The Salon Cashbox

Serial Number: ______________________

Lightning Bolt Computers
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(Single-User Products)

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Quick Start & Installation

Installing The Salon Cashbox Program: You will need a hard drive to install this program. Place the program disk into the A or B floppy drive and type either [A] [:] or [B] [:] and press [ENTER]. This will make your choice the active drive then type [I] [N] [S] [T] [A] [L] [L] and press [ENTER]. The program will make a directory called \SALON\STAT and copy files into these directories. The program will also copy a file called SALON.BAT to your root directory. After the files have been copied type the letter of your hard drive example [C] [:] and press [ENTER]. To start the program type [S] [A] [L] [O] [N] and press [ENTER].

In order for your program to run properly the files statement of the config.sys file will be changed to: FILES = 65 The installation program will do this for you, if files do not equal 65 or greater the program may not run properly on your computer.

The first screen to appear will be the authorizes security screen. You will need to contact Lightning Bolt Computers at eric@lightbolt.com to register your program and get the access code for your copy. This will need to be done before you will be able to run the program. Have your serial number and the security key number found on your screen ready when calling. The serial number can be located On the program disks and on the first page of this manual. This security code will only have to be entered once at the beginning of installation.

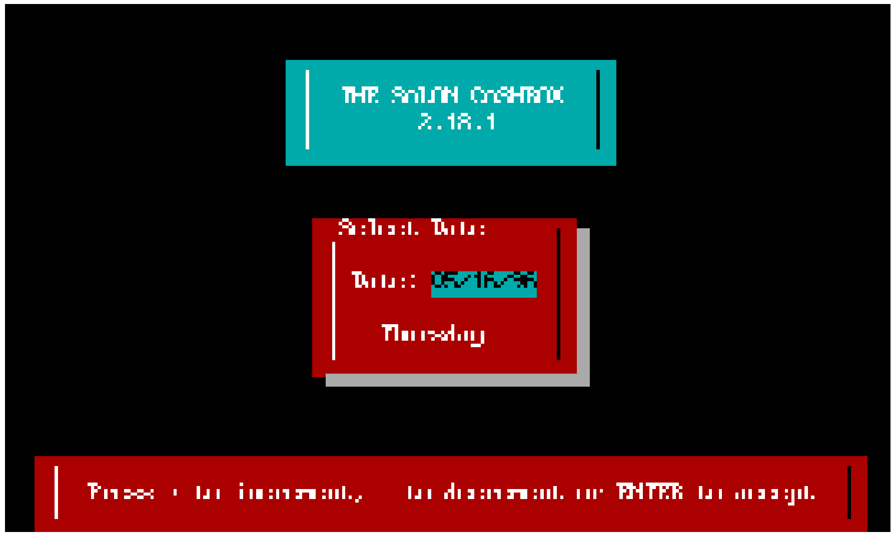
General Program Operation

* ARROW KEYS [←] [→] [↑] [↓] - are used to move within menus and screens
* (+) OR (-) KEYS - are used to change date ranges
* ENTER KEY [ENTER] - is used to execute a command or function
* ESC KEY [ESC] - is used to exit the program or to escape from a function or menu
* LETTER KEYS - are used to enter text or run a function
* FUNCTION KEYS - are used to run options, an example would be pressing [F1] to run help.
* HIGHLIGHTED - means the active command
* CURSOR - is the blinking line on the screen
* BACKSPACE KEY - will remove text from right to left
* DELETE KEY [DEL] - will remove item, line, or text
* INSERT KEY - is for adding text to fields
* [F1] KEY - will run contact sensitive help
* [F2] KEY - will run calculator
* [F3] KEY - will run employee time clock
* [F5] KEY - will open cash drawer
* [F6] KEY - shows amount in cash drawer
* [F8] KEY - run appointment scheduler

TECHNICAL NOTE
* Use AVERY 3 1/2 X 15/16 one up dot matrix labels.
* Set DOS Mode commands for cash drawer / receipt printer as follows MODE COMl:9600,n,8,1,p MODE LPT2=COM1 This will redirect coml to lpt2 and be used for the serial receipt printer cash drawer combination. You can use a parallel receipt printer as long as it is on lpt2.

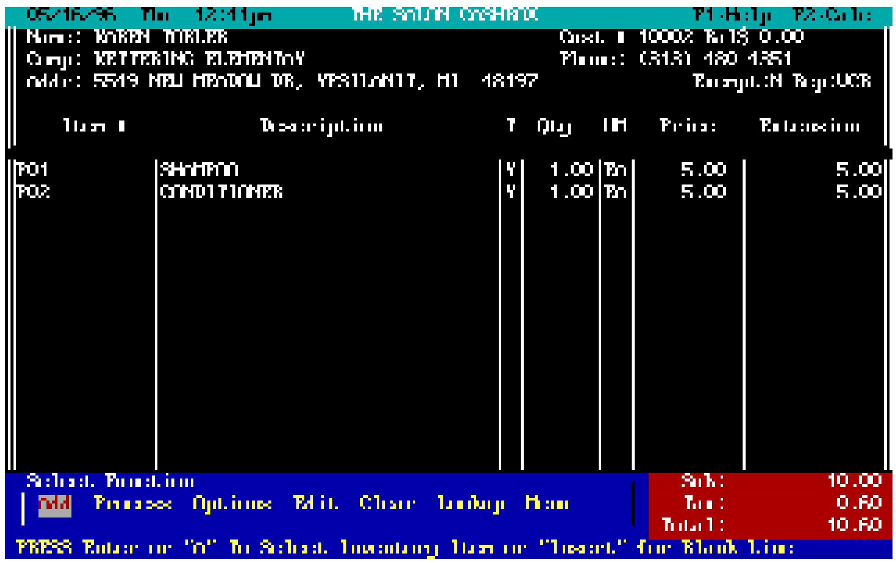
Date Screen

* The date screen has one main function. From this screen you can either press ENTER and accept the date shown or use the + or - keys to advance or decrease the date to be used or type in the correct numbers and press enter. The date you choose will be used within the program for all work conducted. This is very important if you wish to advance or backdate transactions.



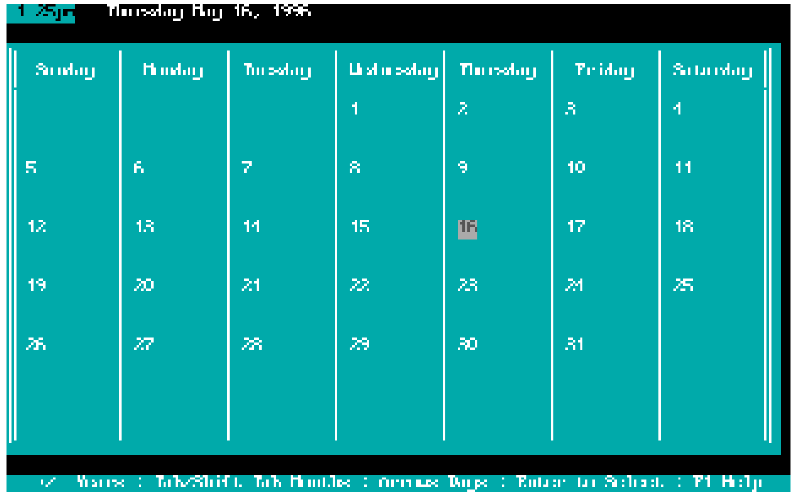
Main Work Screen

From this screen you will be conducting 90% of your work. To make the program as user friendly as possible there are only a few keys to learn. The main work screen has three distinct parts. The **top of the screen** holds the following customer information - name, company name, address, phone, customer number, balance owed, taxable status and the sales person identification. The **middle part of the screen** holds the inventory items to be sold, and basic information about that inventory item - item number, description, taxability, quantity, Unit of measure, price and its extension. The **bottom of the screen** to the right in red is where the subtotal, tax and total of the work sheet items are. The **left side** is where you select the menu functions from. The **last line** on the bottom of the screen will give you an explanation of the function highlighted, sort of mini help.



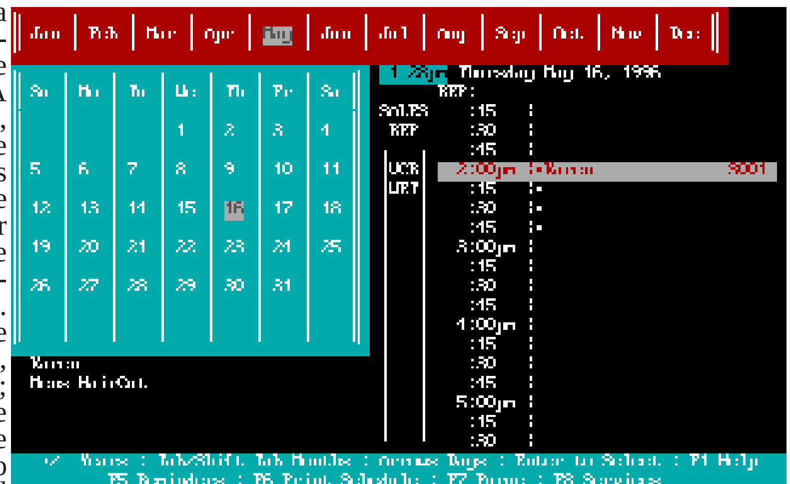
* The first and most important key is the F1 function key. By pressing this key you will bring up the context sensitive help screen. While in the help screen you can jump to any of the topics shown on the right side of the screen.
* The F2 function key will activate the pop-up calculator for quick number crunching. When the calculator is present on the screen instructions for use are located on the lower part of your screen. ESC will return you to the main work screen.
* F3 will load employee time clock * F4 Sets last item sold to another sales person * F5 will place counter sale for your customer. * F6 will open a cash drawer if present. * F7 displays amount of cash in the cash drawer. * F8 will run appointment scheduler. * F9 will calculate the Canadian goods and service tax and place it as last item * ← and → arrow keys are for moving to the function you wish to run.
* To coincide with the arrow keys you may use the first letter of the function you would like to select such as A, P, O, E, C, L, M. An example of this would be pressing the letter M which would bring you to the menu screen.
* The (Insert) key can be used to enter inventory items without going into the inventory pop-up list. This is a quick method of entering items you already know the item number for or if you would like to enter a blank item line or comment. If no customer has been selected yet, insert will first prompt you to select a customer or counter sale.
* The ESC key is used to leave The Salon Cashbox program or if you are in a submenu, the help screen or calculator it will bring you back to this main work screen.
* The following is a list of the functions available on the main work screen.
* ADD: Has two choices, first when the work sheet is blank it will bring up the customer list. Once a customer is selected selecting Add from then on will then bring up the inventory pop-up list.
* PROCESS: will bring you to the transaction menu if the work sheet is not blank. After picking your customer and inventory items to sell, Process will complete your sale, quote, return, layaway or payment.
* OPTIONS: Is used for selecting the options for the current work sheet, such as discounts, taxable, serial numbers, invoice history, layaways and quote logs.
* EDIT: will allow you to edit the customer or work sheet inventory items.
* CLEAR: Is used to clear the worksheet of customer and inventory information. This action will be logged for later evaluation.
* LOOKUP: Menu is used for quick retrieval of serial numbers, customers, inventory items and invoice numbers.
* MENU: This item will place you in the menu screens.

F3-Schedule



The [F3] function key at the main work screen will activate the employee schedule function. This action has two purposes. First it will display the employees schedule for the month and second it allows the employee to clock in and out.
When you first press [F3] at the main work screen a popup list of the active employees will be displayed. Entering these employees is done in the Employee Maintenance module. Once the employee list is displayed use your [←][↑][→][↓] to move the scroll bar up or down. Select the employee you would like to view the schedule of and press [ENTER]. The employee security password will be the next bit of information to enter. Enter the pre-selected password for that employee and press [ENTER].
You will now see the monthly schedule for the active employee. There are only a couple of options to select from here. 1. Moving to the desired date. When the schedule first displayed on the screen today's month, day and year will be shown. This is in two places; first is on top in text form and the second is the calendar itself. Use the (+) or (-) keys to advance or decrease the years, the [TAB] and [SHIFT] [TAB] keys to change the months and the [←][↑][→][↓] to move around the given month to the proper day. 2. When day is picked press the [ENTER] key. This will bring up a box for you to enter the in and out time intro. 3. [ESC] key will bring you back to the main work screen.

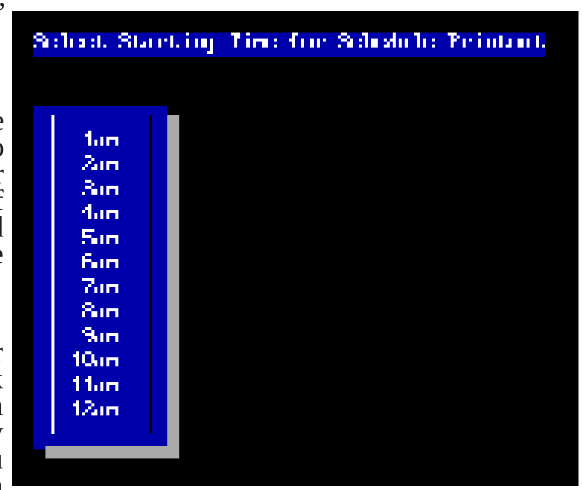
F8-Appointments



The [F8] key from the main work screen will get a screen for keeping track of customer appointments. The first thing you need to do is set up the service Option. Do this by pressing the [F8] key. A list will appear asking you for service code, description, price and time limit. Move the [↑][↓][→][←] to the correct row and column and press [ENTER]. Add the information in and continue to the next line. The service code is a five character abbreviation for the service description. Make them unique. The time is used for schedule Conflicts. Enter in the time in quarter hour segments.
Navigation around the calendar. When the calendar first displays on the screen today's month, day and year will be shown. This is in two places; the first is on top in text form and the second is the calendar itself. Use the (+) or (-) keys to advance or decrease the years, the [TAB] and [SHIFT] [TAB] keys to change the months and the [←][↑][→][↓] to move around the given month to the proper day. Once you have selected the proper day press [ENTER] to activate the appointment process. You will first have to select the representative to schedule the appointment with. Do this by moving your [↑][↓] to the correct employee. You will notice the time screen on the right will display the current time slot and the schedule will change displaying the appointments for the representative highlighted. Select the representative you would like to set the appointment with and press [ENTER]. You will now be in the time slot function. Move the [↑][↓] up and down to the right time for an appointment. If the time is off the screen moving the [↑][↓] in that direction will scroll the item up or down. Press [ENTER] to select the time. If you pass over a scheduled time, the appointment information will show at the bottom left of the screen. If you select a time that is in conflict with another appointment, a warning box will appear prompting you to select another time or over ride the time conflict.
Delete will delete a scheduled appointment. Once you have selected the time a box will prompt you for the customer last name. Type in the name and press [ENTER]. You will have several options here. If the customer was found in the database a list of customers with the same name will be displayed. Select the correct name with your [↑][↓] and press [ENTER]. If that name was not one of the customers displayed, you can add this customer to your database or just make them a temporary name not added to the list. If the name was not found a box will appear asking you if you would like to enter them now. This is important if you want to send them information or reminders in the future. If you select yes add customer information just as you would in customer maintenance. After you have entered the customer you will be prompted for the service. Select from the service list by using the [↑][↓] and pressing [ENTER]. Next, enter any customer comments that you want and press the [ENTER]. After you have been through all the steps above the screen will display the appointment for you. Press any key to continue.
The [F5] loads Appointment, services and can list reminders. The [F6] will print the schedule for the day. The [F7] will purge the calendar appointments from the database. **This is destructive and should be done with caution**. If you select purge, you will loose the ability to send reminders to these people. It will not purge the customer from the customer database.

