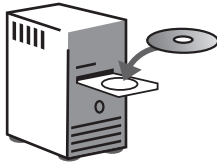# intuit

QuickBooks®

Point of Sale 2013

User Guide
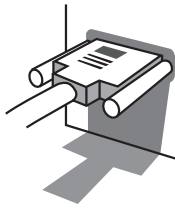
Install and Setup Sequence

1. Install Point of Sale

2. Start Setup Interview

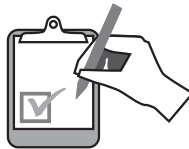## 3. Connect Hardware and Complete Interview

**DO NOT connect hardware until prompted by the
Hardware Setup Wizard after installing Point of Sale!**

4. Ring Up Sales!

5. Next Steps

Before You Begin

All Installations

- Ensure your workstation meets the minimum system requirements listed at the end of this guide
- Sign on to Windows with Administrator rights before installing
- Install the latest updates for your firewall software. Typically, this is done by right-clicking on the firewall icon in your task tray and selecting the option to check for updates.
- If installing on multiple workstations, ensure they are properly networked; contact a qualified network technician if you need networking help
- If integrating with QuickBooks Accounting software, review the QuickBooks Integration tab before beginning

New Single-Store Installations

1. Gather the following information:

- Applicable sales tax rate(s) and the name of the agency to which they are paid

Other helpful information to have:

- Names, contact information, account numbers, balances, etc., for existing vendors, customers and employees
- Current on-hand counts, costs and prices for existing inventory items

Don't worry if you don't have all this information now. You can still install and enter the information later.

2. Follow the order of the tabs in this guide.

Upgrading from a Previous Version

- Select the **Upgrade Prior Version** tab for instructions specific to you

New Multi-Store Installations

1. Review the information on the Multi-Store tab.

2. Gather the following information:

- The information shown for single-store installations
- Names, addresses and phone numbers for each store
- Point of Sale license number and Store Exchange communication method for the Server Workstation at each store

3. Follow the order of the tabs in this guide.

About Firewalls

Firewalls are an important part of an overall data protection strategy. With the latest updates, most major software firewalls will be automatically configured to allow Point of Sale operations. Likewise, the firewall included in Windows® XP/Vista/7 is detected and automatically configured when you first run Point of Sale.

Installing Point of Sale on the Server Workstation

Choosing a Server Workstation

One computer in your store <u>must</u> be made the Server Workstation. This computer performs <u>all</u> Point of Sale activities, plus:

- Creates and stores the Point of Sale company data file
- Manages your Point of Sale registration and user licenses
- Connects to and exchanges data with QuickBooks accounting software
- In a multi-workstation environment, it must be running to use Point of Sale on any workstation

To install Point of Sale on the Server Workstation:

1. Close all running programs, except Windows.

2. Put the Point of Sale CD in your CD-ROM drive.
   - If the installation doesn't begin automatically, locate and double-click the **setup.exe** file on the CD

3. Follow the onscreen prompts:
   - Enter the License and Product numbers from the CD holder or provided to you by a sales agent
   - Choose how many computers Point of Sale will be installed on at this location. If installing on only one computer, go to step 4.
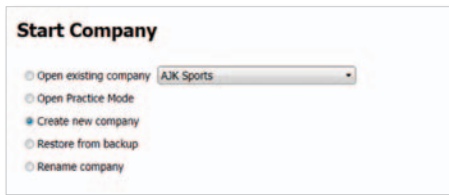
4. If prompted, restart your computer and then launch Point of Sale.
   Point of Sale will automatically install other required applications contained on
   the CD, if necessary. See requirements on back cover.
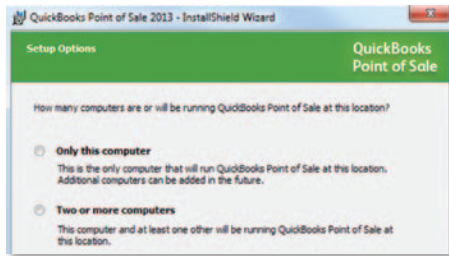
Creating Your Company Data

On startup, Point of Sale displays options for opening or creating a company data file.

1. Select **New Company File**.

2. Enter a unique name for your company data and click **OK**.
   - If a multi-store installation, also enter your Store type, Headquarters or Remote
     and store number
     (Note: Install only one Headquarters store)
3. When prompted, select a workstation number
   (1 is suggested for the Server Workstation).
4. Click **OK**.

Point of Sale creates your company data file; which may take a few minutes.

Registering Point of Sale

Point of Sale must be registered on the Server Workstation or it will cease to function on the 6th day after installation.

1. When prompted, select **Register Now**.
2. Follow the instructions to register online (alternatively, you can register by phone).

After registering, your workstation type and license/product numbers can be viewed by selecting **About Point of Sale** from the **Help** menu. You will need to provide these numbers if contacting Intuit for support or to purchase additional user licenses.

About Point of Sale Licensing

Point of Sale can be installed on multiple workstations using a single license number. However, in that case, only one of the workstations can run Point of Sale at one time. For multiple workstations to run the program concurrently requires multiple user licenses (additional licenses sold separately).

With multiple user licenses, the Server Workstation acts as the "license manager," checking licenses in and out to the other workstations. As many workstations can be using the program concurrently as you have purchased user licenses, up to twenty in a store.

The Server Workstation must be running for any workstation to run Point of Sale, but only uses a license itself if it also has Point of Sale open.

- Instructions for adding Client workstations can be found on the Add Workstations tab
- For additional information about Point of Sale licensing, search the in-product Help index by keyword "licensing"

Completing the Setup Interview

The Setup Interview is automatically launched and will help you configure basic Point of Sale options for your business.

Notes about the interview:

- If you are not prepared to complete a page, skip it and come back later (select **Setup Interview** from the **File** menu)
- Most of the choices you make can be changed later
- Use the **Tell me more** links on each page for answers to frequently asked questions
- More advanced options can be set up later in either **Company** or **Workstation Preferences** (accessed from the **File** menu)
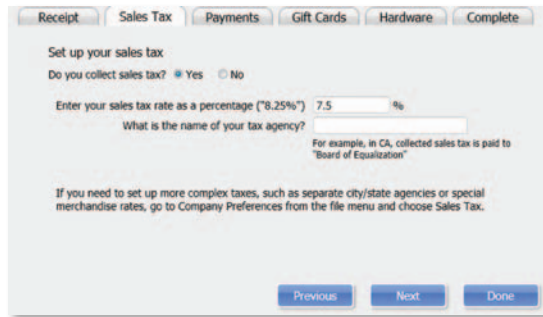
What's important about interview pages?

