Store Manager Getting Started Guide

Contact Information

Retail Management Hero

454 West Napa Street, Unit B

Sonoma, CA 95476

documentation@rhmpos.com

For more information or support, contact your RMH Partner.

Contents

Overview

To get started using Store Manager and POS, we recommend that you complete the following basic setup tasks in the order shown below:

1. Create and connect to the store database
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5. Set up store merchandise
6. Set up store suppliers
7. Set up reason codes
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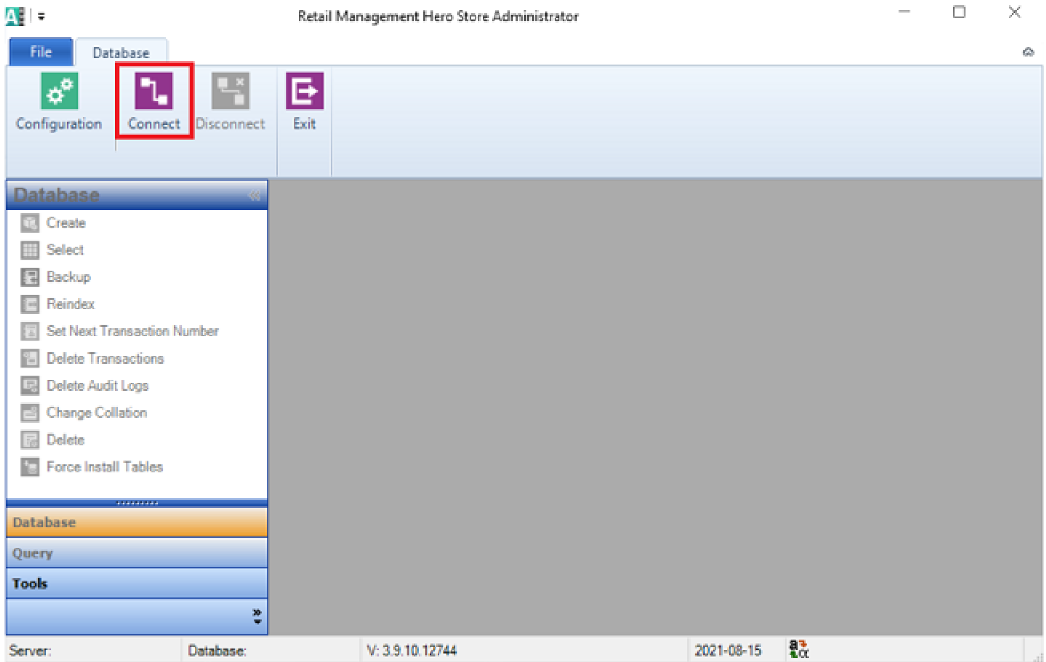
9. Set up receipt formats
10. Set up sales representatives

Create and connect to the store database

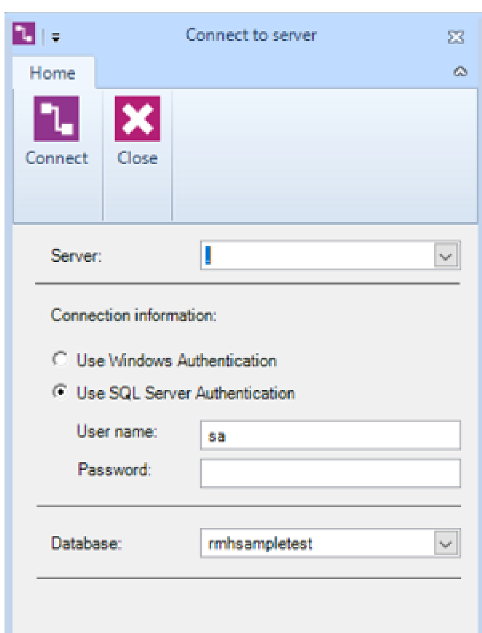
Connecting to the SQL server

1. Start **RMH Store Administrator**. The shortcut should be available on your desktop.

2. Click **Connect**.



3. In the **Server** field, type the name of the server running your SQL server, or use the drop-down list to select the server. If you installed Microsoft SQL Server, Store Manager, and POS on the same computer, you can enter a period, **(local)**, or **localhost** into this field.



4. Under **Connection information**:

   - Select **Use Windows Authentication** if all of your users and computers belong to a Windows domain and you want to use Active Directory to manage the account and password.

     > **Note:** While you can use Windows credentials to connect to the database, you will need to click **Configuration** and enter the SQL server credentials on the **Database** tab.

   - Select **Use SQL Server Authentication** if you want to use the SQL server to manage the account and password. Type the **User name** and **Password** for the SQL server.

     > **Note:** Some versions of SQL Server do not support SQL Server Authentication. If this applies to your SQL Server installation, you must select **Use Windows Authentication**.

5. In the **Database** field, type a temporary name for the database.

6. Click **Connect**.

Creating the store database

1. In **RMH Store Administrator**, click **Create**. The Create Database wizard displays.

2. Click **Next**.

3. On the **Database Size** screen:

   - In the **Database name** field, type a name for your store database.
   - Do not change the **Initial Size (MB)** field value. This just sets the initial size of the store database.

4. Click **Next**.

5. On the **Database Growth** screen, do not change any field values. By default, the store database size will automatically increase as required.

6. Click **Next**.

7. On the **Populate Database** screen, click the **Browse** icon and select a database backup file.

> **Note:** You can select any Store Manager database backup file, including the **rmhsample.bck** database located under **C:\Program Files (x86)\Retail Hero\RMH Store Manager\DBFiles**.

8. Click **Next**.

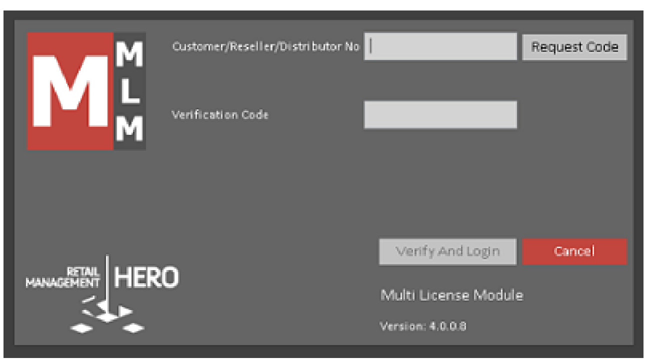
9. Click **Finish**.

Activating your license

Request license keys for Store Manager and POS using the Partner Order Portal (order.rmhpos.com). After the license key is generated you can activate your store database by following the steps in this procedure.

1. Start **MLM**. The shortcut should be available on your desktop.

2. In the **Customer/Reseller No** field, type your number.



3. If this is the first time you have activated a license, enter your email address into the **Email** field.
4. Click **Request Code**. A verification code is generated and sent to your email. Go to your email and copy the code.
5. In the **Verification Code** field, type or paste the verification code that was sent to you by email.
6. Click **Verify and Login**.
7. Confirm or enter your store information and click **Save And Close**. Click **OK** to confirm.
8. In the **Product Name** column, double-click your **RMH Store Manager** license type (Base Pack or Subscription).
9. Click **Licensing**.
10. Under **Status**, select the **Unregistered** line.
11. Click **Activate**. Click **OK** to confirm.
12. Under **Status**, select the **Active** line.
13. Click **Terminals**.
14. In the **Enabled** column, click the checkbox beside Register #1.

> **Note:** In new installations of Store Manager and POS, one register is predefined so you can activate your Store Manager license and get started using the system. If you want to enable additional registers, you must first set up the additional registers in Store Manager using **Setup | Hardware | Register List** and then enable those registers in MLM.

15. Click **Save**. Click **OK** to confirm.

16. Click **Close**.

17. In the **Product Name** column, double-click **RMH POS** license type (Base Pack or Subscription).

18. Click **Licensing**.

19. Under **Status**, select the **Unregistered** line.

20. Click **Activate**. Click **OK** to confirm.

21. Under **Status**, select the **Active** line.

22. Click **Terminals**.

23. In the **Enabled** column, click the checkbox beside Register #1.

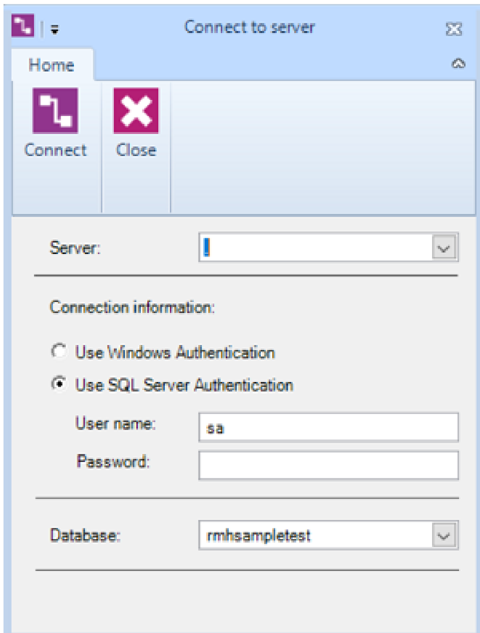
24. Click **Save**. Click **OK** to confirm.

25. Click **Close**. Your license keys for Store Manager and POS are now activated and you can open and use the applications.

Connecting to the licensed store database

1. In **RMH Store Administrator**, click **Connect**.

2. The **Server** name and **Connection information** should be pre-populated. You do not need to change any field values.



3. If prompted, type the **Password** for the SQL server.

4. In the **Database** field, type the name of the store database that you entered on the **Database Size** screen of the **Create Database** wizard.

5. Click **Connect**.

6. Click **Configuration**.

7. On the **Database** tab, enter the **Server Name**, **Database** name, and **SQL Server Authentication** information.

8. Click **Test Database Connection**.

9. Click **Save And Close**.

Set up user roles and user accounts

Setting up manager user roles

User **roles**[1] define privileges that specific types of users have in Store Manager and POS.

> **Note:** You should set up at least one manager user role with full privileges before you set up manager user roles with limited privileges.

To set up a manager user role:

1. Click **Setup**.
2. Expand **People & Security**.
3. Click **Manager User Roles**.
4. Click **New**.
5. In the **Code** field, enter a code for the manager role.

   > **Note:** You must enter a unique Code for each type of manager user role, e.g. Manager-Full, Manager-Merch, Manager-Inv.

6. In the **Name** field, enter a name for the manager role, .e.g., Manager with full privileges.
7. Expand **Privileges** and assign privileges to the manager role.

[1] In Store Manager, you create roles for different employee functions in the store (e.g., manager, cashier, sales representative) and assign specific privileges or rights to the role. When you create a user account for a new employee you assign a role to the user account, and then customize their privileges or rights as required.

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
Manage Configuration		Edit configuration options under **File | Configuration** in Store Manager.	Available
Merchandising	Items	Add, edit, and delete items in Store Manager.	Available
	Item Messages	Set up, edit, and delete item messages in Store Manager.	Available
	Item Matrices	Use the Item Matrices screen to edit the properties of matrix item components such as quantity, cost, and price.	Available
	Departments	Set up, edit, and delete departments in Store Manager.	Available
	Categories	Set up categories in Store Manager.	Available

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
	Discounts	Set up, edit, and delete discounts in Store Manager.	Available
	Schedules	Set up, edit, and delete schedules in Store Manager.	Available
	Advanced Item Wizard	Use the Advanced Item Wizard in Store Manager.	
	Label Wizard	Use the Label Wizard in Store Manager.	
	Inventory Wizard	Use the Inventory Wizard in Store Manager.	
Customer	Account	Add, edit, and delete company or person AR accounts in Store Manager.	Available
	Customer	Add, edit, and delete customer accounts in Store Manager.	Available

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
	Close Billing Cycle	Close the billing cycle for AR accounts in Store Manager.	
	Print Statements	Print or email statements for AR accounts in Store Manager.	
Inventory/Purchasing	Suppliers	Set up, edit, and delete suppliers in Store Manager.	Available
	Supplier Worksheet	Use the Supplier Worksheet in Store Manager.	
	Purchase Orders	Add, edit, and delete purchase orders in Store Manager.	Available
	Purchase Order Requisition	Use the Purchase Order Requisition Wizard in Store Manager.	
	Transfer Ins	Add, edit, and	Available

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		delete transfers in in Store Manager.	
	Transfer Outs	Add, edit, and delete transfers out in Store Manager.	Available
	Purchasing Tasks	Use the Purchasing Tasks Wizard to change item purchasing information such as purchase tax or unit of measure (UOM), or to flag items with Do Not Order.	
	Transfer In Requisition	Use the Transfer In Requisition Wizard in Store Manager.	
	Invoice	Add invoices to Store Manager.	Available
	Credit Note	Add credit notes in Store Manager.	Available
	Cost Adjustment	Use Cost Adjustment Wizard in	

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		Store Manager.	
	Offline Inventory	Manage offline inventory in Store Manager.	Available
	Physical Inventory	Manage physical inventory count in Store Manager.	Available
	History	**Look up history for the following in Store Manager:** ▪ Purchase Orders ▪ Transfer Outs ▪ Transfer Ins ▪ Posted Receipts ▪ Posted Invoices ▪ Posted Credit Notes	
Journal	View	View the Batch List and receipt inform-	

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		ation in the Journal Viewer in Store Manager.	
	Post Closed Batches	Post closed batches in Store Manager.	
	Update Batch Info	Use the filter to look up batches and update batch information in Store Manager.	
Setup	Merchandising	**Set up, edit, and delete the following in Store Manager:** ▪ Reason Codes ▪ Tares ▪ Item Settings	Available
	People & Security	**Set up, edit, and delete the following in Store Manager:**	Available

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		■ Sales Representative ■ Time Clock ■ Password Policy ■ POS User Roles ■ Manager User Roles ■ Users	
	Inventory/Purchasing	**Set up, edit, and delete the following in Store Manager:** ■ Shipping Methods ■ Shipping Carriers ■ Payment Terms ■ Purchasers ■ Charges ■ Order Setting	Available, except for Import Orders

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		▪ Import Orders	
	Financial	**Set up, edit, and delete the following in Store Manager:** ▪ Item Taxes ▪ Sales Tax ▪ Currencies ▪ Tender Types	Available
	Customer	**Set up, edit, and delete the following for Accounts Receivable in Store Manager:** ▪ Account Groups ▪ Account Managers ▪ Finance Charges ▪ Payment Terms	Available, except for Import Customers

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		▪ Reason Codes ▪ Statement Types ▪ Number Series ▪ Import Customers ▪ Accounting Defaults ▪ Email Message	
		Customer Policy	Available
	Hardware	**Set up, edit, and delete the following in Store Manager:** ▪ Register List ▪ Pole Display Messages ▪ Net Display Channels ▪ Receipt	Available

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
		Formats ▪ POS Profiles ▪ Custom POS Buttons ▪ POS Task Pad	
	Miscellaneous	**Set up, edit, and delete the following in Store Manager:** ▪ Custom Fields ▪ Printer Settings ▪ Item Properties ▪ Random Weight EAN	Available
Reports	Active Reports	Generate Active Reports in Store Manager.	
	Queries Reports	Generate Query Reports in Store Manager.	

