



**Business Plus Accounting Touch POS
Quick Start Guide**

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Initial System Startup

When you initially open the BPA software, you will be asked to enter your company information. At minimum, you should enter your company name. All other information can be entered later by going to Definitions→Companies→Modify.

Business plus Accounting

Welcome to Business Plus Accounting 8.0
by Business Software Solutions, Inc.

We are glad you have chosen Business Plus Accounting by Business Software Solutions for your business. Please take a moment to enter the following information regarding your company.

Business Plus Accounting includes the following features:

- Customer Order Processing
- Point of Sale
- Inventory Control
- General Ledger
- Accounts Receivable
- Accounts Payable
- Vendor Orders
- Product Receiving
- ... And Much More!

Please Enter Your Company Information

Company Name:

Street:

City/State/Zip:

Country:

Telephone: ()- -

Fax: ()- -

State ID Number:

Federal ID Number:

Corporate ID:

Defining Employees

The first thing you should do is create an employee in the system. To do this, go to Touch Screen POS→POS Manager Functions→Define Employees→Add. At minimum, you will want to fill out the following fields:

- Employee # - This is a number that you will define for each employee. Most of our customers will use the last 4 digits of each employee's Social Security number for this field.
- Last Name.
- First Name.
- Sale Person ID – When a sale is made in the software, this field will be printed on the customer receipt, indicating who made the sale. We recommend either entering the Employee number, or the first name of the employee.

EMPLOYEES

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Employee #: 5656 Exemptions (0-10):

Last Name: Doe Tax Status (M/S/X):

First Name: John Hourly Rate 1:

Sale Person ID: JOHN Job Code 1:

Street:

City:

State:

Hourly Rate 2:

Job Code 2:

Zip:

Hourly Rate 3:

Job Code 3:

Telephone: () -

Over Time Rate 1:

Telephone: () -

Over Time Rate 2:

Fax: () -

Over Time Rate 3:

Soc Sec #: - -

Salary:

Allow Non-approved Clock Outs:

Pick-F8 Top Prev Next Bottom Find Print Save-F3 Cancel Delete Exit

Creating Your Sales Menu

To create your sales menu, you should perform the following steps:

Adding Product Information to Your System

Anything that may possibly be sold in the system should be defined as a product. To create the product record, perform the following steps:

1. Go to Touch Screen POS→POS Manager Functions→Define Products→Add.
2. At minimum, fill out the following fields:
 - a. Product/Service – This will be the name of the product that you are selling. For example, if you are selling crushed ice, you can enter “Crushed Ice” in this field.
 - b. UPC Code – If you purchased a bar code scanner with your system, you will be able to sale items by scan the product’s bar code. Scan or type in the product’s UPC Code in this field.
 - c. Description 1 – Again, this is the name of the product you are selling. This field appears on the customer receipt, so try not to use any abbreviations in this field. If you run out of space, you can use Description 2 and 3.
 - d. Product Type – This field allows you to categorize the product for reporting purposes. Using our “Crushed Ice” example, you can place this product under the “Food Items” category. Press the F8 key to view a list of categories, and then select the appropriate category.
 - i. If you need to add an additional Product Types to the system, you can do this by going to Touch Screen POS→ POS Manager Functions→Define Products→Define Product Types.
 - e. Sales Taxable – Place a Y in this field if this product needs to be taxed.
 - f. Price Level 1 – This is the price that you are charging for this product.
3. Press Save when finished.