Reminders

The F5 function prints appointment and service reminders and creates a can list. Appointment and service reminders are printed on reminder post cards. Select **Appointments** and press ENTER. Select the beginning and ending date for print out. You can test the printer position now if you would like. Press N key to by pass this. Enter your two line comment if you would like and press ENTER. A card for everyone in that date range selected will be printed with your comments and the service description, date and time.
Services works like appointment printout but looks back in the appointment data base for services performed and prints a reminder for the future. To send every one with a perm, a reminder that it is time for their next perm, use this option. Select services from the menu and press ENTER. Enter comments you would like to add and press ENTER. It will print a card for each person with that service in the appointment database, with information about their last service; the data, as well as your comments.
The call list - use this to make reminder calls. Select Call list from the menu and press ENTER. Enter in the beginning and ending dates for the list. The list will have the customer name, phone number and appointment information.

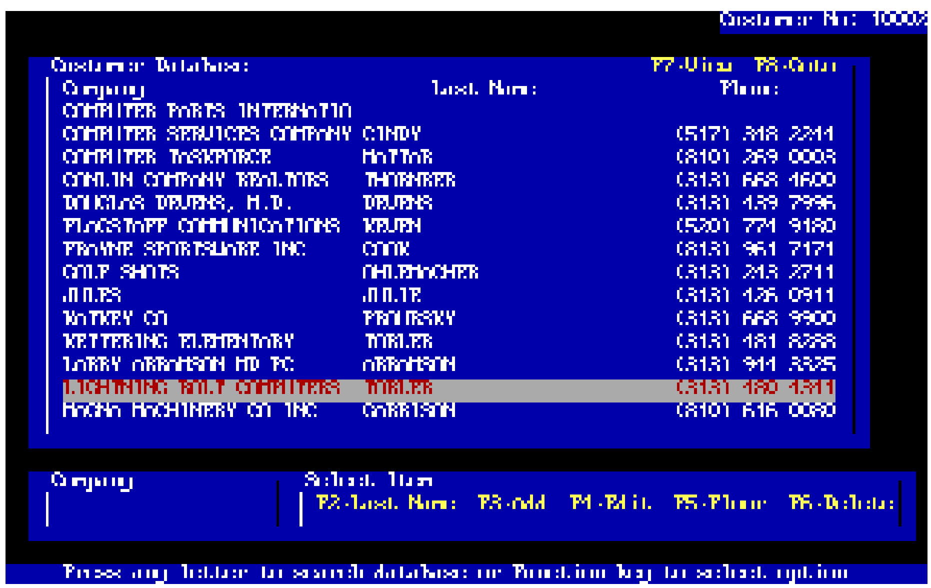


Print Schedule

F6 prints the schedule for the day. After selecting F6 from the appointment screen you will be prompted for the starting time to print. The printout will encompass 12 hours. Move the ↑↓ up or down to the correct time and press ENTER. You will get a printout of the representatives and their appointments. Move the ↑↓ up and down to view the information. Three reps will be on each page. Use the F10 key to print to your printer, F8 key to print to a file.

Customer Pick Screen

Use the ↑ and ↓ arrow keys to highlight any customer of your choice and press ENTER. This will bring you back to the main work screen and will fill in the customer information for you. If you wish to look up a customer by name you can type in the name or company and the program will bring you to that record or closest to it. If you press ENTER the program will bring you back to the main work screen and fill in customer information.



The name you type will be displayed in the lower left box on the screen. Backspace will delete letters to the left of the cursor and move the list accordingly.
The F2 key will change the list order from last name order to company order and vise versa. Searches will be performed on the order selected.
The F3 key will allow you to add new customer information. Type in the appropriate information in the field and press ENTER to continue to the next field. Fill in as much information as possible about the customer so you can use this information later for mail and customer information lists. You will be asked to select CUST TYPE, AD SOURCE, INQUIRE and TERMS if you set these Options up in the system configuration menu. Do this by moving your ↑↓ to highlight a item and press ENTER to select. If the list is longer than can be displayed it will scroll up or down to show you more. Select the tax status and price level of the customer. A pop-up box will ask you to save or abort your additions or changes.
The F4 key will let you edit the customer currently highlighted. Here is where you make changes to the active customer.
The F5 function key places counter (floor sale) as the current customer. This is for customers you do not wish to keep records on.
The F6 function key is used for deletion of the currently highlighted customer. A Options box will appear asking you for (YES or NO) to delete. ESC is like NO and will bring you back to the customer pick screen.
The ESC key will bring you back to the main work screen with no changes made.

Networking:

The Retail CashBox comes in a Single User and a Network version. The network version adds "Nodes" to the main station. The main station holds the master files in C:\VCR. Each station must be able to access this directory and the directories below it (C:\VCR\DICT, C:\VCR\STAT).

<u>Warning Do Not Try This With The Single User Version! Corrupt Files And Data Loss Will Result!</u>

Novell Netware 3.12 or 4.1:

Set the server:
Allow each workstation access to \VCR.
Use the Network Node install software to add Nodes. This will copy files to \VCR.
Set the workstations to:
Login to the network.
MAP the drive you want as \VCR. Such as F:
Change to F:
Change to VCR
Change to STAT
Run POS.EXE

These steps can be added to your login script from the server or a BAT file at the workstation.

```
LOGIN ERIC     <- login to the network
F:             <- change to F:
CD VCR         <- change to VCR
CD STAT        <- change to STAT
POS            <- run POS
```

Lantastic, Invisible Net, Novell DOS 7, Personal Netware, Windows for Workgroups , most any peer-to-peer networking software:

The Novell instructions work for most any peer-to-peer network. The master files are held on one computer. This computer has a directory called \VCR. This directory is shared. The other stations have access to \VCR. This directory is accessed with a drive letter such as F:. Each workstation can have a BAT file that runs The Retail CashBox automatically. The BAT file would look like this:

```
F:             <- change to F:
CD VCR         <- change to VCR
CD STAT        <- change to STAT
POS            <- run POS
```

Multi user Networks MDOS7, CCI Concurrent DOS 3.07, Terminal based networks, Novell DOS 7 and DR DOS 6.0 using task switching or multitasking.

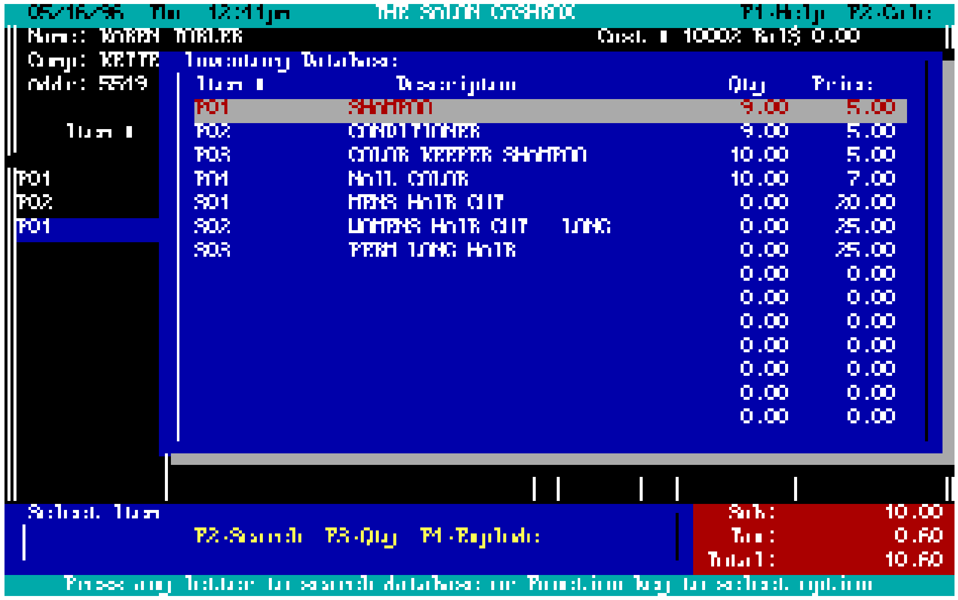
These operating systems have three options: 1) they can run like peer-to-peer networks. In this case use the above instructions. 2) They can run multiple copies of the software on the same computer. The advantage of this is an interrupted sale. This happens when one sales is started and the customer needs to leave the line to get something else. By pressing CTRL a second invoice screen is available to ring the next customer while holding the previous invoice. To do this, set up the Network Node. Each session will have its own BAT file. One for session one and one for each extra desired session. Each BAT file would have the same three lines:

```
CD VCR         <- change to VCR
CD STAT        <- change to STAT
POS            <- run POS
```

The Network Node software would assign a file to keep the transactions separate.

Some of the above operating systems can use low-cost terminals instead of computers. Terminals will work with cash drawers and receipt printers. Barcode readers will also work, but you must be careful to get the right unit to work with the terminals. Color Link MC-80 and monochrome Link MC-5 terminals work fine as well as WYSE and Relsys. After configuring the main host, configure the START00X.BAT or INI0000X.BAT with the above three lines. The Network Node software will make the needed files. If you will have a printer and cash drawer connected to the terminal. Configure the operating system software to print at the local port of the terminal.

Inventory Pick



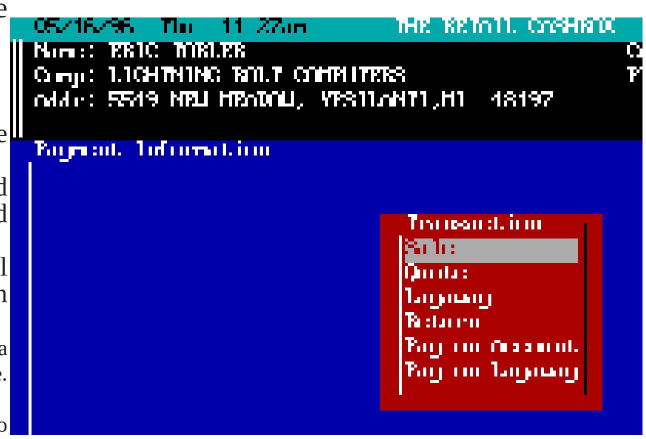
From this screen you will be picking inventory items to add to your worksheet. The [↑] [↓] [PG↓] [PG↑] keys will move you within the list. When an item is highlighted it's corresponding item number is shown on the main work screen at the far left. When you press [ENTER] this item is placed on the work sheet and the next line shows you the next item to select. You may type in the item number and press [ENTER]. If it is a partial number the program will bring you to the closest match in the inventory data base. You may also use a bar code reader here to pick the items from the UPC label or your own bar code labels. If you would like to enter more than one as the quantity you would press [F3] and enter the quantity you wish to sell and press [ENTER]. Entering on a previously selected item will add another one to your worksheet by adding to the others quantity.

* The [F2] key will bring up the search menu and ask if you want to search by description, size, color or price. After Using the [←] [↑] [↓] [→] keys and pressing [ENTER] a new box will ask you for what you want to search for. Type in your search criteria and press [ENTER]. If there are any matches the program will make a list of them for you to pick from.

* The [F4] key will explode out the information about the highlighted inventory item on your screen.

* The [ESC] key will bring you back to the main work screen.

Process Menu



* From this menu you can access the following options by using the [↑] [↓] keys and pressing [ENTER] on the highlighted choice.

* SALE: for standard transactions involving cash, credit, and account processing. This menu will also authorize credit card transactions.

* QUOTE: By pressing Quote on the transaction menu this will print and log this invoice as a quote for this customer. The items on the worksheet will not be subtracted from the inventory.

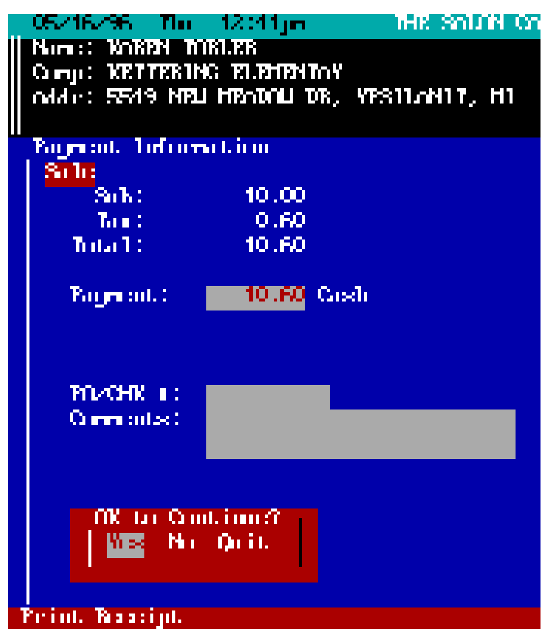
* LAYAWAY: By pressing layaway on the transaction menu you will be printing a layaway receipt and logging this invoice as a layaway under this customers name. You will be subtracting the item on the worksheet from the inventory.

* RETURN: Return is handled the same way as a sale but with negative values. To process a return see sale. The inventory items will be added back into inventory.

* PAY ON LAYAWAY or ACCOUNT: These functions are handled the same as sale except you will not have any items in your work screen, just a customer selected. After selecting one of these functions you will handle the transaction the same as a Sale. See Sale for more information.

* Basically an transaction will lead you through multiple choice questions in compiling your receipt. Any receipt of cash, check or credit will be processed accordingly.

Process Sale



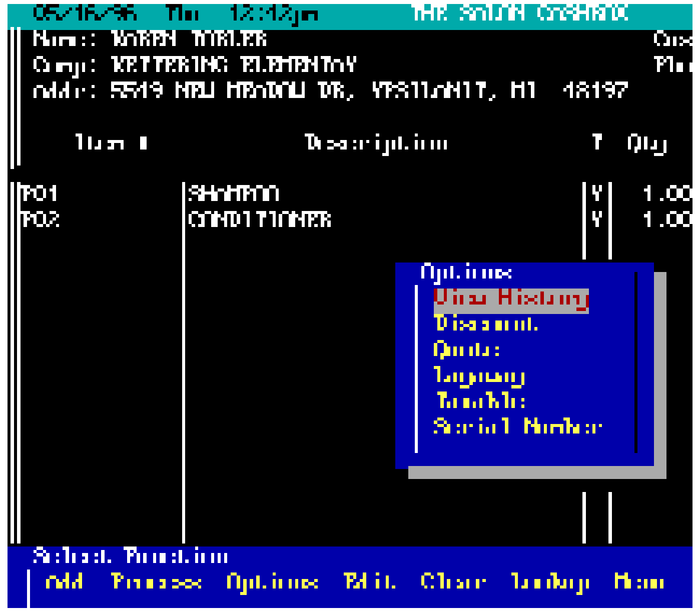
* When selecting sale you will be given multiple choice menus to compile your invoice. The first is payment method with Cash, Check, VISA/MC, AMEX, Discover, Account or Other as your choices. They an act the same with more information needed with charge cards. You will be asked to type in the amount the customer has giving you or press [ENTER] if the amount is the same as shown on the screen. If the amount is more, then the system will ten you how much change to return to the customer. If the amount is less, then the system will prompt you for payment method for the remainder of the balance. After making your choices the next box will ask you for PO or check numbers, if none are required then just press [ENTER] and continue. The same is true for comments. Your last function is to either press [ENTER] on Yes and print your invoice, No to re-process information or Quit to go back to worksheet.