Your Company

The company information you enter is printed on sales receipts and other documents created in Point of Sale.

Sales Tax

If you charge sales tax, answer **Yes** and enter the total sales tax rate and the agency to which you make your tax payments.

Other Sales Tax Options

Point of Sale offers several advanced sales tax options, such as:
- Different rates based on item type, customer location or unit price thresholds
- Collecting and paying taxes to multiple agencies
- Removing taxes on sales to tax-exempt customers
- And others to help you meet local taxing requirements

If you need to set up more advanced sales tax options, enter the tax rate you most often charge on this page and then, after completing the interview, set up other tax options in **Company Preferences**.

More information on sales taxes can be found on the Setup Inventory tab.

Payments*

Learn about the Intuit Payments Account which allows you to easily accept credit and debit cards.

If you already have an Intuit Payments Account for your Point of Sale software, simply log in with your ID and password to link your account to your new software.

For more information, select the **Payments** or **Gift Cards** tab.

Gift Cards*

Learn about the Intuit Gift Card service which allows you to easily accept gift cards.

If you already have an Intuit Gift Card Account for your Point of Sale software, simply enter your account number to link your account to your new software.

For more information, select the **Payments** or **Gift Cards** tab.

*Both services are optional, require application approval and additional fees apply.

Connecting Hardware

Point of Sale hardware is available directly from Intuit or you can purchase compatible hardware from other sources.

- If you purchased hardware from a source other than Intuit, verify it is on the Point of Sale compatible hardware list and have any instructions or driver discs that came with the hardware on hand. The list is available online at **support.quickbooks.intuit.com** and enter **INF16088** in the search box.
- For detailed hardware connection instructions, refer to individual hardware setup guides.

Hardware Port Notes

- Ensure you have the required number and correct type of computer ports for the hardware you are installing. For example, the USB hardware bundle sold by Intuit requires three USB ports.
- If more USB ports are needed, purchase a powered USB hub. Check your computer manufacturer's specifications for the correct type of hub to purchase.
- Installation of some USB devices is specific to the port in which it is plugged at the time of installation. If you later move the connection to another USB port, your device may stop working. We recommend you make a note of the ports used and <u>always</u> plug these devices back into the same port.
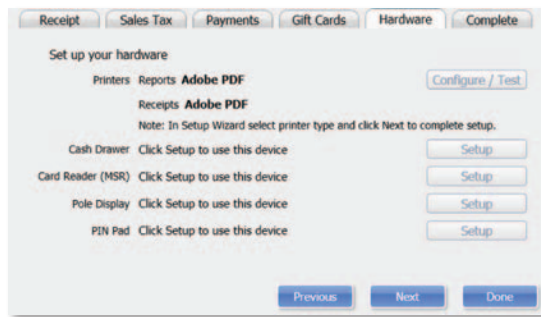
The Hardware Setup Wizard

The Hardware Setup Wizard is included as part of the Setup Interview and will walk you through connecting and configuring your hardware.

- **Do not connect hardware to your workstation until instructed to do so by the wizard**
- You can return to the wizard anytime from the Setup Interview.

To Set Up Your Hardware:

1. Select the **Hardware** tab from the Setup Interview

2. For each piece of hardware you wish to set up, click on the setup button to launch the wizard. Follow the onscreen instructions to connect, configure and test each piece of hardware.

- If installing non-Intuit hardware, you may be prompted to use the manufacturer's CD. When done, return to the Setup Wizard and continue.

Configuring an Inkjet or Laser Printer

1. Select the **Hardware** tab from the Setup Interview.

2. For printer installation, click on the Windows printer setup button to launch the wizard. Follow the onscreen instructions to connect, configure and test the printer.

What if my hardware stops working?

If your hardware stops working in the future, you can use the Hardware Troubleshooter to pinpoint the cause and get it working again.

From the Point of Sale Help menu, select **Hardware Troubleshooter** and follow the prompts.

Next Steps

Getting Started Guide

The Setup Interview helped you to configure basic program options. The recommended next steps for your business are:

- **Set Up Inventory**—create departments and add your vendors and inventory items
- **Customize Point of Sale**—add employees, assign security rights, set up sales tax options and define printing options
- **Complete Routine Tasks**—receive and sell merchandise, run reports and share data with QuickBooks accounting software

Use with QuickBooks Accounting Software

QuickBooks Point of Sale is designed to share data with QuickBooks accounting software.

If you are ready to integrate now, follow the steps in the QuickBooks connection wizard. The wizard can be found in the **Financial Center** under the **Financial** menu.

Do you have data you can import into Point of Sale?

Getting your vendor, item and customer records entered into Point of Sale is, without doubt, the most difficult challenge in getting up and running with Point of Sale.

If you already have this information, Point of Sale can help make this unavoidable chore much easier and faster.

There are two ways existing data can be imported:

1. Import data from your QuickBooks accounting software[1]
2. Import data from an Excel spreadsheet or text file[2]

Select the **Import Data** tab to learn more about these options.

1 Works with any Intuit QuickBooks Pro or Premier (2009–2012) and Intuit QuickBooks Enterprise Solutions (Version 9.0–12.0). Sold separately.
2 Requires Microsoft Excel 2000, 2002, 2003, 2007 or 2010.

Next Steps

Setting Up Inventory

Setting up your inventory can help you maximize profit while minimizing your investment of time and money.

Planning your Departments

In Point of Sale, inventory is categorized into departments. A well-planned department structure helps monitor sales performance, manage inventory and run meaningful reports, allowing you to make informed buying decisions.

Carefully planned departments will also save you data entry time and give you greater flexibility when conducting a physical inventory, modifying prices and printing tags.

Tips for planning your departments:

- Adding departments should be the first task completed in setting up inventory; department tax codes and profit margins are automatically associated with new items added to the department.
- There is no right number of departments. If you want to compare the performance of two groups of items, each should be assigned to its own department. On the other hand, having too many departments makes it difficult to consolidate data on your reports.

Adding or Importing Vendors

Each vendor from whom you purchase merchandise should be set up in Point of Sale. As you add items in inventory, you associate them with a vendor, allowing Point of Sale to automatically add vendor account numbers, terms, and order costs to purchase orders and receiving vouchers and build a history for the vendor, easily viewed from the vendor record.

If you have vendor records in another application or Excel spreadsheet, you may be able to import them to Point of Sale. Select the **Import Data** tab for more information.

Using Price Levels (Optional)

Each item can have a regular price and up to four alternate price levels, allowing you to offer different prices to qualifying customers.

If you plan to use price levels, define them now and Point of Sale will calculate the prices at each level for you as you add your items to inventory.

