by Personal Touch Systems, Inc.

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Users Guide

TECHNICAL SUPPORT

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EMail: support@personaltouchsystems.net
Hours: 8am to 5pm Mtn Time - Mon - Fri Closed Holidays
Afer Hours: www.profitmaker.com/Support.aspx

Free Support
All complete systems come with a limited time of free telephone support.

Charged Support
If you need help after-hours or after your free support elapses please follow these guidelines:

go to   http://www.profitmaker.com/Support.aspx to view support options.

SALES

Personal Touch Systems, Inc.   15 North 470 West   American Fork, UT 84003
Web site: www.profitmaker.com
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Business Phone: 801-649-6691
Sales Phone#:   800-950-6767 (sales only, no technical support please)

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10. **CREDIT CARD PROCESSING**. ProfitMaker 6.1 and later does not store, process or transmit cardholder information. It is very important that you eliminate any and all stored credit card information from your stores database so that you (as the end-user drycleaner) are not subject to violation of these rules. IT IS THE ENTIRE LIABILITY OF THE END USER OF PROFITMAKER AND ALL PROFITMAKER DERIVATIVES TO ENSURE THEY ARE COMPLIANT WITH THE MANDATES AND ALL OTHER RULES OF THE CREDIT CARD INDUSTRY.

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Getting Started

Welcome to ProfitMaker Plus. This getting started section will describe a few basic steps you need to follow when you first get your new system and includes a 9 step tutorial followed by Frequently Asked Questions and Answers.

We assume that you have purchased a complete system from Personal Touch Systems and that you need to make a few settings and enter some basic data before you can use the program. However, your specific needs may be different depending on what you purchased.

Generally, when you first get a system you will need to perform 4 basic steps and follow the tutorial.

Step 1. Setup and plug in your hardware and make sure it comes up into Windows, and that you can start the ProfitMaker program. If this has not yet been performed, do it now and return to step 2 when done.

Step 2. Configure the system so that it operates as closely as possible to how your store works. Use the Config section of this manual as a guide to go thru the configuration settings. A lot of the settings have already been set for you when we integrated your system at our offices. You will have to make sure that things like tax rates, days of operation, etc. are set. Use the configuration section of this manual and go thru each of the configuration settings. Then return to step 3.

Step 3. Step 1 is done, and you have completed the configuration section for your store information. You are now ready to enter the pricing for your store. ProfitMaker ships with a default set of pricing already defined for you. In most cases you will only need to change the amounts to that which you charge in your store. Follow the steps in this chapter for "Setting your prices".

Step 4. Now that your prices have been set you can enter existing orders in your store into ProfitMaker. This step is optional. If you don't want to enter existing orders you don't have to. If you do want to enter existing orders read the section entitled "Batch Order Entry" on the next few pages of this chapter.

Congratulations. You should now be ready to start using your ProfiMaker system
.
Make sure you read and understand how the technical support for ProfitMaker works so you can get help if you need it. Also, make sure to backup your data at least every day.

IMPORTANT: The following are very important items that you need to know:
1. Backup your data at least every day.
2. Have a contingency plan in place incase your computer is stolen/damaged.
3. NEVER shut down your computers without exiting ProfitMaker and Windows
.

Setting Your Prices.

As mentioned earlier, ProfitMaker ships with default departments, items, and upcharges. You can change these items as needed for your store. To change your pricing follow these steps:

1. Start by selecting Configure | Pricing from the Command Center toolbar as shown in figure 1.
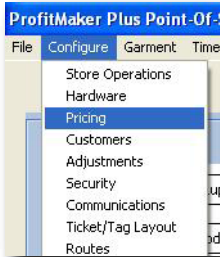
Figure 1. Shows the menu selection to select Pricing.

2. Next, you see the pricing tables. There are three tables on the screen from top to bottom. The top most table is the department table. You can have up to 12 departments. Notice the Departments, Items, and Upcharges tables. Each Department can have 90 Items, and each of those 90 Items can have up to 18 upcharges defined. Lets start by selecting the Dry Clean department as shown in figure 2.

Departments Table
You have 12 departments you can use.

Items Table
Each Department can have up to 90 Items.

Upcharges Table
Each Item can have up to 18 different Upchages.

Figure 2. Shows department 1001 - Dry Clean selected.

When you click on a Department line in the table, it shows all the Items for that department in the Items table. Notice in figure 2 the Items that are showing for the Dry Clean department. Ie Shirt, Blouse , etc.

3. Now, all you need to do is position in the Price column of each item and enter the amount you charge for that item. After you enter the amount, press the EN-TER key and you will be positioned on the next line. Repeat this for each of the items.

4. Now, select the next department in the list (ie: Laundry). Then repeat step 3 for each of the Laundry items by entering the price charged by your store for each one.

Also, when entering text into fields DO NOT DELETE the text, simply press the space bar to make it blank.

Upcharges

You may, or may not, want to add upcharges for some items. As the Item is se-lected the Upcharges for that item are shown below the Items list in the Upcharg-es list. See figure 3. You can erase Upcharges by pressing the SPACE bar and clearing the item text, or add new Upcharges by typing in the Button Text, Ticket Text, and Tag Text as needed. You can have up to 18 Upcharges for each Item. Some things to remember are:

Days. Make sure the days field is set to ZERO unless you want to add extra processing days when this upcharge is added to an order.

Qty. Set the Upcharge qty to ZERO unless the upcharge item makes the quantity of garments greater. For example, if you have a "Pants" Item that has an up-charge that is "BELT" and you want the garment count to be 2 for Pants when a Belt is added as an upcharge, then set the Qty to 1. Otherwise, make sure the qty field is zero.

Figure 3. Shows the Upcharges for the selected item "Shirt".

5. Continue adding / editing Upcharges for each Item.

In Summary, to adjust your pricing follow these steps:
1. Select a Department.
2. Edit each Items price.
3. Edit each Upcharge for each Item.

Batch Order Entry

When you first purchase a ProfitMaker system you may need to get existing orders into your computer. This can be accomplished using the Batch Order Entry feature. This feature lets you enter existing orders on your racks very quickly and easily. Follow these steps to enter orders:

1. Start the Batch Order Entry function by selecting it from the File menu on the Command Center screen. See figure 4.
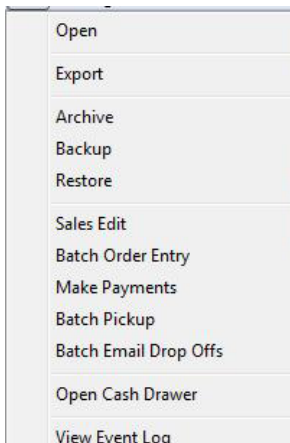
Figure 4. Shows the Batch Order Entry selection.

2. Enter each order/invoice/ticket in your store starting with the customers name. You may need to enter all of your customer names into the system first or you can enter a "Generic" customer name to use for all orders if you don't want to enter customer information at this time. A generic customer is just a customer named "Generic" or "General" or anything else you want to call this customer.
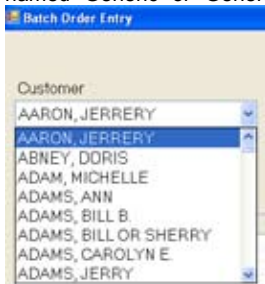
Figure 5. Shows the customer selection window during Batch Order Entry.

