Offering a visual representation of each week and day, this allows you to schedule employees out, making certain both to not have empty periods and to not accidentally over-schedule employees into overtime.

Shown above is the daily view. This one represents a store that’s open 24 hours, but the hours shown will reflect your store’s open and close hours.

In the weekly view, you’ll see a list of all shifts scheduled for the days in that week, and the total number of hours each employee is scheduled for. To allow for a quick base for editing from, you can copy a previous week into the next, then simply make the tweaks you want based on the particular quirks of that week.
One feature that can make utilizing the system far easier is by using the appropriate vendor databases for your industry. There are a few common things to all vendor databases that are available, and then a few important differences.

All vendor databases currently available in the system can be used with the Quick Import feature. This feature allows for you to scan an item, either simply at the register or through item maintenance, that you do not have and search the vendor databases you’re using for it. If it’s found, it’ll bring in the item with the information available in that vendor database.

The vendor databases are also searchable. Ones that are created locally – AEC, Superfile, Ingram Entertainment, All Media Supply, BRE, and VGPC – are searchable under “Vendor Database Search”, available through the databases tab. Content@Ingram is available through the more button in inventory. You may import items into inventory from these search screens.

The available databases do change on occasion, both as new ones are added and occasionally as suppliers discontinue their databases or go out of business.

As of this writing, the available vendor databases in alphabetically order are as follows:
AEC

The AEC database, provided from Alliance Entertainment, is generally available to those who use them as a vendor. It must be obtained from your representative at Alliance. Primarily consisting of music, this database is unique in that it typically is provided as a very large starter file, and then weekly update files are sent out with changes, rather than doing a fresh conversion each week.

Whether updating or creating a new database, to process the file from AEC you’ll go under Databases and then to AEC. From there, you’ll want to select either Create New AEC Database or Update AEC Database. Please note that the initial creation may take some time, up to several hours, and that the station will be unavailable during this process.

Updates typically take much less time and are generally a matter of a few minutes.

AEC allows for updating new prices only.

Amazon MWS

This service allows you to pull information on products down from Amazon. You will need to have a professional level seller’s account through Amazon, and to have signed up for MWS through their site. You will then want to put the credentials they provide into the settings screen under system administration -> Settings -> Internet Features -> Amazon.

While Amazon is the most sweeping of the databases we have available, there are limitations placed on it by Amazon. You cannot pull product down with the proper barcode unless you have it already, and mass price updates are not possible from Amazon. However, the majority of products will be available for quick importing from Amazon.

Amazon has new prices and used prices available on most items, and trade values for some. Please be aware, however, that these prices may not be suitable for a brick and mortar retailer.

AMS

The AMS database, from All Media Supply, is available to all customers. This database is primarily focused on music, with a specialization in imported products. To download this, go under the database tab to AMS, then click download. This database does not need a conversion to function, but the download is rather large; be aware that it may take a few minutes if your connection is slow.

AMS allows for updating new prices and retail price.
BRE

A subscription video game database, contact sales for information on pricing for your store. Containing titles dating back to the NES, BRE offers complete and incomplete pricing on games and video game hardware. For subscribed users, you can download the database and set settings for price adjustments under databases and then BRE.

BRE allows you to make percentage-based adjustments to their pricing and trade values on either a universal or category basis.

BRE allows for updating used prices 1 and 2, trade-in prices 1 and 2, and trade-in cash prices 1 and 2.

Content@Ingram

A subscription service available from Ingram Books, you will need to both be using Ingram Books as a supplier and to sign up for the service through them. Different levels are available for this database subscription, which will give varying levels of detail about the products.

Similar to Amazon, this is a web-based database, and so cannot do mass price updates. However, in addition to the normal information about items, you will be able to see Ingram’s stock levels in their various warehouses for Purchase Ordering purposes. The search for this database can also be customized to a far greater deal than the other vendor databases.

Content@Ingram offers new pricing.

Ingram Entertainment

Similar to AEC, Ingram Entertainment’s content files can be processed by the system. You will need to obtain these from your representative with Ingram. There are three types of file available from Ingram: Games, DVDs, and another file heavy on accessories, figures, and other miscellaneous.

These will all be limited to products distributed by Ingram, but also include upcoming titles, which can be quite useful for stores taking advantage of the preordering system.

Ingram Entertainment offers new pricing.

VGPC

Video Game Price Charts is a subscription service available through sales. Containing multiple options for price feeds, you can select between them to find the one that seems most appropriate for your
store’s situation. Video Game Price Charts has games dating back to the Atari era, and particularly values complete in box older games.