* If you used credit cards as payment methods you will be prompted for the number and expiration date or to swipe the card through the credit card reader for automatic authorization. The system will not continue until this information is supplied.

*If you select check from the type of payment menu the customer file will be referenced to see if checks are allowed for this customer.

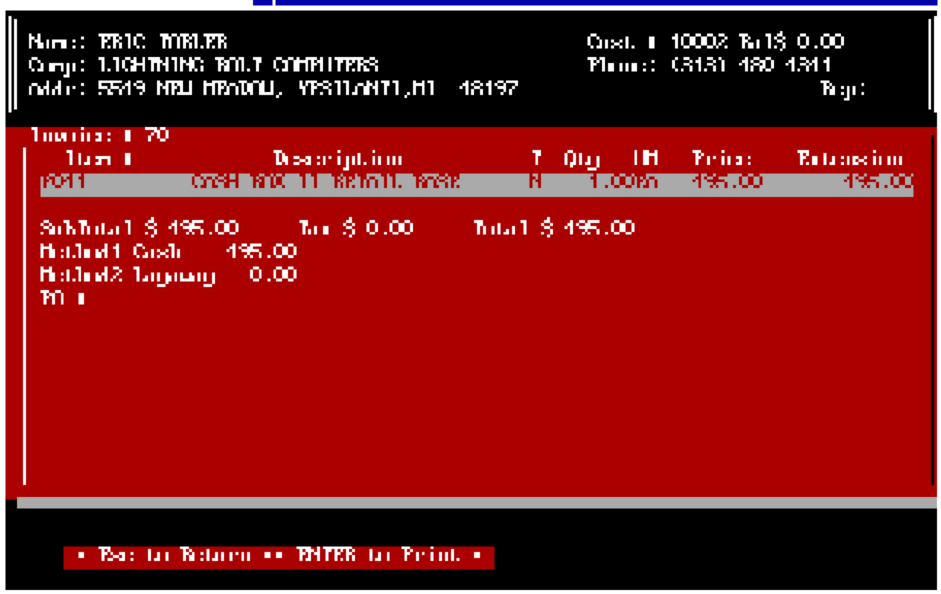
Options

* From here you can access the following features, customer history, discount, quote, layaway, tax and serial number. Use the ↓ ↑ keys to move to your selection and press ENTER.



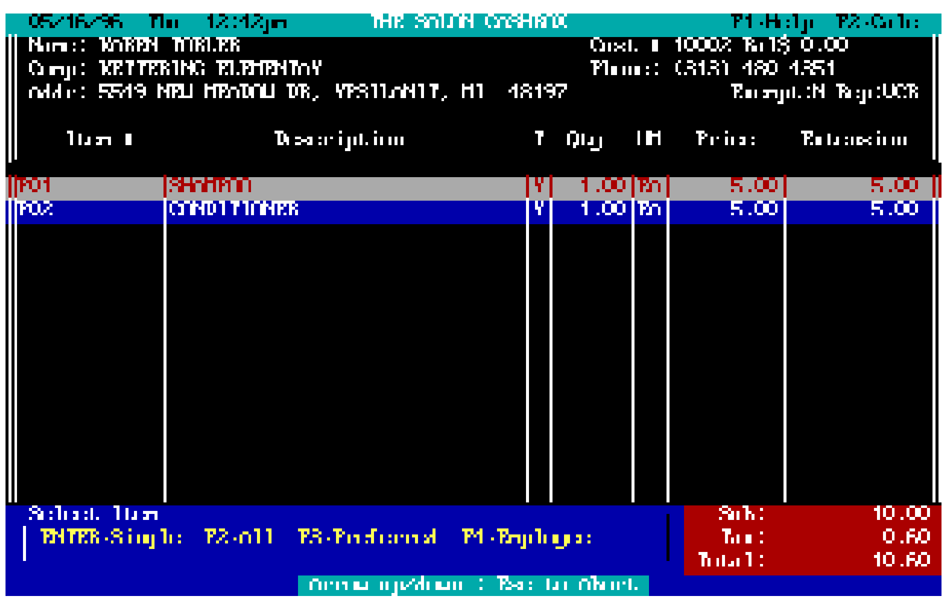
Customer History

* After you have selected a customer for the main work screen this function will bring up, on a new screen an the past dates and invoice numbers for this customer. By using your ↓ ↑ you can select the invoice you wish to review. If there are more items then can be displayed on the screen use your ↓ ↑ to scroll the list up or down. When you highlight an item and press ENTER the screen will clear and a copy of the past invoice will be displayed. After reviewing information you can return to the main screen by pressing ESC or reprint the invoice by pressing ENTER.



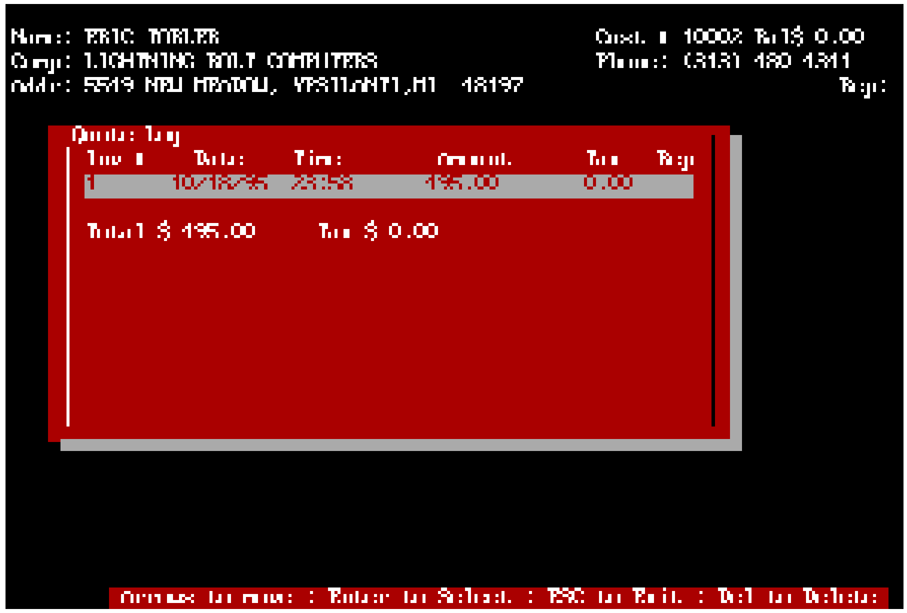
Discount

* Discounting the invoice can be done in one of two ways, either by single item/s or by the entire invoice. This can be done by moving the ↓ ↑ and highlighting the item you wish to discount or by pressing the F2 key to discount the entire invoice. If there are more items then can be displayed on the screen use your ↓ ↑ to scroll up or down the list. After making your choice a box will appear and ask you how much you want to discount. You have two choices here - if you type in the number 1 0 and press ENTER you will discount $10.00, if you type 1 0 % you will discount 10 percent of the retail amount. After making your choice you are returned to the main work screen and a discount line is added to your invoice. Your original price will now have an asterisk added to it so you can see where the changes are made to the amount. The F3 preferred and F4 employee discounts are by percentages and set when you configure your system.



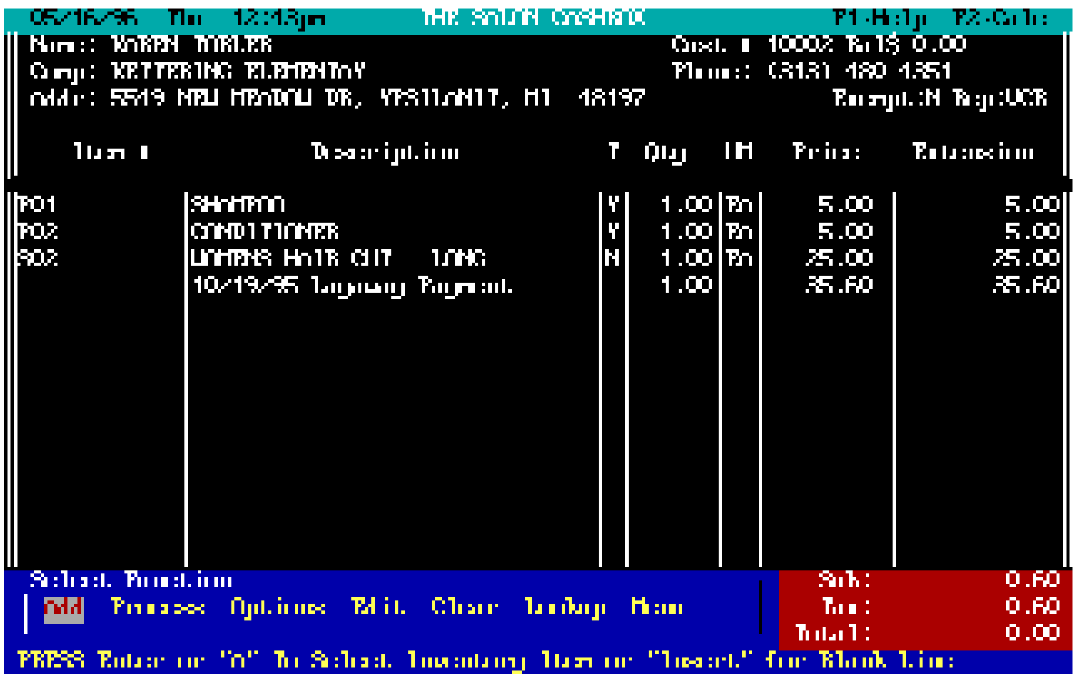
Quote

* The quote option is to retrieve quotes you have prepared for a customer. You must have a customer entered into the main work screen for this function to run. After highlighting quote and pressing [ENTER] a quote log will appear and give you the choice of picking any past quotes by date. Using the [↓] [↑] and pressing [ENTER] will put the chosen quote into the work screen. If there are more items than can be displayed on the screen use your [↓] [↑] to scroll the list up or down. You can add or delete inventory items or process it like any other invoice.



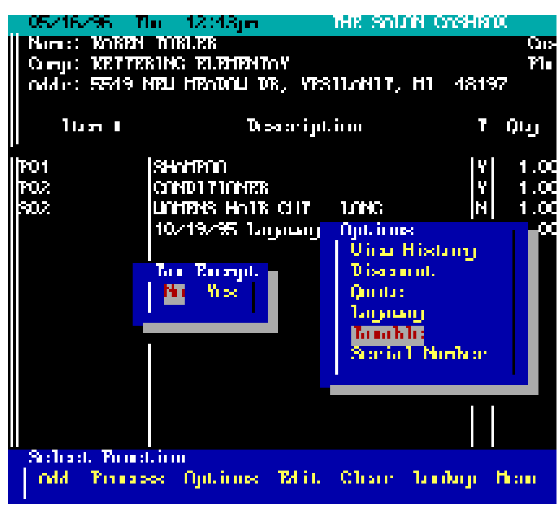
Layaway

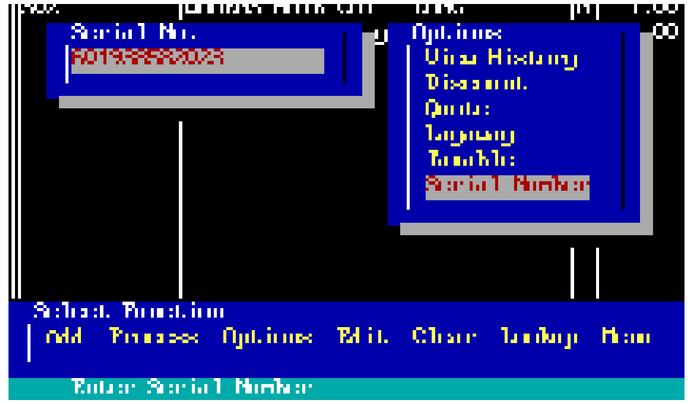
* LAYAWAY: This option runs exactly like quote. After pressing the [ENTER] key a log will appear. By using the [↓] [↑] and pressing [ENTER] on the highlighted item you will retrieve that layaway transaction to the work screen. If there are more items than can be displayed on the screen than use your [↓] [↑] to scroll up or down the list. From there you can process the layaway by making payments on it. The layaway item will stay in the log until it's paid off. You cannot edit a recalled layaway item. If you need to make changes to layaway items you must payoff the layaway item first and then return the item to stock. Then you can re-layaway with the changes you would like to make.



Taxable

* By pressing [ENTER] on this function you will be given the choice of making this customer taxable or not for the items in this invoice. Use the [↓] to select yes and press [ENTER] or press [ENTER] to select no.



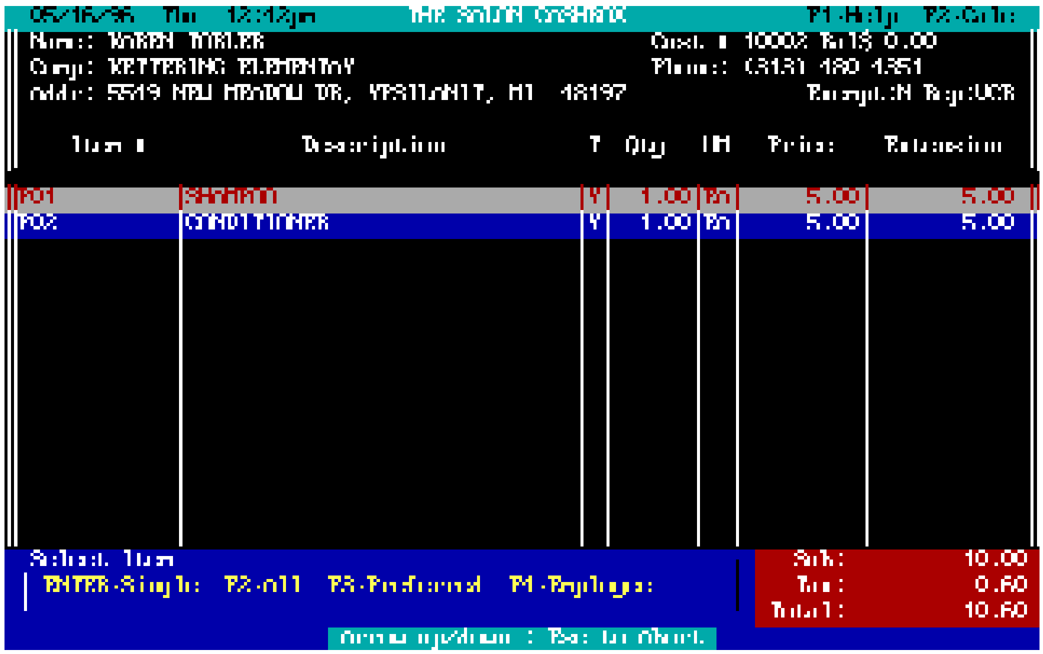


Serial Number

* By pressing [ENTER] on this function you will bring up a small window for you to type in a serial number to be added to the next line in your invoice. This number will be displayed and kept on the customer invoice for later tracking if needed.

