QuickBooks: Point of Sale

Ring Up Sales
Inventory Management
Customer Tracking
Credit Card Management
Multiple Security Levels
Extensive Reporting
Integration with QuickBooks Financial Software
Why QuickBooks: Point of Sale?

• Easy Inventory Management:
  • Auto inventory tracking
  • Real-time data with each sale

• Ring Up Sales Quickly, Easily & Accurately
  • Scan barcodes
  • Search by item
  • One-click sales reports

• Know Your Best Customers
  • Capture detailed customer data

• Easy to Learn & Use
  • Setup interview, import lists, 30-day support included

• Works Alone or with QuickBooks Financial Software
  • Easy file transfer to your other financial software with one-click

• Fast Setup
  • Step-by-step interview

• Many Levels of Security
  • Complete control of who views what information

• High Reliability
  • The number of users speaks for itself!

• Excellent Informative and Useful Reports
  • Reports that help make better business decisions

• Tech Support
  • Help Screens and knowledgeable support reps from Intuit

• Low Investment
  • Superior value when compared to other POS systems
A Point of Sale Version
Right for Your Business

• QuickBooks: Point of Sale - Basic
• QuickBooks: Point of Sale - Pro ****
• QuickBooks: Point of Sale - Pro Multi-Store

• Up to 10 workstations at each location
• Up to 10 locations when using Pro Multi-Store

*** BEST Option for a small retailer who expects inventory
to turnover many times during the year (repeat ordering);
who will use promotions & sales discounts regularly; who employ
non-relatives to operate the cashier and make pricing decisions.
The screen is easy to follow:

- Laid out in “work centers”. Commands written in plain English are easy to navigate and understand. For example “Make a Sale,” “Add New Item” or “Receive Items”.
- Word menu at the top with familiar commands.
- Icon bar can be customized.

Central Navigation areas:
1. Purchasing
2. Inventory
3. Quick Find
4. Point of Sale
5. Learning Other Tasks

Left Side:
Open Windows
Help and Support

Right Side:
Memorized Reports
How is my business doing?
Inventory Reminders
**Point of Sale Software / Hardware Bundle**

- Point-of-Sale software with hardware bundle includes:
  - Cash Drawer
  - Bar Code Scanner
  - Receipt Printer
  - Credit Card Swipe

- Configured to work right away
- Available in cream or black/grey
- Easy setup and connection instructions included with bundle

- POS Bundle contains hardware tested by Intuit for compatibility with Point-of-Sale.
- You can have the confidence that the hardware is compatible and will work.
- The setup instructions show how to set up and connect the POS hardware. Can avoid the expense of calling a network engineer.
## Many Levels of Security

- **Preset with 4 Levels:**
  1. Owner
  2. Manager
  3. Assistant Manager
  4. Sales Associate

- **Additional workgroups can be created**
  - User defined, for example:
    - Night or Weekend Manager
    - Temporary/part-time Sales Associate
    - Warehouse Staff
    - And many others

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- If levels of security are not set up, all users will have access to all areas of POS.
- Merchant can control who has access to cost prices, profit reports, sales associate productivity reports, etc.
• When creating a Security Group, the entire list of Security Rights is available for selection.
• Merchant has control over the access to areas available to employees.
• Can create “User-Defined” security group for greater control and privacy.
• Rights of each user-defined security group can be changed at any time.
Point of Sale Reliability

• Over 45,000 QuickBooks Point of Sale users

• Extensive beta testing

• Maintenance releases throughout the support life of product

As of January 2006 more than 45,000 small businesses are using QuickBooks POS.

Intuit conducts extensive beta testing before each new version is released.

Maintenance releases provided by Intuit throughout the support life of product. The support life as provided by QuickBooks is usually 3 years. After the 3 year time frame, support is usually available from third-party suppliers.

Retail Navigator page has link: “Send Feedback about QuickBooks POS.”

Feedback from users allows QuickBooks to identify maintenance issues and release patches.

Also used to find customer needs -- used to improve future releases.
Superb Reporting Function

Point of Sale includes multiple types of reports… let’s take a look at each one in detail.

✓ Dashboard
✓ Sales
✓ Cash Drawer
✓ Payment
✓ Customers
✓ Customer Orders
✓ Items
✓ Purchasing
✓ Memorized Reports

• Most likely, the reporting function will be the most useful to the merchant.
• Let’s look at each one in detail.
A quick way to look at a snapshot of the business.