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Sales Tax Options

During the Setup Interview, you entered one sales tax rate and the agency to which you pay sales taxes. If necessary, you can set up other sales tax options in company preferences. The sales tax codes, locations and taxing instructions you set up can then be associated with inventory items and customers, so the correct sales tax is collected on sales.

The Sales Tax page of company preferences opens with the help sidebar displayed:

Use the **Add** or **Edit** buttons to set up sales tax codes and locations and define taxing instructions for each.

- Sales **tax codes** allow you to collect tax based on what merchandise is sold
- Sales **tax locations** allow you to use different taxing instructions for each tax code based on where the merchandise is sold or where the customer is located

Adding or Importing Items

Each item added to inventory must be unique in the combination of item type, department, description, size and attributes you enter.

Tips for entering items:

- For merchandise items, select **Inventory** as the item type
- **Department** and **Item Name** are required fields
- If entering new items not yet received, leave the On-Hand Quantity field empty. Point of Sale will update this field
- If using department margins to calculate prices, enter the item cost but leave price fields empty. Point of Sale will calculate the prices when the item is saved or received.
- Press **F1** on the item window to learn more about adding items

If you have existing item records in QuickBooks accounting software, an Excel spreadsheet, or a text file, Point of Sale can import those records for you. Go to the **Financial Center** from the **Financial** menu for more information.

Importing Data

Point of Sale offers two importing options that can greatly reduce your initial data entry time. Importing not only saves time, it also helps avoid data entry errors that can occur with manual entry. Using these tools, you can import existing customer, vendor and item records.
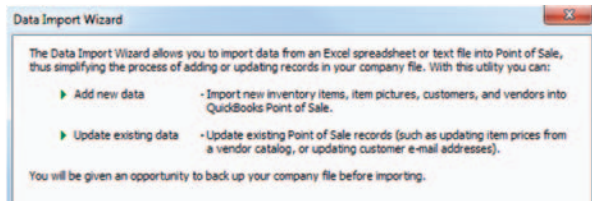
Using the Data Import Wizard

The Data Import Wizard can be used to import data you have exported from another software application, received from a vendor, or have in an Excel spreadsheet or text file (text files must be saved with the .csv extension). Point of Sale provides a default Excel template or you can custom map fields from your own file to the fields in Point of Sale.

1. From the Point of Sale **File** menu, select **Utilities** > **Import**.
2. Follow the onscreen prompts to specify the type of data and file format for the import.
    - **Default Template**: Enter (or copy and paste) your data to the appropriate columns of the template
    - **Custom File**: Follow the onscreen instructions to indicate how the data will be imported to Point of Sale
3. Specify other import options, as available, and then start the import.

Additional information is included on the default template or can be accessed by selecting **Help** from within the wizard.

Importing from QuickBooks Accounting Software

Data Import Wizard

The Data Import Wizard allows you to import data from an Excel spreadsheet or text file into Point of Sale, thus simplifying the process of adding or updating records in your company file. With this utility you can:

▸ Add new data · Import new inventory items, item pictures, customers, and vendors into QuickBooks Point of Sale.

▸ Update existing data · Update existing Point of Sale records (such as updating item prices from a vendor catalog, or updating customer e-mail addresses).

You will be given an opportunity to back up your company file before importing.

Importing from QuickBooks is enabled after you have established the connection between the two programs. Review the QuickBooks Integration tab for an overview of integration.

Importing QuickBooks vendors and customers

Active QuickBooks vendors and customers are automatically imported with every data exchange.

- If you do not want a customer or vendor imported, mark them as Inactive in QuickBooks before your first data exchange
- After the initial exchange is completed, review the imported customer and vendor records and edit them as necessary to take advantage of Point of Sale features unique to each
- New or edited customers and vendors in either program are exchanged routinely

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Importing QuickBooks items (optional)

Point of Sale will prompt you to import QuickBooks items until you do so or decline.

1. Select to import when prompted or select **Import Items Now** from the Advanced Options page of the **Financial Center**.

2. In the **Item Fields** window displayed, specify how you want to map the QuickBooks description fields to Point of Sale item description fields.

3. On the **Item Selection** window, specify if you want to import all items or selected items.

Note: If you prefer to track some items in QuickBooks, such as non-resale items, don't import them.

4. If importing selected items, use the **Select Items to Import** window to specify the items.

   - Select or clear the checkboxes at the left. All selected items will be imported.
   - Click a column header to sort the list by the values in that column
   - Use the **Select All**, **Unselect All** or **Filtered View** buttons at the bottom to help locate items and make selections
   - Select **Help** for more information

5. Select **OK** to start the import.

What's important about importing items from QuickBooks?

- You can import all or just selected items
- After importing, all activities related to the imported items, such as ordering, receiving and selling, should be done in Point of Sale
- Imported item quantities, costs and prices are tracked only in Point of Sale, although your QuickBooks financial accounts are updated to reflect item transactions
- Quantities of imported items are "zeroed out" in QuickBooks
- Review the imported item records, and edit as necessary, to take advantage of Point of Sale inventory features
- Select **Help** on the Import windows for more information
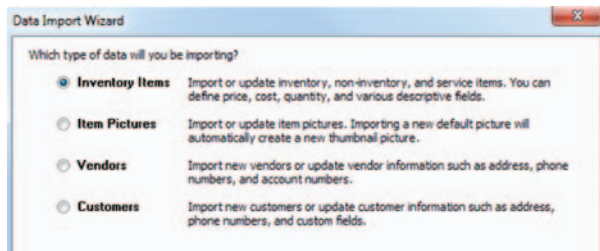
Upgrading From a Prior Version of Point of Sale

Preparing to Upgrade

- Ensure you meet the system requirements for Point of Sale 2013 outlined at the end of this guide
- Complete activities in your previous version:
    - ✓ Settle any pending credit card/debit transactions
    - ✓ If applicable, conduct data exchanges with other stores and your QuickBooks accounting software
    - ✓ Make a backup of your Point of Sale company data file
    - ✓ If you require passwords to log in to use Point of Sale, ensure you have a password assigned to the Sysadmin user; some activities in Point of Sale 2013 are restricted to this user
- Do not uninstall your previous version before upgrading; if you have already uninstalled, you must insert the CD from the previous version when prompted
- Update any installed firewall software to the latest release. Typically, this is done by right-clicking on the firewall icon in your task tray and selecting **Check for Updates.**
- If changing your configuration in conjunction with this upgrade, such as adding workstations, stores, or integrating with QuickBooks accounting software, read the information on the applicable tabs of this guide before beginning

Upgrade Notes

Previous version remains intact. Your previous version and data remain intact after upgrading. However, you should enter new transactions only in the new version. You can safely uninstall the previous version, if desired.