Edit Work Screen

* From this function you will be able to perform two operations. If you have a customer selected but no inventory item/s in the work screen, edit will retrieve the customer record for you to make changes to. Do this exactly as you would under Add Customer or Customer Maintenance. If there are inventory items on the work screen edit will allow you to make changes to the work screen. Move the [↓][↑] to select the item you would like to change and press [ENTER]. If there are more items on the screen than can be displayed than use the [←][→][↓][↑] to scroll up or down the list. This will allow you to make changes to the description, quantity and price. You can also use the [DEL] key to delete any item in the list. After you have completed your changes the program will return you to the main work screen. If you would like to return to the main work screen without making any changes then press [ESC].



Clear

* If you select clear from the main menu you will be prompted for a Yes or No. Use your [←][→][↓][↑] to highlight one of these and press [ENTER] to return to the main work screen with no changes. If you select yes and press [ENTER] the work screen will be cleared and a record of the transaction will be stored in the clear log for later review.

Lookup

* From here you will be able to quickly lookup basic POS information like serial number trace, customer record retrieval by number, inventory explosion by number and invoice review by number.
* SERIAL NUMBER: When you process a sale and add a serial number this function will retrieve the customer and invoice where that serial number was assigned to. Select this option by highlighting Serial Number with the [↓][↑] and pressing [ENTER]. A small box will appear that asks you for the serial number to search. Enter the number and press [ENTER]. The program will search the existing invoices and locate the serial number. If the proper serial number is found the invoice will be displayed on the screen for your review. Press any key to return to the main work screen.
* CUSTOMER NUMBER: Select this option to quick retrieve basic customer information. A small box will appear and ask you for the customer five digit number. Enter the number (10001 is Counter Sale) and if the number is found a box will appear with basic customer information. Press any key to return to the main work screen.

* INVENTORY NUMBER: Select this option by moving the [←][→][↓][↑] to highlight Inventory number and press enter. A small box will appear and ask for the inventory number. Input the inventory number you would like to find and the system will locate an exact match to the number you entered. If the inventory item is found a box will appear with the inventory information. Press any key to return to the main work screen.
* INVOICE NUMBER: Move the [↓][↑] up or down to highlight this option and press [ENTER]. A small box will appear, type in the invoice number you would like to review and press [ENTER]. If the invoice is found customer and work sheet information will be displayed on the screen. Use your [←][→][↓][↑] to scroll inside detail information up or down. Press any key to return to the main work screen.
* NOTES: you can tag notes to customers files from the Lookup menu option on the main work screen. Type in any notes you would like for that customer, use the [DEL] and Backspace keys to delete items you no longer want. You can type up to 1600 lines per customer. [CTRL][W] saves the changes, [ESC] aborts with no changes.

Printers:

All reports and labels are printed to LPT1: (the first parallel printer port). The receipt printer can be LPT1: or LPT2: (the second parallel printer port) with 40 column printers.

One problem with POS software is all hardware that can be attached to the computer. Each item needs a port! If you will be using a receipt printer, a label printer and report printer; a switch box will be helpful.

Some people do not like switch boxes so here are some hints to reduce the number of printers.

1) The barcode labels need a 9-pin printer. By using a 9-pin printer for reports, labels and receipts you will only need one printer.

2) If you want a small receipt printer it can be connected to a serial port and the report/label printer would be connected to LPT1:. Again, use a 9-pin printer for the labels.

3) If you do not need barcodes, a 9-pin printer is not needed. If you want full page invoices, you do not need a small receipt printer.

4) To reduce counter clutter. Use a small label printer on LPT1: and a small receipt printer on LPT2:. Adding two more parallel ports to you computer is under $100. Place the report printer under the counter and attach it to LPT3:. To print reports, at the end of the day exit The Retail CashBox and run CBR.BAT. You'll need to create this BAT file, but it should look like this:

```
rem  The next line sends the reports to the third printer port instead of the first.
MODE LPT1:=LPT3:
rem   The next three lines run The Retail CashBox
CD VCR
CD STAT
POS
rem  The next line resets the ports to normal.
MODE LPT1:=LPT1:
```

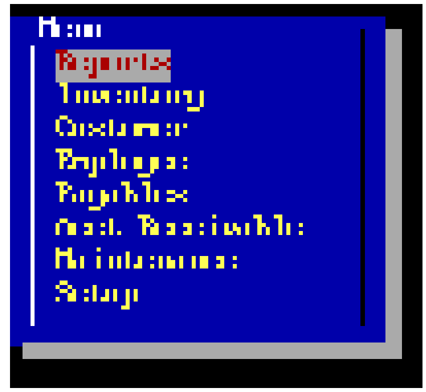
The program can be fooled to print to another port. Use the DOS MODE command to redirect the print-outs to a different port. Most users will not need to do this. Refer to your DOS manual for help with the MODE command. For example, to use a serial receipt printer:

1) Configure The Retail CashBox to print 40 column receipts on LPT2:
2) Exit the software
3) Edit the BAT file that starts The Retail CashBox to use the MODE command.

```
rem  The next line sends the receipts to the second serial port.
MODE LPT1:=COM2:
rem   The next line sets the COM port
MODE COM2 9600 8 1 N
rem   The next three lines run The Retail CashBox
CD VCR
CD STAT
POS
```

Now you can attach the receipt printer to the COM2: serial port and every time The Retail CashBox is started, it will configure everything.

Menu



* From this screen you will be able to access the report menu, inventory, customer, Employee, accounts payable, account receivable, maintenance, and setup screens. You choose the option you would like to run by moving your [↓] [↑] up or down and pressing [ENTER].

Reports Menu

* Most of the reports are set to run the same way, select your Options by using the up or down [↓] [↑] and pressing [ENTER] on the correct highlighted item. After making your selection a box with the beginning date will appear. You can press [ENTER] and accept the date or use the plus (+) and minus (-) keys to increment or decrement the date or type in the date you would like to use, then press [ENTER]. The same will hold true for the ending date. This sequence will let you select the date range for any report. If you would like one day then the beginning and ending dates should be the same.

* DAILY REPORTS: This function will retrieve all sales by name, invoice number, taxes, totals, products, serial numbers, discounts, dates, account representatives and method of payment. This information is then compiled into a report snowing an sources of income for the date period. The last screen will snow the product number, description, quantity and any discounts for an inventory items sold in the period specified. It will also show GST tax at bottom of report
* DAILY SUMMARY: This report is a shorter version of the daily reports showing sources of income and grouping of inventory items by either department, division or vendor.
* TIME SUMMARY: This is a very good tool to show sales revenue over time in the day. The sales are tabulated in a time line fashion. This is nice for scheduling purposes and operation hours surveys.
* INVENTORY: This will show you the current inventory items in stock by either product number, department, division, vendor, reorder items, or below user defined minimum levels. After making your choice a pick list will appear of the active departments, divisions or vendors. Use your [↓] [↑] up or down to select one of the items in the list and press [ENTER] to continue. Selecting An will print a report with sub-groups of the departments, divisions or vendors you have selected.
* EMPLOYEE: This report will give a list of an active sales people and the amount of their total sales grouped together by the date range selected.
* SALES ANALYSIS: This report will allow you a look at an sales and analyze by product number, department, vendor, division or customer. After picking your date range, select your type of analysis by moving the [↓] [↑] up or down and pressing [ENTER].
* PHYSICAL INVENTORY: Use this report to print out a physical inventory of an the active inventory items grouped by either product numbers, departments, divisions or vendors. A list of an the inventory items will be printed with a line for your physical Count.
* RANK SALES: This report will rank sold inventory items by percentage showing you your most active items it runs the same as sales analysis.
* When you run any of these reports they will be displayed to the screen you may press the [F8] to send your report to a file or press the [F9] or [ESC] key to return to the menu or the [F10] key will print your Report. While the report is displayed you can use the up or down (arrow keys) to scroll within the report.

Inventory Menu

* From this menu you have the option of either adding, editing or deleting an inventory item. Use your up and down [↓] [↑] to highlight your choice and press [ENTER].
* You can search or locate the item the same way as the add screen works on the main menu, by Using [←] [→] [↓] [↑], typing the product number or bar code reader.
* If you choose Add then you will be brought to the add inventory menu. Your choices here are either standard for entering a single inventory item, matrix for adding like items of different colors, sizes, styles ... or kits to add multiple existing inventory items intro one item to be sold as a kit.
* If you choose Edit then the inventory edit screen will appear. Use your [←] [→] [↓] [↑] to select the item and press [ENTER]. This will display the existing inventory information for the item you have selected on the screen for you to make changes to.
* If you wish to delete an item select Delete from the inventory menu. A list of the inventory items will appear. Type in the number or move the [←] [→] [↓] [↑] to the correct item you wish to delete and press [ENTER]. A brief description of the item to be deleted will be displayed and a box asking you Yes or No to delete. Move your [→] to the right answer and press [ENTER]. If you select yes an reference to that inventory item will be deleted.

Hardware:

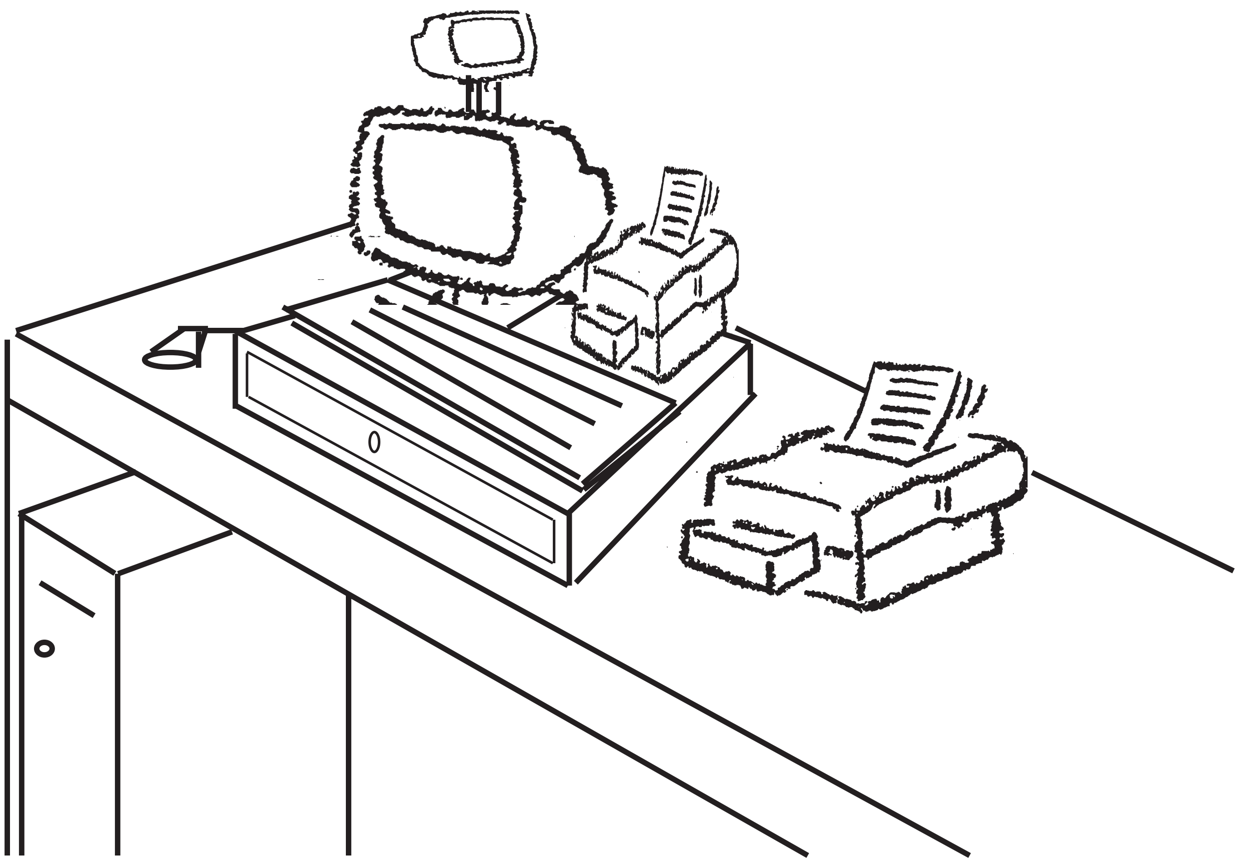
The Retail CashBox will work on any IBM-PC/XT, 286, 386, 486, Pentium, or P6. The only requirement when working with older equipment is a fast hard drive. With a 286 or better, a cache hard drive controller will give better performance. This device has memory to make the hard drive run faster.

In the retail business we want to keep counter space to a maximum. To do this, keep the computer under the counter. Do not place the computer on the cash drawer. The slamming of the cash drawer shut will cause damage to the hard drive.

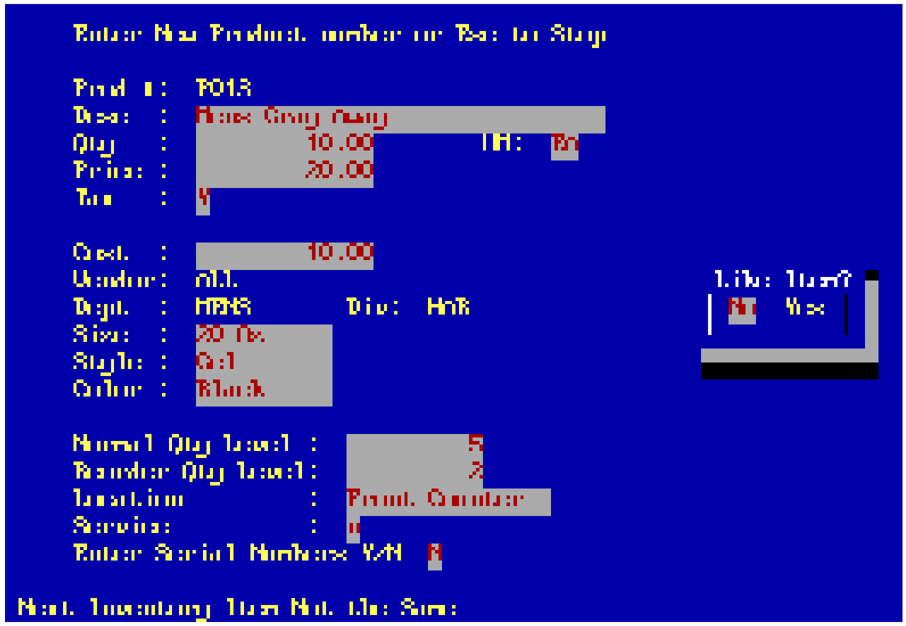
Small receipt printers, keyboards, 9" monitors and pole displays can all fit on top of the cash drawer. The barcode reader takes up little space. The computer fits below as can the report printer. Stores that want a full page invoice may have the full page printer on the counter.