Privilege Group	Privilege	If Selected, User Has Full Access to	View Only
	Sharp Shooter Reports	Generate Sharp Shooter reports in Store Manager.	
Tools	Backup Database	Back up the store database in Store Manager.	
	Label Designer	Use the Label Designer in Store Manager.	
Items Privileges		Allow to change Item On Hand Quantity	
Loyalty Privileges		Allowed to access the Loyalty Program	

8. Click **Save And Close**.

Setting up cashier user roles

User **roles**[1] define privileges that specific types of users have in Store Manager and POS.

[1] In Store Manager, you create roles for different employee functions in the store (e.g., manager, cashier, sales representative) and assign specific privileges or rights to the role. When you create a user account for a new employee you assign a role to the user account, and then customize their privileges or rights as required.

You should set up at least one cashier user role with full privileges before you set up cashier user roles with limited privileges. There are typically three types of cashiers in a store:

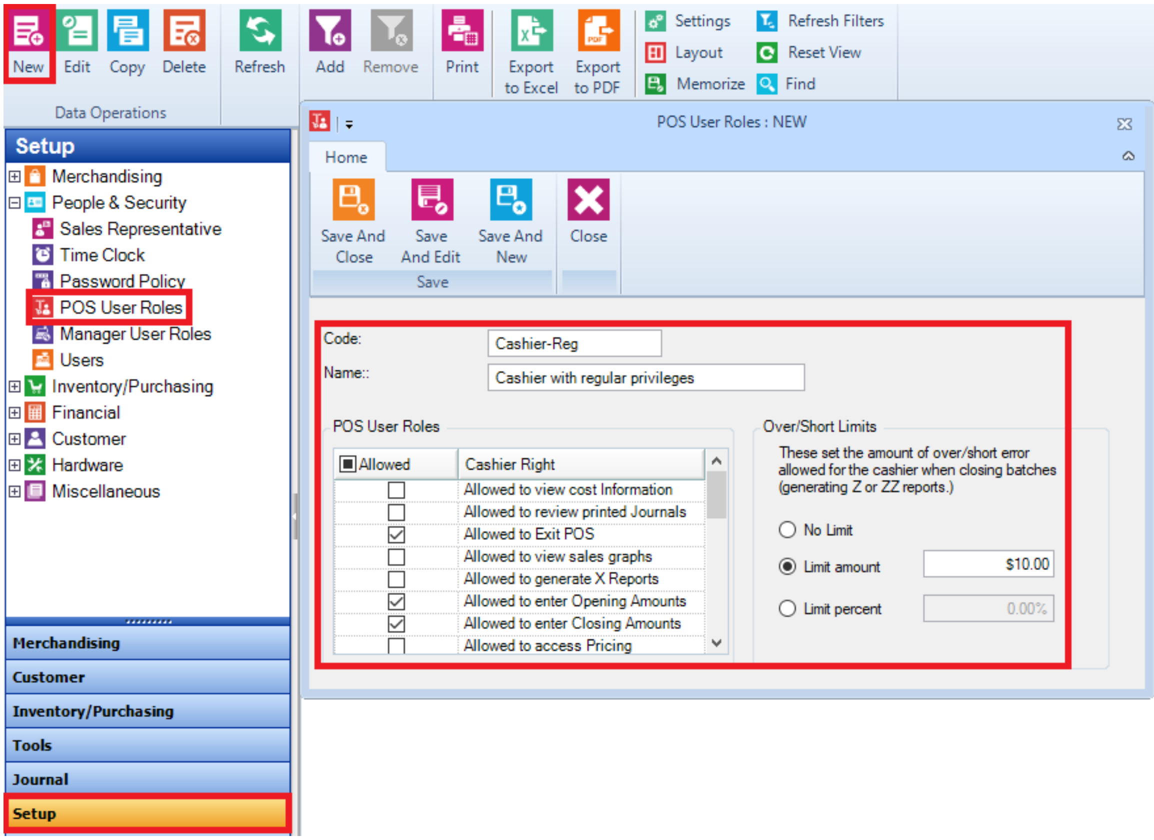
- Regular cashiers: Responsible for entering customer transactions at a register.
- Senior cashiers: Responsible for correcting transactions at registers, performing drops to the safe, generating X, Z, and ZZ reports, and entering more complex transactions.
- Admin cashiers: Responsible for all cashier operations.

To set up cashier user roles:

1. Click **Setup**.
2. Expand **People & Security**.
3. Click **POS User Roles**.
4. Click **New**.
5. In the **Code** field, type a code for the cashier user role.

> **Note:** You must enter a unique Code for each type of cashier user role, e.g., Cashier-Reg, Cashier-Full.

6. In the **Name** field, type a short description of the user role, .e.g., Cashier with regular privileges.



7. Click the checkbox beside each **Cashier Right** you want to give to cashiers assigned to this user role.

Admin	Senior	Regular	Field	Description
X			Allowed to view cost information	Can view and edit Cost of Item in POS and Store Manager.
X			Allowed to	Can review prin-

Admin	Senior	Regular	Field	Description
			review printed Journals	ted Journal in POS.
X	X		Allowed to Exit POS	Can shut down (exit) the POS application.
X	X		Allowed to view sales graphs	Can view sales graphs in Store Manager.
X	X		Allowed to gen-erate X reports	Can generate X reports in POS.
X		X	Allowed to enter Opening Amounts	Can enter an opening amount for a register or cash drawer.
X		X	Allowed to enter Closing Amounts	Can enter a clos-ing amount for a register or cash drawer.
X	X		Allowed to access Pricing	Can view and edit Pricing information in

Admin	Senior	Regular	Field	Description
				POS and Store Manager.
X	X		Allowed to change tax status	Can change the tax status of an item in POS.
X	X		Allowed to perform No Sales	Can open the register or cash drawer by entering a no sale.
X	X		Allowed to perform Drops and Payouts	Can enter cash drops for the safe or payouts for managers.
X	X		Allowed to put transactions on hold	Can put a transaction on hold and recall at a later time.
X	X	X	Allowed to perform Closeouts	Can blind close out the register at the end of a shift.

Admin	Senior	Regular	Field	Description
X	X	X	Allowed to generate Z & ZZ Reports	Can generate Z and ZZ Reports in POS.
X	X		Allowed to delete entries from transactions	Can delete items added to a transaction.
X	X	X	Allowed to view and edit all customers	Can view and edit customer information. Can deactivate, but not delete, customer profiles.
X	X		Allowed to post empty transactions	Can post empty transactions.
X	X		Allowed to sell to employees with discounts	Can complete employee transactions with discounts.
X	X		Allowed to abort	Can cancel

Admin	Senior	Regular	Field	Description
			transactions	transactions before com-pletion.

8. In the **Over/Short Limits** section, choose one of the following:

- No Limit
- Limit amount
- Limit percent

Field	Description
No Limit	Select this option if you want the cashier to be able to close the batch regardless of the amount the cash drawer is over or short.
Limit amount	Select this option if you want to set an amount threshold above which the cashier is considered over or short. For example, if you enter $10.00 and the cash drawer is short $5.00 the cashier is not considered short and they can close the batch. However, if the cash drawer is short $15.00 they are considered short and cannot close the batch.
Limit percent	Select this option if you want to set a percent threshold above which the cashier is considered over or short. For example, if you enter 10% and the batch total is

Field	Description
	$1,000, if the cash drawer is short an amount less than $100 the cashier is not considered short and they can close the batch. However, if the cash drawer is short an amount more than $100 the cashier is considered short and cannot close the batch.

9. Click **Save and Close**.

Setting up a user

Every person who uses Store Manager or POS should have their own unique **user account**[1].

To set up a user and assign a user role:

1. Click **Setup**.
2. Expand **People & Security**.
3. Click **Users**.
4. Click **New**.
5. Enter the following information:

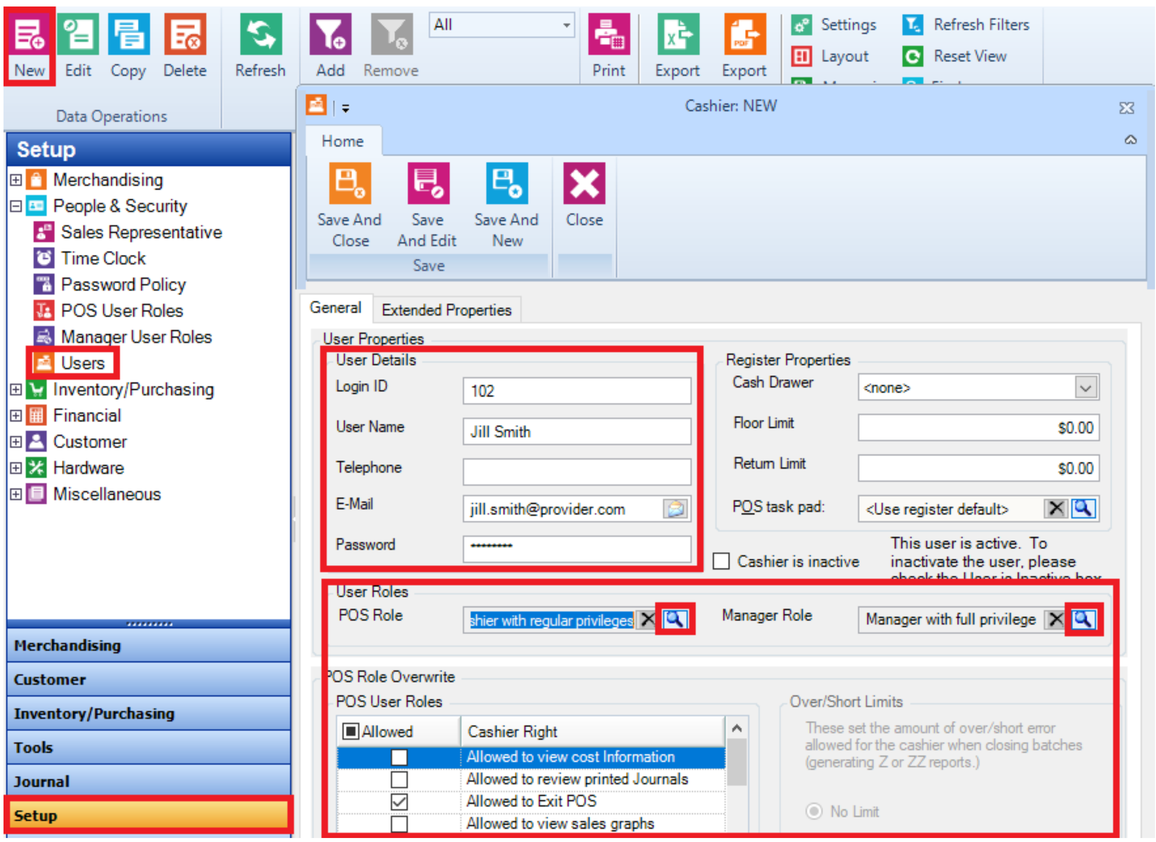
[1] A user account is required to log in to Central Manager, Store Manager, Loyalty, or POS. Every employee should have their own unique user account.

Field	Description
Login ID	The ID that the person will use to log in to POS. **Tip:** The Login ID prints on the customer's receipt. To protect the privacy of employees, consider using a numeric ID. (An added benefit is that numeric IDs are also easier to enter in POS.) You might also consider using a number series for IDs that aligns with the user's role. For example, all 100's are cashiers, 200's are floor managers, 300's are manager, and so on.
User Name	The user's first and last name.
Telephone	The user's telephone number.
Email	The user's email address.
Password	A password that the user must enter to log in to POS or Store Manager. Passwords are optional but recommended. User accounts that do not have passwords are vulnerable to fraud and theft.