Upgrade one workstation at a time. If you have multiple workstations, close Point of Sale on all and then upgrade the Server Workstation. Then install other workstations, one at a time.

Upgrade all workstations/stores to new version. Workstations not upgraded to this version will not be able to access the company data until upgraded.

Review custom settings. Some settings (varies by previous version) may be returned to the default configuration to accommodate new features in this version. Review the following settings:

- **List columns and order**. To reconfigure columns, right-click in a column header and select **Customize Columns**.
- **Memorized reports**. Reconfigure and rememorize.
- **Custom security groups**. Employees in a custom group will not have access to new features until the group properties are updated.

Update Store Exchange settings. Multi-Store users must update their Store Exchange settings to reflect new license numbers and exchange folder paths for each store.

Upgrading the Server Workstation

1. Close all running programs except Windows.
2. Put the Point of Sale Upgrade CD into your CD-ROM drive.

*If the installation doesn't begin automatically, locate and double-click the **setup.exe** file on the CD.*

3. When prompted:
   - Enter the License and Product Numbers from the CD holder or provided to you
   - Select **Server Workstation** as the installation type
4. If prompted, restart your computer when the installation is completed.
5. Launch Point of Sale 2013.

Your previous version is detected and you are prompted to convert it for use with the new version.

6. Click **Yes** to copy and convert your data. Enter a name for the new company file (can be the same as previous).
7. On the window displayed, accept the suggested location for your previous data or browse to a different location and click **OK**. The conversion process may take some time, as Point of Sale builds the data necessary for new features.
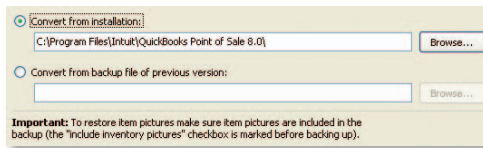
8. If applicable, use your existing user name and password to log in.
9. Register your new software when prompted; then select **Manage My License** > **Synch License Data Online** from the **Help** menu.

Synching your license data is necessary to update your company file with the number of user licenses you have purchased.

Upgrading Client Workstations

1. Close Point of Sale on the Server Workstation, but leave the Server Workstation running.
2. Follow the same procedure to install the upgrade to each client workstation, selecting **Client Workstation** as the installation type.
3. Restart your computer and launch Point of Sale 2013.
4. Point of Sale will search for and connect to the company data on the Server Workstation. If more than one company data file is found, a list is displayed. Select the correct company data and click **OK**.
5. If prompted, enter a workstation number and then your user name and password to log on.
6. If prompted, follow the onscreen instructions to merge licenses with the Server Workstation. Select **Help** on the Merge window for more information.

On subsequent launches, Point of Sale will reconnect to the same company data from the Client Workstations.

Adding Client Workstations

Point of Sale supports up to twenty networked workstations in a store, one Server Workstation and up to nineteen Client Workstations, which access the Point of Sale company data on the Server Workstation across the network.

Before beginning...

- Make sure your computers are properly networked and meet the minimum system requirements (see end of guide). Consult a qualified network technician if you need assistance with your network.
- Review the Point of Sale licensing information on the New Installation tab for information about when additional licenses are needed for multiple workstations
- Install the Server Workstation and create your company data file. Close Point of Sale on the Server Workstation, but leave the computer running.

Network
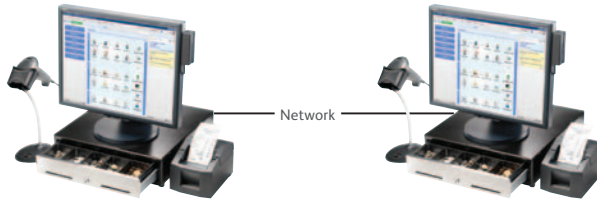
Server Workstation
- Program and company data files
- Database applications
- Communicates with QuickBooks accounting software
- Must always be running for any workstation to use Point of Sale

Client Workstation
- Program files
- Accesses company data across network

Multi-Workstation Guidelines

Only one Server Workstation allowed. Additional workstations must be installed as Client Workstations.

Install one workstation at a time. Point of Sale must be able to determine what workstation numbers are available and in use during each Client installation. Installing on multiple workstations at the same time could result in duplicate workstation numbers, which could cause data conflicts.

Same version/level required at all workstations. Workstations on the same network must be installed with the same version (e.g., Point of Sale 2013) and level (Basic, Pro or Multi-Store) as installed on the Server Workstation.

Server Workstation must always be running. For Clients to access the company data, the Server Workstation must be running (but not necessarily running Point of Sale).

Installing a Client Workstation

1. Close all programs except Windows on the computer being installed as a Client.
2. Put the Point of Sale CD in your CD-ROM drive.

*If the installation doesn't begin automatically, locate and double-click the **setup.exe** file on the CD.*

3. Follow the onscreen prompts to install the program files to your computer:
   - Enter the License and Product numbers (from CD holder or provided to you by a sales agent)
   - Select **Add Client Workstation** as the installation type
   - Accept the default installation folder (recommended). **Do not install to the Server Workstation over the network**.
4. If prompted, restart your computer.

To connect to the company data:

1. Ensure the Server Workstation is running and then start Point of Sale on the Client Workstation.
2. Point of Sale searches your network and locates the company data on the Server Workstation. If one company data file is found, you are automatically connected to it. If multiple company data files are found, a list is presented; select the correct file and click **OK**.
3. When prompted, select a workstation number for this computer.
4. Use the Hardware Setup Wizard to install hardware connected to this workstation. See the Connect Hardware tab.

Merging and Synchronizing Licenses

If you entered a unique license number for the Client installation, you will be prompted to merge the license with the license on the Server Workstation. You have 5 days to complete the merge, after which time only one workstation will be able to run Point of Sale at any one time.

After merging, the Server Workstation synchronizes its license with Intuit's online licensing servers. Once done, both workstations can concurrently run Point of Sale.

To merge and synchronize licenses:

1. When prompted to merge, select **Merge Now**.
2. Follow the onscreen prompts or phone agent's instructions to complete the merge.
3. On the Server Workstation, synchronize with Intuit's licensing server.
   - If Server is connected to the Internet and has previously registered, this is completed automatically. If not connected or not registered, select **Manage My License** from the **Help** menu and then:
     - a) To register/synchronize online: Select **Synch License Data Online Now** and follow the prompts, or
     - b) To register/synchronize by phone: Select **Buy A User License** and call the number displayed

Getting Around in Point of Sale

Shown below is the Point of Sale Home page Navigator (Pro level).

Standard menu provides access to all areas and features.

Quick Find allows you to search for items, receipts, help and more.

The **Navigator** provides an overview workflow and clickable links to common tasks.