The keyboard can have a Magnetic Swipe Reader (Mag reader) to read credit card and checks for electronic approval. Electronic approval lowers the store's credit card processing rate. The software needed to get credit card approval is IC-Verify. At $350 for the single user version, it will allow a retailer to get 1-2% lower credit card processing fees. Many processors make their money selling retailers a ZON Jr and a printer. This is a credit card swipe device. They cost $750 as a set and most processors will try to lease them to the retailers for $48/mo for 36 months. That's 1,728! The Retail CashBox works with IC-Verify.

Barcode readers (wand or CCD) attach to the keyboard port with a "Y" adapter. They read all types of barcodes. Portable barcode scanners are available to take inventory from the floor. These portable scanners will "dump" their data into the main computer. The Salon CashBox works with any portable scanner that "dumps" data in dBase format.

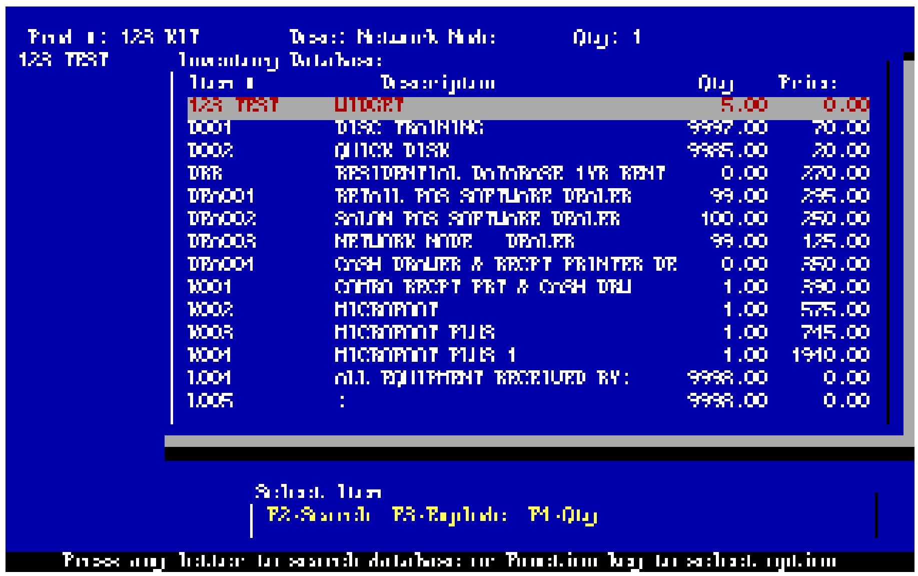


Adding Inventory Items



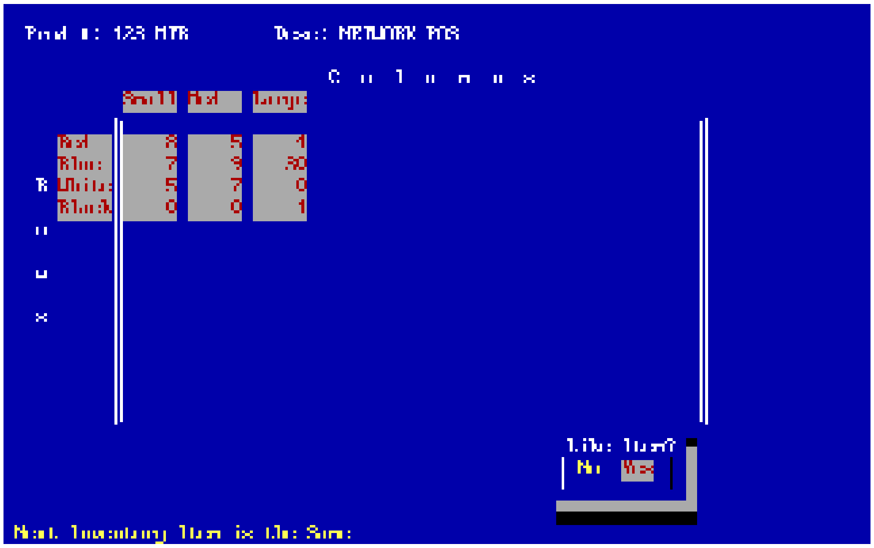
* Select ADD from the inventory menu and display the add inventory submenu. Select standard to add item.
* General inventory information like standard, kits, or matrix items will be entered in the same way.
* First enter in the new product number and press ENTER. If you are Using a bar code reader, swipe the bar code to enter the item number. If the inventory item is already in stock you will be notified.
* Enter as much data as possible for each item.
* Select vendor, department, and division from the pick list displayed. The pick lists are user defined and must be modified for an new categories. Instruction for add, edit and delete are displayed on the screen. New vendor, department and division information must be added, edited, or deleted by you in order to keep the list current. They will not update themselves automatically
* When an the information is entered on the screen you will be prompted for the next item to enter. If you say like item (Yes) product information will be carried over from the last item entered. This will speed up multiple like entries.
* If you are done entering items press ESC when prompted for product number and you will be returned to the menu.
* Serial Numbers - you will be prompted to select serial numbers for inventory items that have serial numbers attached to them.
* Service - If you place a (Y) for yes here this item will be set to a service.

Adding Inventory Kits



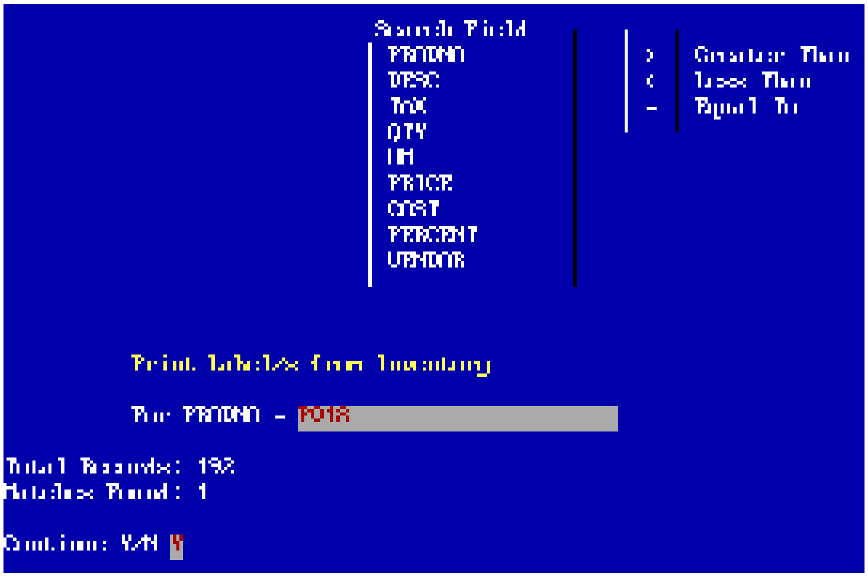
* Select ADD from the inventory menu and display the add inventory submenu. Select KIT to add item.
* Entering kit items is the same as standard or general inventory add. You will be prompted for the entry of general data as described in Adding Inventory Items previously.
* After you have entered in the general information a inventory pick list of existing inventory items will appear.
* Use the ← → ↓ ↑ to scroll the list or type the number and press ENTER to locate. The list will move to the closest inventory item of the number you typed.
* Press ENTER to select the item/s for your kit just like you where fining in an sale.
* You cannot edit the kit list. If you want to change the items in the list you must delete the kit from inventory and re-enter the kit.
* Information for each kit item will be looked up when you sell the kit so you can edit the inventory items in the kit at any time. The kit is only a reference of inventory items.

Adding Inventory Matrix



* Select ADD from the inventory menu and display add inventory submenu. Select Matrix to add item.
* Add general inventory information from the screen just as standard items.
* After general information is entered the screen will change to a box labeled columns and rows. The general principle for matrix items is to have one product number with multiple types, sizes or colors such as garments, shoes, bikes ...
* Enter the column headers you would like across the top. Entry on a blank column header will move the cursor to the rows entry fields. Enter these the same way. Again, entry on a blank row box will move the cursor to the next step quantity entry. An example would be SM, MED and LG for columns and RED, GREEN & BLUE for rows (or vise versa).
* Enter the quantity in each box that corresponds with the columns and rows. The system will move you from left to right and from top to bottom.
* Once you have completed an the boxes you will be prompted for the next inventory matrix item. Continue just as you would with standard items from here.
* You can not edit matrix column and row names - if you want to change the names you must delete the item and re-enter it. You can edit the inventory basic information such as price, vendors or quantities at any time.
* If you want to use a number for your matrix rows or columns you need to use a letter in the field first then type in the number. An example would be if you wanted to make a row for size 10 you would put (S10) for the field name.

Printing Inventory Labels

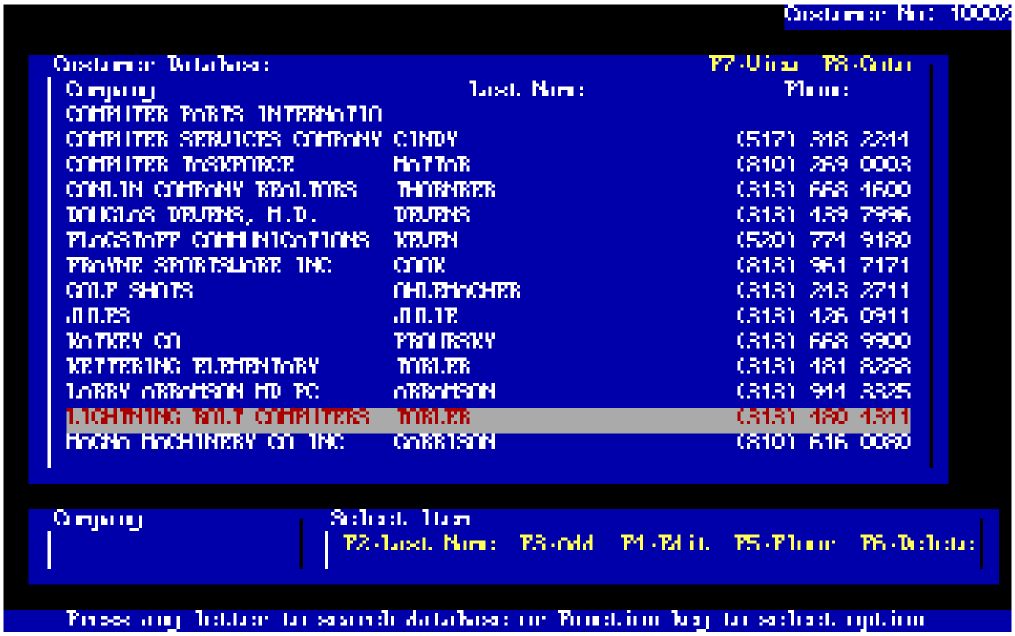


* Printing inventory labels is a multiple step process that will ask you several multiple choice questions.
* First you will need one up labels (AVERY 4010) and calibrate you printer for the labels. Press Y to start a test print of three labels. Any key will stop the process or ESC will cycle three more labels.
* Next you will need to select the search field for the label/s you would like to print. If you want to print an select the PRODNO field and enter P 0 and press ENTER.
* Select the operator you would like to use for your search equal, greater or less than.
* Type in the search criteria to meet for the labels to print.
* A tally of the records matching your search criteria will be displayed and you will be prompted if you would like to continue. Yes Y is the default, if you do not want to print the criteria selected select N or ESC.
* You will then be asked if you want bar codes generated, select Y or N.
* Finally before printing begins you will be asked for the quantity of labels to print. You can select an the labels, one for each inventory item or just one label per product number.
* You can reprint labels any time you would like.

Customer Menu

* From this menu you have choices of maintenance for adding, editing or deleting a customer, word processing to write form letters, mail labels, and mail merge customer files with your letters.
* MAINTENANCE: is exactly like Customer from the add menu or edit menu.
* WORD PROCESSOR: This is a fun feature word processor to use for writing custom form letters, thank you notes and requests for payment letters. The word processor comes with templates and a 66,000 word spell checker.
* MAIL MERGE: This function is used in conjunction with the word processor to create mail merge letters from the customer data base and letter created with the word processor. This is very good for thank you letters, collection notices or mass mailing from the customer data you have compiled.
* LABELS: is used to create mail labels from the customer data base for the above letters.

Customer Maintenance



You have a number of functions available to you from the customer screen. First use the up and down ← → ↓ ↑ to highlight any customer of your choice and press ENTER.

* If you wish to look up a customer by name you can enter in the name or company and the program will bring you to that record or closest to it. The name you type will be displayed in the lower left box on the screen. (Back space) will delete letters to the left of the cursor and move the list accordingly.

* The F2 function key will change the list order from last name order to company order and vise versa. Searches will be performed on the order selected.

* The F3 function key will allow you to add new customer information. Type in the appropriate information in the field and press ENTER to continue to the next field. Fill in as much information as possible about the customer so you can use this information later for mail and customer information lists. You will be asked to select CUST TYPE, AD SOURCE, INQUIRE and TERMS if you set these options up in the system configuration menu. Do this by moving your ↓ ↑ up and down to highlight a item and press ENTER to select. If the list is longer than can be displayed in the box it will scroll up or down to show you more. You will also need to select the tax status and price level of the customer. A pop-up box will then ask you to save or abort your additions or changes.

* The F4 function key will bring up the edit screen on the customer currently highlighted. Here is where you will make any changes to the active customer.

* The F5 function key places counter (floor sale) as the current customer. This is for customers you do not wish to keep records on.

* The F6 function key is used for deletion of the currently highlighted customer. A option box will appear asking you for (YES or NO) to delete. ESC is like NO and will bring you back to the customer pick screen.

* The ESC key will bring you back to the menu with no changes made.

IC-Verify Setup:

This setup is for version 6.50.88 DOS.
This is the setup for the POP-UP that will grab information from The Salon CashBox Process screen when you are using credit cards.