VGPC offers new, used, and trade-in values for both complete and incomplete, cash and credit.
Importing Data

The importer is a utility for bringing data in from a spreadsheet and either creating or updating records from it. This works with comma separate values files (*.csv), tab delimited text files (*.txt), and excel files (either *.xls or *.xlsx). It does not work with fixed width files; if wanting to import from a fixed width file, we recommend using your spreadsheet program of choice to convert it from fixed width into tab delimited text.

Please note that while we have put as many safeguards as we reasonably can on the importer, it can still be easy through mis-mapping or through a sloppy import source file to create large amounts of incorrect data in the system. By far the most thorough and easiest way to clean up after a mishap like this is to restore to a backup from before the import. There is no undo within the program for an import, other than to restore a backup. For this reason, performing an import during store business hours is inadvisable.

The standard support agreement does not include repairing databases following an import. We will recommend restoring to a backup.

With that being stated, the importer can be an excellent tool for getting a store going, particularly if converting from another inventory management system.

To access the importer, go to System Administration, then to Import. You will need to be an administrator in the system to see this option.

You will be presented with the following screen:
This will present you with a further warning about keeping a backup, as well as a selection screen for the type of data you want to import.

Note that if planning an item import and you want to set departments and categories on your imported items, you should either ensure that all departments and categories are already in the system, or do a category or department import first.

After selecting the type of data you’ll be working with, hit next to proceed.

For further screenshots here, we will have selected items; the process differs only in the columns that are being mapped to.

On the next screen, you will need to select your import file. Click browse to launch a windows browser prompt, then navigate to the compatible import file. If successful, you will see data populate, as in the above example.

Upon loading a file, if it does not populate data then there may be an issue with your source file. Examine it in your spreadsheet program of choice, and possibly try saving it in a different format. Tab delimited text tends to be the easiest format for importing from. If you are using a spreadsheet program other than excel, saving to excel formats can result in invalid data for the importer.

If you are satisfied that the data is from the file you wish to import from, click next to proceed.
The next step is to assign where the information from your file is going to go in the program. This process, known as mapping, is essential to get correct. Fields that you do not map will be set to a default value. Some fields are required; these will be listed in below.

Depending on what type of data you are importing, the following are the available fields:

<table>
<thead>
<tr>
<th>Items</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ItemID</td>
<td>The primary item number. Required, up to 20 characters long, must be unique.</td>
</tr>
<tr>
<td>Name</td>
<td>The title of the item. Required, up to 50 characters long.</td>
</tr>
<tr>
<td>ItemID2</td>
<td>A secondary item number. Up to 20 characters long.</td>
</tr>
<tr>
<td>ItemID3</td>
<td>A tertiary item number. Up to 20 characters long.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the item; often, the author or artist. Up to 50 characters long.</td>
</tr>
<tr>
<td>Description2</td>
<td>Another description of the item. Up to 50 characters long.</td>
</tr>
<tr>
<td>DepartmentID</td>
<td>The department ID for the item. If assigned, this department must exist in the system, or the row will not be imported. If unassigned, this will default to department ‘0’.</td>
</tr>
<tr>
<td>CategoryID</td>
<td>The category ID for the item. If assigned, this category must exist in the system, or the row will not be imported. If unassigned, this will default to category ‘0’.</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>The maker of the item. Up to 40 characters.</td>
</tr>
<tr>
<td>NewQuantity</td>
<td>The new quantity in stock of the item.</td>
</tr>
<tr>
<td>UsedQuantity</td>
<td>The used quantity in stock of the item.</td>
</tr>
<tr>
<td>NewPrice</td>
<td>The new price of the item.</td>
</tr>
<tr>
<td>UsedPrice</td>
<td>The used price of the item.</td>
</tr>
<tr>
<td>UsedPrice2</td>
<td>The used price of the item in condition 2. If not using extended pricing, this field is unutilized.</td>
</tr>
<tr>
<td>TradeinPrice</td>
<td>The trade in price of the item, for credit.</td>
</tr>
<tr>
<td>TradeinPriceCash</td>
<td>The trade in price of the item, for cash.</td>
</tr>
<tr>
<td>TradeinPrice2</td>
<td>The trade in price of the item, for credit, in condition 2. If not using extended pricing, this field is unutilized.</td>
</tr>
<tr>
<td>TradeinPriceCash2</td>
<td>The trade in price of the item, for cash, in condition 2. If not using extended pricing, this field is unutilized.</td>
</tr>
<tr>
<td>NewCost</td>
<td>The cost of this item to the store for new copies.</td>
</tr>
<tr>
<td>UsedCost</td>
<td>The cost of this item to the store for used copies.</td>
</tr>
<tr>
<td>UsedMax</td>
<td>The used quantity of the item at which to stop automatically accepting trades. By default, this will warn of exceeding the limit; optionally, it can block the trade entirely.</td>
</tr>
<tr>
<td>RetailPrice</td>
<td>The manufacturer’s suggested retail price of the item. This is an informational field that will not change the price charged at checkout.</td>
</tr>
<tr>
<td>ReorderLevel</td>
<td>The new quantity below which to suggest reordering this item.</td>
</tr>
<tr>
<td>ReorderQuantity</td>
<td>The number of copies to default to purchase ordering at a time.</td>
</tr>
<tr>
<td>Taxable1</td>
<td>Whether tax rate 1 is applied to the item. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td>Taxable2</td>
<td>Whether tax rate 2 is applied to the item. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>Taxable3</strong></td>
<td>Whether tax rate 3 is applied to the item. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>Service</strong></td>
<td>Whether the item is a service item. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off. If the item is a service item, quantities are not tracked for it.</td>
</tr>
<tr>
<td><strong>Preorder</strong></td>
<td>Whether the item is a preorder item. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>PreorderDate</strong></td>
<td>The date at which preorder deposits can be made towards the item.</td>
</tr>
<tr>
<td><strong>PreorderMinPayment</strong></td>
<td>The minimum deposit to reserve a preorder for this item. May not be greater than the new price of the item.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Miscellaneous notes about this item.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>The location of this item. Maximum length of 20 characters.</td>
</tr>
<tr>
<td><strong>SerialNumbered</strong></td>
<td>Whether this item should prompt for a serial number when it is added to the invoice. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>WebStore</strong></td>
<td>Whether an item is listed on your website for sale or not. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>Amazon</strong></td>
<td>Whether an item is listed on Amazon for sale or not. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>ASIN</strong></td>
<td>The amazon identifier for an item.</td>
</tr>
<tr>
<td><strong>AgeRestricted</strong></td>
<td>Whether an item’s sale is restricted based on the customer’s age. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>MinimumAge</strong></td>
<td>The minimum age a customer must be if the item is age restricted.</td>
</tr>
<tr>
<td><strong>StreetDate</strong></td>
<td>The date where a product is available for purchase.</td>
</tr>
<tr>
<td><strong>Weight</strong></td>
<td>The weight of the product, used for calculating shipping costs with ecommerce.</td>
</tr>
<tr>
<td><strong>Active</strong></td>
<td>Whether or not an item is actively available for sale. Either 1 or true is valid on the source data for rows where it is on; either 0 or false is valid if it is off.</td>
</tr>
<tr>
<td><strong>LabelStudioName</strong></td>
<td>The label under which the item was published. Up to 30 characters.</td>
</tr>
</tbody>
</table>

<p>| <strong>Customers</strong> | <strong>CustomerID</strong> | The primary ID of the customer. Up to 10 characters. Must be unique, required. |
| <strong>FirstName</strong> | The first name of the customer. Up to 30 characters. Required. |
| <strong>LastName</strong> | The last name of the customer. Up to 30 characters. Required. |
| <strong>Company</strong> | The company the customer works for. Up to 30 characters. |
| <strong>Address1</strong> | The address of the customer. Up to 50 characters. |
| <strong>Address2</strong> | The second line of the customer’s address, if needed. Up to 30 characters. |
| <strong>City</strong> | The city where the customer lives. Up to 30 characters. |
| <strong>State</strong> | The abbreviation of the state or province where the customer lives. Up to 3 characters. |
| <strong>Zip</strong> | The postal code of the customer’s address. Up to 10 characters. |
| <strong>Phone1</strong> | The first phone number for the customer. Up to 15 characters. |
| <strong>Phone2</strong> | The second phone number for the customer. Up to 15 characters. |</p>
<table>
<thead>
<tr>
<th>Phone3</th>
<th>The third phone number for the customer. Up to 15 characters.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>The fax number for the customer. Up to 15 characters.</td>
</tr>
<tr>
<td>Email1</td>
<td>The email address of the customer. Up to 50 characters.</td>
</tr>
<tr>
<td>Email2</td>
<td>The second email address of the customer. Up to 50 characters.</td>
</tr>
<tr>
<td>Website</td>
<td>The website for the customer. Up to 50 characters.</td>
</tr>
<tr>
<td>AccountOpenDate</td>
<td>The date on which the customer opened an account that could carry a balance.</td>
</tr>
<tr>
<td>AccountCloseDate</td>
<td>The date on which the customer closed their account.</td>
</tr>
<tr>
<td>AccountBalance</td>
<td>The balance between the customer and the store. A positive balance indicates the customer owes the store that much money; a negative balance indicates a debt from the store towards the customer.</td>
</tr>
<tr>
<td>AccountMax</td>
<td>The maximum balance that the customer may carry.</td>
</tr>
<tr>
<td>AccountActive</td>
<td>Whether the account can currently charge to on account or not.</td>
</tr>
<tr>
<td>RewardsMember</td>
<td>Whether an account can gain rewards points for purchases and activity.</td>
</tr>
<tr>
<td>RewardsPoints</td>
<td>How many points the customer currently has.</td>
</tr>
<tr>
<td>TaxExempt</td>
<td>Whether a customer is tax exempt or not.</td>
</tr>
<tr>
<td>Active</td>
<td>Whether a customer can be selected for invoices or not, regardless of payment method.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>DepartmentID</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Active</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>CategoryID</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Active</td>
</tr>
</tbody>
</table>