Page 1	Page 2	Page 3
Product Information	Cost, Pricing & Tax	Inventory Information
Product/Service: CRUSHED ICE	Cost: []	Unit Of Measure: ea
UPC Code: 123456789	Price Level 1: 2.000	Unit Weight: []
Description 1: Crushed Ice	Price Level 2: []	On Hand: []
Description 2: []	Price Level 3: []	Order Level: []
Description 3: []	Price Level 4: []	Maximum Level: []
Department: []	Price Level 5: []	Reorder Vendor 1: []
Product Type: FOD	Compare At: []	Reorder Vendor 2: []
Size: []	Sales Taxable: Y	Reorder Vendor 3: []
Style: []	Tax Group: Sales Tax	Vendor Conversion UM: []
Color: []	Goods Taxable: N	Vendor Conversion ID: []
Pick Group 1: []	G/L Sales Acct: 4105-0000	Vendor Conversion #: []
Pick Group 2: []	G/L COG Acct: 5105-0000	Lead Time Days: []
Pick Group 3: []		Default Location: []
Product/Service: P		Shelf Life Days: []

Pick-F8 Top Prev Next Bottom End Print Save-F3 Cancel Delete Exit

Changing Menu Tab Names

On your sales menu, you can have up to eight (8) tabs.

The screenshot displays a POS interface with several key components:

- Keypad:** A numeric keypad with buttons for 0, 1-9, a clear button, and a decimal point.
- Payment Section:** Buttons for Check, In Store Credit, Credit Card, and Debit Card, each with a corresponding balance field showing 0.00. Below these are buttons for Gift Card, EBT Payment, and Cash.
- Summary Fields:** Sub Total (0.00), Tax (0.00), Total (\$0.00), and Change (0.00).
- Menu Grid:** A grid of menu items under categories like Self-Serve Items and Outside Items. Visible items include various milk products such as PINT 2% MILK, PINT CHOCO MILK, QUART BUTTERMILK, QUART HALF AND HALF, QUART HVY CREAM, 1/2 GALLON SKIM MILK, 1/2 GALLON 1% MILK, 1/2 GALLON 2% MILK, 1/2 GALLON WHOLE MILK, 1/2 GALLON CHOCO MILK, GALLON SKIM MILK, GALLON 1% MILK, GALLON 2% MILK, GALLON WHOLE MILK, and GALLON CHOCO MILK.
- Bottom Bar:** A row of function buttons including PgUp, PgDn, Misc POS, Discount, Exact Check, Exact Card, \$1, \$5, \$10, \$20, \$50, and Exact Cash. A second row includes buttons for Specific Customer, Put On Account, Retrieve Order, Hold Order, Print Receipt, Reprint Receipt, Void Item, Void Sale, Open Drawer, Cashier Out, Cashier In, and Exit.

To change the tab names, perform the following steps:

1. Go to Touch Screen POS → POS Manager Functions → Assign Menu Names.
2. Change the menu names as needed, then press the F3 key on your keyboard.

ASSIGN MENU NAMES	
DEFAULT MENU NAME	YOUR MENU NAME
Menu 1	Dairy Products
Menu 2	Fresh Fruits
Menu 3	Fresh Vegetables
Menu 4	Bakery Items
Menu 5	Deli Items
Menu 6	Hot Case Items
Menu 7	Self-Serve Items
Menu 8	Outside Items


Adding Buttons To Your Sales Menu

Once you have created all product records and created menu tabs, you can now begin placing products into your menu. To do this, perform the following steps:

1. Go to Touch Screen POS→POS Manager Functions→Define Menu Items→Add.
2. Enter the following fields:
 - a. Product Code(SKU) - This is the name of the product that you added in Define Products. To view a list of these products, press the F8 key on the keyboard.
 - b. Select Menu – This is where you will place the product in the appropriate menu tab on your sales menu. To view a list of your menu tabs, select the F8 key on the keyboard.
 - a. Button Text Top/Bottom – This is the text that will show on the button on your menu. Using the Crushed Ice example, you could just enter “Crushed Ice” in this field.
 - i. Each line allows you to type in ten (10) characters. So, if you do not have enough space on the Button Text Top, you can use the Button Text Bottom to fill this space.
3. Press Save when finished.