3. Now enter the quantity of garments for a department. The Departments will

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appear in a dropdown list that you can select from.
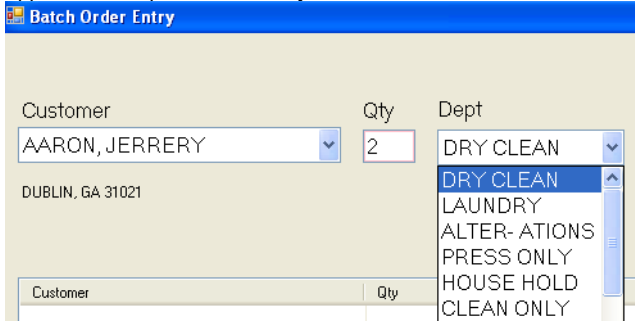
Figure 6. Shows a Qty of 2 Dry Clean items selected.

4. After you select a department, the Items for that department show in the Item List. Select the Item from the list

NOTE: To further speed entry of Orders you can enter an "Item" called "Existing Order" that can be used for an entire order so the total amount owed can be entered on 1 line.

Figure 7. Shows the Item selection list.

5. Now enter the amount (each) of the garment being entered.
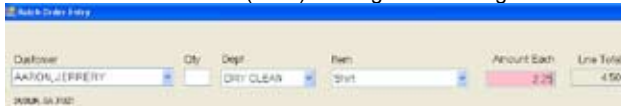
Figure 8. Shows an amount of $2.25 entered which is multiplied by the Qty of 2 for a total of 4.50.

6. After you exit the Amount Each field, the line is added to the Orders List. (It is not yet added to your database.)
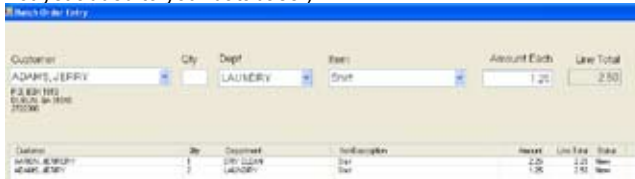
Figure 9. Shows items added to the Order List.

Processing the Orders

Now you have a list of orders ready to be added to your system all at the same

time (in batch). To add the orders in the list click on the ACCEPT button. You will be asked to confirm the addition of the orders. Click on YES to add the orders or NO to not add the orders.

Printing an Order Ticket
If you want an Order Invoice (Ticket) printed for each line in the list make sure the "Print Order Tickets" check box is checked. An Order Ticket will then be printed for each line in the list to the "Detailed Tickets" printer as defined in your Hardware Configuration. Uncheck the box if you do not want order tickets printed.

Delete an Order from the List
If you made a mistake and you want to delete an order from the list simply high-light the line in the list with your left mouse button and press the DELETE key on your keyboard. The highlighted item will be removed from the list and therefore not added to your orders database.

Clear List
After you press the ACCEPT button to process orders, the list of orders will be showing still. The far right column shows the order # created for your reference. You can click on the "Clear List" button to clear ALL lines from the list. This is usually done after a list is processed but it can be done at anytime.

Tutorials
Now your pricing should be setup and you are ready to start processing orders. This tutorial will walk you step by step thru each of the main operations in Profit-Maker. The main tutorials are:

1. Add a New Customer
2. Find an Existing Customer
3. Create a New Order
    a. Quick
    b. Detailed
4. Markup/Edit an existing Order
5. Assign Location information to an Order
6. Customer Pickup of Orders
7. Sales Items
8. Reports.
9. Delete the test orders we just created.

Each of the above operations will be shown step by step so you can follow along. Keep in mind that the steps we go thru are not the only way to do things in Prof-itMaker they are just one example. These tutorials assume you know what the Command Center screen is. Ok, let's get started with Tutorial 1.

Tutorial 1: Add a New Customer

Step A. From the Command Center click/touch the "NEW" button.

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Step B. You will then see the Customer Information screen. Fill in each of the fields for the customer.

Step C. Click on the ACCEPT button to add the customer.

Configuration Note: You can use the Config | Customer tool at the top of the Command Center screen to define which customer fields appear when adding a new customer.

Tutorial 2: Find an Existing Customer

After customers have been added as in tutorial #1, you can find them so that Orders can be entered for them. To find a customer:

Step A. From the Find Customer area of the Command Center enter a few letters of the customers last name and then press the ENTER key. Pressing the Enter key lets the computer know when you are done entering customer name characters and that it is time to find a match to what you entered.

Step B: All customers that match what you entered will be shown in the customer list.

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Find customer by ID#, last name, phone #, or Order#.

Step C: Click/Touch the desired customer in the list and whichever operation you choose next will be performed on that customer.

Tutorial 3: Create a New Order

QUICK TICKETS - Quick Orders are used when you only want to enter the customers name/phone and the quantity of garments per department and not any detail about the garments. Garments can be marked up at a later time. To add a Quick Ticket:

Step A. Find the customer (see Tutorial 2 for instructions on finding an existing customer). You can also leave the customer blank for selection later.

Step B. Click/Touch the QUICK button on the Command Center screen

Step C. Add the quantity of garments for each department. For example:

1. Click on the DryClean Department then touch/click on the 3 quantity button.

2. Click on the Laundry Department   then touch/click on the 2 quantity button.

Step D. Click/touch the Accept button to add a new Order to your system.

Quick Ticket Notes: You can use the Markup/Edit operation explained next to add details to the Quick Ticket you entered, Also, Click/touch on the Date/Time button to change the expected Pickup date.

DETAILED TICKETS. Like the Quick Ticket operation, you use the Detailed Ticket operation to add a new order to your system. But, the Detailed Ticket operation allows you to enter details about the garments that are being dropped off. To add a new order using the Detailed operation follow these steps:

Step A. Find the customer (see Tutorial 2 for instructions on finding an existing customer). You can also leave the customer blank for selection later.

Step B. Select the Detailed button:

Step C. You will now see the Order Entry Screen. Select items to add to the order by following these steps for example:
1. Click on the DRY CLEAN department button.
2. Click on the SHIRT button to add a shirt to the order entry area.
3. Click on the SILK upcharge button to add an upcharge of SILK to the Shirt.
   Notice how the $4.00 Shirt charge changes to $4.50 when silk is added to it.

Step C. You can now select other garments to add to this new Detailed Order. You add new items in this order.
1. Select the Department (if changing to an other department).
2. Select garment quantity. You can enter "3 Shirt" or Shirt, Shirt, Shirt.
3. Select the garment item. You will see the garment added to the order screen.
4. Optionally select any upcharges, colors, patterns for the garment.
Continue at step 2 for all other garments of the same department and then select the next department, etc, etc.

```
Qty Dept   Description              Amount
 1 DRY  Shirt                        4.50
        1 Silk
        1 Blue
        1 "EXTRA STARCH ON COLLAR"
 2 LAU  Dress                       20.50
        1 Silk
        1 White*
```

Department
Item
Upcharge
Color
Comment

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Making changes to your orders.

If you need to change garments details you have a couple of options.

1. Click on the garment and then on the "Clear Line Item" button to remove it.
2. Click the garment and the "Modify Item" button to change the quantity/price.

Adding Comments to a garment on the order.

You can add free form text comments (as shown on the above order) for any garment. Simply click on the garment and then the "Add Comment" button. Enter the description for the comment and it will appear on the order. Our example above shows how we entered a comment for extra startc on the colllar.

Tutorial 4: Markup/Edit an Existing Order

After new orders are added with the Quick or Detailed order operations you can make changes to existing orders with the Markup/Edit operation. Follow these steps:

Step A. From the Find Customer area of the Command Center enter a few letters of the customers last name and then press the ENTER key. Pressing the Enter key lets the computer know when you are done entering customer name characters and that it is time to find a match to what you entered.

Step B. Touch/click on the Markup/Edit button.