To map, you’ll select the source column from your spreadsheet in the leftmost list, select where that information is going in the middle list, and then hit the map columns button to add this to the mapped columns in the third list. When you do this, the destination will be removed from the second list – you can put information from the same source column in several places if you desire, but destinations can only have one source.

If you need to remove a mapping, highlight it in the rightmost list and then hit ‘delete mapping’. This will make the destination available again for remapping.
At the bottom of this screen are several options and functions. The update existing records check box will determine whether rows that have the same unique identifier column (such as ItemID or CustomerID) will update the record in the database with new data from the fields, if checked, or be tossed out and reported as failed import rows, if unchecked.

After you’ve got your columns mapped, you may want to save a mappings file. This will allow you to load that file if you are importing a spreadsheet with the same columns later. This can be done using the save mappings and load mapping file buttons, respectively, at the bottom of the screen.

Finally, once you’re ready to proceed, click import and the system will attempt to import your data.
Register Designer

The register designer is a feature that will allow you to customize the look and functionality of your register screen. This can be done individually on each station, or you can reuse a template file across your store or stores. This includes an online sharing center, where you can post your own templates for others to work from or take from templates others have shared.

This functionality is only available to supported users.

To access the designer, you’ll need to be logged in as an administrator. The designer is available through System Administration and then Register Designer.

Upon going into the designer, you’ll be presented with the above screen, offering you options for getting started. Begin With A Completely Blank Template will start you completely from scratch. While this will give you a great deal of flexibility, we do not necessarily recommend this when first using the designer; it can be far easier to take an existing template and tweak it unless planning on a simple design.

Load From A Local Template File will allow you to load from a saved file (*.dat extension), which you could have done at another store or saved from the designer. This method allows you to share templates with select others without making them publicly available through the online exchange.

Load From Saved Templates will allow you to select from the templates saved in your local database. This includes the default ones included with the program as well as any you have previously saved.
Load From Online Exchange will take you to the online exchange gallery to browse between different customers’ submissions, as well as some from Extreme Point of Sale, Inc. You’ll be able to see a screenshot of the design there as well as a description that they have entered.

Regardless of how you go into the designer, you will see the toolbox window. If you load a template, you will also get a register designer window. If you have a blank template, you will need to hit ‘Create’ on the toolbox screen to make that; this is to give an opportunity to set the design size first.

Pictured above, we’ve loaded the included Lower Resolution Dark Theme. Several aspects of the toolbox screen are worth drawing attention to. When first loading a template, or creating from a blank one, it will be on the “Setup” tab, which controls saving and loading templates, and several general options for the register. “Add controls” lets you place additional elements onto your design, while “Edit” is used for changing details about an element.

The Template Name is the key to what the template will be called within the software. Even if you save it to a file, with a different file name, internally this is what will cause it to be overwritten or create a new design. We recommend changing this if you are going to tweak existing designs, to prevent confusion.

The title bar text is what appears at the top of the register window. This can be made to include, for example, your store name or motto.

The register form design size controls the size of the designer window. This allows you to more easily develop for a specific resolution monitor, particularly if not working on the station that the template will be used on.

Back Color changes the color of the register screen; for example, here it is a very dark grey.

Popups and payments will launch a secondary option screen where you can customize the colors and fonts of popup screens and the complete transaction screen for this template. Please note that using an
overly large font will result in unreadable or truncated text; if you run into this, you should modify your template to use a smaller font.