6. In the **User Roles** section, click the **Search** icon beside **POS Role** or **Manager Role** and select the user role with the appropriate privileges, e.g., Cashier-Reg, Manager-Full.

You can customize the privileges for the cashier by adding or removing cashier rights from the list. If the manager may need to enter transactions, you can assign both a POS Role and a Manager Role.

There are two default Manager roles: Manager-Full has full privileges and Manager has read only access.



7. Click **Save and Close**.

Enter basic store information

Setting up store contact information

1. Click **File** | **Configuration**.

2. Click the **Store** tab.

3. Enter the following information:

> **Note:** The Name, Address, City, State, and Zip, Country fields become read only after the license key is activated. You can only change this information in the MLM application.

Field	Description
Name	Your store's name.
Address	Your store's street address.
City, State	The city and state in which your store is located.
Zip, Country	The zip (postal) code for your store, and the country where your store is located.
Phone, Fax	The phone and fax numbers for your store.
E-mail Address	The primary email address for your store.

4. Click **Save And Close**.

Setting up ordering rules

1. Click **File** | **Configuration**.
2. Click the **Ordering rules** tab.
3. Enter the following information:

Option	Field	Description
Layaway	Expiration	The maximum number of days the customer has to pay off the total layaway amount before the layaway agreement expires and is no longer valid, e.g., 90. The number of days includes the day the layaway order was placed.
	Deposit	The minimum percentage of the total layaway amount that the customer must pay as a deposit when the layaway order is created.
Work Order	Due Days	The expected number of days from when a work order is created until it is ready. Store Manager uses this number to calculate the pick up date, which in printed in the work order header.
	Deposit	The minimum percentage of the total work order amount that the customer must pay as a deposit when the work order is created.
Back Order	Expiration	The maximum number of days the store has to fill a back order before it expires.
	Deposit	The minimum percentage of the total back order amount that the customer must pay as a deposit when the back order is created.

Option	Field	Description
Quote	Expiration	The maximum number of days customers have to purchase an item at the quoted price before the quote expires and is no longer valid.

4. Click **Save And Close**.

Setting up inventory rules

1. Click **File** | **Configuration**.
2. Click the **Inventory rules** tab.
3. Enter the following information:

Option	Field	Description
Cost Update Method	None	Store Manager can automatically update the cost of items received through purchase orders or inventory transfers. Select this option if you do not want to change existing costs when items are received.
	Last Cost	Select this option if you want Store Manager to automatically update the cost of items based on the item cost on the most recent purchase order.

Option	Field	Description
	Weighted Average	Select this option if you want Store Manager to automatically update the cost of items based on the average cost of all in stock (existing) and new units, e.g., you have 2 units in stock @ $10/ea. and 20 new units just arrived at $12/ea. for a total of $260. The weighted average cost ($260/22 units) is $11.82.
Landed Cost	Use landed cost when receiving merchandise	Select this option if you want to use landed cost, e.g., include tax, shipping, tax on shipping, and invoice discounts in the cost of each item received.
	Default Cost Distribution Method	Select the default cost distribution method (Quantity, Value, or Manual) that you want Store Manager to use to calculate the landed cost. Refer to Calculating landed cost for more information about the calculations used for landed cost. **Tip:** Use the RMH Landed Cost Plus Cost Update Method Work-

Option	Field	Description
		sheet to check your landed cost for specific items. This worksheet is available for download from the PDF Guides section of the RMH online help.
Price Calculation	Use Minimum Price	Store Manager analyses discount, level, sale, and buydown prices for the item and calculates the lowest price for the item.
	Use Level if it exists. Otherwise use minimum.	Store Manager calculates the price of the item based on the defined price level. If the price level does not exist, it uses the minimum price.
	Prioritize in order of: quantity discount, level, sale, then buydown	Store Manager calculates the quantity discount price. If no quantity discount exists, it uses the price level. If no price level exists, it uses the sale price. If no sale price exists, it uses the buydown price.

4. Click **Save And Close**.

Setting up sales tax rules

1. Click **File | Configuration**.

2. Click the **Sales tax** tab.

3. Enter the following information:

Option	Field	Description
Method of Tax-ation	Tax-Exclusive (United States, Canada)	The tax exclusive system is primarily used in the United States. The price shown on the price tag or shelf tag is the price before (excluding) tax. The tax is calculated and added to the transaction total when the item is sold. Select this option if your store is located in the United States, or in a region where a tax exclusive system is used.
	Value Added Tax (VAT) or Tax-Inclusive (Europe)	Many countries use a VAT or tax inclusive system. The price shown on the price tag or shelf tag is the price including tax. Select this option if your store is located in a region where VAT or a tax inclusive system is used.
	VAT Reg. No.	If your store is located in a region where VAT is used, enter your busi-nesses VAT registration number. This number is printed on receipts and tax reports.
	VAT Detail ID	

Option	Field	Description
Tax Schedule Basis	Select the local tax (identified in the Item tax field) to apply to any newly created items	If you select a tax from the drop-down, it is automatically selected in the **Item tax** field on the **General** tab of the **Item** window for new items.
	If shipping to the customer, select the value (e.g. Ship to state\ city\ country\ ZIP) to use to determine the local tax at the destination (on a per customer basis)	Select this option to enable POS to use the local tax at the destination if you are shipping items to customers. Select which customer field in the shipping address is used to determine the local tax at the destination.

4. Click **Save And Close**.

Setting up store rules

1. Click **File | Configuration**.
2. Click the **Store rules** tab.
3. Enter rules for the following:

Option	Field	Description
Customer	Allow new customers at POS	Allow cashiers to add new customers.
	Always display "Find" window for Customers	Display the Find screen (i.e., to select customers) instead of the Customer list screen.
	Prompt for customer selection	Prompt cashiers to select a customer after logging on, completing a sale, or canceling a sale.
	Require customer selection for orders	Require cashiers to select a customer before creating work orders.
	Require customer selection for quotes	Require cashiers to select a customer before creating quotes.
	Require customer selection for sales	Require cashiers to select a customer before entering sales.
General	Don't remember list sorts	Select this option if you want to display the Item and Customer lists sorted by the first column in ascending order. If you do not select this option, Item and Customer lists will

Option	Field	Description
		display however they were previously sorted.
	Force open/close amounts	Require cashiers to enter opening and closing amounts before completing close-outs (i.e., running a Z Report).
	Mark journal receipts as duplicate	Print a DUPLICATE watermark on every page of journal receipts.
	Require decimal entry	Require cashiers to use two-digit decimal point values for dollar amounts (i.e., $.88, $2.01, $5.00).
	Suppress backup reminder	Select this option if you do not want a backup reminder message to display when you exit the Store Manager application.
	Use blank receipt in journal	Select this option if you want to post a blank receipt in the receipt journal for the use of add-in programs. Contact your Microsoft Certified Partner for more information about add-in programs.

Option	Field	Description
Item	Calculate cost of kits	Automatically calculate the cost of kits based on the cost of items contained in the kit.
	Display out of stock	Display a warning message if the cashier attempts to sell more than the in-stock quantity of an item. This is useful for mail-order sales.
	Display unknown item screen	Display a message if the cashier scans or manually enters an unknown item. Requires the cashier to press Esc to continue.
	Do not allow the sale of items when out of stock	Prevent cashiers from selling items that are out of stock (i.e., the quantity available is equal to or less than zero).
	Look up unknown items	Display the Items screen whenever the item lookup code entered by the cashier does not match any item lookup codes in the database.
	Show Item Extended Description	If you entered an Extended Description for the item, select this option to display it on the POS screen.

Option	Field	Description
	Show Item Notes	If you entered Notes for the item, select this option to display them on the POS screen.
	Show Item SubDe-scription	If you entered Sub Descriptions for the item, select this option to display them on the POS screen.
	Show previously defined Item SubDescription	Select this option to change the Sub Description fields to drop-down lists, populated with previously-defined Sub Descriptions for the item.
	Do not allow edit of Item Cost	Prevent cashiers from editing Item Cost.
POS	Automatically close change screen	Automatically close the Post Trans-action dialog box, which displays the transaction status and any change due to the customer, at the end of a transaction.
	Don't round food stamps	Do not round up food stamp trans-actions to the nearest dollar.
	Enable back orders	Allow cashiers to sell more than the in-stock quantity of an item. If

Option	Field	Description
		enabled, the cashier is required to select a customer to create a back order.
	Force logon each sale	Forces cashiers to log on using their user name and password for each transaction.
	Prevent sale of inactive items	Prevent cashiers from selling inact-ive items.
	Print no sale receipt	Print a receipt when cashiers enter no sale transactions.
	Prompt for details on transactions	Display the Transaction Information screen at the beginning of every sale to prompt cashiers to enter transaction details (e.g., reference number).
	Prompt for sales representative	Prompt cashiers to select a sales representative at the beginning of every sale.
	Record item com-ments	Save any comments that are entered in the Transaction Inform-ation screen in the transaction his-

Option	Field	Description
		tory when the transaction is completed. This can cause the database size to increase rapidly.
	Require sales representative	Require cashiers to select a sales representative before accessing the Tender screen.
	Return local currency	Displays customer change in the local currency if the customer uses another currency as tender.
	Save tender information with quotes	Save tender information (e.g., totals, taxes, tender types) with sales quotes.
	Share the OPOS printer with other application	Select this option if Store Manager and POS are installed on the same computer and you want both applications to share the OPOS printer.
	Show Bin Location on Pole Display	Display the item's Bin Location on the pole display instead of the item's Description.
	Utilize random weight EAN codes	Use random weight EAN codes.

Option	Field	Description
	Utilize random weight UPC codes	Use random weight UPC codes.
Purchase Order	Update supplier cost and tax rate from Purchase Order	Use the item cost and tax rate from the last order received from the supplier.
	Hide details by default	Hide the Details in the Purchase Order form. If this option is selected, Purchase Orders generate faster.
Reason Code	Prompt for reason code on discounts	Prompt cashiers to enter a reason code for any customer discount applied to a transaction.
	Prompt for reason code on manual inventory	Prompt cashiers to enter a reason code for any manual change to the store’s inventory.
	Prompt for reason code on no sales	Prompt cashiers to enter a reason code for no sale transactions.
	Prompt for reason code on returns	Prompt cashiers to enter a reason code for any returns.
	Prompt for reason code on tax	Prompt cashiers to enter a reason code for any tax changes.

Option	Field	Description
	changes	
	Reason code required on dis-counts	Require cashiers to enter a reason code for any customer discount applied to a transaction.
	Reason code required on drops	Require cashiers to enter a reason code for any cash drops.
	Reason code required on manual inventory adjustments	Require cashiers to enter a reason code for any manual change to the store’s inventory.
	Reason code required on no sales	Require cashiers to enter a reason code for no sale transactions.
	Reason code required on pay-outs	Require cashiers to enter a reason code for any kind of payout.
	Reason code required on phys-ical inventory count adjustments	Require cashiers to enter a reason code for any changes to the store's physical inventory count.
	Reason code	Require cashiers to enter a reason

Option	Field	Description
	required on returns	code for any returns.
	Reason code required on tax changes	Require cashiers to enter a reason code for any tax changes.
Serial Number	Allow POS serial number creation	Allow cashiers to create new serial numbers.
	Enforce unique serial numbers	Require cashiers to select unique serial numbers for items. Duplicate serial numbers are not allowed.
	Require serial number at the POS	Require cashiers to enter the serial number for all serialized items.
	Require serial number when receiving invent-ory	Prompt users to enter serial num-bers when receiving inventory against a purchase order.
	Synchronize quant-ity with serial num-bers	Update the item's quantity whenever a new serial number is added for either a serialized or voucher item.

4. Click **Save And Close**.

Setting up rounding rules

You can use rounding rules to perform realistic rounding for item prices. For example, if you discount a certain category of items by 10%, the discounted prices might look unusual or unrealistic, such as $5.54 or $10.23. You can configure rounding rules to round these prices up, down, or to the nearest desired value. You can also configure rounding rules to end the price with a specific value, such as $0.95 or $0.99.

1. Click **File** | **Configuration**.

2. Click the **Rounding rules** tab.

3. (Optional) If you only want to perform rounding for specific ranges of prices, enter them in the **Price Range** section.

   For example, to limit rounding to items with prices that are less than $100.00, in the **Price Range** section, enter $0.00 in the **From** field and $100.00 in the **To** field. If you want to perform rounding for all items, leave the amounts as $0.00 and $0.00 in the From and To fields.

4. (Optional) If you want to perform rounding to a specific dollar denomination, click the check box beside the relevant price range, if applicable, and enter the dollar denomination.

   For example, to round items to the nearest dollar, under **Make price multiple of**, enter $1.00. To round items to the nearest $10.00, enter $10.00.

5. (Optional) If you want to end rounded prices with a specific value, click the check box beside the relevant price range, if applicable, and enter the value to use.

   Some stores will end prices with specific values to indicate regular prices, sale prices, clearance prices, one-time markdown prices, or competitor matching prices. For example, if your store uses $0.97 to indicate clearance prices for items with prices that are less than $25.00, set up a price range and under **Then end price with**, enter $0.97.