Existing Orders
**Markup /
Edit**

All active orders that belong to the customer will be shown in the Orders List

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Step C. Click the Order you want to Markup/Edit and its details will show on the screen invoice.

Step D. Now you can add new garments, remove garments, or use the "Modify Item" button to change the quantity or price of a line item.

Reprinting an Order

You can use the Markup/Edit operation to reprint an order simply by bringing it up in the Markup/Edit area and then click/touch on the "Save Order and Reprint" button.

Tutorial 5: Assign Location Info to an Order

After you have processed the garments on an order and they are hung in the racking/storage area it is time to assign Rack/Location information to the order. This lets the computer know that the order is ready to pickup and gives the order an "Assembled" status. To assign locations to orders:

Step A. Click/touch the "Assign Location" button.

Step B. Enter the Order number (scan it if you have a barcode reader). Any existing locations entered for this order are shown .

Step C. Enter the Location or Range of Locations this order is placed at.

Step D. Click/touch the Accept button

Step E. Repeat step B, C, D for each order being racked.

Tutorial 6: Customer Order Pickup

When the customer comes back in to pickup their order(s) you will use the Pickup operation as follows:

Step A. Find the Customer by Home Phone, Last Name, Customer number, or Order Number.

After a customer has been selected you will see **all of the active orders** the customer has in your store. Orders in green are ready and orders in blue are still in assembly. You can either click on each order being picked up or click a button:

Select All Ready button to check mark all the green "ready" orders

Select All In-Process button to check mark all the blue "in assembly" orders

Use the Select All Orders or Un-Select button to check or uncheck mark all orders.

Also, you can simply proceed immediatly to the Pickup Screen and select orders there.

When all (or none) of the orders being picked up click on the PICKUP button

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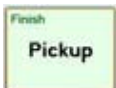
Step B. All orders for the customer selected will show in the Orders List.

Totals for selected orders

You select an order to be picked up by touching/clicking on it in the orders list. When an order is selected for pickup a green check mark will appear under the pickup column. Orders with a red x are not being picked up. All orders that are checked for pickup have the individual order totals added together and shown at the bottom of the orders list. The Total$ is shown in the tendered area.

Step C. Now, click/touch the method of payment box ie; Cash Check Credit Card and enter the amount being paid (see the Accounts section of this manual to learn how to put amounts due on a charge account).
NOTE: Press the "+" key or the "Amount Due" button to have the amount due entered automatically for you to avoid errors in typing.

Step D. Now click/touch the "F12 - Finish" button to finish the sale.

Tutorial 7: Sales Items
Sometimes you might need to make a sale without finding a customer. For example, a customer may walk in your door and just want to purchase a Lint Roller. To sale items quickly and easily use the Sales operation as follows:

Step A. From the Command Center screen select the Sales button.

Step B. Now click/touch on each item the customer is buying from the on screen list. Each item you select will be added to the list of selected items. To delete an item you selected, click on it and then click/touch the "Delete Selected Item" button.

Selected items show in the list.

Step C. When all items have been selected and are showing in the list, click/touch the Accept button.

Step D. From the Pickup screen enter the type and amount tendered and the click on the F12-Finish button to complete the transaction.

Tutorial 8: Reports
There are many, many reports in ProfitMaker. We will show you a couple of the important ones here and then let you explore the Reports section of the manual to learn about the other reports.

ZKey Report.
The ZKey report is a great report to show you sales and cash drawer information for all or a selected employee and for a whole day or just an employees shift. To get a ZKey report:

Step A. From the Command Center click/touch the ZKey report button.

Z-Key Report

Step B. From the Till Count screen enter the Employee Access Code that you want ZKey details for. If you want information for ALL users leave the entry blank. The selected user will show in the upper right of the screen or "ALL" will show if all transactions will be shown. Todays date will be shown by default but you can change the date and time ranges for the transactions time period desired.

Step C. You will now see the ZKey Till Count screen. Enter the till counts for the money in your till. If you just want to see statistics leave the till counts blank
.
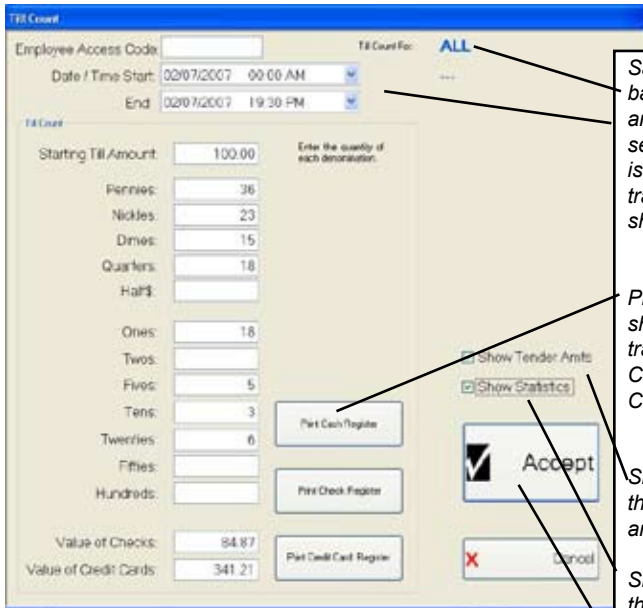
Sales will be printed based on the user and date range selected. If no user is selected ALL transactions are shown/

Prints a register showing all transactions for Cash, Checks, and Credit Cards.

Show, don't show the tendered amounts

Show, don't show the statistics.

When user, date range and options are selected, click on Accept button to print the Zkey report to your invoice printer.

Step D. Click on the Accept button to run the ZKey report to the printer.

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Tutorial 9: Delete the Test Orders

If you completed tutorials 1 thru 8 you created orders in your system that you may want to delete if they are not real orders. It is easy to delete orders as follows:

Step A. From the Command Center select the File | Sales Edit option at the very top of the screen.
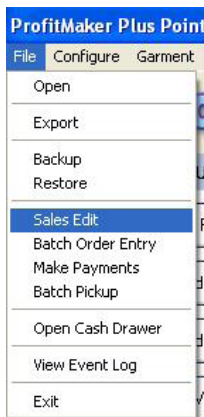
Step B. You will now see a list of all of your Orders for the date range selected. If all of your test orders were created today, you will see all of the orders in the list. Click/touch on the order to be deleted.
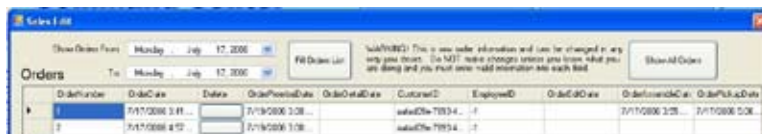
Step C. With the desired order line highlighted, click/touch the button for that order in the DELETE column. The Order will be immediately deleted (and can not be un-deleted).

Step D. Repeat step B for each order that you want to delete.

NOTE: Needless to say, you won't want your users/employees deleting orders. Consult the Security section of this manual to learn how to set up your system so that only you, the owner, and whomever you choose can delete orders.

Frequently Asked Questions and Answers

How do I...

Allow Customers to put amounts due on account?
You may want to allow customes to put amounts due to your store On Account.
On Account amounts due can then be printed on Statements that can be mailed
to customers for payment at a later date. To allow customes to charge on ac-
count you must set the customers options to allow it as follows:

First, setup the customer so they can charge on account.

1. From the Command Center screen find the customer desired by typing in
their name, phone, or cust#.

2. Select the Customer in the found customers list by clicking on the customers
name so it is highlighted.

3. Click on the Edit button to the right of the customer name, phone seach
fields..

4. You should now be in the Customer Information screen. Click on the Show All
Groups button.

5. You will now see all the possible customer information groups. Find the Ac-
count Information group;

6. Select the Terms box and set it to Net7, Net15, Net30, etc. Net7 means the
customer pays within 7 days. Net15 is 15 days, etc.