Finally, for the setup tab there are several options for saving and loading templates. Under online functions, load will take you to the online exchange to browse. Save will push your template to our server, and if ‘Make template publicly viewable’ will make it available for others to download, with the description set in the textbox below these buttons.

Create will wipe the current register window and start a blank one. Do not click this when you’re working on one unless you want to restart.

Load File, Save File, and Save As File will all work with local templates .dat files. If you have previously loaded or saved as, the “Save File” button will be available and will update that file, rather than having to browse for a filename.

Load From Database and Save To Database will work directly on the database, based on the template name. If you save to the database and that template name is not already your current station template, you will be asked if you want to make it your current template.

Under Add Controls, you’ll find all the possible elements to add to your register layout. These can either be grouped by the general function, or they can be grouped by the type of control they are (such as Buttons or Labels). As you click on each one, an explanation of what it is will appear below the list.
Each control must have a name, and most of them also can have text on them. The names must be unique – the system will block you from adding a second element with the same name as another.

If you want, you can set an initial set of colors and fonts on controls where this is appropriate. This can always be changed through the edit screen afterwards.

Once you hit add, you will be taken to the register designer, and your cursor will be a cross. Click to position the control you’re wanting to add.

Controls on the register designer can be moved and resized using the mouse, or through the edit tab:

Under the edit tab, you can edit aspects of an element of the design. You can select which to edit through three methods:

A) Hit the select button at the top of this screen, then select the one by name you want.

B) Hit the edit button at the bottom of this screen, then click the control you want in the register. You will continue to be able to click to edit until you hit “move”.

C) Right-click the control you want in the register, then hit edit in the context menu that appears.
The right-click context menu contains many other functions that can make your life easier with the designer, including deleting elements and aligning different elements.

On the edit tab, most options are available for all types of controls. There are a few notes:

Anchoring will keep an element its current distance from the edge of the screen, or if it is in a groupbox from the edge of the groupbox. If opposing sides are both anchored, then the element will grow and shrink with the screen. Using this correctly allows a design to scale as the program is maximized or minimized.

Horizontal and Vertical position are based on the screen UNLESS the control is contained in a groupbox, in which case they are the position within the groupbox.

“Advanced” contains some specific settings for different controls. Most notably here, you can set the color and font options for your items grid, the size and orientation of your touchbutton array, and what report and filters report buttons use by setting the advanced properties.
Notable Keyboard Shortcuts

F1: Open or return to the Register Screen from elsewhere in the program.
F2: Go to Items from the register
F3: Go to Customers from the register
F4: Add a miscellaneous item to the current transaction
F6: Check a gift card’s balance
Control + Shift + F8: Reprint last completed transaction’s receipt (from this station)
Control + F3: Manage bundles
Control R: Transaction Search
F5: Suspend Transaction
F9: Recall Suspended Transaction
F7: Search Vendor Database
Alt+C: Cancel Transaction
Control + L: Change selected item’s discount percentage
Control + T: Set transaction notes
Control + Q: Change selected item’s quantity.
Control + I: Change selected item’s price
Control + M: Change other details about selected line item.
Common Support Issues and Questions

I am getting an error about the server not running, and the program is asking if I want to select another.

There are three main considerations here:

If you are on a secondary station, and the program is working from the primary:

This typically indicates a networking issue. If this was previously working, the most likely culprits are a change in your network or in your firewall. Check all connectivity, and if new security software has been installed, make certain it is allowing connections to Microsoft SQL Server and SQL Server Browser on the server station.

If you are on the server station:

Generally, this indicates that the SQL Server service is not running in Windows. The most benign and likely cause of this is that resources were tied up during startup and prevented the service from starting. To attempt to start it manually, in windows, go through control panel and to Administrative Tools. Then, go to services. Scroll down the list, looking for the SQL Server (ExtremePOS) option. Right click it and hit start.

If this starts, attempt restarting ThunderPOS. If it does not, this indicates a more severe issue, and you should contact support if supported for assistance.

If you have renamed or replaced the server:

If you have renamed the server computer, or replaced it, you will need to point the other stations to the new server. This can be done by saying YES to selecting another server, then pointing to the new server name.

My receipts are getting cut off at a certain point consistently

This indicates that your receipt printer driver in windows is set to use a shorter form of paper, rather than the roll. Exact details on this vary from printer to printer, but you will want to go into Devices and Printers in Windows, then printer properties for your receipt printer.

Somewhere in this will be a paper selection. Make certain you are set to use a receipt roll (typically 80mmxROLL).

If you need assistance with this and are supported, contact support.