6. Select the rounding method:

   - **Round to nearest:** Select to round to the nearest desired value. For example, if you want prices to end with $0.97, and the discounted price is $5.54, the price will be rounded up to $5.97. However, if the discounted price is $10.23, the price will be rounded down to $9.97.
   - **Round up:** Select to round to the nearest desired value that is above or equal to the price. For example, if you want prices to end with $0.97, and the discounted price is $5.54, the price will be rounded up to $5.97. Similarly, if the discounted price is $10.23, the price will be rounded up to $10.97.
   - **Round down:** Select to round to the nearest desired value that is below or equal to the price. For example, if you want prices to end with $0.97, and the discounted price is $5.54, the price will be rounded down to $4.97. Similarly, if the discounted price is $10.23, the price will be rounded down to $9.97.

7. Click **Save And Close**.

Setting up tender rules

> **Pre-requisites:** You must set up your store's Tender Types before you can configure Tender rules.

1. Click **File | Configuration**.
2. Click the **Tender** tab.
3. From the **Default Change Tender** field, select the default tender type for providing change to customers. For example, if you accept debit cards and allow cash back with purchases, select Cash.

4. From the **Voucher Expiration** field, enter the number of days that customers have to use a voucher (e.g., a gift card or gift certificate) before the voucher is no longer valid. Enter zero (0) in the Voucher Expiration field if you do not want the voucher to expire.

5. Click **Save And Close**.

Setting up multiple stores

You only need to use this tab if you have deployed Store Manager and POS to multiple stores in a chain and are using Central Manager to manage the store databases.

1. Click **File** | **Configuration**.

2. Click the **Multi-Store** tab.

3. The **Store ID** is assigned by Store Administrator.

4. Select **Enable Central Mode** to manage the store using Central Manager.

5. In the **Central Server URL**, enter the URL of the Central Server. The Central Server is used to exchange and synchronize data between Store Manager and Central Manager.

6. Click **Test** to test the connection to the Central Server.

7. Click **Save And Close**.

Set up store financials

Setting up currencies

1. Click **Setup**.

2. Expand **Financial**.

3. Click **Currencies**.

4. To add a new currency, click **New**.

5. Enter the following information:

Field	Description
Description	The name of the currency, e.g., US Dollar, Euro, Peso.
Code	A code that identifies the currency, e.g., USD, EUR, MXN.
Conversion rate	The ratio between two currencies, e.g., 1:2, which indicates how much of one currency is needed to exchange for the equivalent value of another currency. Store Manager uses the conversion rate to convert the local currency used by the store to a foreign currency.
Exchange rate	The rate, e.g., 1.35, at which one country's currency can be exchanged for another currency. Store Manager uses the exchange rate to convert any amounts tendered in foreign currencies to the local currency.
Locale	The country where the currency is standard, e.g., for USD you would select English (United States) but for CAD you would select English (Canada).

6. To copy an existing currency, select it and click **Copy**. You must enter a new **Description**, but all other values are copied.

7. To edit an existing currency, select it and click **Edit**.

8. Click **Save And Close**.

Setting up tender types

1. Click **Setup**.

2. Expand **Financial**.

3. Click **Tender Types**.

4. To add a new tender type, click **New**.

5. Set up the tender type.

Field	Description
Description	The name of the tender type, e.g., Cash, Visa, MasterCard, Debit Card.
Tender Code	A code that identifies the tender type, e.g., CA, VI, MC, DC.
Tender Type	The tender type, e.g., Cash, Credit Card, Debit Card.
Currency	Select the applicable currency for your store. Select Default Currency to use the currency defined in your Windows operating system.
Tender Type is inactive	Select this option if the tender type is no longer in use in your store. If you make a tender type inactive, cashiers can no longer select it at the register, including for returns. However, it will still be available for

Field	Description
	reports and journaled receipts. If you no longer use a tender type, the best practice is to make it inactive instead of deleting it. If you delete a tender type it breaks the relationship with historical transactions in your store database.
Maximum Amount	Enter the maximum amount, e.g., $1,000, of the tender type that the store will accept. If you set a maximum amount, cashiers will not be able to tender sales with tender amounts higher than the limit specified. Leave the Maximum Amount as $0.00 if you do not want to set a limit.
Denominations	Enter denominations if you plan to use the change Calculator on the Tender screen at the POS.
Display Order	The order that the tender types display on the POS, with 1 at the top.
Scan Code	If you have a programmable keyboard, enter a keyboard shortcut key for the tender type, e.g., C for Cash. Leave the Scan Code as 0 if you do not use this feature.
Round to Value	The amount to which you want Store Manager and POS to round up the value of this tender type, e.g., if pennies are not used in your region but nickels are,

Field	Description
	enter $0.05.
Prevent Cashier overtendering	Select this option to prevent cashiers from tendering amounts higher than the transaction total. This option is automatically selected for Credit Card tender types because overtendering on credit card is not permitted by credit card companies.
POP Cash Drawer	Select this option if you want POS to open the cash drawer whenever this tender type is used.
Require signature	Select this option if you require a customer signature for this tender type, either on the credit card signature line on the receipt or via a signature capture device.
Allow multiple entries	Select this option if you want to permit cashiers to accept partial payment of the transaction total on two or more of the same tender type, e.g., splitting the transaction amount between two Visa cards.

6. To copy an existing tender type, select it and click **Copy**. You must enter a new **Description** and **Tender Code**, but all other values are copied.
7. To edit an existing tender type, select it and click **Edit**.
8. Click **Save And Close**.

Setting up sales taxes

Your store may be required to charge several different types of sales taxes, e.g., value added, goods and services, luxury. Use this setup screen to define how specific sales tax amounts are calculated, e.g., rate and amounts.

1. Click **Setup**.
2. Expand **Financial**.
3. Click **Sales Tax**.
4. To add a new type of sales tax, click **New**.
5. Set up the sales tax.

Field	Description
Description	The name for the sales tax, e.g., Value Added Tax, Goods and Services Tax.
Code	A unique code for the sales tax, e.g., VAT, GST.
Minimum taxable amount	If applicable, enter a threshold amount above which the sales tax is charged. For example, if your store charges a luxury tax on items above a certain value, enter the value in this field.
Maximum taxable amount	If applicable, enter a threshold amount above which the sales tax is no longer charged.
Sales Tax Rate (%)	If the sales tax amount is calculated as a percentage of

Field	Description
	the item's price, enter the percentage.
Fixed Amount	If the sales tax amount is calculated as a fixed amount regardless of the item's price, enter the amount.
Only apply tax to portion over minimum taxable amount	Select this option if you entered an amount in the Minimum taxable amount field. For example, if you entered $1,000 in the Minimum taxable amount field and the item's price is $1,250, the sales tax amount is only calculated on the $250.
Include any previous sales taxes in calculation	Select this option if the sales tax amount is calculated based on the item price and taxes from previous sales tax codes.
Use partial dollar method in sales taxes calculation	Select this option if the sales tax amount is calculated using the partial dollar tax method. Check local and state laws to determine if this applies to your store. Use the partial dollar tax table below to define the breaks in the dollar (brackets) where the tax amounts are charged.

6. To copy an existing sales tax, select it and click **Copy**. You must enter a new **Description** and **Code**, but all other values are copied.

7. To edit an existing sales tax, select it and click **Edit**.

8. Click **Save And Close**.

Setting up item taxes

Your store may be required to charge different sales taxes based on the type of items, e.g., liquor, tobacco, clothing, food, prescriptions. Use this setup screen to define which taxes are charged by the item type.

1. Click **Setup**.
2. Expand **Financial**.
3. Click **Item Taxes**.
4. To add a new item taxes, click **New**.
5. Set up the item tax.

Field	Description
Description	The name of the item tax type.
Code	A unique code for the item tax type, e.g., liquor, tobacco, clothing.
Compute tax on (Price-Cost) instead of Price	Select this option if you want to calculate tax using price - cost instead of price.
Compute tax on Cost instead of Price	Select this option if you want to calculate tax on the wholesaler's cost instead of price.
Compute tax on Item Weight instead of	Select this option if you want to calculate tax as a fixed amount per item, e.g. excise tax, instead of price. For

Field	Description
Price	example, if the excise tax is $0.05 per milliliter, the selling price is $10.00, the cost is $7.00, and the value in the Weight field of the item is 100, the tax calculated will be $5.00 ($0.05 x 100 = $5.00).
Apply individual taxes in the following order	Select all of the taxes that apply to the item type, in the order that you want them to display on the POS screen. Select On Receipt if you also want to display the sales taxes on the receipt.

6. To copy an existing item taxes, select it and click **Copy**. You must enter a new **Description** and **Code**, but all other values are copied.
7. To edit an existing item taxes, select it and click **Edit**.
8. Click **Save And Close**.

Set up store merchandise

Setting up departments

Setting up departments is not required, but it is recommended. If you organize your items into departments and categories it is easier to analyze inventory, pricing, and profits.

1. Click **Merchandising**.
2. Click **Departments**.
3. To add a new department, click **New**.
4. Enter the following information:

Field	Description
Code	A unique code, e.g., a number or abbreviation, that identifies the department.
Name	The name of the department.

5. To quickly add categories to a department, in the Categories section click **New** and enter a **Code** and **Name** for the category.

6. To copy an existing department, select it and click **Copy**. You must enter a new **Code**, but all other values are copied.

7. To edit an existing department, select it and click **Edit**.

8. Click **Save And Close**.

Setting up categories

Setting up categories is not required, but it is recommended. If you organize your items into departments and categories it is easier to analyze inventory, pricing, and profits.

1. Click **Merchandising**.

2. Click **Categories**.

3. To add a new category, click **New**.

4. Enter the following information:

Field	Description
Code	A unique code, e.g., a number or abbreviation, that identifies the category.
Name	The name of the category.
Department code	Click the checkbox to select the department that the category belongs to.

5. To copy an existing category, select it and click **Copy**. You must enter a new **Description**, but all other values are copied.

6. To edit an existing category, select it and click **Edit**.

7. Click **Save And Close**.

Setting up standard items

> **Note:** It is recommended that you set up suppliers before you enter a large number of items.

1. Click **Merchandising**.

2. Click **Items**.

3. Click **New**.

4. Select **Standard Item** and click **OK**.

5. Use the **General** tab to enter general information about the item.

Field	Description
Item Lookup Code	A unique code for the item. This is usually the UPC item code. **Note:** You can set up Store Manager to automatically generate item lookup codes. Refer to Generating automatic item lookup codes for more information.
Description	The name or description of the item. There is a 30 character limit.
Extended Description	Any additional information that describes the item.
Sub Description 1, 2, 3	You can rename this field and use it to define additional attributes for the item, e.g., Size, Colour. **Note:** Define the field label using **Setup** | **Miscellaneous** |**Custom fields** | **Item** tab. Select the **Show previously defined SubDecription** option from **File** | **Configuration** | **Store rules** | **Item** to change this from a text field to a drop-down list populated with previously-defined Sub Descriptions for the item.
Barcode	The item's barcode type. For example, the UPC barcode type is the standard type of barcode for items sold to the general public. The barcode type affects

Field	Description
	how labels are formatted and printed.
Item type	Select one of the following options: ▪ **Standard:** The item does not have special attributes. ▪ **Serialized:** The item is associated with a unique serial number, which Store Manager uses to track purchases. ▪ **Kit:** The item is a kit that contains other items that are in the store database. These items are bundled together and sold as one item. ▪ **Gasoline:** The item quantity is recalculated when a new extended price is entered. ▪ **Weighed:** The item must be weighed to determine its sale price. The weight can be entered manually or using an electronic scale connected to the register. If you select this option, you can also assign a tare weight to the item on the Tare Weights tab. ▪ **Non-Inventory:** The item is not tracked, e.g., shipping charges, labor hours. ▪ **Voucher:** The item is a gift certificate or gift card sold by the store.
Member of	If the item is a component of a matrix, lot matrix, or

Field	Description
	assembly item, the lookup code for the matrix, lot matrix, or assembly item it is sold under displays in this field.
Departments	The department the item belongs to. **Note:** Define departments using **Setup** | **Merchandising** | **Departments**.
Categories	The category the item belongs to. **Note:** Define categories using **Setup** | **Merchandising** | **Categories**.
Item tax	The local tax to apply to this item. **Note:** If you have enabled POS to apply tax on a per customer basis in the Tax Schedule Basis section under **File** | **Configuration** | **Sales Tax**, and you are shipping the item to the customer, POS will apply the local tax at the destination instead of the tax selected in this field.
Item is taxable	Select this option if the item is taxable.
Price	The regular price for the item. You can either set the price on the General tab or the Pricing tab. The fields on both tabs are connected.

Field	Description
Cost	The amount the store paid to purchase the item. You can either set the cost on the General tab or the Pricing tab. The fields on both tabs are connected.
Profit Margin	The profit margin for the item. This field is calculated using the calculation [(Price - Cost) / Price] x 100. You can either set the profit margin on the General tab or the Pricing tab. The fields on both tabs are connected.

6. Use the **Inventory** tab manage your item inventory.

Field	Description
On hand	The current number of items in stock. The number is reduced whenever the item is sold. The number shown can be either a positive or negative. If the item is a non-inventory item, the number is zero.
Unit of Measure	How the item is counted or measured, e.g., weight, size, cans, bottles, packages.
Available	The current number of items in stock that you can sell, i.e., on hand – committed. This field is calculated and cannot be edited.
Offline	The total number of all entries for the item stored in offline inventory. This field is calculated and cannot be edited.