7. Click on the Accept button to save the customer changes you have made.

Second, On Pickup, add amounts due to the On Account fields

1. When a charge customer picks up their orders put the amount due into the
Store Account tendered field.

2. Finish the pickup as normal.

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Backup my Customers / Tickets

As you add customers and orders to your system you are creating important information that will help you be successful. It is very important that you backup your important data on a regular basis in case of computer hardware failure, store disaters, and theft. To backup your data follow these steps:

IMPORTANT: Please remember to...

Backup to a different disk every day

Never backup when you are having a data problem (it just backs up the data problem).

Take a GOOD backup disk off site incase of emergency.

Selective Backups.

1. From the top left of the Command Center screen select the File | Backup option.

2.You will see Step 1: Select the Backup Disk Drive. Systems shipped from PTS generally use drive E:/ as the backup drive.

(if your store uses a different backup drive, put its drive letter in place of the E:\ drive letter)

3. Click on the Step 2: Start Backup button. The backup process will start.

4. Click on the Exit button when the backup has completed.

Backups on ShutDown

When you click on the EXIT button from the Command Center you will see the Backup Data button. Select this button to start a backup before you shutdown at night.

Change number of copies for a receipt.

When you add new Quick or Detailed orders, a receipt (Ticket) is printed after you Finish/Save the order. The number of copies that is printed is determined by the hardware configuration settings. To change the settings follow these steps:

1. From the top left of the Command Center screen select the Configure | Hardware option.

2. In the Printers Setup area, find the type of tickets you want to change (Quick, Detailed, Pickup, Sales/Payment)

3. Change the Copies To Print number (ie; 1= 1 copy, 2= 2 copies, etc.) You can

use the up/dow arrows to change the count or type it in with the keyboard.

4. Click on the ACCEPT button.

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Add a Coupon.
You can define Coupons that can be used during markup of orders or at the time of Pickup. To add, and then use, coupons follow these steps::

1. From the top left of the Command Center screen select the Configure | Pricing option.

2. In the Departments section, scroll down the list until you see Department 1012 - Adjustments. (Scroll down using the mouse on the right side of the depart- ments section).

3. When you click on department 1012 - Adjustments you will see all of the cur- rently defined adjustment Items showing in the Items list below departments.

4. Find an Item that has a Blank (empty) Button Text field and enter the name of the Coupon in that field. Do the same in the Ticket Text and Tag Text fields.

5. In the Price Field press the Minus key (the dash key on the keyboard) and then the amount of the coupon. For example: -1.99. This will cause ($1.99) so show in the price field. The quotes ( ) around the price indicate that it is a Dis- count Amount that will be subtracted from the amounts showing on screen.

6. Set the Tax Rate field to 1, 2, etc. if the Coupon should be taxed.

7. Click on the EXIT button.
REMEMBER! At Pickup, orders are shown one at a time so discounts and cou- pons are added and calculated on an order by order basis.

Apply Payments from Charge Customers
After you send out your statements it is likely that your customers will mail in payments to be made to their account. To apply the payments made to customer accounts follow these steps:

1. From the top of the Command Center screen select the Payments | Payments on Account option.

2. Select the customer who is making a payment from the list of On Account customers.

3. Once you have selected the customer who is making a payment you will see all of their orders that have amounts due.

4. Click on the Payment Type button Cash, Check, Credit Card, or Store Credit.

5. Enter the amount of the payment in the Amount Paid box.

6. Click on the ACCEPT button.

Delete a Customer
To delete a customer that you have added to your database follow these steps:

1. From the Command Center screen find the customer desired by typing in their name, phone, or cust#.

2. Select the Customer in the found customers list by clicking on the customers name so it is highlighted.

3. Click on the Edit button to the right of the customer name, phone seach fields.

4. At the bottom of the Customer Information screen click on the Delete Customer button.

5. If the customer has orders in the database you will see a message that the customer has orders on file and should not be deleted. Proceed if you really want to delete the customer.

6. Click on the Red X that the top of the screen to delete the customer -or-

7. Click on the Cancel button to not delete the customer and their orders.

Changing Customer Orders
If you don't want to delete a customer because they have orders in the database you can change the order to belong to another customer and then the customer can be deleted.

To change which customer an order belongs to follow these steps:
A. From the Command Center screen find the customer you want to delete.

B. Click on the Markup / Edit button.

C. You will see a list of orders for the selected customer. Double left mouse click on an order in the list that you want to change.

D. You will see a message asking if you want to "Change the Customer For This Order?". Click on the Yes button.

E. Select the new customer that this order should be assigned to by finding the customer.

F. Repeat steps B thru E for all the orders belonging to this customer.

G. Now go to step 1 above to delete the customer now that they do not have any orders

Give Customer a Discount

Configured Discounts
You can give customers discounts by setting their customer discount type. This is useful for employees who get discounts, vendors, and others who don't ever pay full price.
(SEE Coupons if you want to give customers an occasional discount).

To setup a customer so that they pay a discounted (or greater) amount than your pricing table follow these steps:

• From the top left of the Command Center screen select the Configure | Adjustments option.
• Decide which type of discount the customer will receive and set the amounts accordingly. For example you might set the Employee Discount setting to -40.00 so that employees get 40% off the normal price. The amount is entered with a Negative sign (the dash key) for a discount, or without the negative sign as an add to the standard pricing.
• Select the departments that the discounts will apply to. Put a check mark in each box that the discount will apply to. For example: 1001 is the first department (usually DryCleaning). Any departments that don't have a check box will not use the discounts defined here. This is useful for those situations where a customer gets a discount for Drycleaning and Laundry but not Alterations. So departments 1001 and 1002 are checked but department 1003 (Alterations) is not.
• Click on the ACCEPT button.

Percentage Discounts

If you want to give a customer a percentage discount (ie; 10%, 20%, etc) you can select an adjustment button during Order Markup or Order Pickup. Follow these steps:

•While the customers Order is showing on screen (either Markup or Pickup)
•   Select department 1012 - Adjustments
•   Click on the 10% Discount button.
•   An item is added to the order that is a discount of 10%.

Configuring Discounts

You can configure any discount information you wish. Consult the Users Guide and the Pricing | Adjustments (Department 1012) areas and enter any discount adjustment you wish. For example, you can add new % discounts by going to a new Item line in the 1012-Adjustments department and entering the information just like the 10% Discount Item that is already there.

REMEMBER! At Pickup, orders are shown one at a time so discounts and coupons are added and calculated on an order by order basis.
\

Make a Payout

If you need to withdraw money from your till to pay for supplies or other things during the day you can follow these steps:

1. From the Command Center, select the SALES button. (no customer information is needed).

2. Select the "Payout *ASK*" button and enter the amount of the payout
If you don't have a "Payout" button defined, consult chapter Order Adjustments for directions for adding a department called - Payout *ASK*.

3. Enter the amount of the payout with a negative sign preceding the amount like -10.00 and press the Enter Key.

4. The payout amount will show on the Order and you can enter a tendered amount that matches the amount of the payout like -10.00

5. Click on the FINISH button.

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Reprint a Ticket / Tags.

To reprint an Order that is currently being worked on in your store...

1. From the Command Center screen find the customer desired by typing in their name, phone, or cust#.

2. Select the Customer in the found customers list by clicking on the customers name so it is highlighted.

3. Click on the Markup / Edit Button to view all of the customers orders.

4. Select the Order that you want to reprint in the list so it is highlighted. It's details will show in the list below the Orders list.