Report Center helps you manage your business with an extensive list of reports.

The **Employees** section helps you manage employees *(optional)*.

Side toolbar can be customized for easy access to your most common tasks.

Items List helps you manage your inventory.

Getting Around in Point of Sale (Cont.)

Make a Sale allows you to ring sales, take payments and print receipts.

In Progress helps you multi-task by toggling between open documents.

Temporarily put a sale on hold and then come back and finish it later.
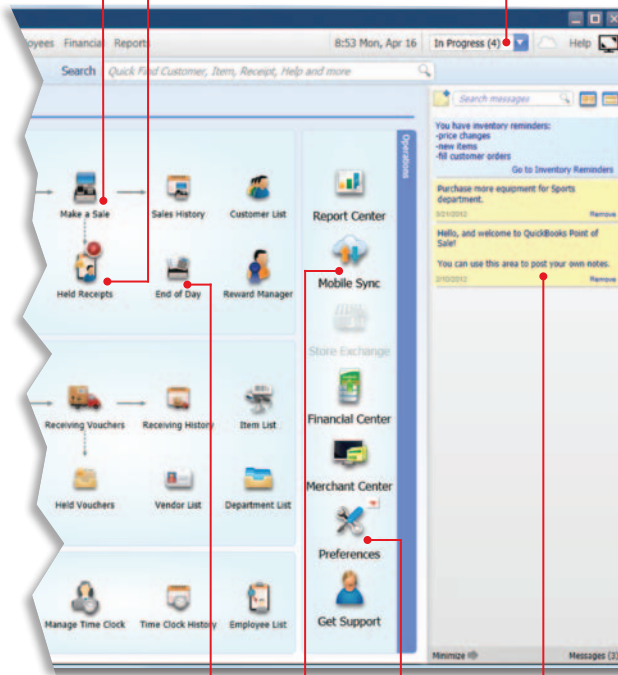
End of Day helps you close out your cash drawer and balance against sales.

Messages area allows you to post your own notes.

Mobile Sync allows you to share your items with your mobile devices and make sales wherever, whenever. *(Intuit Payments Account required).*

Preferences helps you manage the various settings and options in your software.

Working with Lists

New records and documents are added in a form, but upon saving are added to the corresponding Point of Sale list

Click any column header in a list or report to re-sort the list by the values in that column. Click it again to sort in reverse order. Right-click a column header and choose **Customize Columns** to add or remove columns. Drag columns to rearrange.

I want to... menus provide access to other tasks related to the current window.
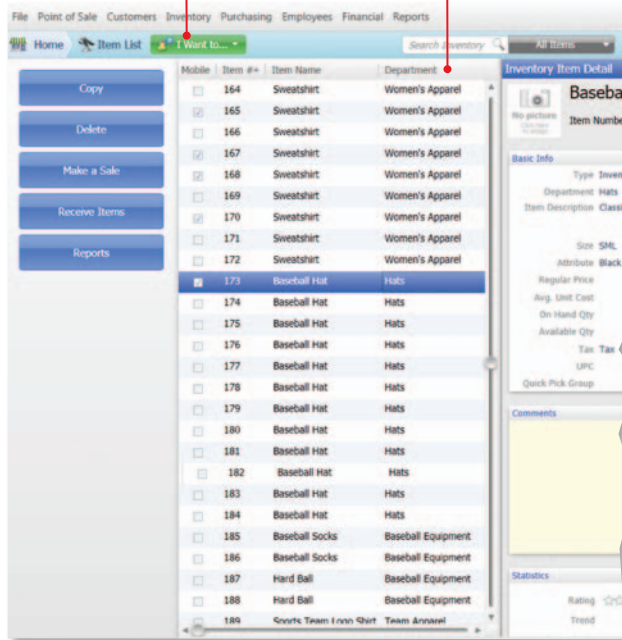
Working with Lists (Cont.)

The **View** selector allows you to change the records currently displayed by selecting from predefined options.

Press **F1** or select **Help** for assistance with your current task.

Enter search keywords here to filter lists.

To return the full list view click on the **Hide Detail** button.

Sync to Mobile allows your item to be shared outside your store using Mobile Sync *(requires an Intuit Payments Account)*.

Action buttons let you quickly edit the current item or add a new item. Actions vary in other lists.

Sales Receipt

Scan barcode or enter item information here to add to the receipt.

Look up customer information and assign them to the sale.

Make changes to the selected item using the available buttons.

Once you have taken the payment, click on the **Print Receipt** button to complete the transaction.

Side toolbar can be customized for easy access to your most common tasks.

Intuit Payments and Gift Card Services

Accepting Credit, Debit and Gift Cards

With an Intuit Payments Account you can accept all major credit and debit cards as well as add Gift Card Services for your business.*

Key Benefits

No credit card terminal needed. Use our optional credit card reader and data is entered right into your Point of Sale software.* This reduces the many hidden (or "unknown") costs of using a credit card terminal, including:

- Double-entering information into both a terminal and your software
- Zeroing-out a terminal every day
- Reconciling discrepancies between your terminal and your software
- Maintaining a second phone line
- Leasing a terminal

Get better information about your business and customers

When you use an Intuit Payments Account, your QuickBooks Point of Sale software will automatically capture transactions, approval code, type of card and credit card number for each transaction. Use this information to better understand your business and provide better service to your customers.

* Integrated credit and debit card processing requires an Intuit Payments Account. Integrated gift card processing requires an account with Intuit Card Service. Both services are optional, require application approval, and fees apply. Optional credit card reader required for lowest discount rate available, sold separately. PIN pad to accept PIN debit transactions required, sold separately. See the end of this User Guide for additional requirements.

Key Benefits (Cont.)

With Intuit Transparent Pricing, you don't have to worry
- From Intuit, the makers of QuickBooks and TurboTax software
- You get a competitive discount rate
- There are no hidden fees (e.g., statement fees, cancellation fees)
- There are no contracts—you can cancel at any time

With Intuit Gift Card Service you can automate gift card acceptance and redemption.

Mobile Sync

With an Intuit Payments Account you can accept payments on your mobile device and automatically update your Point of Sale software. By checking the Sync to Mobile box on your Item Details in Point of Sale, your items will seamlessly appear on your mobile device to sell wherever, whenever. You can then make sales away from your business with the confidence that your data is correct. When you view the sales receipts you will see the the sales you made on your mobile device within your Point of Sale software. Adding new items from your mobile device is easy, and you will also see those appear in your Point of Sale software. To learn more, refer to the Help menu and the Mobile Sync icon on the Navigator.

*Requires an Intuit Payments Account, as well as a supported mobile device; visit **www.GoPayment.com** for more details about the mobile solution.