4 Reports at a time

1. Department Sales Graph
2. Best Employee Sales
3. Best Selling Items
4. Sales Over Time

- Dashboard and individual reports can be customized:
  - Click on “Show Full Report” to change date ranges or modify the report to get just the data desired.
  - A report can be removed and another added in its place.
Refer to list and descriptions on the slide for presentation information
Other Sales Reports not shown on this screen include:

1. Additional sales graphs
   - Date Comparison – sales comparison over 2 time periods
   - Demographics – sales by city, state, zip code, etc.
   - Employee Comparison – comparison of sales by employee
   - Payment Method – breakdown of sales by payment type

2. Multi-store reports
3. Sales Tax Summary
4. Tax activity detail

Important: Most reports can be modified extensively with select criteria. Selection filters include dates, time, departments, zip codes, phone numbers, items, etc.
Refer to list and descriptions in the slide for presentation information.

• *Z-Out* refers to Zero Out, a term from the days of cash registers. A cash register would be ‘zeroed out’ at the end of a day to reset the tabulators to zero to begin a new day. Point-of-Sale does the same when it performs a Z-Out. It resets the day’s tabulators to zero to begin the new day. However, it does not lose the information; it is transferred into the history.

• *X-Out* refers to “checking” some information. It is usually used throughout the day to check on sales, amount of money in the drawer, etc.
• Merchant Service reports are for those who are using Intuit’s Innovative Merchant Solutions (IMS).

• IMS allows the processing of credit cards directly through the POS software.

• Card present -- swipe through card reader. Swiping the credit card leads to greater accuracy; the information does not need to be keyed into a separate machine.

• Card not present -- key in card information.

Intuit’s Merchant Solutions rates are very competitive with other merchant service suppliers.

Point-of-Sale can sell, redeem and track balances of gift cards through Innovative Merchant Solutions.

Gift cards are a great way to get new customers referred to a store because the cards are frequently purchased by current customers.

Studies have shown that many customers spend more than the value of the gift card.
• POS offers 3 options regarding tracking customers when making sales and then options for sorting the data:
  1. Never get a customer’s name
  2. Always get a customer’s name
  3. Occasionally get a customer’s name
• Use this list to create mailing lists.
• Information can be selected based on:
  1. Names
  2. Zip Codes
  3. Phone numbers
  4. Addresses
  5. Date of last sale
  6. Account balance
  7. Customer type
  8. And others
Refer to the information on the slide.

• Layaways, special orders and work orders are available in Point-of-Sale: Pro and Pro Multi-Store

*NOTE: They are not available in Point-of-Sale Basic.

Layaways – generally used to hold an in-stock item while a customer makes a series of payments over time against the total price.

Sales Orders & Special Orders – for items out of stock, or not carried in inventory. Can be used to create quotes.

Work Orders – to track service orders, repairs, alterations or warranty work.
The term “Items” generally refers to inventory. However, it also can refer to assemblies, non-inventory part, service item or group item.

Other reports not shown on this slide include:
1. Cost detail of merchandise adjustments
2. Store transfers – both detailed and summarized
3. List of departments
Purchasing Reports

Keeps track of merchandise on order and monies committed to these orders. Reports on merchandise received on still on previous orders.
Track gross sales, commissions, by employee.
The graph gives a visual presentation.
• Modify reports and then save them.
• Eliminates steps necessary to recreate them again.
• Memorized Reports give the accountant an opportunity to provide an extra service to the retail client. Reports that an accountant might create include reports that generate information for paying estimated taxes, specific sales tax reports, etc.
Integration with QuickBooks Financial Software

- **End of Day… information is transferred to QuickBooks**
  - Cash & credit card sales
  - Check sales
  - Accounts Receivable sales
  - Customer information
  - Item mapping
  - Activity Log
- **Point of Sale can update financials at any time of the day**

End of Day:
- Information is transferred to QuickBooks Financial Software.
- Can be sent summarized or detailed:
  1. Cash and credit card sales generally are summarized but can be sent in detail
  2. Check sales are sent individually
  3. Accounts receivable sales are sent detailed
  4. Customer information can be shared (optional on cash sales)
  5. Individual item sales can be mapped to specific Income, Cost of Goods Sold and Inventory Asset accounts
- If there are any errors in transmitting the information to QuickBooks financial an activity log will highlight these errors
- Point-of-Sale can update QuickBooks financial at any time during the day by clicking on “Financial” on the word menu and then selecting “Update QuickBooks.”
Help and Technical Support are readily available:

- Tech Support
  - F1 Key
  - Help and Support from within the product
  - Free support for first 90 days you have Point of Sale
- Certified QuickBooks Point-of-Sale ProAdvisor

Help and Tech Support are readily available:
1. By using the F1 key
2. By selecting “Help & Support” on the left side of the Retail Navigation page
3. Free Tech Support for the first 90 days after registration of product
Additional features in Pro

1. Item styles – track items through a color/size/attribute matrix.
2. Build and use Assembly Items -- create kits, gift baskets, package deals that can be broken apart after the promotion or season is over.
3. Group Items – use a special price for a purchase of a quantity.
4. Special Order Items – for items not carried in stock.
5. Layaways – for items paid for by a series of deposits.
6. Work Orders – service, alterations, repairs, warranty work.
7. Multiple Vendors for the same Item – tracks items purchased from different suppliers.
**Multi Store Software**

- **Features in Point of Sale: Pro Multi-Store**
  - ✓ Inventory Items
  - ✓ Transfers
  - ✓ Other Stores’ Inventory
  - ✓ Can be used in up to 10 locations
  - ✓ Up to 10 workstations in each store

*QuickBooks Point-of-Sale Pro Multi-Store is available for up to 10 locations*
*One Headquarters Store and up to 9 Remote Stores*
*Inventory Reminders – Duplicate Items*
*Transfers between stores*
*View quantities at other stores*
*QB can handle 10 workstations per locations and can be used in up to 10 locations*
### Which Point of Sale is Right for You?

**Manage Inventory**

<table>
<thead>
<tr>
<th>Manage Inventory Automatically</th>
<th>Basic</th>
<th>Pro</th>
<th>Pro Multi-Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track inventory accurately and effortlessly</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Manage vendors</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>E-mail purchase orders</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Track item costs to three decimal places</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Create special orders for items not tracked in inventory</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Generate purchase orders automatically at pre-set inventory levels</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Add non-inventory items to sales receipts</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Track multiple vendors and UPC codes per item</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Track inventory assemblies (kits) and items sold as groups</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Track serial numbers</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Track lot numbers</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Display styles and colors in grid format</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Customizable fields for vendors, items, and customers</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
### Which Point of Sale is Right for You?

**Ring up Sales and Track Customer Data**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Basic</th>
<th>Pro</th>
<th>Pro Right</th>
<th>Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ring up sales by scanning bar codes</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Process credit card and debit card transactions in one step</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Issue and accept gift cards</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Choose from multiple form and receipt options</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Get sales reports with one click</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Customize price tags, receipts and more with the Document Designer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Track work orders and sales orders</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Track employee sales commissions</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Add shipping charges to receipts</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Price items the way you want, with more flexible pricing options</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

### Stay Close to Your Customers

<table>
<thead>
<tr>
<th>Feature</th>
<th>Basic</th>
<th>Pro</th>
<th>Pro Right</th>
<th>Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer info and purchase tracking</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>See purchasing histories as you ring up sales</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Capture mailing and e-mail addresses</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Capture “ship-to” addresses</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Create mailing lists and labels</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
# Which Point of Sale is Right for You?

## Getting Started, Security, Integration & Flexibility

<table>
<thead>
<tr>
<th>Feature</th>
<th>Basic</th>
<th>Pro</th>
<th>Pro Multi-Store</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Get Started Quickly</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Answer a few simple questions to start</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Import items and customers from Microsoft Excel</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Learn by example with the Practice File</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>View built-in tutorials for common tasks</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Get 30 days unlimited phone support at no extra charge</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Install up to 16 copies in one store</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Control Security</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Track petty cash payments</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Control access to administrative features by password</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Works Alone or with QuickBooks Financial Software</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer data from Point of Sale to QuickBooks Financial Software in one step</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enjoy a complete, end-to-end business management solution</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Manage up to 10 Stores from a Single Office</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consolidate multi-store data into one file</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate performance and inventory reports for individual stores and the company</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Track inventory transfers between stores</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Point of Sale Investment**

- **Point of Sale Software Only:**
  - Point of Sale: Basic $799.95 $639.95
  - Point of Sale: Pro $1,049.95 $835.95
  - Point of Sale: Pro Multi-Store $1,399.95* $1119.95