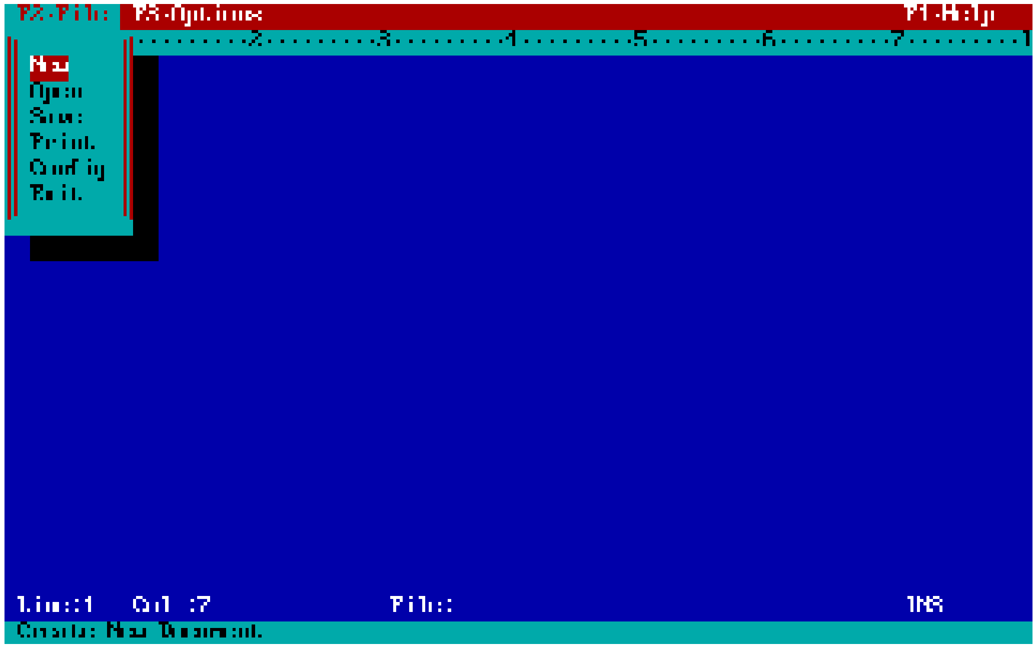
IC-Verify will grab the Credit Card Number and Expiration Date and Amount. This will happen AFTER you have swiped the card. We are providing you with ONLY the HIGHLIGHTED values. Everything else on the popup setup may need to be changed. This is a screen shot from our exact setup that works.

+--ICSETUP Copyright 1990-1995+, ICVERIFY, INC. 6.50.88 - Popup---------------+
ICVERIFY.SET 05-26-1996
Memory Resident?(Y/N/B/L):B
Popup Window?(Y/N/B/L/S):B
Use EMS Memory?(Y/N):Y
Standard Hotkey (A-Z):V____
Use Disk Swapping?(Y/N):Y
Credit Sale Hotkey (A-Z):00000
Check Sale Hotkey (A-Z):00000
Debit Sale Hotkey (A-Z):00000
Amount Col, Line, Len: 24,12,08
Credit Card # Col,Line,Len: 28,13,16
Expiration Dt Col,Line,Len: 42,13,04
Clerk Col, Line, Len: 78,04,03
Comment Col, Line, Len: 41,17,27
Address Col,Line,Len: 42,04,34
ZipCode Col,Line,Len: 49,04,05
Tip Col,Line,Len:00,00,00
+---------------------[Esc] End [F10] Restore Original ---------------------+

col,line,len to retrieve TIP, 99:current cursor, 0:ignore

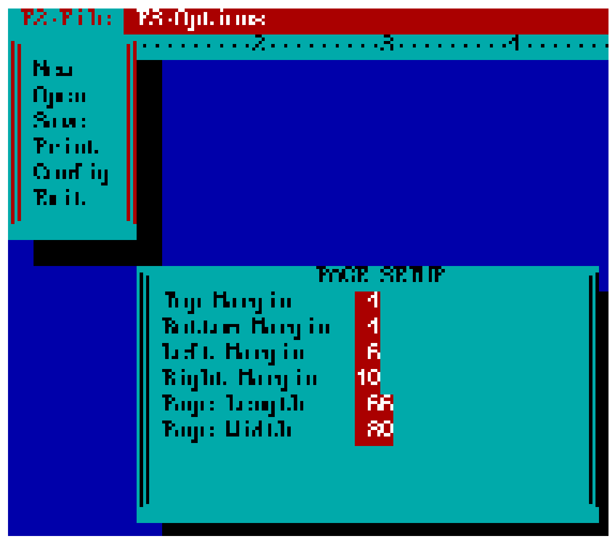
Use these numbers for The Retail CashBox

Word Processor



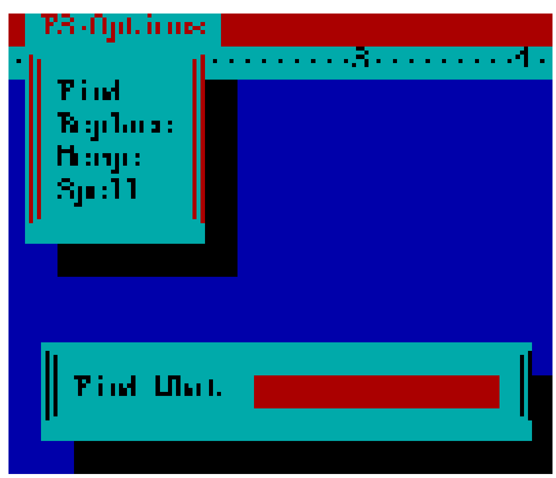
* The word processor supplied with this program was designed for very simple use. Basic functions can be viewed with the F1 help key. You can use the ← → ↓ ↑ to move up, down, left and right in your text. The ENTER key will start a new paragraph on the next line and the DEL and (Backspace) keys can be used to delete text.
* Use the F2 and F3 keys to access the menus and F1 for help.
* By pressing F2 you will bring down the menu for file access and system configuration.
* NEW: is used to clear the word processor screen and start a new document. If there is work on the screen that has not been saved the system will prompt you to save the file. The system will not let you overwrite an existing file without prompting you for overwrite or new name.
* OPEN: is displayed above and is used to open existing files for printing or editing. A pick list of existing files will be displayed for you to choose from, move your cursor up and down and press ENTER to select the file to view.
* SAVE: is used to save existing work on the screen. If you try to overwrite an existing file the program will prompt you.
* PRINT: will simply print your document.
* CONFIG: is system information, for example, margins and page sizes.
* EXIT: will exit you from the word processor and return you to the customer menu.

Word Processor Configure



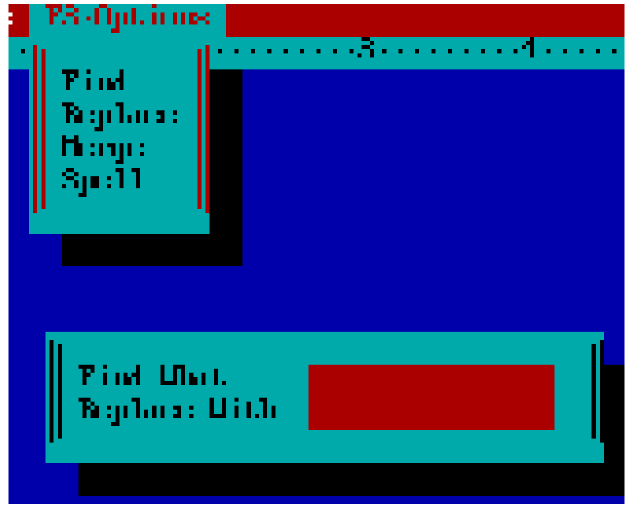
* Basic word processor configuration information is stored in this menu option.
* Move the cursor down to configure and press ENTER.
* Enter the information you would like for margins, page length and width and press ENTER.
* A pop-up box will appear asking you to confirm changes. Press ENTER on (Yes) and your changes will be saved and applied to your current document. Press (No) and an changes will be aborted.

Word Processor Find



* This is to locate user defined information in the existing document.
* Press F3 to pop-down the Options menu and select Find.
* A box will appear asking you to “Find What:”. Simply type in the word you would like to find and press ENTER. The box will disappear and the text will be centered on the word you were looking for, if found.
* Select find again and if you would like to find the same word it will already be in the “Find What: “ box. Press ENTER on the word and the next occurrence of the word will be found.
* Continue selecting find to locate your word or change the word to locate a different word.

Word Processor Replace

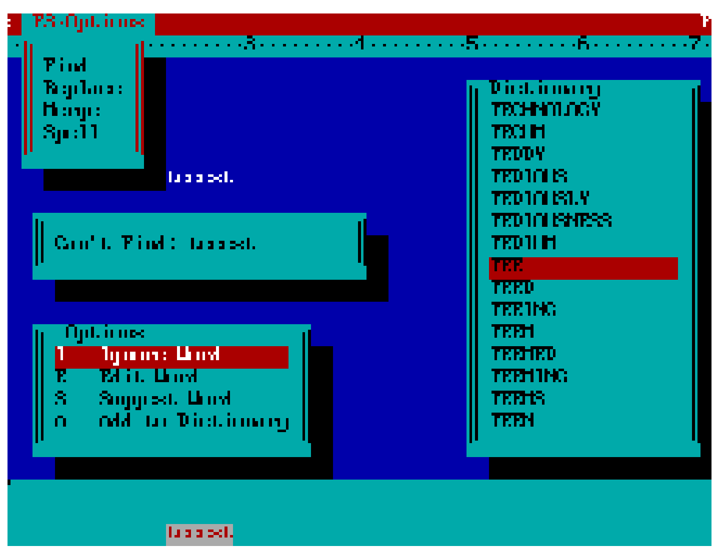


* Replace works very much the same way as Find except the found word is replaced.
* Press F3 to access the Options menu. Move the highlight bar to Replace and press ENTER.
* A box will appear asking for the word to find and the word to replace it with.
* An occurrences of the word, if found, will be replace with the replace word you supplied.
* Replace is case sensitive and will replace the new word in the same case.

Word Processor Merge

* Merge is the power of the word processor. Use it to develop collection letters, thank you letters or any kind of correspondence with your customers. The merge section places data base fields from your customer list into letters developed in the word processor.
* Press F3 to access the Options menu. Move the cursor to Merge and press ENTER.
* A pop-up list of the customer data base fields appear. Move your cursor up or down to highlight the field you would like to merge and press ENTER.
* The field you have selected will be placed where your cursor was in the document you are working on. The field will be bracket by { } .
* You can move or delete the merge field like any other text in your document.

Word Processor Spell



* The spell checker has a 66,000 word dictionary that it will access to correct your spelling.
* Press the F3 to access the Options menu. Move the arrow keys to highlight the spell Options and press ENTER. The spell checker will begin to automatically process the text in your current document for spelling errors.
* If a mis-spelled word is found, that word will be displayed in a box. The syntax of the word will be displayed at the bottom of the screen.
* An options box will appear to select the following
* IGNORE: which will ignore the word with no changes and continue checking.
* EDIT WORD: This will allow you to edit the word with your version of the correctly spelled word.
* SUGGEST WORD: will switch control to the pick list on the right and allow you to move the list up and down with the ↓ ↑ and PG↓ and PG↑. Move the highlight bar to the word you would like to replace the misspelled word with and press ENTER.
* ADD TO DICTIONARY: will allow you to add the word to the dictionary so future checks will process the word as correctly spelled.

Customer Merge

* Select merge from the customer menu.
* Use the [↓] [↑] to move the highlight up or down and select a file developed with the word processor for merging with the customer data base.
* Select the search field used to narrow the search. If you would like an the records select the CUST_NUM field and enter [>] [0].
* Select the operator to be used in the search equal, greater or less than.
* Enter the search criteria and press [ENTER].
* A list of matches will be compiled and you will be prompted to continue. Press [ENTER] [Y] to continue or [N] and [ENTER] to stop.
* One letter for each customer that meets the search criteria will be printed with information from the customer file.

Customer Labels

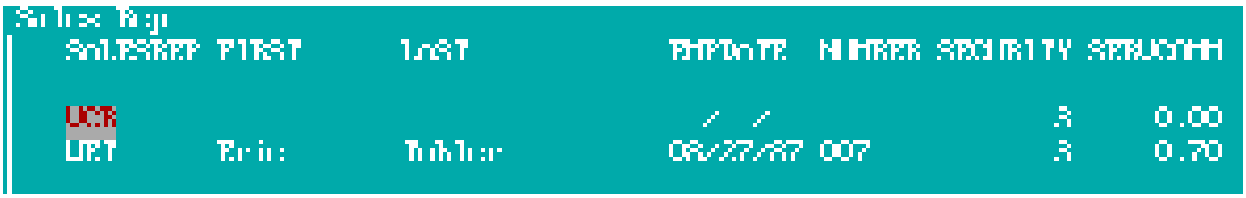
* Select labels from the customer menu.
* You will be prompted to test the setup of the labels in the printer. If you would like to test the printer press [Y] and [ENTER]. A test print of three labels will be printed. If the setup is ok press any key to continue. If you would like to retest the labels, press [ESC] to reprint the test labels again.
* Select the search field used to narrow the search. If you would like an the records select the CUST_NUM field and enter [>] [0].
* Select the operator to be used in the search equal, greater or less than.
* Enter the search criteria and press [ENTER].
* A list of matches will be compiled and you will be prompted to continue. Press [ENTER] [Y] to continue or [N] and [ENTER] to stop.

Employee Menu

From this menu you will be able to set up Sales Rep's, Schedule employees and look at commission reports. To run one of these functions use your (arrow keys) up or down and press the [ENTER] key.

Sales Rep

* This file is used to store information about the sales representatives.
* Select Sales Rep from the maintenance menu by moving the [↓] [↑] to Sales Rep and pressing [ENTER].
* A list of active Sales Reps will be displayed in row and column form
* Move the highlight bar around the table with the up, down, left and right [↓] [↑] [→] [←].
* If you would like to add, edit or delete information move the highlight bar to that item and press [ENTER]. You are now in the edit mode. Change the information or delete it with the (Backspace) key. Press [ENTER] again and the information will be saved.
* By pressing the [DEL] key on a line you will see the word <DELETE> in the upper right comer. If you delete in this manner the item will be deleted from the list upon exit.
* Exit with the [ESC] key.
* Fill in as much information in this manner as possible - you will be using this information for menu and system access.
* A security level of (3) is for complete systems access.
* A security level of (2) is manager access to reports and system areas.
* A security level of (1) only allows worksheet access. No menus.
* To set up service and product commissions type in the percentage amount as shown. Example; if your rep received 50% it would be entered as .50.
* You should always leave in the VCR rep



Employee Action Menu

* The employee Action menu allows you to schedule a rep and see day, week and monthly schedule.
* To run one of the Options use your [↑] [↓] up or down and press [ENTER]
* Schedule - Move the cursor to schedule and press [ENTER]. You will be asked to select the representative you would like to schedule. Move the highligent bar the rep and press [ENTER]. A box will appear with the in and out time for you to fill in. Enter the time in any form and press [ENTER]. You have now scheduled that employee.
* Day - When you select this Options a list of the sales reps, their scheduled time and clock in and out times will be displayed. Use you [↑] [↓] to move up and down and [ESC] to return to the monthly scheduler.
* Week - A weekly schedule will be displayed for an sales reps. Use the [F10] key to print to printer and [ENTER] key to print to file. This is exactly like every other report format.
* Month - This function will display the entire months schedule for the employee you select. After selecting this command you will be prompted for the sales rep to view schedule for, move the highlight bar to the rep and press [ENTER].