FAQs

Can I use my current merchant service? Yes. You will process payments separately through your credit card terminal and then must manually record them into Point of Sale. You will not benefit from integrated authorization, settlement and reporting and risk higher chances of data entry error.

Do I need special hardware? A card reader is recommended to speed credit and gift card processing and qualifies you for a lower rate on credit card sales. Other hardware is available, including a PIN pad for PIN Debit transactions, a signature capture device and a card reader/PIN pad combination. All are optional and sold separately.

Do I need a separate phone line? You have two connection options:
1) Internet connection, which eliminates the need for a separate phone line, or
2) by direct modem connection, in which case a dedicated phone line is required.

What kind of support will I get? Live customer support is available via phone 24/7/365* for your merchant service account. You can also manage your account online for free through our Merchant Services Center.
* Subject to occasional downtime due to systems and server maintenance.

What if I have multiple stores? You will need to set up separate merchant and gift card accounts for each store location. Discounts are available. Call **1-877-672-7040** for details.

Configuring Intuit Payments and Intuit Gift Card Services

Once you are approved and create your Intuit login via the link in your welcome email, you'll need to configure Point of Sale for transaction processing.

1. Select **Setup Interview** from the **File** menu.

2. Select the **Merchant** tab.

3. Select login and enter your account info (the email address and password you created earlier).
   - Select the appropriate associated profile.

4. Once you have signed in correctly, the tab will indicate that your Intuit Payments Account is linked.

5. Select **Payments Preferences** to configure other payments options.

6. *(Optional)* Navigate to the Gift Cards tab and enter the gift card account number that you received after signing up for Intuit Gift Card Service.
   - Note: You can only accept gift cards in QB POS 2013 if you also have an Intuit Payments Account

Configuring Intuit Payments and
Intuit Gift Card Services (Cont.)

7. Select **Communication Setup** from the left-side menu.

8. Select **Use this computer**... if you want all communication to the service(s)
    to connect through this workstation.

    • If this setting is grayed out, communication is already configured to go through
      this workstation. To change to another workstation, access this setting from that
      workstation.

9. Select **Secure Internet Connection** or **Direct-dial** *(modem)* as your
    communication method.

    • If you need assistance, select **Internet Connection Setup**. Internet connection
      requires you have an Internet Service Provider (ISP). A high-speed, always-on
      connection is recommended (such as DSL or cable).

10. Accepting PIN Debit payments also requires that a PIN pad be installed.
    Refer to the Connect Hardware tab for installation instructions.

Protecting Credit and Debit Cardholder's Data

Point of Sale provides a separate Implementation Guide to help
you comply with the requirements of the Payment Card Industry
Data Security Standard.

Select **User Guides** from the **Help** menu to access this important
information.

Setting Up Multiple Stores

Review this information and then follow the setup procedures in this guide at each store, starting with your Headquarters store.

Overview

With the Pro level of Point of Sale, you can effectively manage up to twenty stores from one location, with features like centralized purchasing, transfers of merchandise, exchange of information between stores and company reporting. The managing location is called the **Headquarters** and all other stores are **remote stores**.

All stores share one inventory, but Point of Sale tracks item quantities by store and, if integrated with QuickBooks Accounting software, profit and loss by store can be tracked using the class tracking feature.

Store Exchange

The exchange of information between remote stores and Headquarters is called Store Exchange. Store Exchanges are done through the Server Workstations in your stores via one of five methods:

- **Desktop email**, using your default Windows email client
- **Web-based email**, such as Yahoo!® Mail and MSN Hotmail®
- **Removable media**, such as a USB memory stick
- **Network file transfer** over a VPN, WAN, or LAN
- **Exchange** over the Internet with the Intuit Service (fees apply)

To learn more about how a multi-store configuration works, see in-product Help.

Choosing a Headquarters Store

Selection of a Headquarters is important, because only Headquarters:

- Can add, edit or delete items, departments and vendors
- Set or edit item prices (remote stores can give discounts)
- Create regular purchase orders (remotes can do special orders)
- Consolidate data from all stores and run company reports
- Define company-wide preferences
- Enter transactions for other stores
- Exchange data with QuickBooks accounting software
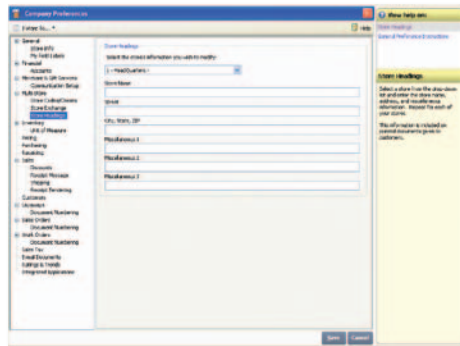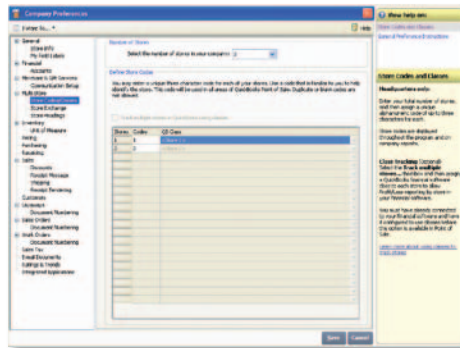
Multi-Store
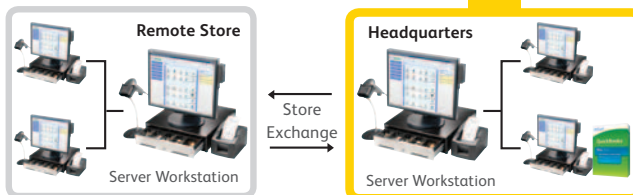
Install and Configure at Headquarters

1. Follow the **New Installation** instructions to install the Server Workstation, create your company data (select **Headquarters** as Store type) and start the Setup Interview.

2. Select **Preferences** > **Company** from the **File** menu. In the Multi-Store section select the number of stores and enter information for your first remote store:
   - A 1–3 character store code and a store name
   - A communication method for sending Store Exchange files to the store
   - The Point of Sale license number from the remote Server Workstation
   - Email address, removable media drive or port, or file transfer path for the selected method

3. Repeat for each remote store.

4. Select **Change Password** and enter a password to encrypt Store Exchange files. This same password must be entered when setting up each remote store.

5. Set up departments, sales taxes, price levels, etc. as needed and enter or import items, vendors and customers. Refer to the other tabs of this guide for instructions.

6. When Step 5 is done and after remote stores have installed, select **Store Exchange** > **Send Files** from the **Stores** menu to send each remote store a file with your company data (inventory, preferences, etc.).