Define Menu Items

MENU ITEMS Create a Copy

Product Selection	Product Information	Menu Button Picture
Product Code (SKU): <input type="text" value="CRUSHED ICE"/>	Price Level 1: <input type="text" value="2.00"/>	 <input type="text"/> <input type="button" value="Select Picture"/>
Description: <input type="text" value="Crushed Ice"/>	Price Level 2: <input type="text"/>	
Description: <input type="text"/>	Price Level 3: <input type="text"/>	
Description: <input type="text"/>	Price Level 4: <input type="text"/>	
Description: <input type="text"/>	Price Level 5: <input type="text"/>	
Menu Item Options		
Select Menu: <input type="text" value="Self-Serve Items"/>		
Button Text Top: <input type="text" value="Crushed"/>		
Button Text Bottom: <input type="text" value="Ice"/>		
Allow Custom Price: <input type="checkbox" value="N"/>		
Allow Custom Credit: <input type="checkbox"/>		
Prompt For Quantity: <input type="checkbox" value="N"/>		
Auto Calculate Qty: <input type="checkbox" value="N"/> (i.e. Gallons Of Gas)		

Pick-F8 Top Prev Next Bottom End Save-F3 Cancel Delete Exit

You have now successfully added products to your sales menu.

Adding Sales Tax

To enter your sales tax percentage, perform the following steps:

1. Go to Definitions→Sales Tax Table.
2. Under Tax Code 1, enter your City, State, and Tax Rate.
3. Press Save and Exit when finished.

Define Sales Tax Rates

Customer Sales Tax Rates | **Product Tax Reporting Groups**

When customers are defined they are given a sales tax table number. That table number corresponds to a sales tax rate. All customers given the same table number will have the same sales tax rate.

Use this screen to assign tax rates to the tax table numbers. To change a sales tax rate for a group of customers you only have to change the rate in the tax table. For exempt customers create a 0.0 tax rate.

If you have products that should be charged at a different rate from your standard sales tax rate, you can specify their tax unique tax rate using product definitions.

Sales Tax

TAX CODE	CITY - COUNTY	STATE	TAXRATE
1	Your City	UT	6.0000
2			0.0000
3			0.0000
4			0.0000
5			0.0000
6			0.0000
7			0.0000

Sales Tax name to print on invoices:

Minimum Sales Amount for Sales Tax In Restaurant POS (If Applicable):

GST Tax

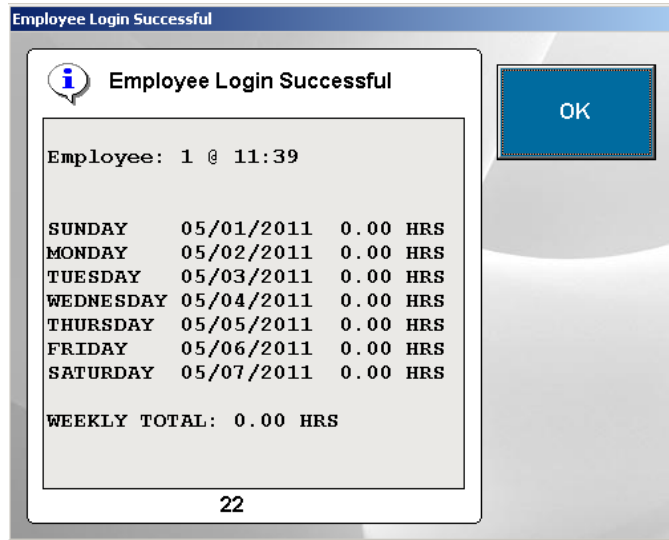
Goods And Services Tax Rate (Used In Canada):

Goods & Services Tax name to print on invoices:

Clocking In and Out of the Time Clock

Before you can perform sales in the system, you must be clocked into the time clock. To clock in, perform the following steps:

1. Go to Touch Screen POS→Cashier Clock In/Clock Out→Employee Clock In.
2. Enter the employee number you wish to clock in, and then press OK.
3. You should now receive a message that says “Employee Login Successful.”



At the end of the day, to clock out of the time clock, perform the following steps:

1. Go to Touch Screen POS→Cashier Clock In/Clock Out→Employee Clock Out.
2. Enter the employee number you wish to clock out, and then press OK.
3. You should now receive a message that says “Employee Logout Successful.”