Field	Description
On Order	The total number of the item that you have on order, e.g., in purchase orders or inventory transfers. This field is calculated and cannot be edited.
Transfer out	The total number of the item that is included in outward inventory transfers that have not yet been issued. This field is calculated and cannot be edited.
Date created	The date the item was created. This field is calculated and cannot be edited.
Last received	The date the item was last received into the database. This field is calculated and cannot be edited.
Last ordered	The date the item was last ordered. This field is calculated and cannot be edited.
Last sold	The date the item was last sold. This field is calculated and cannot be edited.
Replacement cost	The amount the replacement item will cost.

7. Use the **Pricing** tab to manage item pricing.

Option	Field	Description
General Pricing	Price	The regular price for the item. You can either set the price on the Gen-

Option	Field	Description
		eral tab or the Pricing tab. The fields on both tabs are connected.
	Cost	The amount the store paid to purchase the item. You can either set the cost on the General tab or the Pricing tab. The fields on both tabs are connected.
	Profit Margin	The profit margin for the item. This field is calculated using the calculation [(Price - Cost) / Price] x 100. You can either set the profit margin on the General tab or the Pricing tab. The fields on both tabs are connected.
	Price level A, B, or C	If your store uses different price levels for items, enter the prices in these fields. If the price levels are not set, POS uses the value in the Price field (the regular price).
	MSRP	The manufacturer’s suggested retail price (MSRP) for the item.
Price Bounds	Lower bound	The recommended lowest price for

Option	Field	Description
		the item. If a cashier or sales representative attempts to sell the item below this price, POS displays a warning message.
	Upper bound	The recommended highest price for the item.
Sale Pricing	This item is on sale	Select if the item will be on sale during the specified number of days or according to a schedule.
	Sale price	The sale price that is in effect during the specified number of days or according to a schedule.
	This sale is in effect for a specific period	Select this option if the item will be on sale for a specific number of days. Use the **Start Date** and **End Date** fields to select the time period.
	This sale is in effect according to a schedule	Select this option if the item will be on sale according to a specific schedule and select the **Schedule** from the drop-down list. **Note:** Define the schedule using **Setup** | **Merchandising** |

Option	Field	Description
		Schedules.
Buydown Pricing	Buydown price	The price to charge for each qualifying buydown item.
	Buydown quantity	The quantity that is available at the buydown price. If the customer buys more of the items than the remaining buydown quantity, POS prices all of the items at the buydown price. In subsequent sales, POS uses the value in the Price field (the regular price).

8. Use the **Discounts** tab to manage item discounts.

Field	Description
There is no discount scheme for this item	Select this option if there is no discount scheme currently applied to the item.
Use a Mix and Match discount theme	Select this option to apply a mix and match discount scheme and select the scheme from the **Discount scheme** drop-down list. **Note:** Define the discount scheme under **Setup** | **Merchandising** | **Discounts**.
Use a Buy X and get Y for Z discount	Select this option to apply a buy X and get Y for Z discount scheme and select the scheme from the **Dis-**

Field	Description
scheme	**count scheme** drop-down list. **Note:** Define the discount scheme under **Setup** | **Merchandising** | **Discounts**.
Use a quantity discount pricing table	Select this option to use a discount table to establish discount prices for the item based on the quantity purchased. The **Quantity** column indicates the minimum number of items that must be purchased at the indicated **Price** in order to qualify for the discount prices in the **Price A, B, or C** columns. Select **Discount odd items** if you want to extend the discount price of the item to items above the Quantity that do not meet the next level of discount.

9. Use the **Commission** tab to manage commissions on sales of this item.

Field	Description
Do not allow commission for this item	Select this option if there is no commission on this item. If a sales representative who earns commission sells this item, they will not earn a commission from it.
Base this item's commission on the schedule defined for the sales rep	Use the commission schedule defined for the sales representative. **Note:** Define the sales representative's commission schedule using **Setup** | **People & Security** | **Sales Representative**.

Field	Description
Base this item's commission on schedule defined below	Use a commission schedule that is specific to the item. If you select this option, the commission schedule you define for the item overrides the commission schedule defined for the sales representative.
Fixed Amount	If you want to base commission on a fixed dollar amount per sale, enter that amount.
Percent of sale	If you want to base commission on a percent of the sale amount, enter the percentage.
Percent of profit	If you want to base commission on a percent of the profit, enter the percentage.
Maximum commission	If you want to cap commissions on the item to a specific dollar value, enter that amount.

10. On the **Aliases** tab, enter any aliases for the item.

    You can use aliases to look up items. They are like alternate item lookup codes. To be effective, aliases should be easy to remember and shorter than a standard UPC code. Aliases must be unique to a specific item.

11. On the **Substitutes** tab, enter any substitute items that are similar to the item that a customer could purchase if this item is out of stock.

12. Use the **Special** tab to manage other item characteristics.

Field	Description
Tag along item	If this item is sold with a tag along item, click the **Browse** icon and search for the lookup code of the tag along item.
Quantities	The number of tag along items that will be sold when the original item is sold.
Parent Item	The lookup code of the parent item (e.g., a case of bottled water) that contains a specific quantity of this item (e.g., a bottle of water), which can also be sold as a single item. If the on hand quantity of the single item reaches zero, the store can open up the parent item and add that quantity of the single item into inventory. This is known as breaking.
Child quantity	The quantity of single items (e.g., 12 bottles of water) within a parent item (e.g., a case of bottled water).
Item message	The item message that is displayed to the cashier at the register when the item is sold, e.g., Verify age limit. **Note:** Set up item messages using **Setup** | **Merchandising** | **Item Messages**.
Bin location	The location in the store where the item is stored.
Weight	The weight of the item.

Field	Description
Notes	Any special information about the item.
Picture	If you want to display a picture of the item on net display, do one of the following: ▪ Click the **Browse** icon and select the picture. ▪ Enter the file path to the picture (including the file name). ▪ Enter the file name. Pictures must be in BMP, JPG, or GIF format. If you prefer to enter only the file name, the file must be saved to the **Pictures** folder. The Pictures folder is usually located at **C:\Program Files (x86)\Retail Hero\RMH Store Manager\Pictures**. The path to the **Pictures** folder must be configured in the Store Administrator app. In **Store Administrator**, click **Configuration**. On the **Path** tab, in the **Pictures** field, enter the path to the Pictures folder, then click **Save And Close**. If you enter a different file path to the picture, e.g., C:\Temp\Picture.jpg, when you save the item, the system saves copy of the picture in the Pictures folder.

13. Use the **Options** tab to manage other options for the item.

Field	Description
Must enter price at the POS	Select this item to prompt the cashier to enter the price of an item before the item can be added to the transaction, e.g., the price of items sold at a deli counter.
Accept food stamps for this item	Select this option if the customer can purchase the item using food stamps. **Note:** Set up food stamps as a tender type using **Setup** | **Financial** | **Tender Types**.
Quantity entry at POS not allowed	Select this option if you want to restrict cashiers from entering the quantity of the item at the register.
Item is not discountable at the POS	Select this option if you want to restrict cashiers from entering discounted prices for the item at the register.
Item is available on the website	Select this option if you are using RMH Store Manager with a web store and you want to make this item available on the web store.
Item is now inactive	Select this option if you are no longer selling this item as a single item. If an item is inactive, it can still be sold as part of a matrix, lot matrix, or assembly item. **Note:** Making an item inactive is the recommended approach. If you delete an item, it can break relationships in the database and cause problems with generating reports.

Field	Description
Block sales for this item	Select this option if you want to block sales for the item for the specified number of days or according to a schedule.
The block is in effect for a specific period	Select this option if sale of the item will be blocked for a specific number of days. Use the **Start Date** and **End Date** fields to select the time period.
The block is in effect according to a schedule	Select this option if the sale of this item will be blocked according to a specific schedule and select the **Schedule** from the drop-down list. **Note:** Define the schedule using **Setup** | **Merchandising** | **Schedules**.

14. Use the **Purchase** tab to manage purchasing and reordering.

Field	Description
Tax Code	If applicable, the tax applied in a purchase order for the item. In the U.S. and Canada, stores typically purchase items tax free and collect tax from the customer at the point of sale.
Child/Kit Reorder	If the item is the child of a parent item, or part of a kit, use this option to determine whether to reorder the parent item when this item is purchased.
Do Not Order	Select this option if you no longer want to order this

Field	Description
	item.
Unit of Measure	Select the unit of measure to use in a purchase order for the item. **Note:** Define the unit of measure using **File** |**Configuration** |**Unit of measure**.
UOM/Qty	The options available for this field depend on how you have defined the unit of measure.
Purchase UOM	The unit of measure to use in a purchase order for this item.

15. If the item is a voucher item, use the **Voucher** tab to manage voucher options and numbering.

Field	Description
Item can not be sold	Select this option if you want to prevent the item from being sold.
Item can not be returned	Select this option if you want to prevent the item from being returned.
Voucher can be reused	Select this option if you want to be able to reload pre-payment amounts to the voucher. This is particularly useful for gift cards.

Field	Description
Global	
Linked tender	Select a voucher tender type. All vouchers much be linked to a tender type so they can be redeemed at point-of-sale. **Note:** Define tender types in **Setup** | **Financial** | **Tender Types**.
Cashier entered	Select this option if you want the cashier to enter the voucher number in POS when a voucher is sold. For example, you might select this option if you sell pre-printed gift cards and you want the cashier to swipe the magnetic stripe to record the card's number when it is sold.
Auto generated	Select this option if you want POS to automatically generate a voucher number when a voucher is sold. For example, you might select this option if you sell gift certificates and you want POS to automatically generate a unique voucher number for each gift certificate.
Number format	If you selected auto generated numbering, enter the number format and length.

16. If the item is a weighed item, use the **Tare Weights** tab manage tares as required:

    - **Allow Open Tare:** Select this option if you want to enter the tare in POS. For example, you might select this option if you sell gravel by the ton and you have to enter the tare weight of the vehicle in order to correctly calculate the cost of the load of gravel. Select decimal rounding from Open Tare Rounding, as required.

- **Fixed Tare Weight:** Enter either a fixed value or a percentage of the item's measured weight to deduct as tare weight. This tare is specific to the item and cannot be used with other items.
- **Recommended:** Select a predefined tare from the table. These tares are defined in **Setup | Merchandising | Tares**.

> **Note:** You can click **New** in the Manage Tares section of the ribbon to set up a predefined tare. It will display in the table. However, you can only edit or delete the predefined tare in **Setup | Merchandising | Tares**.

17. On the **Extended Properties** tab:

    a. Select **Whole Number** if you want to display quantities in whole numbers only, e.g., 8 instead of 8.5. In stores that only sell whole units, such as clothing stores, this can make quantities easier to read. Do not select this option if your store sells weighted items or items that sell in partial quantities, e.g., 6.5 yards of fabric.

    b. Select **Do not allow to edit Unit of Measure on Inventory Tab** if you want to prevent cashiers and others from changing the unit of measure for sales.

18. Click **Save And Close**.

Setting up matrix items

A **matrix item**[1] is composed of items that are essentially the same, e.g., t-shirts or pants, but vary in one or two ways like size or color. These items, or *components*, typically have the same **lookup code**[2], description, and price as the matrix item. However, you have the option of setting up unique lookup codes, descriptions, and prices for each component.

You can define up to three *dimensions*, e.g., size or color, to differentiate between components in the matrix. Within each dimension you can define several *attributes*, e.g., XS, S, M, L, XL, XXL, XXXL.

> **Note:** It is recommended that you set up suppliers before you enter a large number of items.

1. Click **Merchandising**.
2. Click **Items**.
3. To add a new item, click **New**.
4. Select **Matrix Item** and click **OK**.
5. Use the **General** tab to enter general information about the item.

---

[1]A matrix item is composed of items that are essentially the same, e.g., t-shirts or pants, but vary in one or two ways like size or color. These items, or components, typically have the same lookup code, description, and price as the matrix item. However, you have the option of setting up unique lookup codes, descriptions, and prices for each component. You can define up to three dimensions, e.g., size or color, to differentiate between components in the matrix. Within each dimension you can define several attributes, e.g., XS, S, M, L, XL, XXL, XXXL.
[2]A unique set of alphanumeric characters used to identify an item, e.g., barcode numbers if an item has a barcode.

Field	Description
Matrix lookup code	A unique code for the matrix item. **Note:** You can set up Store Manager to automatically generate item lookup codes. Refer to Generating automatic item lookup codes for more information.
Description	The name or description of the matrix item.
Sub Description 1, 2, 3	You can rename this field and use it to define additional attributes for the item, e.g., Size, Colour.
Notes	Any notes that you want to enter about the matrix item.
Department	The department the item belongs to. **Note:** Define departments using **Setup** | **Merchandising** | **Departments**.
Category	The category the item belongs to. **Note:** Define categories using **Setup** | **Merchandising** | **Categories**.
Item Tax	The tax that is applied to the item when it is sold. **Note:** Define item tax using **Setup** | **Financial** | **Item Taxes**.
Price	The regular price for the item.

Field	Description
Cost	The amount the store paid to purchase the item.
Supplier	The primary supplier of the matrix item. **Note:** Define suppliers using **Inventory/Purchasing** | **Suppliers**.
Barcode	The item's barcode type. For example, the UPC barcode type is the standard type of barcode for items sold to the general public. The barcode type affects how labels are formatted and printed.

6. On the **Component Item** tab:

   a. In the **Dimension for component items** section, in the **Dimension 1** field, type a name for the type of dimension, e.g., Size.

   b. In the **Attributes** and **Codes** area below the Dimension 1 field, define the attributes for the dimension, e.g., Extra Small, Small, Large, and the codes for those attributes, e.g., XS, S, L.

   c. Define additional dimensions (up to three) and attributes as required.

   d. After you have defined the dimensions, attributes, and codes, do one of the following:

- If you want Store Manager to automatically create components for each dimension and attribute combination, click **Create Components** and then click **Yes** and **OK**.