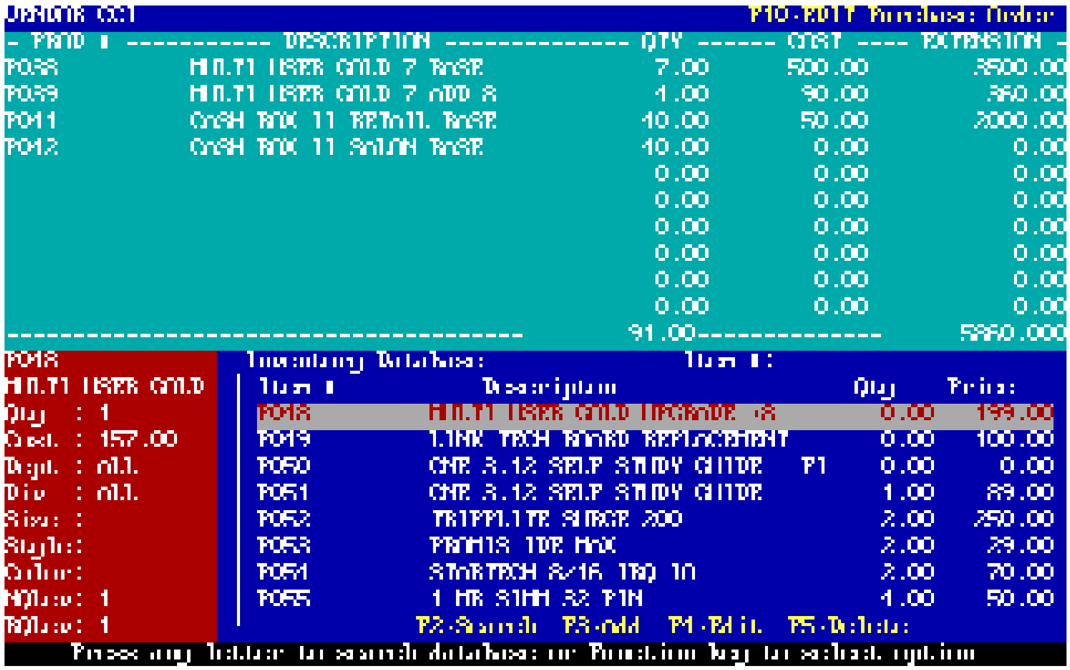
Print Commission

* By picking commission on the employee menu you will be given a choice of picking the employee you wish to report on or press the [ESC] key to see an employees.

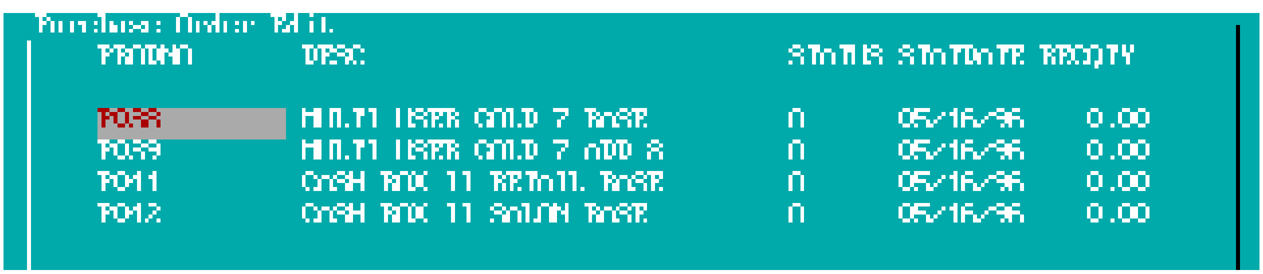
Accounts Payable Menu

* From this menu you can create, edit, delete and process purchase orders (PO's) by using the [↑] [↓] to highlight your choice and pressing [ENTER].
* No matter which option you select you will be prompted to select the vendor you would like to use. Do this by moving the [↑] [↓] up or down to highlight the vendor and press [ENTER]. Only the inventory items will be used for that vendor. If you are going to edit or delete a PO then only those from this vendor will be used.
* DELETE PURCHASE ORDER: Pick the vendor and PO for that vendor that you want to delete. A small box will display asking you Yes or No to delete. Select the option that you would like and press [ENTER].
* An PO's will be displayed in the same print format for add and edit. Use the [F10] key to print. [F9] or [ESC] will return you to the menu.

Create/Edit Purchase Order



CREATE PURCHASE ORDER: The first step in creating a purchase order is to pick a vendor to buy from. Use the up and down [↑] [↓] to highlight your choice and press [ENTER]. After selecting the vendor an items in the inventory from that vendor will be displayed on the screen for you to select from. Highlight your choice and press [ENTER]. After selecting an item to order you are taken to the left hand red box to enter order information for that item. After entering your choices the item will be displayed on your purchase order on top. You can edit or delete any mistakes with the [F10] key. After completing these steps for an the items to be ordered from this vendor you press [ESC]. A salon box will appear asking you to save or abort this purchase order. Use your [↑] [↓] to select your choice and press [ENTER].
* EDIT PURCHASE ORDER: Runs similar to making PO's. You first pick a vendor. A list of PO's created for that vendor appears. Move your [↑] [↓] to select the one you would like to edit and press [ENTER]. Your order will be displayed. Press the [F10] key to edit the order. Press [ESC] when done.
* By using the [ ] keys you can add, edit or delete inventory items exactly as described under inventory.



Process Purchase Order

* PROCESS PURCHASE ORDER: Pick a vendor from the list. A list of the PO's will be shown, highlight the order you wish to process and press [ENTER]. The order is shown with the highlighted located on the first product number. Move to the status field and enter one of the codes from the bottom of the screen (O-ordered, R-received...). After setting the status, changing the date and if you have received any items make sure you have entered in the quantity received then press [ESC] to stop. A small box will appear with save and abort. Select the action you would like and press [ENTER]. You can also change the cost of an item here. When cost is changed the existing items are averaged with the new items to give you a average cost of goods in inventory. Do this by moving your arrow key to the right to see more of the items order information.

Accounts Receivable Menu

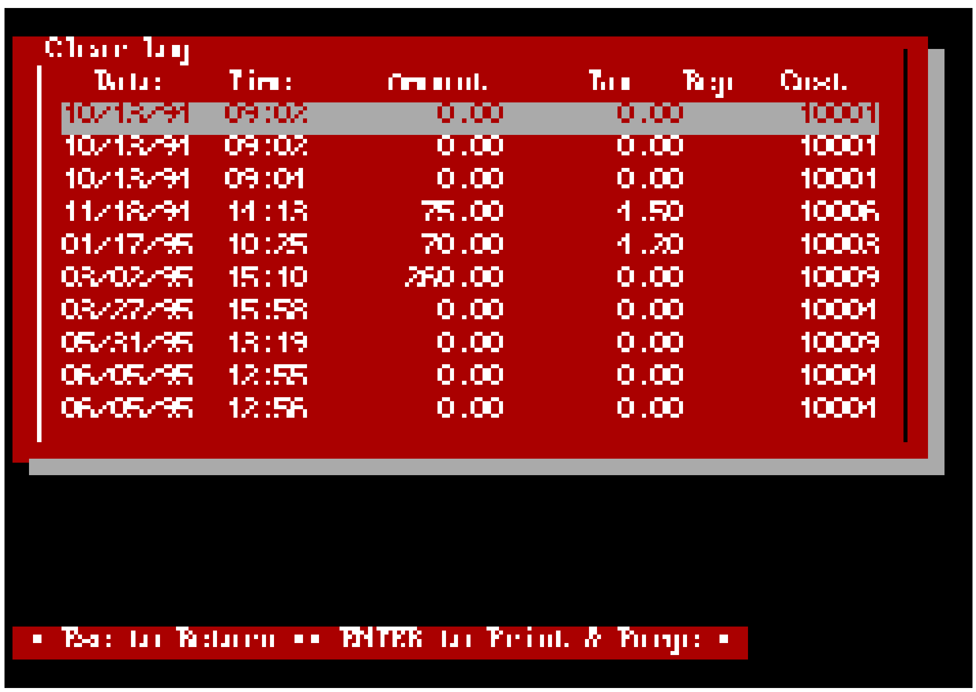
* From this menu you can either display a account or layaway report.
* ACCOUNT RECEIVABLE: From this menu you may pick a single customer and press ENTER or press F3 for an customers. This is a simple report that will show you customer number, invoice date, charges, payments and balance due. Interest is also calculated on late charges.
* STATEMENTS: This function is used to print statement for one or multiple customers for balance due on account.
* LAYAWAYS: From this menu option you will be able to view layaway status of one or an customers.

Maintenance Menu

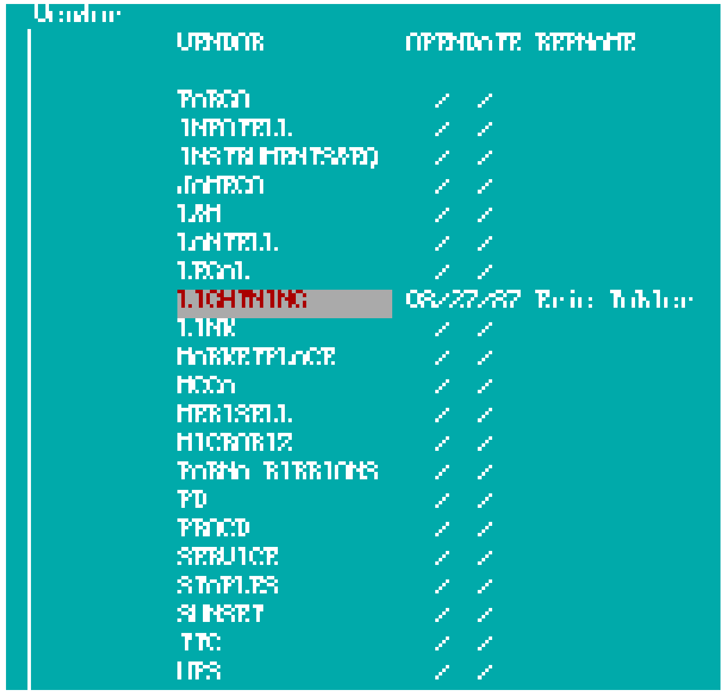
* This menu lets you look at the transactions cleared before printing. You can also Add, Edit or Delete vendors, Not in inventory items and Back up system files to disk.
* Vendor, NO-Find, and Customer type an work the same way. From these screens you can Add, Edit or Delete any field or line. Use the up and down ↑ ↓ to highlight your choice or DEL to delete an item. An letters and number keys are active within this screen. When a record is marked for deletion a <Deleted> will be shown on the top of the screen. To leave the screen press ESC. An changes will be saved.
* Use the Cash Drawer Options to set the amount of money you would like to have in your cash drawer. Select Cash drawer from the menu with your arrow keys and press ENTER. Type in the amount of your cash drawer and press ENTER.
* Pack: will clean out deleted information and pack your files for better use.

Clear Log

* An clears used on the main work screen will store their information in this file.
* This is a view file that can only be printed and purged by a system administrator
with a security level of 3.
* Select Clear Log from the maintenance menu.
* If you would like to print and purge the clear log press ENTER.
* You can view the log with out printing by using the ↑ ↓.
* ESC will exit you from the log and return you to the menu.



Vendor



* The vendor log is used to store information about the vendors you do business with.
* The vendors added or deleted from the vendor pick lists will be effected by the actions you take in this menu.
* Select vendor from the maintenance menu by moving the ↑ ↓ to vendor and pressing ENTER.
* A list of active vendors will be displayed in row and column form
* Move the highlight bar around the table with the up, down, left and right ↑ ↓ → ←.
* If you would like to add, edit or delete information move the highlight bar to that item and press E. You are now in the edit mode. Change the information or delete it with the (Backspace) key. Press ENTER again and the information will be saved.
* By pressing the DEL key on a line you will see the word <DELETE> in the upper right corner. If you delete in this manner the item will be deleted from the list Upon exit.
* Exit with the ESC key.
* Fill in as much information in this manner as possible - you will be Using this information in purchase order functions.

No Find

* No Find is a function used for the administration and maintenance of inventory items. Use this file to see what inventory items nave been sold that are not in the inventory.
* You can browse up, down, left or right with the ↑ ↓ ← →.
* By hignlignting an item and pressing the DEL key that item in the log will be deleted Upon exit.
* Use the (Esc) key to exit.

Backup

* This may be one of the most important functions to The Salon Cashbox program. It is very important that you back up your data files as often as possible.
* Backup utilizes DOS backup command and must be pathed in order to work properly. Make sure the directory, usually C:\DOS, is in your path.
* Select backup from the maintenance menu by moving the highlight bar up or down with the ↑ ↓ and pressing ENTER.
* A box will appear with the disk drive to back up to.
* Use the ↑ ↓ to select the drive and press ENTER.
* DOS backup will take over and prompt you for disks in the drive you nave selected.
* You can restore the back up by following DOS instruction for restore.

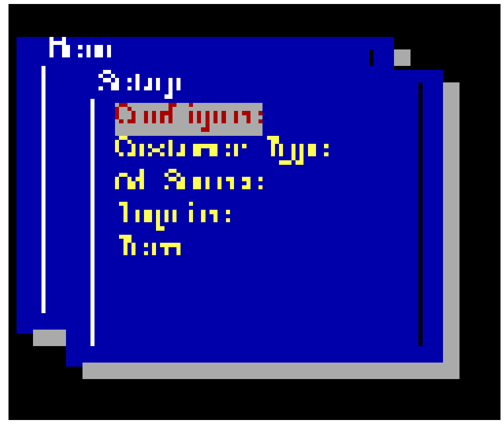
Backup

The Retail CashBox uses very little disk space. Yet, today the floppy disk drive is not the best way to backup your data. We suggest you buy a tape drive.

For thoes who won't take our advice ... we have included a way to run a backup to floppy disk. This methoid relies on a program called BACKUP. The BACKUP program is included in most versions of DOS. If you have a tape drive, you can rename BACKUP.* to BACKUPO.* then rename your tape backup program to BACKUP.EXE or BACKUP.COM. This would make The Salon CashBox run the tape backup instead of the floppy backup.

The BACKUP program must be in a directory that is in your PATH which is set by the PATH command in the AUTOEXEC.BAT file.