5. Click on the Save Order and Reprint button at the bottom of the screen.

Note on Configuration Settings: The printing of receipts and tags will depend on whether you have printing configured in your Configure | Hardware | Printers section. If not printing is configured, then noting will print. If you have it configured to "Ask Me" if you want to print it will first prompt you to reprint the tickets / tags.

Redo a Garment.

Sometimes it is necessary to REDO a garment that was not done correctly. Follow the steps below to REDO a garment at Pickup:

1. Find the customer, select the Pickup operation, and click on the order if you have not already done so. You should now see all garments for the order in the garments list.

2. Click on the Garment that you want to REDO and then click the "Redo or Pickup Later" button.

3. You will see a confirmation message stating that the selected garment will be put on a new order. Select YES.

4. The selected garment will be put on a new order and a New Order invoice will be printed (if configured to print).

5. The newly created order for the garment that is a REDO will now show in the list along with the original order. Note the new Order#.

6. Finish the Pickup by selecting the Original Order from the Orders list and letting the customer pay for the order (minus the garment that is a REDO).

30   7. After the Pickup transaction is completed with the customer you can go to the

Markup/Edit screen for the customer and find the new Order.

8. While in the Markup/Edit operation for the Order with garment that is a redo, decide how the customer is paying.
a. Not paying for the redo.
1. Go to the Adjustments department and select a REDO adjustment. It will put a corresponding negative amount on the order.-or- you can modify the price of the item being redone.

b. No changes needed.

9. Finish the Order and print a new ticket if you want. The new order with the REDO garment is now ready to be racked and then picked up

Print Monthly Statements

When you put customer amounts due onto a Store Account you will want to print out monthly statements. Monthly Statements print on 8 1/2 x 11 inch letter size paper to a standard windows InkJet or Laser printer. If you don't have an InkJet or Laser printer you will have to purchase one before you can print statements. Follow the procedure as shown below:

1. From the top of the Command Center screen select the Reports | IntelliReports option.

2. Select the A/R (Accounts Receivable) tab from the list of Report Categories.

3. Select one of the Statements Reports.

4. Select a Statement Period date range. Orders within the date range selected will show in detail on the statements. Orders before the date range will show as "Balance Forward". Orders after the date range will not appear on the statements. Normally, you would run statements on the 1st of the month and select a Statement Period for the Last Month.

5. Click on the Run Report button. The statements will show in a PreView window. Click on the "Print Layout" button on the top of the report preview window. Then click on the "Print" button and select the printer from the list of printers attached to your computer and Print the invoices. Invoices are generally designed to fit in standard #10 window envelopes.

Restore my Store Information

The Store Information contains all of the settings for your store including the Store Name, address, hours of operation, printers to use and other configuration settings (but not pricing). Each time you make changes to your store information a backup of those settings are saved in the PTS | ProfitMaker Plus subdirectory. If for some reason you need to restore your settings from a saved file follow these steps:

1. From the top left of the Command Center screen select the File | Restore option.

2. Click on the Find Backup Files button and set the Look In directory to either the E:\ drive or the Program FIles | PTS | ProfitMaker Plus folder to locate your latest configuration save file.
(Saved config files are named either Application.Config.Bak or Application.Config.mm.dd.yyyy where mm.dd.yyyy is the month, day, and year.

3. Click on the latest version of the Application.Config file and then click on the Open button. The Application.Config file selected will show in the Step 1. box.

4. Click on the "Restore Config File" button. You will be warned about overwriting an existing file. Confirm your selection by selecting the Yes button.

5. After the file is restored. Exit ProfitMaker and restart the program.

Void A Ticket.

If you need to void an Order you can use the *VOID* Adjustments button. The Adjustments department comes with a *VOID* *ALL* button predefined. Hopefully, you haven't removed it from your Pricing Configuration. If it has been removed see Chapter Order Adjustments to add it back in.

Voiding All Items on an Order That Is Still being Processed. (ie; Not being Picked Up)

1. From the Command Center screen find the customer whose order is to be voided by typing in their name, phone, or cust#.

2. Select the Customer in the found customers list by clicking on the customers name so it is highlighted.

3. Click on the Markup / Edit button so that all of the selected customers orders show in the Orders List.

4. Click on the Order to be voided. Order Garments will show in the Items list.

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5. Select the More Depts button so that the Adjustments Department is showing.

6. Click on the Adjustments Department button so its items will be shown.

7. Click on the button *VOID* *ALL* (Voids all items on the screen).
(If a *VOID* *ALL* button does not show, it must be added to your adjustments
department thru the Configure | Pricing option)

8. A line item will appear on the Order Details that has an amount that will offset
all of the amounts on the screen.

9. Finish the Order.

Voiding All Items on an Order That Is being Picked Up by the customer.

1. From the Command Center screen find the customer whose order is to be
voided by typing in their name, phone, or cust#.

2. Select the Customer in the found customers list by clicking on the customers
name so it is highlighted.

3. Click on the Pickup / Sales button and all of the selected customers orders
show in the Orders List on the Pickup Screen.

4. Select the Order from the Orders list. Its garments will show in the Items List.
5. Click on the Discounts / Coupons button at the bottom of the screen.

6. Select the *VOID* *ALL* option from the Items button choices.
(If a *VOID* *ALL* button does not show, it must be added to your adjustments
department thru the Configure | Pricing option)

7. A line item will appear that will offset the amount owed with a Void line.

Adjusting the Void Amount
If the void amount shown is not correct click on the Modify Price button and
change the voided amount accordingly.
Sometimes using different tax rates for different departments and adjustments
can cause rounding differences. If so, modify the voided price as needed.
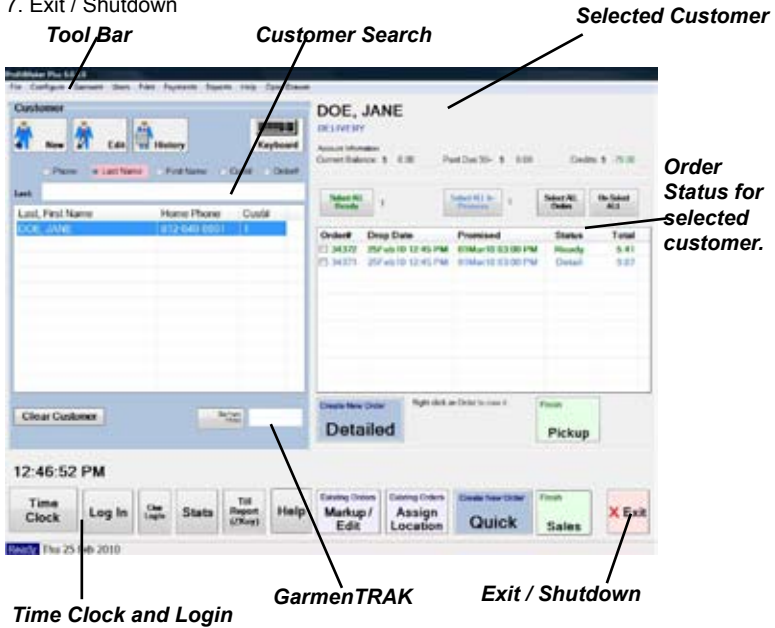
Voiding A Single Line Item
If you need to void just a single item try using the Modify Price button to change
the amount of that single item.