- If you want to manually create components for each dimension and attribute combination, click **Add Items**. Choose **Select an existing item to add** to add items that already exist in the database or select **Create new item to add** to create a new item and click **OK**.

7. On the **Quantity View** tab:

   a. In the **Display these quantities** field, select on hand, committed, available, on order, or transferred out. Use the dimension drop-down lists to control what displays in the quantity table.

   b. If required, change the quantities in the quantity table.

8. Click **Save And Close**.

Setting up lot matrix items

A **lot matrix item**[1] is composed of items that are packaged in different quantities and have different prices based on the quantity purchases, e.g., a can of beer that may be sold individually, or in 6-pack, 12-pack, or 24-pack quantities.

> **Note:** It is recommended that you set up suppliers before you enter a large number of items.

1. Click **Merchandising**.

2. Click **Items**.

3. To add a new item, click **New**.

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[1]A lot matrix item is composed of items that are packaged in different quantities and have different prices based on the quantity purchases, e.g., a can of beer that may be sold individually, or in 6-pack, 12-pack, or 24-pack quantities. Lot matrix items typically have the same lookup code but have different prices that correspond to the lot size (e.g., package quantity).

4. Select **Lot Matrix Item** and click **OK**.

5. In the **Lot Matrix Lookup Code** field, type a unique code for the lot matrix item.

> **Note:** You can set up Store Manager to automatically generate item lookup codes. Refer to Generating automatic item lookup codes for more information.

6. In the **Description** field, type the name or description of the lot matrix item.

7. Click **Add**.

8. Choose **Select an existing item to add** to add items that already exist in the database or select **Create new item to add** to create a new item and click **OK**.

9. If required, change the quantities in the quantity table.

Setting up assembly items

An **assembly item**[1] is composed of items that are bundled or assembled into a package and sold under a separate **lookup code**[2], e.g., a gaming package with a controller, console, and game, or a cell phone contract that includes a specific cell phone.

---

[1] An assembly item is composed of items that are bundled or assembled into a package and sold under a separate lookup code, e.g., a gaming package with a controller, console, and game, or a cell phone contract that includes a specific cell phone. When a customer purchases an assembly item, the in-stock quantity of the individual assembly components is updated in the store database. More importantly, the cashier can change the quantity, price, or taxes of individual assembly components, e.g., the cashier can add or remove components and both the in-stock quantity of the components and the price of the assembly item are automatically adjusted.

[2] A unique set of alphanumeric characters used to identify an item, e.g., barcode numbers if an item has a barcode.

Kit items[1] (sold as standard items) and assembly items are not the same. When a customer purchases a kit item, the in-stock quantity of the individual kit components do not change in the store **database**[2]. In addition, the cashier cannot change the quantity, price, or taxes of individual kit components.

When a customer purchases an assembly item, the in-stock quantity of the individual assembly components is updated in the store database. More importantly, the cashier can change the quantity, price, or taxes of individual assembly components, e.g., the cashier can add or remove components and both the in-stock quantity of the components and the price of the assembly item are automatically adjusted.

> **Note:** It is recommended that you set up suppliers before you enter a large number of items.

1. Click **Merchandising**.
2. Click **Items**.
3. To add a new item, click **New**.
4. Select **Assembly Item** and click **OK**.
5. In the **Assembly Lookup Code** field, type a unique code for the assembly item.

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[1]Kit items contain other items that are in the store database but are only sold as one item, e.g., a first aid kit. Kit items are sold as standard items. Kit items and assembly items are not the same. When a customer purchases a kit item, the in-stock quantity of the individual kit components do not change in the store database. In addition, the cashier cannot change the quantity, price, or taxes of individual kit components.

[2]A structured set of data that is stored and accessed by a computer software application. In relational databases, data is organized into tables that can be linked (related) based on a value that is common to each, e.g., a lookup ID or customer ID.

> **Note:** You can set up Store Manager to automatically generate item lookup codes. Refer to Generating automatic item lookup codes for more information.

6. In the **Description** field, type the name or description of the assembly item.

7. Click **Add**.

8. Choose **Select an existing item to add** to add items that already exist in the database or select **Create new item to add** to create a new item and click OK.

9. Click **Use Component Price** to display the **Price** column in the quantity table. It shows the regular price for the item if it is sold individually. If you want to charge a different price for the item when it is included in an assembly item, enter the assembly item price in this field.

10. If required, change the quantities in the quantity table.

Setting up discounts

Your store may offer common discounts such as Mix and Match or Buy X and Get Y for Z. Use this setup screen to define discounts that your store offers.

1. Click **Merchandising**.

2. Click **Discounts**.

3. To add a new discount, click **New**.

4. In the **Description** field enter the name of the discount.

5. Select the discount option and the parameters of the discount.

Option	Field	Description
Mix and Match: Unit Price		Select this option if you want to offer a lower unit price for an item if the customer buys the specified quantity, e.g., the item is regularly $0.79/ea. but you are offering a discount of $0.50/ea. if the customer buys 3 of the same item.
Pricing Schedule	Quantity	The quantity of the item the customer must buy to qualify for the lower unit price.
	Reg. Price	The price for the specified quantity, i.e., the discounted price times the number of items.
	Level	The price for the specified quantity, i.e., the discounted price times the number of items, if the customer buys additional items in the specified quantity. Examples might include 3 for $0.50 (Reg. Price $1.50) and 6 for $0.45 (Level A $2.70).
	Discount odd items	Select this option to extend the discounted unit price to items above the Quantity that do not meet the next

Option	Field	Description
		Level discount. Examples might include an item that is regularly $0.79/ea. with a discount of $0.50/ea. if the customer buys 3 of the same item. If Discount odd items is selected and the customer buys 4 of the same item, the customer pays the discount unit price of $0.50/ea. for the 4 items.
Mix and Match: Percent Off		Select this option if you want to offer a percent reduction on the price of the item if the customer buys the specified quantity, e.g., you are offering a discount of 30% off the price if the customer buys 3 of the same item.
Pricing Schedule	Quantity	The quantity of the item the customer must buy to qualify for the percent reduction in price.
	Reg. Price	The percentage discount on price for the specified quantity.
	Level	The percentage discount for the specified quantity if the customer buys additional items in the specified quantity. Examples might include 30% off

Option	Field	Description
		the price if the customer buys 3 of the same item and 35% off the price if the customer buys 6 of the same item.
	Discount odd items	Select this option if you want to extend the percent reduction on the price of the item to items above the Quantity that do not meet the next Level of discount. Examples might include a discount of 30% off the price if the customer buys 3 of the same item. If Discount odd items is selected and the customer buys 4 of the same item, the customer pays the discount price of 30% off for the 4 items.
Buy X and get Y for Z: Unit Price		Select this option if you want to offer items for free or at a lower unit price if the customer buys the specified quantity of items at full price, e.g., buy one t-shirt at full price ($29.99), get a second t-shirt for $15.99.
Pricing Schedule	Quantity to Buy at full price	The quantity of the item the customer must buy at full price to qualify for the discount.

Option	Field	Description
	Quantity to Get at discount	The quantity of the item the customer will receive at a discount.
	Discount Price	The unit price for the discounted item (s).
Buy X and get Y for Z: Percent Off		Select this option if you want to offer items for free or at a percent reduction on price if the customer buys the specified quantity of items at full price, e.g., buy one t-shirt at full price ($29.99), get a second t-shirt at 50% off.
Pricing Schedule	Quantity to Buy at full price	The quantity of the item the customer must buy at full price to qualify for the discount.
	Quantity to Get at discount	The quantity of the item the customer will receive at a discount.
	Discount Percent	The percentage that will be deducted from the price of the discounted item (s).

6. To copy an existing discount, select it and click **Copy**. You must enter a new **Description**, but all other values are copied.

7. To edit an existing discount, select it and click **Edit**.

8. Click **Save And Close**.

Setting up item messages

Use item messages to display messages to cashiers whenever they add specific items to transactions. Examples might include a message to check a customer's identification for age or a message to remind a customer that the item is final sale and cannot be returned or exchanged.

1. Click **Merchandising**.
2. Click **Item Messages**.
3. To add a new item message, click **New**.
4. Enter the following information:

Field	Description
Title	The title of the message, e.g., Verify age limit.
Age limit (Years)	If applicable, the minimum age (in years) that customer must be to buy the item, e.g., 21. Leave as 0 if the age limit does not apply.
Message	If you entered an age in the Age limit (Years) field, type [DATE] in the Message field. POS will automatically subtract the number of years that you entered in the Age limit (Years) field from the current date so the cashier can easily verify the age limit. You can enter other messages in this field, e.g.,"No returns or exchanges on this item", "Returns and exchanges

Field	Description
	within 15 days only", or "This item is not equipped with batteries".

5. To copy an existing item message, select it and click **Copy**. You must enter a new **Title**, but all other values are copied.

6. To edit an existing item message, select it and click **Edit**.

7. Click **Save And Close**.

Setting up schedules

Use schedules to define when to offer discounts or sales prices, or to identify times when the sales of certain items are blocked.

1. Click **Merchandising**.

2. Click **Schedules**.

3. To add a new schedule, click **New**.

4. Enter the following information:

Field	Description
Description	The description of the schedule, e.g., Weekday Lunch Special.
Time Increment	Select the time increments to use in the schedule, i.e., 15 minute increments, 30 minute increments, 1 hour

Field	Description
	increments.

5. Select a block of time when you want the schedule to be in effect, e.g., Monday 11:00 am to 11:15 am and click **Set**. Repeat until you have set the schedule for all of the desired blocks of time.

6. If you want to remove a block of time from the schedule, select it and click **Clear**.

7. To copy an existing schedule, select it and click **Copy**. You must enter a new **Description**, but all other values are copied.

8. To edit an existing schedule, select it and click **Edit**.

9. Click **Save And Close**.

Setting up store suppliers

Setting up suppliers is not required, but it is recommended that you set up suppliers before you start adding items. If you add supplier information to items immediately it is much easier to manage store inventory.

This topic describes how to manually set up suppliers in Store Manager. You can also use the Supplier Wizard to set up suppliers.

1. Click **Inventory/Purchasing**.

2. Click **Suppliers**.

3. To add a new supplier, click **New**.

4. Enter relevant information about the supplier.

Tab	Field	Description
General	Code	A unique code, e.g., a number or abbreviation, that identifies the supplier.
	Name	The name of the supplier.
	Term	The supplier's payment terms, e.g., 30 days.
	Address	The supplier's street address.
	City	The city in which the supplier is located.
	State	The state in which the supplier is located.
	Zip	The zip (postal code) for the supplier.
	Country	The country in which the supplier is located.
	Account Number	Your store's account number with the supplier.
	Tax Number	If required in your locale, enter the supplier's tax number.

Tab	Field	Description
	Accepted Currency	Select the supplier's currency. Select Default Currency to use the currency selected in the computer's Windows operating system.
	Contact Name	The name of the person who is your primary contact at the supplier.
	Telephone	The supplier's main telephone number.
	Fax Number	The supplier's fax number.
	E-mail Address	The supplier's main e-mail address.
	Web Page	The supplier's web site.
Additional	Custom Text	Any custom text that you want to enter.
	Custom Number	Any custom reference number that you want to enter.
	Custom Date	Any custom reference date that you want to enter.
Notes		Any notes that you want to enter about the supplier.

Tab	Field	Description
Purchase	Min. Order Amt.	The minimum order amount the supplier requires.
	Tax Exempt	Select this option if orders from this supplier are tax exempt.
	Inactive	Select this option if you want to deactivate the supplier. Deactivating a supplier instead of deleting them is recommended because it maintains relationships in the store database. If you delete a supplier it can break relationships in the database and have unexpected consequences for data look up, reporting, and more.

5. To quickly apply discounts to items ordered from the supplier, click **Discounts** and enter the following:

Field	Description
Type	Select the type of discount: Department, Category, or Item.
Code	Click the Browse icon to look up the specific Department, Category, or Item.
Description	The Description is automatically populated with the

Field	Description
	Description of the Department, Category, or Item.
Starting Date	The date the discount starts.
Ending Date	The date the discount ends.
Discount	The percent reduction in price to offer on items from this supplier.
UOM	Select the unit of measure to use in a purchase order for the item. **Note:** Define the unit of measure using **File** | **Configuration** | **Unit of measure**.
Min. Qty	The minimum quantity of the item to include in the purchase order to qualify for the discount.

6. To quickly view the items your store has ordered from the supplier, click **Items**.

   > **Note:** You can add items by clicking Add, but this is not the recommended method for setting up items. Use the Item Setup Wizard instead.

7. To copy an existing supplier, select it and click **Copy**. You must enter a new **Description**, but all other values are copied.

8. To edit an existing supplier, select it and click **Edit**.

9. Click **Save And Close**.

Setting up reason codes

Reason codes[1] identify specific actions performed at the register, e.g., no sales, discounts, or returns. Reason codes are not required, but they are recommended.

1. Click **Setup**.
2. Expand **Merchandising**.
3. Click **Reason Codes**.
4. To add a new reason code, click **New**.
5. Enter the following information:

Field	Description
Code	A unique code, e.g., a number or abbreviation, that identifies the reason code.
Description	A description of the reason code.
Type	The type of reason code, e.g., No Sale.
Start Date	If desired, select a start date for the reason code. Leave the field blank if you want the reason code to be active immediately.
End Date	If desired, select an end date for the reason code.