Multi-Store

Install and Configure at Remote Stores

1. Follow same procedure as Headquarters to install a Server Workstation, except choose **Remote Store** as the store type.

2. Select **Preferences** > **Company** from the **File** menu and enter the requested information for the Headquarters Store.

3. Select **Store Exchange** > **Receive Files** from the **Stores** menu to process the initial Store Exchange file from Headquarters.

4. Select **Preferences** > **Company** from the **File** menu and review store-specific settings, such as the default tax location and default price levels for your store.

You now have access to inventory and can carry out all normal Point of Sale activities.

Integrating with QuickBooks® Accounting Software

Overview

Point of Sale is designed to be integrated with QuickBooks accounting software.*
Point of Sale tracks your daily retail activities: purchasing, receiving, sales and related inventory activities, while your financial software tracks your financial information.

Exchanging data between the two programs, referred to as Financial Exchange, can significantly reduce your workload because you can transfer your daily Point of Sale transactions to your financial software and, if you already have existing data in your QuickBooks accounting software, it can be imported into Point of Sale.

Several options are available to customize the way data is exchanged between the programs, such as the account mappings, level of detail and data formatting.
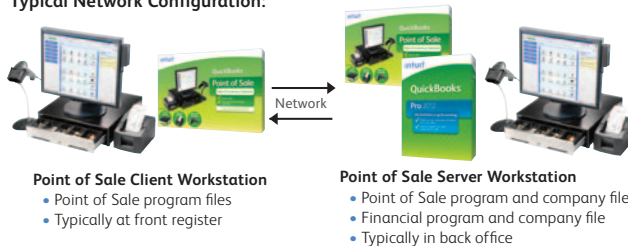
You do not have to integrate the programs immediately; integration can be accomplished at any time in the future, if preferred.

For more information about how data is exchanged, search the in-product Help index using keyword **financial exchange**.

* Requirements of Integration
- QuickBooks Pro or Premier (2009–2012) or Enterprise Solutions (9.0–12.0), sold separately
- QuickBooks accounting software company file set up and configured for exchanges (see below)
- If applicable, a properly configured network with mapped drives as appropriate

QuickBooks Integration

Typical Network Configuration:

Network

Point of Sale Client Workstation
- Point of Sale program files
- Typically at front register

Point of Sale Server Workstation
- Point of Sale program and company file
- Financial program and company file
- Typically in back office

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| Division of Activities after Integration		
Activity	**QuickBooks Point of Sale**	**QuickBooks Accounting Software**
Add & track inventory items	✓	
Order & receive merchandise	✓	
Ring up sales & collect sales tax	✓	
Point of Sale reports	✓	
Add customers & vendors	✓	✓
Track cost of goods sold & expense		✓
Pay bills & sales tax		✓
Invoice customers		✓
Process payroll		✓
Financial reports		✓
Banking activities		✓

QuickBooks Installation Options

1. **QuickBooks installed only on the Point of Sale Server Workstation.** Only option if you have only one workstation and the typical choice on a network. The Point of Sale Server Workstation and QuickBooks could be in a back office or at a front register.
2. **QuickBooks installed on both the Point of Sale Server Workstation and another networked computer.** Typical when the Point of Sale Server Workstation is at a front counter, but you want your QuickBooks financial file in a back office; the copy of QuickBooks on the Server Workstation does not have to be run there.
3. **QuickBooks installed only on another networked computer (not on the Point of Sale Server Workstation).** This more advanced option, called Remote Data Sharing (RDS), uses server and client applications to send information across your network.

For more information, search the Point of Sale in-product Help index using keywords **financial exchange, installation options**.

Preparing your QuickBooks Company File

1. If necessary, install QuickBooks according to one of the options above and begin a new financial company file, following the instructions included with QuickBooks.

2. Ensure your QuickBooks company preferences (from the **File** menu, select **Preferences)** are set as follows:

   - Integrated Applications: Ensure the checkbox for ***Don't allow any application to access this company file*** is NOT selected.
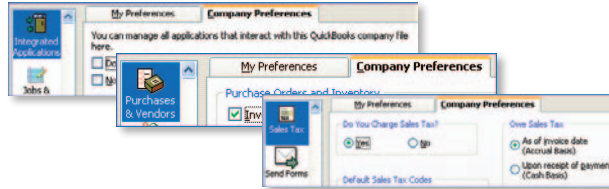
   - Purchases and Vendors. Ensure the checkbox for ***Inventory and purchase orders are active*** is selected

   - **Sales Tax**: Click **Yes** if you collect sales tax

3. From the **Company** menu, select **Chart of Accounts** and ensure that the following accounts are present. Select **Account** > **New** and add them if necessary:

Account Name	Account Type
Cost of Goods Sold	Cost of Goods Sold
Accounts Payable	Accounts Payable
Accounts Receivable	Accounts Receivable
Undeposited Funds	Other Current Asset
Inventory Asset	Other Current Asset
Sales Tax Payable	Other Current Liability

Connecting to QuickBooks Accounting Software

You can establish the connection with QuickBooks by selecting **Financial Center** from the Point of Sale **Financial** menu. QuickBooks must be running and your financial company file open during the initial connection.

Help and Support Resources

Point of Sale offers both self-help and assisted support to ensure you can find the answers you need!

Self-Help Options

Quick in-program help for your current task:

- Press **F1** on your keyboard
- Select the **Help** button on a window or message
- Click a blue help text link

For more information:

- Select **Help Contents** from the **Help** menu
- Browse through the "books" in the **Table of Contents** on the left side of the Help window
- Click on the **Index** or **Search** tabs and enter a search keyword
- Select **Help & Support** from the **Help** menu for a full listing of online and phone support options
- Select **Help and Learning** from the **Help** menu for addition support including a **Glossary of Terms**

Self-Help Resources: (Internet connection required)

- Select **User Community** from the **Help** menu to connect with other Point of Sale users and experts to ask questions and share advice
- Visit **www.quickbooks.com/support** to search our Knowledge Base of frequently asked questions, learn about available updates or research other support options
- Select **How-To Videos** from the **Help** menu to access videos that will guide you through the basics

Assisted Support Resources

Get help from an expert or find a local resource to help you install, set up and use Point of Sale.

30 Days Free Support

Free QuickBooks Point of Sale Support included for 30 days by calling **1-800-348-0254**.

Please note:
- FREE 30 consecutive days support begins on the date of product registration
- You must register within 90 days after the date of purchase

Support Plans*

Intuit offers a variety of support plans, providing expert assistance when and as often as you need it; one-time or for an unlimited number of issues. (Fees apply.)

Learn more about QuickBooks Support Plans at **pointofsale.intuit.com** and click on Support.

Already have a Support Plan?