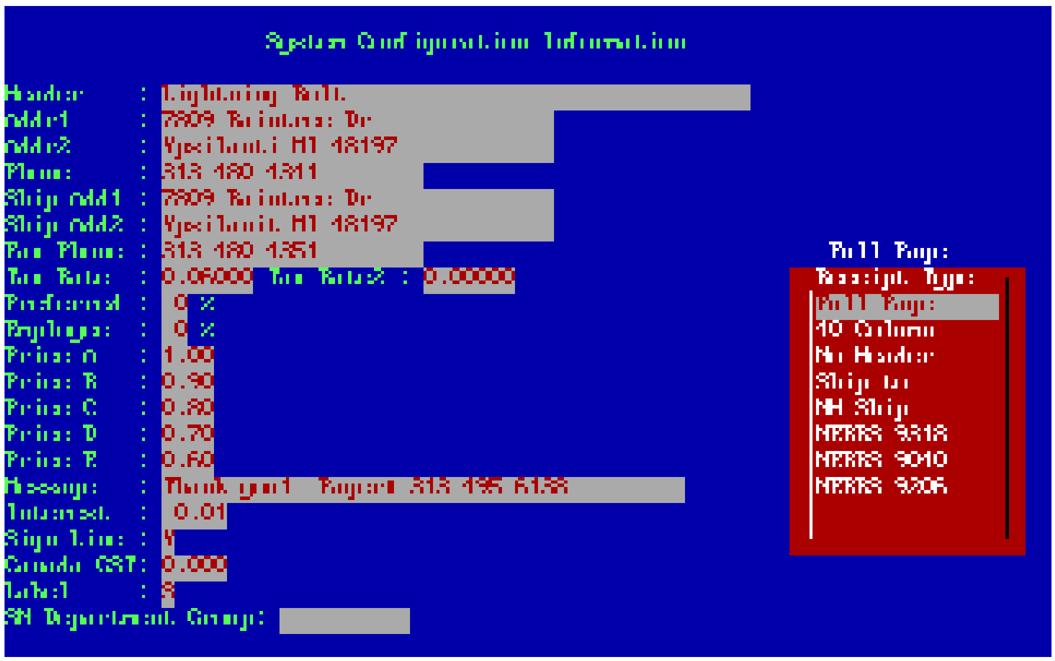
Setup Menu



* From this menu you will be able to Configure your system, Set customer type, Ad source, Inquire, and Term.

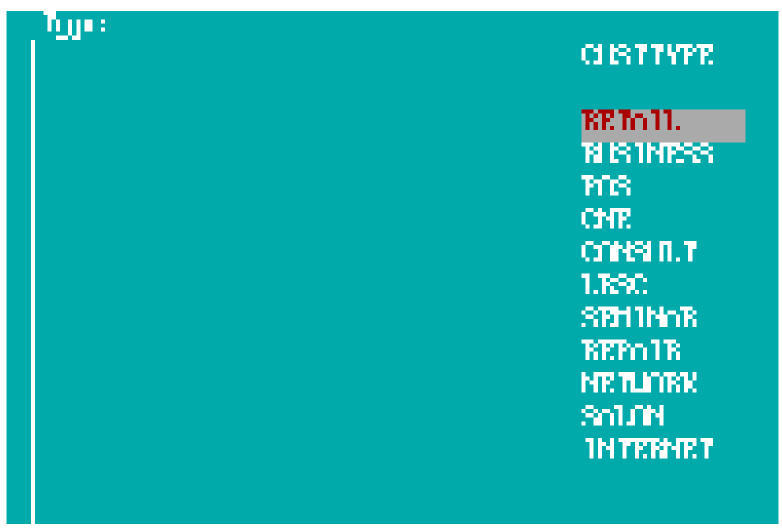
Configure

* Configure your company information from this menu.
* Select configure from the setup menu
* Fill in the information requested in as much detail as possible. When multiple answers need to be selected a pick list will be displayed.
* Company information will be display as typed on an reports.
* Tax rates are pennies on the dollar.
* Discounts are percent of retail.
* Price levels are percentage of retail, (1 would be full retail, .5 would be 50% off)
* Interest is also pennies on the dollar.
* Selection of modem codes and credit card access is vital for credit card authorization and batch processing.
* You will be able to pick from a number of receipt types the standard fun page and 40 column receipt or use no header fun page, ship to fun page, and ship to no header fun page. You may also pick any of the custom forms like the NEBBS 9318.
* If you select 40 column receipt you will be prompted to select the printer port the printer will be attached to. This is for people who nave parallel receipt printers and would like to attach them to LPT1.
* You can select receipts to have signature lines or not.



Setup Pick Menus

* Customer Type, Ad Source, Inquire and Trem all work the same way.
* From these screens you can Add, Edit or Delete any field or line.
* Use the up and down [↑][↓] to highlight your choice or [DEL] to delete an item.
* To edit an item, highlight the item and press the [ENTER] key, the edit screen will appear. Move the cursor to the line you want to change and type in the new information. For the imformation to be saved you need to go to the next line before pressing the [ESC] key to leave the edit screen. If you want to add new information move the [↓] key until you get a blank edit screen to enter into.To Delete an item press the [DEL] key, the itemwill be removed from the screen. To leave the screen press the [ESC] key, all changes will be saved.
* When a record is marked for deletion a <Deleted> will show on the top of the screen.
* To leave the screen press [ESC].
* All changes will be saved.



How Do I

Configure the program for my business:

Before you begin using The Salon CashBox program, you will want to configure the program to display your company name, tax rates, price levels ... within the program. At the bottom of the main work screen, you will see a command box with the caption SELECT FUNCTION above it. Within the command box there are seven different function. They are Add, Process, Edit, Clear, Lookup, and Menu with a highlighted bar over the Add function. Use the Arrow keys to highlight the Menu function and press Enter. Another command box will appear with Reports, Inventory, Customer, Payable, Acct Receivable, Maintenance, and Setup within it. Using your arrow keys highlight Setup and press Enter. Press Enter on Configure here to edit the configure screen. The first field is caned header. Your business name goes here, type it in and press enter to move to next field. You can also use the arrow keys to move within this screen. Continue on through the fields until you reach Tax Rate. This field is based on cents on the dollar so 0.05 would be 5% sales tax enter in your tax rate here and move to the next field. The preferred, and employee fields are for setting a percentage of discount they can be set at this time or left blank. Price levels are a percentage of retail (1 would be fun retail, .5 would be 50% off) you should fin in the first one to be 1 the rest can be set at this time or left blank. Interest is set as cents on the dollar type in amount to set and press Enter. A box will appear and ask if you will be using standard or a 40 column receipt printer make your choice and press Enter. If you are going to be using this program to run your charges card connected to a modem then fill in the following fields with the information given to you by Trans Net. After fining in an appropriate fields keep pressing the Enter key to exit and save.

Add Sales Clerks:

After you have configured the program for your company the next step is to identify those employees that will be using the program. From the main work screen highlight Menu and press Enter then highlight Maintenance and press Enter. Press Enter on Sales Rep to bring up the Sales Rep Add/Edit screen. To Add, Edit, or Delete information move the highlight bar to a item and press Enter this will put you into the edit mode.

Change the information or delete it with the Backspace key. Press enter again and the information will be saved. By pressing the Delete key on a line you will see the word <delete> in the upper right corner. If you delete in this manner the item will be deleted from the list upon exit. Fill in an appropriate information but remember the last field must have at least one sales person with a security level of (3) if none is set at this time with this level you will not be able to view an the menus or return to this screen to add or edit any other salespeople.

Add Customers:

To enter in new customers highlight the Add function from the main work screen and press Enter. This will bring you to the customer pick screen. Press the (F3) key to bring up the customer add screen. The last name field is ready for you to begin typing in information after fining in the field press Enter to move to next field. After entering data in an fields a box will appear asking if this customer is tax exempt select yes or no and press Enter. The next box will ask for a level of pricing to charge this customer highlight choice and press Enter. A small box will ask if you want to save this customer or abort now highlight choice and press Enter. This will bring you back to the main work screen, if you saved a customer then that customer is now displayed on the main work screen.

Add Inventory Items:

From the main work screen highlight Menu and press Enter. Next highlight Inventory and press Enter. From this menu pick Add and press Enter you now have to decide if this is going to be a standard, matrix, or kit highlight your choice and press Enter. Fill in the product number you want here or use a bar code reader to enter it for you. Fill in an fields up to Vendor where a box with a list of vendor will appear.This box will have an highlighted you will need to press the Insert key now if you want to add any other vendors. After entering the vendor press Enter on the vendor of your choice to move to next field. Do the same for Dept, and Div. Fill in the last fields until you see a choice box labeled Like Item? if you pick yes the new item will use the last items information for it’s fields. Place new product number in and continue. Press Esc to exit inventory Add screen.

Make & Process a Sale:

From the main work screen press Enter on the Add function to pick your customer. After picking a customer press Enter on the Add function again to bring up the inventory list. Highlight the item you want to sell and press Enter to place it on the main work screen. Press the Esc key to return to the main work screen. Highlight the Process function and press Enter this will bring you to the process menu. Highlight Sale and press Enter. Pick the type of payment this customer is making either cash,check,MC\Visa.... and press Enter. You are now asked to type in the amount the customer is giving you if it is the same as the one shown then press Enter. If there is a check number or PO number type them in now if not press Enter. If you have any comments you would like shown on the sale then type them in here if not press Enter twice to move to last field. If you had picked one of the charge cards you would have been asked to enter card number and expiration date or swipe the card for the information. The last question is to either press Enter on (YES) continue and process the sale or (NO) and return to the beginning of the page or (QUIT) and return to the main work screen. Highlight your choice and press Enter.

Discount an Item:

After you have selected your customer and picked the items you want to sell to this customer highlight Options under select function and press Enter. From this submenu highlight Discount and press Enter. You can discount an the items by pressing (F2) or pick one item to discount by moving the arrow keys up or down and press Enter on the one you want to discount. After making your choice a small box will appear and ask you how much you want to discount. You can either type a dollar amount like (10) for ten dollar or type (10%) if you want to discount by a percentage of the retail amount. You are then returned to the main work screen and a discount line will be added to the screen.

Make a Quote:

To make a quote follow the same steps as a normal sale. Pick your customer and any items or services to sell to this customer then highlight Process under select function and press Enter. When the process submenu appears highlight Quote and press Enter. This will add the quote to the quote log under this customers name and print out a quote. To retrieve this quote pick the same customer and highlight options and press Enter then highlight Quote and press Enter. You will see a list of quotes to pick from for this customer, highlight the date or quote number to retrieve and press Enter. This will bring the quote into the work screen and can be processed like any other sale. If there are no quotes for the customer you have chosen no quote list will be shown.

Run a Report:

To run a report select Menu from the main work screen and press enter. A menu will be displayed, select Reports from this menu. You will have a list of report types to pick from. Select the type of report you would like, daily, summary, inventory, sales, time or sales rep and press enter. The report will ask you for the date range this report will cover. Select the date you would like by pressing enter to accept the date shown, + or - to advance or decrease the date or type in the new date and press enter. Do the same for the ending date. Depending on the report selected you will be prompted for more information to add to the report.

Follow the screens to compile your report. Once you have provided an the information for a report the contents will be displayed on the screen. Use your arrow keys to move the report up and down on the screen. F10 will print the report to the printer and Esc or F9 will return you to the menu.

Run Statements:

Select menu from the work screen function list and press enter. The system sub menu will appear. Move the arrow keys to highlight Account Receivables and press enter. Select statement from this menu and press enter. A customer list will appear. Select the customer you would like to print a statement for by moving the highlight bar with the arrow keys or typing in the name or company and pressing enter. If you would like to print statements for an the customers select F3 from the customer pick list. After selecting the customer/s or an from the list a statement/s will be compiled for that customer/s. Use the arrow keys to move the screen up or down. F9 or Esc exists the statement or F10 prints. The statement will show the current amount owed if any, the amounts paid and interest due if configured for interest in setup - config.

Make Collection Letters:

In order to create collection letters you need to do a two step procedure.

First create the letter with the word processor and merge fields from the customer data base. Second print merge letters from the customer menu. Let’s look at the letter creation process for the word processor first. Select menu from the work screen and press enter. Select customer from this sub menu and press enter. An the options to create a collection letter are in this menu. Select Word Processor from this menu and press enter. A collection letter is nothing more than a simple letter with mail merge fields in it. Press F3 to access the options menu and move highlight bar to merge. A pop-up box will appear with the data base fields from the customer list. Select First_name and press enter. {FIRST_NAME} will be displayed on your letter. You have just created a letter with the merge field FIRST_NAME in it. When you print this letter from the customer menu merge option you will get one page for each customer with their first name on it. Let’s add the rest of the fields for last name, company, address, city, state and zip the same way. Make the letter look like a normal letter but the actual names and other information is substituted with the customer field names. After you have put in an the address information you will want to write the body of the text of your collection letter. When you are through with your letter save it and exit. If you exit without saving the program will ask you for a name for your changes so don’t worry it’s not that easy to lose an your good hard work. When you exit the word process you will be returned to the customer menu screen. Select Mail Merge from the menu and press enter. A pop-up will appear asking you to select the document you would like to merge the customer data base with. Select the one you just typed above. Next you will be asked to narrow the number of customers you would like to print.

Collection letters are to people who owe you money so select BALDUE from the next list. You will need to move the arrow key down in order to see the BALDUE field. Once you select BALDUE an operator box will appear select > (greater than) and press enter. Enter the amount of 0 for your BALDUE. You have created a search criteria for your customer data base for an records that have a BALDUE greater than $0. A tally of customer matches will be compiled and you will be prompted for Y or N to continue. If you press Y you will get a letter for each of the customers that owe you money.

You can use this same method to print thank you letters or any other kind of letter that you would like to personalize to each customer.

Run Mail Labels:

Once you have printed merge letters you will want to print labels to the same people or just print labels for any of your customers. Select menu from the main work screen and press enter. From this menu select customer and press enter. Highlight labels and press enter. A test set of labels will be printed if you so desire. After you have calibrated your printer for the labels select the search criteria for the labels you would like to print. Do this exactly like the merge option of collection letters. Briefly, you will select the field from the customer data base that you would like to use for your search criteria. Good examples are BALDUE, CITY_STATES, ZIP codes and so on. Select the operator for your search Greater than, less than or equal to and press enter. Type in the amount or name and press enter. A list of the customer matching the search criteria will be printed and you will be prompted to continue. Select Y to start printing you labels.

Make Product Labels:

At any time you can print product labels with or without bar codes. Select menu from the main work screen and press enter. A sub menu will appear, select inventory from this menu and press enter. Select labels from the inventory menu and press enter. You will be asked to test print three labels to make sure your printer is lined up correctly. Press any key to continue or Esc to re-print three more labels.

After you have your printer setup you will be asked to narrow your search. Do this by selecting an inventory field from the inventory field pop-up list and press enter. Select the operator from the next window and type in the amount or name to search by. An example of this would be to print labels for an products costing more than $50, an products entered in after a certain date or an products from a certain vendor. Once you have the search criteria selected the system will tally an possible matches and ask you to continue or not. If you select Y to continue you will be asked to print bar code labels for these products. The last choice you will have before printing will be if you want one label or one label for each inventory item in stock, ie. one label for each like item.

Set Up Security:

The security screen ap

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