[1] A reason code is a pre-defined list of explanations for a specific action, e.g., price correction, cancelled sale, staff discount, etc.

Field	Description
	Leave the field blank if you do not want to set an end date.

6. To copy an existing reason code, select it and click **Copy**. You must enter a new **Code**, but all other values are copied.

7. To edit an existing reason code, select it and click **Edit**.

8. Click **Save And Close**.

Setting up registers

You need to identify the POS devices connected to each register. You can use the same settings for every register, or you can use different settings at different registers.

1. Click **Setup**.

2. Expand **Hardware**.

3. Click **Register List**.

4. To add a new register, click **New**.

5. Use the **General** tab to enter general information about the register.

Section	Field	Description
Register Prop-erties	Register number	A unique number identifying the register.

Section	Field	Description
	Description	A description of the register, e.g. Lane 1.
	Default price level	If your store uses different price levels, use this option to set the default price level to use at this register, e.g., Price A. If a cashier adds an item that does not have the price level defined, POS uses the standard price.
	POS task pad	If your store uses task pads, select the POS task pad assigned to the register. Select **Use Classic View** if you are not using a task pad at the register. The cashier will instead see the custom buttons panel along the right side of the screen.
Default Shipping Information	Default Carrier	If your store uses specific shipping carriers, use this option to set the default carrier to use for sales at this register. **Note:** Define shipping carriers using **Setup** | **Invent-ory/Purchasing** | **Shipping Carriers**.

Section	Field	Description
	Default Service	If your store only uses specific shipping methods, e.g., standard overnight, use this option to set the default service to use for sales at this register. **Note:** Define shipping methods using **Setup** |**Inventory/Purchasing** | **Shipping Methods**.
POS Profile	POS Profile	If your store uses POS profiles to configure additional POS settings (e.g., Weights and Measures, idle logoff time, AR Info tab) select the POS profile assigned to the register.

6. Use the **Receipt Printer** tabs to set up the printer and receipt defaults.

Field	Description
Sales Receipts	Select one of the following options: ■ **Do not print receipt:** No sales receipts will be printed at this register. ■ **Print automatically after each transaction:** Sales receipts will print for every transaction at this register.

Field	Description
	■ **Print only after asking cashier:** For every transaction at this register the cashier will be prompted to ask the customer if they want a printed receipt or not. If you select this option, the change due for cash transactions will also display in the receipt prompt dialog. This helps cashiers provide change while at the same time asking the customer if they want a receipt for their transaction.
Gift Receipts	Select one of the following options: ■ **Do not print receipt:** No gift receipts will be printed at this register. ■ **Print automatically after each transaction:** Gift receipts will print for every transaction at this register. ■ **Print only after asking cashier**: For every transaction at this register the cashier will be asked if they want to print a gift receipt or not.
Printer Type	Select one of the following: ■ WindowsOPOS
Device Name	The device name for the Printer Type you selected.

Field	Description
Journal receipts from this printer	Select this option if you want RMH Store Manager to journal (i.e., keep all copies of) receipts for this register.
Receipt format	Select the receipt format.

7. If an electronic scale is connected to the register, use the **Scale** tab to set it up.

Field	Description
Scale is enabled for this register	Select this option to enable the scale to communicate with POS.
OPOS device name	The device name for the scale.
Time out	The maximum amount of time that POS will wait to receive a weight from the scale.
Maximum scale capa-city	If required for Weights and Measures Certification, enter the maximum scale capacity.
Asynchronous mode	If the scale supports it, select this option to enable asynchronous mode. In asynchronous mode, when a cashier scans or looks up a weighted item at the register they are prompted to put the item on the scale. The register automatically reads the weight from the scale and after the cashier confirms the weight it is added to the transaction. If the scale does not support

Field	Description
	asynchronous mode, or if asynchronous mode is disabled, the cashier must put the item on the scale before they can scan or look up the item.

8. If an electronic scanner is connected to the register, use the **Scanner** tab to set it up.

Field	Description
Scanner is enabled for this register	Select this option to enable the scanner to communicate with POS.
OPOS device name	The device name for the scanner.

9. If an electronic cash drawer is connected to the register, use the **Cash Drawer** tabs to set it up.

Field	Description
Cash drawer is enabled for this register	Select this option to enable the cash drawer to communicate with POS.
OPOS device name	The device name for the cash drawer.
Wait for drawer close	Select this option if you want to force the cashier to close the cash drawer before starting a new transaction.

Field	Description
Time out	The maximum amount of time that POS will wait for a cash drawer to be closed before sounding an alarm.

10. If an electronic pole display is connected to the register, use the **Pole Display** tab to set it up.

Field	Description
Pole display is enabled for this register	Select this option to enable the pole display to communicate with POS.
OPOS device name	The device name for the pole display.
Pole display message	The pole display message you want to display at this register. **Note:** Set up pole display messages in **Setup** | **Hardware** | **Pole Display Messages**.

11. If a separate monitor is connected to register to display advertisements or Web pages, use the **Net Display** tab to set it up.

Field	Description
Net display is enabled for this register	Select this option to enable the net display monitor to communicate with POS.

Field	Description
Net display channel	The net display channel you want to display at this register. **Note:** Set up net display channels in **Setup** | **Hardware** | **Net Display Channels**.
Show receipt on net display	Select this option to display the customer's transaction receipt on the net display monitor, and to determine the position of the receipt on the monitor in relation to the channel content.

12. To copy an existing register, select it and click **Copy**. You must enter a unique **Register number**, but all other values are copied.

13. To edit an existing register, select it and click **Edit**.

14. Click **Save And Close**.

Setting up receipt formats

You must create at least one receipt format for each store. The receipt format identifies which receipt templates to use when printing receipts for the different types of transactions entered into POS (Sales, Cancelled, Layaway, Payment, Pay Out, Cash Drop, Quote, or Work Order). The receipt format also identifies the receipt template to use when printing the Z and ZZ reports (Report). A receipt format must be assigned to each of the register(s) used in the store.

You can customize the receipt templates. For example, you can add the store logo, show or hide specific sections, add custom messages, change the font, and more.

1. Click **Setup**.

2. Expand **Hardware**.

3. Click **Receipt Formats**.

4. Click **New**.

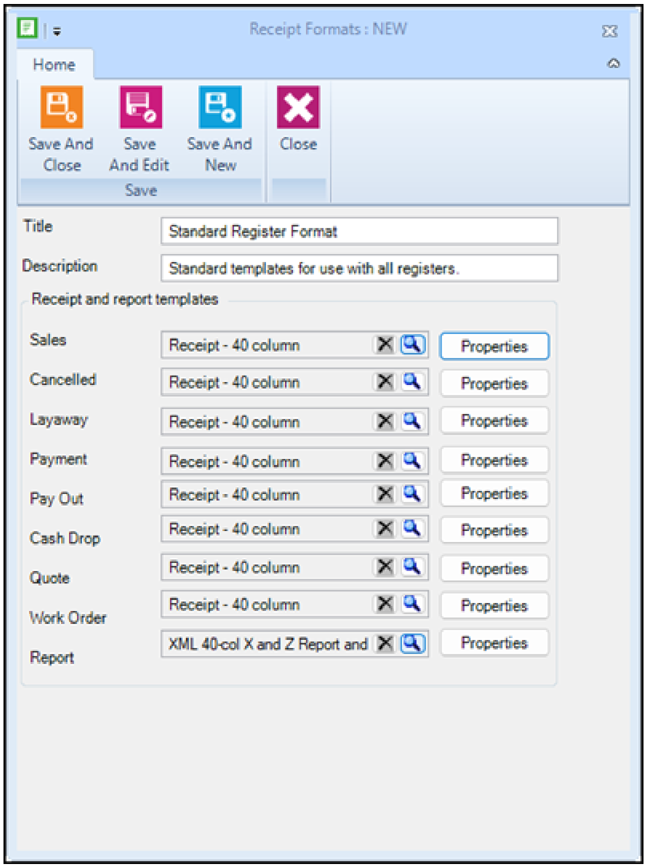
5. Enter a **Title** and **Description**.

6. In the **Receipt and report templates** section, click the **Browse** icon beside a transaction type, such as Sales.

7. Go to **C:\Program Files (x86)\Retail Hero\RMH Store Manager\ReceiptTemplates**.

8. Select the receipt template.

   - You can use **receipt.xml** for all transaction types, such as **Sales**, **Cancelled**, **Layaway**, **Payment**, **Pay Out**, **Cash Drop**, **Quote**, or **Work Order**. This is a standard 40-column receipt template.
   - If the store is using the RMH Loyalty Extension, select **HeroPoints40Receipt.xml** for transactions where you want to print loyalty program information on the receipt, such as Sales. This is a standard 40-column receipt template.
   - If Weights and Measures (WAM) is enabled for POS (under the POS Profile), select **WAMReceipt.xml** for transactions where you need to include the store's WAM information, such as Sales. This is a standard 40-column receipt template.
   - If you need to print receipts on standard letter/A4 paper, select **fullpage.xml**.



> **Note:** The template must have a **.xml** file extension. You cannot use templates that have another file format, such as .rct.

9. Click **Open**.

10. The message **Would you like to update all transaction types that are currently set to [receipt template]?** may display. Click **Yes** to use the same receipt template for the other transaction types. Click **No** to only use the receipt template for the current transaction type.

11. Click the **Browse** icon beside **Report**.

12. Go to **C:\Program Files (x86)\Retail Hero\RMH Store Manager\ReceiptTemplates**.

13. Select **XReport.xml**.

> **Warning!** You should always select **XReport.xml** for the **Report** option. This is the receipt template for Z and ZZ reports. If you do not select XReport.xml for the Report option, your Z and ZZ reports will not print.

14. Click **Open**.

15. Click **Save and Edit**.

16. Customize the receipt templates as required:

    a. Click **Properties**.

    b. Edit the receipt content and format.

    c. Click **Print** to print a test receipt to see the changes you made to the template.

    d. Click **Save and Close** to save the changes to the existing template. Click **Save As** to save the changes as a new template, e.g., custom.xml.

    e. The message **Would you like to update all transaction types that are currently set to [receipt template]?** may display. Click **Yes** to use the same receipt template for the other transaction types. Click **No** to only use the receipt template for the current transaction type.

17. Click **Save And Close**.

Setting up sales representatives

You need to create sales representative accounts if your store has employees who earn commissions on specific types of sales. Cashiers, managers, or the sales representatives themselves can then select the appropriate sales representative account when entering transactions in POS. This allows Store Manager to calculate commissions for sales representatives and to generate reports on commission sales.

> **Note:** When you set up Items, you identify whether sales representatives can earn a commission on the sale of the item or not. You can define a commission schedule for the item itself or you can define a commission schedule for sales representative.

1. Click **Setup**.
2. Expand **People & Security**.
3. Click **Sales Representative**.
4. To add a new sales representative, click **New**
5. Enter the following information:

Field	Description
Name	The sales representative's full name, e.g., Jane Brown.
ID Number	The sales representative's ID number.
Telephone	The sales representative's mobile phone number.
E-mail Address	The sales representative's email address.
Fixed Amount	If the sales representative receives a commission based on a fixed dollar amount per sale, enter that amount.

Field	Description
Percent of Sale	If the sales representative receives a commission based on a percent of the sale amount, enter the percentage.
Percent of Profit	If the sales representative receives a commission based on a percent of the profit, enter the percentage.

6. To copy an existing sales representative, select it and click **Copy**. You must enter a new Name and ID Number, but all other values are copied.

7. To edit an existing sales representative, select it and click **Edit**.

8. Click **Save And Close**.

> **Note:** The sales representative account is only used to track commission sales. You still need to set up a user account for the employee so they can use POS.

Glossary

A

accelerators
A mechanism for multiplying collected loyalty points.

alias
Aliases are like nicknames. You can define one or more aliases for an item. Aliases are a useful way to search for an item in POS or Store Manager. Each alias must be unique and cannot be the same at the item lookup code.

AR
The accounts receivable (AR) is money that is owed to a company by a customer who received products and services that were provided on credit.

assembly item

An assembly item is composed of items that are bundled or assembled into a package and sold under a separate lookup code, e.g., a gaming package with a controller, console, and game, or a cell phone contract that includes a specific cell phone. When a customer purchases an assembly item, the in-stock quantity of the individual assembly components is updated in the store database. More importantly, the cashier can change the quantity, price, or taxes of individual assembly components, e.g., the cashier can add or remove components and both the in-stock quantity of the components and the price of the assembly item are automatically adjusted.

B

back office

In a retail store, the back office usually refers to office space at the back of the store where managers and other team members perform tasks like counting cash, running reports, or reordering inventory out of sight of customers. This area may or may not be secured to prevent unauthorized entry. At Retail Management Hero, sometimes the Store Manager application is referred to as the Back Office Manager (BOM).

back order

An order for an item that is currently out-of-stock.

backup

A copy of a file, such as the store database, that is created in case the original file is damaged or deleted. Stores should backup their database every day.

bar code

A code that can be read by a scanning device. The bars that make up the barcode represent a series of numbers.

batch

Store Manager uses batches to export data to external accounting software applications. A unique batch number is assigned to each register when it is opened. This batch remains open until you run a Z report to close the register. You can then post the information in the closed batch to an external file that can be imported into your accounting software.

billing cycle

The period of time between billings for products or services, e.g., a month.

bin location

The location in the store where an item is stored.

blind closeout

A blind closeout is the process of closing a batch at a register without running a Z report. Typically, cashiers will perform a blind closeout at the register at the end of their shift and then take their cash drawer to the back office where they can balance their cash drawer and complete the closing process out of sight of customers.

block sale

You can block sales of items according to a schedule or starting or ending on a specific date.

buy X and get Y for Z

A type of discount where a customer buys a specified quantity of items ("X") at full price and then gets a specified number of items ("Y") for free or at a discounted price, e.g., BOGO or "buy one get one" free discounts.