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Command Center

The ProfitMaker Main Screen is where you will start all of the opertions performed in your store. The main sections of the screen are:
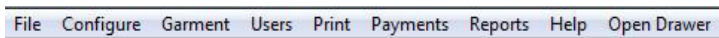1. ToolBar
2. Customer Search Methods
3. Order Buttons
4. GarmenTRAK
5. Time Clock / Login
6. User Messages
7. Exit / Shutdown

Tool Bar   *Customer Search*   *Selected Customer*

Order Status for selected customer.

Time Clock and Login   *GarmenTRAK*   *Exit / Shutdown*

This chapter will explain the general operation of the options on the Command Center or Main Screen.

ToolBar
The Tool bar contains several function and operations that can be performed in ProfitMaker.

File   Configure   Garment   Users   Print   Payments   Reports   Help   Open Drawer

File Commands
The File Commands option on the tool bar lets you perform functions that usually deal with the data in your store. Each of these commands is explained in more detail in different sections in this users guide.

ProfitPlus

Open

Export

Archive
Backup
Restore

Sales Edit
Batch Order Entry
Make Payments
Batch Pickup
Batch Email Drop O

Open Cash Drawer
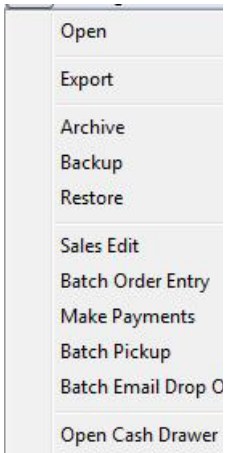
Configure Commands
Configure commands allow you to set the way ProfitMaker works in your store.

Configure Garment Us

Store Operations
Hardware
Pricing
Customers
Adjustments
Security
Communications
Ticket/Tag Layout
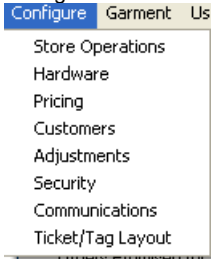
Garment Commands
Use Garment Commands option to seach for garments and perform inventories.

Garment Users

Search
Inventory
GarmenTR
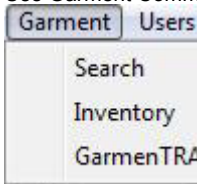
Users Commands
Users commands lets you add and/or edit users and employees in your store.

Users Print Payme

Clock In
Clock Out
Add / Edit Users
Message Send
Message Manag
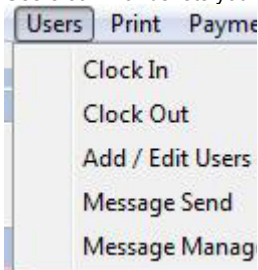
Orders
The Orders option lets you view your orders journal and reprint orders.

Reports
Use the Reports toolbar option to run reports
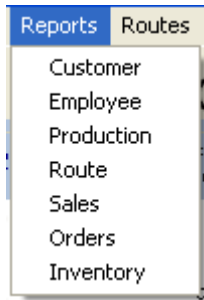
Routes
Use the Routes options to manage your routes and delivery options
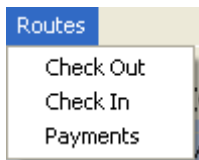
Payments
Use the Payments options to log payments made from customer for amounts they owe you.
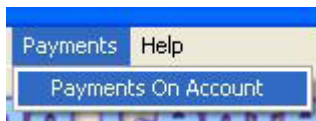
Store Status Reports
The Store Stats shows the critical counts of orders in your store. Also, your store name, address, phone are shown. The store license number is also shown at the top of the store information.

The status counts let you quickly see the critical numbers or counts of certain items in your store.
The store statuses are as follows

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1. Overdue for Pickup. Number of orders that are over 30 days old.

2. Orders Promised for Today. Orders with romise dates of today.

3. Todays Voids and Exceptions. "SOLD" and have *EXCEPT* or *VOID*

4. Tomorrows Workload. These are orders that need processing tomorrow.

5. Orders Not Detailed. Quick Tickets that need to be detailed

6. Orders Not Assembled. No rack or location information.

7. Ready to Pickup. All orders that are ready to be picked up by the customer.

REFRESH: The stats are automatically updated once per minute but you can press the "Refresh" button at anytime to get up-to-date counts.

Store Status Counts and Clock Status

Click on the Stats button at the bottom of the Command Center Main Screen to see your store stats. It has 2 parts - Clock Stats and Order Counts. Updated automatically once per minute. The clock status grid shows all Emloyee clock in's / out's for the current day and total hours.

Order Counts

Shows the count of Orders Dropped, Assembled, and Picked Up for each hour of the day. Click on the "Refresh button to re-count the orders at anytime. t

Status Report

This screen shows a quick status report for the selected date.

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Batch Email Drop Offs

Using the File | Back Email Drop Offs operation you can have ProfitMaker EMail customers with the details of the orders they have dropped off.

If the customers EMail address has been saved then once a day or whenever convienient you can build a list of customers with dropped of orders. After building the list click on the "Send" button and a detailed EMail will be sent to the customer. You must have high speed internet in your store and an EMail account setup and configured in the Configure | Communications area of ProfitMaker.

ZKey Report
The ZKey report is used to tally up a users till after a shift has ended.
Pressing the ZKey Report button will bring up the till counter screen as shown below.

Balancing Your Till
The ZKey report is used to help you balance your till. Start by entering the Employee Access Code for the user/employee/clerk that is balancing their till. If you want a total for everything just leave this blank and ALL transactions will be counted.

Now select start and end times of your shift. Any orders that were SOLD during that time frame and while you were logged in will be used to calculate how much should be in your till. Enter the count of each of the denominations shown in the list. For example, if you have 12 pennies in your till you would enter the number 12 in the "Pennies" field. If you have 13 nickels in your till you would enter 13 in the nickels field (not 65 which is the "value" of 13 nickels ie; 13 * .05). Continue entering the counts of each denomination you have in your till. Leave fields blank if you don't have any coins or bills of that type. Add up the face value of all of the checks you have collected and do the same with the credit cards. This is the "value" of all checks and credit cards NOT the number of checks you have.

The amount of checks and credit cards you entered during the day is shown automatically and you can click on the "Cash Register" and other register buttons to print a detailed list of those types of payments.

Click on the Accept button and the computer will calculate and print out how much money you said was in the till, compared with how much money you should have collected during your shift. It will show the amount over or short and will have a place for you to sign.

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Order Buttons

The Order Buttons are what you will select to add new orders, edit existing orders, markup orders, assemble and sell orders. Each of the order buttons is explained below
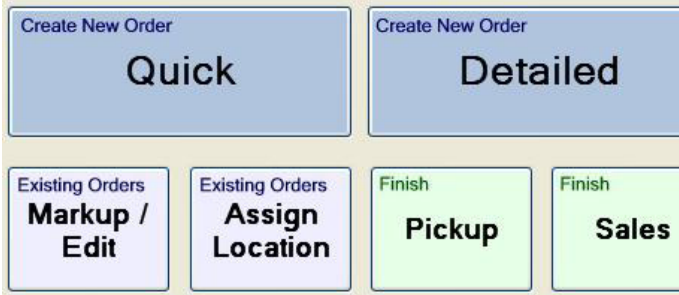
Quck

This will allow you to add a new "Quick Ticket". No detail about items is entered.

Detailed

Adds a new order and allows you to enter detailed items and descriptions onto the order.

Markup/Edit

Markup and/or edit orders and assign rack numbers and locations.

Assign Locations

Lets the computer know an order is done and ready for pickup and lets you assign location information to orders.

Pickup

Give orders to customers and accept payment from them.