- **Point of Sale Software with Hardware Bundle:**
  - Point of Sale: Basic $1,499.95 $1,199.96
  - Point of Sale: Pro $1,749.95 $1,399.95
  - Point of Sale: Pro Multi-Store $2,099.95* $1,679.96

*Per license / workstation

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Note: All prices are per workstation. Each workstation is required to have its own individual license. For example:

- If a company has 3 stores and 5 workstations in each store… they would need 15 licenses of Pro Multi-Store
- If a company has 1 store with 5 workstations… they would need 5 licenses of either POS Basic or POS Pro.

- Workstations can be configured to fit the merchant’s needs. If the merchant has a workstation in the stockroom for receiving inventory, they do not need the entire bundle. A recommended setup for the stockroom might include the workstation with the software, a bar code scanner, an 81/2 x 11 printer (for purchase orders and receiving vouchers), a tag printer and a physical inventory scanner (portable data terminal for taking inventory).

  - The merchant would have the software with the bundle at the workstation used for checkout at the front of the store. They would be networked with Workstation one being the server.
QuickBooks: Point of Sale

Point of Sale Hardware / Software Bundle

**Investment**

**Point of Sale: Basic Bundle** $1,499.95

**Point of Sale: Pro Bundle** $1,749.95

**Point of Sale: Multi-Store Bundle** $2,099.95*  
* Per License / Workstation

If the Same Hardware & Software are Purchased Separately:

- **Basic** - $1,689.75
- **Pro** - $1,939.75
- **Premier** - $2,289.75

When purchased as a bundle you save $189.80

**QuickBooks: Point of Sale**

**Basic Bundle** – One location, one terminal

**Pro Bundle** – One location, one terminal

**Multi Store Bundle** – Manage up to 10 stores from a single location and automatically track sales and inventory for each store. Multi-store is not multiple systems in multiple locations, rather it is a central system that can communicate with up to 10 other locations. Example: If you have 2 cash registers at 5 locations, you need to purchase 10 POS systems.
<table>
<thead>
<tr>
<th>Hardware</th>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIN Pad</td>
<td>Enable your customers to pay using debit cards</td>
<td>$169.95</td>
</tr>
<tr>
<td>PIN Pad with Integrated Card Snapper</td>
<td>Allow customers to select their preferred payment type – debit or credit</td>
<td>$289.95</td>
</tr>
<tr>
<td>Tag Printer</td>
<td>Hand-held PIN Pad allows customer to enter PINs for debit transactions</td>
<td>$314.46</td>
</tr>
<tr>
<td>Pole Display</td>
<td>Secure, compact and ergonomic</td>
<td>$229.95</td>
</tr>
<tr>
<td>Physical Inventory Scanner</td>
<td>Ean-scan PIN-based payment or credit card transactions</td>
<td>$611.96</td>
</tr>
<tr>
<td></td>
<td>User-friendly, intuitive design</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Compact and ergonomic</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USB interface</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Print your own inventory tags and barcode labels</td>
<td>$369.95</td>
</tr>
<tr>
<td></td>
<td>Create a variety of bar code tags and labels</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pair with bar Code Scanner to enter merchandise</td>
<td></td>
</tr>
<tr>
<td></td>
<td>information faster and more accurately</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USB interface</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Display prices to reassure customers</td>
<td>$209.95</td>
</tr>
<tr>
<td></td>
<td>Display item prices as you ring up sales</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allows customers to verify accuracy of the sale for increased satisfaction</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USB interface</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Scan inventory anywhere – it’s wireless!</td>
<td>$719.95</td>
</tr>
<tr>
<td></td>
<td>Scan barcodes in batches for fast physical inventory management issues</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Battery operated scanner goes anywhere – including your warehouse</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Return to sales (included) to automatically update your POS inventory records</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USB interface</td>
<td></td>
</tr>
</tbody>
</table>

List of all hardware available and pricing if purchased separately.
Normal delivery time from time of placing order is 5 – 7 days.
Next Steps?

• We have reviewed the system as it relates to your business.
• We have discussed the features that will take you to “the next level”.
• We have discussed the QuickBooks Point of Sale commitment to your success.
• Where do we go from here?

Questions - Call 800-216-0763 to speak with a Certified Point of Sale Installer