Call us directly at **1-800-348-0254** to get expert assistance.

Find a Local Expert

Get local, onsite help from an expert certified by Intuit on Point of Sale. (Fees apply and are set by the expert.)

Certified Point of Sale Intuit Solution Providers are your local retail business and technology experts that can help you with any retail technology questions.
Visit: **Intuitsolutionproviders.com**

Certified QuickBooks Point of Sale ProAdvisors® can provide accounting advice tailored to your business needs.
Visit: **www.FindAProAdvisor.com**

Sales Specialists

To get information about additional products, services or hardware available for your Point of Sale system, call **1-866-379-6636**.

*Fees, hours of operation and terms and conditions apply and may vary for assisted support options. Visit **pointofsale.intuit.com** for details.

Assisted Support Resources (Cont.)

How are we doing?

You are the retail expert and the Point of Sale team wants to hear from you. How can we improve the product to better meet your needs? Find a program bug? Is help not helping? Let us know! While we can't promise a personalized response to every submission, we do read all feedback and use it to improve future releases of Point of Sale.

- Select **Send Feedback** from the **Help** menu, choose a category and enter your comments or suggestions

Helpful Tips

Did you know you can...?

- Add your store logo to printed sales receipts
- Add, remove or rearrange the order of columns in lists
- Rename item description fields to better reflect the merchandise you sell
- Customize the main toolbar with the task buttons you use most
- Restrict employee access to features or sensitive data
- And select from many other customization options

To learn more, from the **Help** menu select **Help Contents** and explore the options in the **Customizing Point of Sale** folder.

Quick Tips

- Point of Sale allows you to open multiple windows at one time. You can view, switch between or close all open windows at one time from the **Windows** menu.
- Keyboard entry is often the fastest way to navigate the program. From the **Help** menu, select **Keyboard Shortcuts** to view a list of the keyboard commands for your current area.
- When working in Point of Sale lists, many frequently used tasks can be quickly accessed by **right-clicking** in the list
- Lists can be sorted by another value by clicking the column header for that value. To sort a list by multiple values, from the **View** menu select **Sort List** > **Sort on Multiple Columns**.

Protecting Your Data

Your company data is valuable and you should take steps to protect it. We recommend at a minimum that you:

- Install and keep up-to-date anti-virus and firewall software
- Make daily backups of your data, preferably to removable media that you store off-site

Protecting Your Data (Cont.)

- Assign and require passwords for employees to log in
- Install an uninterruptible power supply (UPS) and reboot your computers at least once a week; power losses and infrequent rebooting can lead to corruption in any database

For more information, browse the topics in the **Working with Company Data** folder in **The Basics** area of the in-product Help contents.

Tips for Lists

- Perform basic operations, such as printing, deleting, or adding items to a document, on multiple list records by selecting them all before choosing an action:
  - Hold down your **Ctrl** key and click each record to select
  - To select a series of records, click and hold your left mouse button down on the first record and drag to the last record OR hold down the **Shift** key and click the first record and then the last record
  - To select all displayed records, press **Ctrl+A** on your keyboard

Why Is a Feature Unavailable to Me?

If there is a feature you would like to use, but you are unable to access, it could be for any of the following reasons:

- Feature doesn't apply to your level of Point of Sale
- You don't have the security right to use the feature
- The feature is disabled in company preferences (access from Edit menu)
- A necessary field or button is not currently displayed in a list or on a taskbar to complete the task

For more information, explore the options in the **Customizing Point of Sale** folder from the in-product Help contents.

For your convenience, write down your important Intuit numbers here:

Point of Sale License Number_____

Point of Sale Product Number _____

Intuit Payments Account Number _____

Intuit Gift Card Account Number _____

Point of Sale 2013
System Requirements

Recommended Configurations:

- At least 2 GB of RAM for a single workstation installation
- 1 GB of disk space (additional space required for data files)
- Optimized for 1024x768 screen resolution
- Operating Systems:
  Microsoft Windows XP, all editions (SP3 or later strongly recommended)
  Windows Server 2003
  Windows Vista, all editions (SP2 or later strongly recommended)
  Windows Server 2008 (SP1 or later strongly recommended)
  Windows 7
- Data import/export and Microsoft Office integration requires:
  Microsoft® Excel 2000, 2002, 2003, 2007 or 2010
  Microsoft® Word 2000, 2002, 2003, 2007 or 2010

Multi-user recommendations:

- Multi-core processor and 4 GB of RAM are recommended for better performance on the Point of Sale server workstation.
- In a multi-user configuration, each workstation concurrently running Point of Sale must have a separately purchased user license, and every copy of Point of Sale must be the same version and level.[1]

Intuit QuickBooks Point of Sale Merchant Service: (sold separately)

- Optional fee-based service, additional terms and conditions apply
- Requires an Intuit QuickBooks Point of Sale Merchant Service account through Intuit Payment Solutions, LLC. Application approval and fees apply. Details available at **www.payments.intuit.com/posms.**
- PIN pad required for debit transactions, sold separately.
- Internet connection required

Intuit QuickBooks Point of Sale Gift Card Service (sold separately)

- Optional fee-based service, additional terms and conditions apply. Requires a gift card account through QuickBooks Point of Sale Gift Card Service, provided by Intuit Payment Solutions, LLC. Application approval and fees apply. Details available at **www.payments.intuit.com/posgcs**.
- Requires QuickBooks Point of Sale Gift Card Service gift cards, sold separately
- Internet connection or modem required
- Service is independent of QuickBooks Point of Sale Merchant Service
- Optional card reader and receipt printer sold separately or available with QuickBooks Point of Sale Software/hardware bundle

QuickBooks Accounting Software integration requires:

- Intuit QuickBooks Pro or Premier 2009–2012
- Intuit QuickBooks Enterprise Solutions Versions 9.0–12.0

Security Software:

- Products have been tested with the following software:
    - McAfee Internet Security Suite
    - Symantec Norton® Internet Security Suite
    - Zone Labs' Zone Alarm Pro
    - Trend Micro

Note: Some configurations may require that you adjust settings in firewall and anti-virus products to ensure the best possible performance with Point of Sale.

System Configuration Notes:

- Disk space requirements do not include company data files. If your company data file is very large or includes item pictures, you may need more disk space.
- In order to run several applications simultaneously, your system should have a multi-core processor and at least 2 GB of RAM. Point of Sale will run on both 32-bit and 64-bit processors running Windows. However, not all hardware devices will install and operate on 64-bit operating systems. We recommend that you contact the device manufacturers for more information about installing their hardware devices on 64-bit operating systems.

1 Applicable to the Server Workstation when multiple networked computers concurrently run Point of Sale.