Sales

Allows you to sell things like "Lint Rollers" without finding a customer.
Each of these buttons and their operation is explained in detail in the appropriate sections of this users guide/

Customer Lookup

The Command Center has a customer lookup area so that you can find customers very quickly by their phone number, last name, customer number, or Order number. Also, you can add new customers, edit customer information, and see a customers history by selecting the button for that operation. An on screen keyboard is available if you want to use a touch screen to enter the information you are looking up.

Customer Phone Number Lookup

Enter all or part of a customers phone number. In the following example shown below, the last four digits (4567) of the customers phone number is entered. Any match for that number is shown in the list for selection. Phone numbers can be entered in several ways such as:

333:	Shows all customers whose phone number starts with 333
4567	Shows all customers whose phone number ends with 4567
3334567:	Shows all matches for the 7 digit phone number entered.
8013334567:	Matchs the customers phone number including area code

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Customer Name Lookup
You can lookup customers by their last or first name. Enter as much or as little of the customers name as you want to seach on. In our example below, the customer name "DOE" was entered and two customes were found that had last names of "DOE".

Customer First Name Search
Click on the "First Name" button to find customers by their first name. Then you can find customers by typing "Jane" and all customers with a first name of Jane will show in the list for selection.

NOTE: If you are searching on a name like "SMITH" or "JONES" or any other very common last name, it is wise to enter the first few letters of their first name preceded by a comma so that the search is faster and the list is smaller. For ex-ample; SMITH, JA would only list the Smiths whose first name started with "JA".

Customer Number Lookup
You can find customers by their customer number. The customer number is assigned by the computer as they are added to your system. When you enter a customer number in the customer lookup field the customer is shown in the list.

Customer Order Number Lookup
Sometimes, customers bring in their Invoice that has the Order# printed on top. You can enter the order number inthe "Order#" field and the customer that be-longs to that order is shown in the list

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After a customer is found and selected in the customer list, any order processing that is done or started from the Command Center uses the selected customer. A customer is selected when their name is highlighed in the list as shown below

Customer Operations
You can perform several operations on customers from the Command Center screen. You can add new customers, edit existing customers and show customer history.

Also, if you are using a touch screen, you can bring up an on screen keyboard for data entry.

Add New Customer
Press the "New" button to add a new customer to your customer database. The Config | Customer section from the Command Center tool bar lets you determine which fields show on screen when you add new customers. Clicking on the "Show All Groups" button will show all of the fields that can be entered for a customer. Press the accept button when you are finished enter a new customer

Edit Customer
When a customer is selected in the list, press the "Edit" button to change the customer information. The screen is the same for as that for adding a new customer but the fields contain the information for the customer being edited. Change the fields as needed and click on the Accept button to save your changes.

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Clear Customer

If you want to clear the customers currently showing in the list click/touch the "Clear Customer" button. It does not erase customers, if simply clears the list.
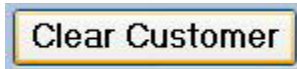
Customer History

Press the "History" button to view all orders in your system for the highlighted customer. Each order has a status and each status type displays in a different color for easy identification. You can filter out orders by selecting the type of order status you want to view. Check the button next to the order status selectors at the top of the customer history screen. The order statuses are explained below

Show In Process Orders

These are orders that have a status of "New", "Detailed" or "Edit". They are the orders that are being worked on in your store and are not ready for customer pickup yet.

Show Orders Ready for Pickup

Orders that have a status of "Assembled" are shown with this option. Orders that have a rack number or location description are considered assembled.

Show Orders Picked Up

Orders that the customer has already picked up and paid for are shown with this option. This is handy when a wife may haved picked up an order and the husband comes in to pick it up also. You can quickly see orders that have been picked up.

View Selected Order

Allows you to view the order that is currently highlighted, on your computer screen.

Print Selected Order

Allows you to print the order that is currently highlighted, to your detailed ticket printer.

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Time Clock / Login

The Profitmaker Time Clock is a very convenient way to have your employees clock in and out during their work shifts. To clock in, simply click on the Time Clock button, enter your access code and select the "IN" button on the time clock screen. Likewise, clock out with the same procedure but select the "OUT" button. When you clock in or out your emplyee name and access level are shown on screen as well as your clock status as shown below

User Messages

User messages allow you to communicate with other users of your ProfitMaker system. To add, edit or delete messages click on the "User Messages" button. All messages currently in your system are shown in the list. Consult the Messaging section of this Users Guide for more information
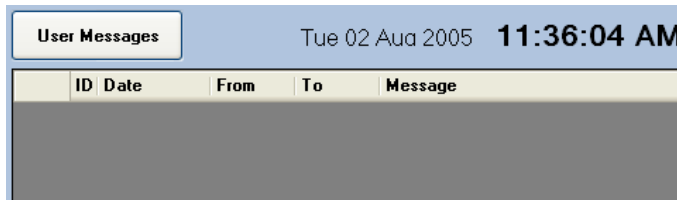
Exit / Shutdown

When it is time to close down your store at night you press the Exit button on the bottom right part of the screen. The exit button operation then shows the Shut-Down selection screen as explained next.
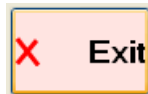
Shutdown

It is very important that you shutdown your system in a normal fasion each time you exit ProfitMaker and/or Windows. Failing to do so could result in lost data.

The shut down screen has three options

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Exit To Windows
This option simply takes you out to the Windows Desktop screen.

Turn Off Power
This option turns off the power to your computer after it shuts down all active programs.

Backup Data
This option starts the back up program which saves a copy of your critcal store data.

Cancel
This option returns you to the ProfitMaker Command Center.

IMPORTANT
It is very important that you backup your ProfitMaker data at least once per day. Also, backup your data to a separate place every day so that you have several restore options available to you should you lose some or all of your data.

Backing up your data is like taking a snapshot of your customes, orders, pricing, and other important data as it exists when the backup is done. Doing a backup of data at 1 PM for example, does not contain data that was added after 1 PM. Likewise, doing a backup on Aug 1st can only restore data that existed as of Aug 1st so if you need to restore data from a backup done on Aug 1st and it is now Aug 31st, all orders entered from Aug 2nd to Aug 31st will NOT be on the back-up and there-fore will no longer exist once a backup from Aug 1st is restored. So, it is very important to backup at least every day.

Disaster Planning
Things can happen that can destroy or partially damage any computer system. Power failures, break ins, equipment failure, and other things that can occur need to be prepared for. There are several things to consider:

1. Have a procedure in place for doing orders in a manual way should your computer break.
2. Store a copy of your backup data off site incase there is a fire or a break-in at your store.
3. Run reports showing Rack locations so you can manually find clothes in case of power outage.
4. Purchase spares of printers, cash drawers, etc. if doing without them during repairs is not acceptable.

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Configuration

The configuration section of ProfitMaker lets you make settings that will determine how the program works in your store. ProfitMaker ships with a default configuration already defined for you. You will need to go thru each of the sections in configuration to make sure they are set to your liking. Configuration is started from the Command Center screen as shown below.
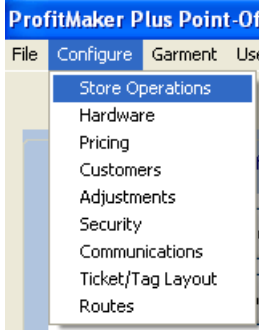

The different sections of configuration are

Store Operations: Enter information such as store name, hours of operation, tax rates, etc.

Hardware: Enter printer, cash drawer and other information about your system.

Pricing: Enter the prices for each of the garment types.

Customers: Define default fields and other information about customers.

Adjustments: Discounts and other adjustments can be defined here.

Security: Lock down your system so you know who is doing what.

Communications: Paths and URL information for EMail, and data upload and download.