C

cash drawer

A electronic cash drawer is a cash drawer that is connected to the register via a cable. Typically, electronic cash drawers open automatically at the end of a transaction.

child item

A child item is an item that can either be sold singly or in a specific quantity within a parent item, e.g., 24 single bottles of water (child) in a case (parent). When the on-hand quantity of the single item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

collection schedule

A set of rules which determines how the points are collected.

committed

A value that represents the quantity of an item that has been back ordered or work ordered. This value does not represent what is currently in-stock.

conversion rate

The ratio between two currencies, e.g., 1:2, which indicates how much of one currency is needed to exchange for the equivalent value of another currency. Store Manager uses the conversion rate to convert the local currency used by the store to a foreign currency.

custom commands

You can define custom commands that display on the right side of the POS screen. You might use custom commands to provide access to third party integrations or any custom POS functions that you have built using the POS Software Development Kit (SDK). At Retail Management Hero, these custom commands are sometimes referred to as shortcut keys that allow cashiers to access a function quickly. You can use custom commands with custom keys and task pads.

customer group
A group of customers to which collection or redemption apply. Consists of individual customer accounts.

D

database
A structured set of data that is stored and accessed by a computer software application. In relational databases, data is organized into tables that can be linked (related) based on a value that is common to each, e.g., a lookup ID or customer ID.

denomination
Denomination refers to the recognized face value of specific units of a currency, usually in the form of coins and bank notes. For example, in the U.S. the most recognized denominations for coins are pennies ($0.01), nickels ($0.05), dimes ($0.10), and quarters ($0.25). The most recognized denominations for bank notes are $1.00, $2.00, $5.00, $10.00, $20.00, $50.00, and $100.00.

device
In Retail Management Hero, a device refers to any electronic device such as a keyboard, monitor, cash drawer, scale, scanner, printer, etc.

drop
Excess cash that is removed from a cash drawer and put in the store's safe until the register is reconciled at the end of the cashier's shift.

E

EAN
The European Article Number (EAN) is an international numbering and barcode standard used to identify a specific item that is sold in a specific packaging configuration by a specific manufacturer.

exchange rate
The rate, e.g., 1.35, at which one country's currency can be exchanged for another currency. Store Manager uses the exchange rate to convert any amounts tendered in foreign currencies to the local currency.

F

field

A field in a computer software application is a drop-down, checkbox, or text box where you can select pre-defined values (drop-down or checkbox) or enter text (text box). Field data is stored in a database record.

function button

In the POS user interface, there are a number of function buttons at the bottom of the screen: Items, Customers, Taxes, Transaction, Orders, Discounts, and Operations. Use these button to access related functions.

G

gift card

There are two types of gift cards: (1) A voucher generated by the store in the form of a gift card, which may have a magnetic strip or barcode; and (2) A gift card from Visa, Amex, or another company that is processed through the payment system.

gift certificate

A type of voucher, usually printed on heavy card stock. The voucher number and prepaid dollar amount can be preprinted on the certificate or written on the certificate by the cashier. The gift certificate holder can use the certificate to purchase goods or services up to the total dollar amount specified on the certificate.

GL

The general ledger (GL) is a book that summarizes all of a company's financial transactions through offsetting debit and credit accounts.

GST

Goods and Services Tax (GST) is a value added tax. Countries that charge GST include Canada, the UK, France, Spain, Italy, Vietnam, Singapore, South Korea, and India.

I

incentive group

A group of items to which collection or redemption may apply. An incentive group may contain individual items, or entire departments and categories.

inventory

In a retail store, inventory refers to a list of items sold by the store and the quantity of each item that the store has on hand.

Inventory Wizard
In Store Manager, the Inventory Wizard is a tool you can use to make bulk changes to items in your store database, e.g., change the item price, cost, reorder information, or sales tax, or apply discounts.

item
In Retail Management Hero, items are specific goods or services sold by the store. Every item must have a unique item lookup code.

J

journal
The journal contains all transactions in the store's database.

K

kit item
Kit items contain other items that are in the store database but are only sold as one item, e.g., a first aid kit. Kit items are sold as standard items. Kit items and assembly items are not the same. When a customer purchases a kit item, the in-stock quantity of the individual kit components do not change in the store database. In addition, the cashier cannot change the quantity, price, or taxes of individual kit components.

L

Label Designer
In Store Manager, the Label Designer is a tool you can use to create templates for your own labels, e.g., add graphics and custom text.

Label Wizard
In Store Manager, the Label Wizard is a tool that you can use to select a template, enter filter criteria to select items, and then print the required number of labels for those items.

landed cost
Store Manager can automatically calculate the landed cost for each item received through purchase orders and inventory transfers. The landed cost of an item is the sum of the item's cost, tax, shipping, and other fees. You can specify the default cost distribution method that RMH Store Manager uses when items are received: Quantity, Value, or Manual.

lane
In a retail store, a lane refers to a checkout lane where a customer takes the items they wish to purchase so the cashier can add the items to a transaction in POS

and collect payment. A lane may be configured as an actual lane, or it may simply be a counter or desk.

layaway
Layaway is a process where a customer pays for an item (or items) in increments. The customer only receives the item when it has been fully paid for. The customer typically pays a minimum deposit on the item to place it on layaway.

lookup code
A unique set of alphanumeric characters used to identify an item, e.g., barcode numbers if an item has a barcode.

lot matrix item
A lot matrix item is composed of items that are packaged in different quantities and have different prices based on the quantity purchases, e.g., a can of beer that may be sold individually, or in 6-pack, 12-pack, or 24-pack quantities. Lot matrix items typically have the same lookup code but have different prices that correspond to the lot size (e.g., package quantity).

loyalty batch
A complete set of the loyalty transactions - between the first instance of collecting the points, and redemption (full or partial).

loyalty points
A mechanism of collecting loyalty value. Depending on the collection, type may be awarded based on the purchased items price, quantity, or on the transaction subtotal.

loyalty program
A combination of the collection schedule and redemption schedule with some optional parameters (such as effective dates).

M

matrix item
A matrix item is composed of items that are essentially the same, e.g., t-shirts or pants, but vary in one or two ways like size or color. These items, or components, typically have the same lookup code, description, and price as the matrix item. However, you have the option of setting up unique lookup codes, descriptions, and prices for each component. You can define up to three dimensions, e.g., size or color, to differentiate between components in the matrix. Within each dimension you can define several attributes, e.g., XS, S, M, L, XL, XXL, XXXL.

merchant account
A merchant account is a special business account set up to process debit and credit card transactions. It is not a normal bank account. Its sole purpose is to pro-

cess debit and credit card transactions and deposit those funds into the store's checking account, minus any transaction fees.

mix and match
A type of discount where the customer can buy a specified quantity of items (the same item or similar items) for a discounted price, e.g., you have candy bars A, B, and C that you normally sell for $.85/ea. but you set up a mix and match discount where the customer can buy three of those candy bars, in any combination, for $1.99.

N

net display
A net display is a monitor, usually connected to a register, where you can display product photos, multimedia advertisements, or websites.

New Item Wizard
The New Item Wizard is a tool that you can use to add items and their components to the store database. The New Item Wizard is particularly useful for adding matrix, lot matrix, and assembly items to the store database.

no sale
In POS, a no sale is a type of transaction that allows the cashier to open the cash drawer without completing a sale. In Store Manager, you can control whether cashiers are allowed to enter a no sale. If they are allowed to enter a no sale, you can require a reason code and printed receipt.

O

offline database
You can set up POS to use an offline database if the network connection to the main database is disrupted.

offline inventory
Offline inventory are items that are not for sale, such as items that are damaged, have been returned, or that you plan to transfer out of the store. Note: Do not confuse offline inventory with items that are blocked for sale.

on hold
An on hold transaction is on that has not been completed. It has been saved for retrieval and completion at a later time. When an on hold transaction is retrieved, it appears in the state it was in when it was saved.

open up
When the on-hand quantity of a single (child) item is depleted, you can use Store Manager to open up the parent item and add the quantity of child items to the on-hand quantity for the single item, e.g, you open up a case of 24 bottles of water so

you can sell the 24 bottles of water individually as single items. This is also known as breaking. It is a useful way to extract single items from carton or case inventories.

OPOS

OLE for Point of Sale (OPOS) is a standard that ensures that hardware and software is compatible. You can connect OPOS compatible hardware or peripherals, e.g., printers, pole displays, cash drawers, scales, and scanners, to registers running POS.

P

parent item

A parent item contains a set quantity of a single item, e.g., a case (parent item) of 24 bottles of water (single or child items). When the on-hand quantity of the single item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

payment provider

A payment provider is responsible for collecting cash from authorized debit or credit card transactions and depositing it into the merchant account according to the settlement transactions submitted by the store.

peripheral

A peripheral is a device, e.g., printer, scale, scanner, that is plugged in to a computer.

PO

A purchase order (PO) is an order for specific items that is placed with a supplier.

R

reason code

A reason code is a pre-defined list of explanations for a specific action, e.g., price correction, cancelled sale, staff discount, etc.

redemption schedule

A set of rules which determines how the points are redeemed.

register

A register refers to the computer running POS in a lane. A number of devices may be connected to the register, such as a monitor, keyboard, mouse, electronic cash drawer, scanner, or scale.

reorder point

The reorder point is the mimimum number of items you can have on-hand before you should place a PO with the supplier to reorder the item.

restock level
The restock level is the quantity of an item that you want to have in stock. Store Manager uses the restock level to computer the quantity of the item to order when you generate a PO for the item.

return
A return is a transaction in which a customer returns an item they purchased. They may return the item for exchange with the same or a similar item, or for a full or partial refund on the purchase price.

reward transaction
A sales transaction in which the collected loyalty value is being redeemed.

role
In Store Manager, you create roles for different employee functions in the store (e.g., manager, cashier, sales representative) and assign specific privileges or rights to the role. When you create a user account for a new employee you assign a role to the user account, and then customize their privileges or rights as required.

S

sales quote
A sales quote contains a list of items that the store or sales representative is willing to sell for the price specified in the quote. A sales quote is typically only valid for a limited period of time, e.g., two weeks.

serial number
A serial number is a unique identifier assigned to an item. It is typically a sequential or incremented number, e.g., 1, 2, 3, 4.

serialized item
A serialized item has a unique serial number assigned to it. Store Manager can track the purchase of serialized items by serial number.

settlement
Settlement is a process where the store sends authorized debit or credit card transactions to the acquiring bank to be processed. The acquiring bank then "purchases" the transactions and deposits cash in the store's bank account.

T

tag along item
A tag along item is sold along with another item. When the other item is rung up at the register, the tag along item is automatically added to the sale.

tare weight
The tare weight is the extra weight accompanying an item that is not included in the item's weight when the sale price of the weighted item is calculated, e.g., packaging.

tender type
The tender type is a monetary classification, e.g., cash, debit, credit.

transaction
A transaction is any action at the register (using POS) that involves the entry of items from the store database, e.g., sales, returns.

U

UPC
A universal product code (UPC) is a type of code printed on item packaging that identifies the item. The code has two parts: a scannable barcode and a 12-digit number located beneath the barcode.

URL
A universal resource locator (URL) is a website address, e.g., http://www.rmh-pos.com

user account
A user account is required to log in to Central Manager, Store Manager, Loyalty, or POS. Every employee should have their own unique user account.

V

VAT
Value added tax (VAT) is a type of tax that is levied on the price of a product or service. It is typically applied to items when they are rung up at the register (the point-of-sale). Stores that charge VAT must have a VAT account with the government so they can both submit VAT that they collected from customers and request credit for VAT they paid for products and services.

void
You may opt to void a transaction if, for example, the customer paid for the transaction using the wrong credit card or debit card. When a transaction is voided, it is as if it never happened. Inventory is not affected, and the sale method is cancelled (for example, their card will not be charged). You can only void a transaction if the batch is still open. You cannot void transactions in closed batches.

voucher
A voucher is an item that acts as a gift card or gift certificate.

W

weighted item
A weighted item is an item whose sale price at the register (the point-of-sale) is determined by its weight. The cashier must input the weight of the item manually or through an electronic scale. The item may have an associated tare weight.

work order
A work order is a type of transaction that is saved so it can be retrieved and completed at a later time. A deposit is typically collected from the customer for work orders.

X

X report
An X report is a report that displays current sales statistics for a register. Running an X report does not close the batch; it only displays sales information.

XML
Extensible markup language (XML) is a way of formatting data so it is easy to distribute across networks or between computer software applications.

Z

Z report
A Z report is similar to an X report because it displays current sales statistics for a register. However, running a Z report closes the batch. You should only run a Z report once a day. Most stores run a Z report at store closing.

ZZ report
A ZZ report is similar to a Z report. However, it is a report on all of the Z reports that were generated since the last ZZ report.