Ticket/Tag Layout: Define what will show on tags and tickets.

Store Operations

The store operations section is where you enter information about your store.

ProfitPlus
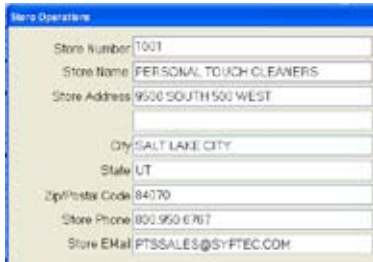
Store Name Fields

The store name fields are where you enter the name, address, and phone for your store.

IMPORTANT: You need a registration number that matches your store information The registration number is usually on your ProfitMaker CD, users guide, computer, or box.

Registration Number

As mentioned above, the registration number is generated from your store information. Do not change your registration number, or your store name fields as this will put the program into DEMO mode if a valid registration number is not entered that matches the store information.

Registration#

122-111-145-255-1-859-258

IMPORTANT!
The Registration # matches your store name, address, and phone.
Changing any of the Store information requires a new registration number.

Call 1.800.950.6767 during our business hours to obtain a new registration number.

Settings

There are several settings and checkboxes that can be used to make ProfitMaker operate as you desire. Set them as follows:

Default Tax Rate 7.00 percent
Canadian PST Rate 0.00 percent
Value Added (Commercial) 0.00 percent

☐ Allow change to be given on checks
☑ Show warning on excessive change over 10.00
☐ Customers never pay on drop off.
☐ Show Promo's at drop off.
☑ Track Check Numbers
☐ Each item is on a new line
☐ Use Customer Initial for Rack Location

Tax Rates

Enter the tax rates for your store. The default tax rate is normally used for most items. Each item in your Pricing Table has a field for a "Tax Rate". The tax rates are as follows: 0 - No tax.   1 - Default tax rate.

Set the Default tax rate to the percentage of tax that you charge in your store. For example, enter 6.60 if you charge a 6.6% sales tax. You can disable tax charges per department as explained in the Pricing section of this manual.

NOTE: Environmental taxes are set in the "Adjustments" configuration area.

ProfitPlus

Allow change on checks
Check this box if you allow change to be given when someone writes you a check. For example, if the total amount due is $19.95 and the customer writes you a check for $25.00 then you would owe them $5.05 in change. Check this box if that is ok. If not checked then there will be a warning message if the amount tendered is greater than the amount due when an amount is entered in the check field.

Show warning on excessive change
If the change given to a customer is over the amount in the numeric box, a warning message is shown. If not checked, then no warning message is given regardless of the amount of change due.

Customers never pay at drop off
Check this box if you do not want to see the pay at drop option on the New Order screen.

Show Promotions at drop off
Check this box if you want promotions to be shown at the time new orders are entered. Normally, the promotions are only shown at pickup time and this box is unchecked.

Each Item is on a New Line
When you enter Items on a new order you can have all like items (ie; Shirt) show on the same line, or each item can be on its own line. Below you can see the difference between the 2 settings.

This shows each item on its own line.
Here like items are combined together.

If you check the "Each Item is on a New Line" box, you will get invoices filled in as on the left example. Having items on their own line makes it easier to add specific upcharges, colors, and patterns to each garment.

Use Customer Initial for Rack Location
Assigning Rack/Location information to orders, if this box is checked the customers last initial will automatically be used as the Rack/Location value. Check this box if you put finished garment orders on your slick rails according to first initial of last name. If checked, when you are assigning locations to orders you will simply scan every order after it is assembled without having to manually enter a location. (Note: using last initials for location has inherent employee theft risks)

Store Hours Settings
You can set your store hours of operation so that the program knows how to calculate such things as the expected ready date and time. Set the field values as follows:

Standard Processing Days: This is the standard number of days it takes your store to process garments. This is used along with the Pickup Time setting when

Quick Tickets are added to calculate the default Ready On Date and time.

	Open	Day Of Week	Cut Off Time	Days to add after cutoff	PickupTime
▶	☑	Monday	15 pm ⌄	1	16 pm ⌄
	☑	Tuesday	15 pm ⌄	1	16 pm ⌄
	☑	Wednesday	15 pm ⌄	1	16 pm ⌄
	☑	Thursday	15 pm ⌄	1	16 pm ⌄
	☑	Friday	15 pm ⌄	1	16 pm ⌄
	☑	Saturday	15 pm ⌄	1	16 pm ⌄
	☐	Sunday	15 pm ⌄	1	16 pm ⌄

Store Hours of Operation.   Standard Number of Processing Days: 3

Open: Check this box if your store is open for each day of the week.

Cut Off Time: This is the time of day that determines when orders need another processing day to be finished.

Days to add after cutoff: If customers drop off orders after this time, the number of days in the "Days to add after cut off" are added to the calculated processing time to determine a Ready Date.

Pickup Time: This is the normal time of day that orders should be ready to be picked up

Allow Garment Days to Override Processing Days
Check this box if you want each garments processing days as defined in Pricing to override the calculated processing days that is set as explained above.

Hardware Configurations

Printers

Here is where you will define which printers to use, how they will print and how many copies will print.

Select from printers installed on your system.

How many copies.

Always Print, Do Not Print or Ask Me to print.

Notice that each printer type can have its own settings so you can have Quick Tickets always print 2 copies and Pickup Tickets ask you before it prints 1 copy.

Okidata Tag Printer Setup

You can use the Okidata 320 and 390 style printers to print garment wet tags. These wet tags come in continuous pin fed stock like the LPCC tag as shown below

To configure ProfitMaker to use the LPCC or CTS-1 style tags on an Okidata 320 or 390 printer follow these steps:

1. Set the Tag style to "Cont4x3" (continuous tags 4" wide by 3 lines). in the Config | Ticket/Tag Layout

2. As with the other type of tag printers, set the Config | Hardware | Tag Printer to use a "Generic Text Only" type printer. (Must be installed using Windows "Add New Printer" operation if not already installed.

Cash Drawer Setup

If you have a cash drawer connected to your computer this is where you set its connections. Most often you will have a cash drawer connected to the Invoice/ Ticket printer (not the tag printer).

(The Star TSP143 printers use the USB0001 setting usually)

LPT1 type printers are those that have the bigger 25 pin connection cables between the computer and the printer.

USB type printers use a smaller (no pins) standard USB connection between the computer and the printer. Make sure to select USB0001 (or whatever USB port your INVOICE (Thermal) printer is connected to).

Serial Cash Drawers: If you have a serial cash drawer (connected to a serial port) you will normally set the baud rate to 600 Baud and the text field to a character string like "AAAAAAAAAAAAAAA" used to open the cash drawer. The Ascii setting can be used if your cash drawer needs a specific control character sequence to open.

Consult your cash drawer manufacturer for details for your cash drawer.

Credit Card Processing

Make sure the "Built-In" option is selected to process credit cards within Profit-Maker. This is the easiest and least expensive way to process credit cards.
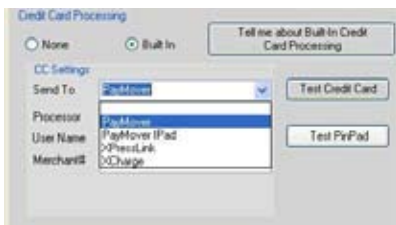
Send TO:

Paymover: Uses an encrypted credit card swiper to process credit cards.

Paymover IPad: Uses an Magtek IPad to process debit cards.

Merchant #: This is your Merchant# assigned to you by Payment Processing Inc.

Other Settings:

The other settings are only used by specialized processors are are only set when applicable which is very rarely.

Pricing Configuration

The Pricing configuration operation lets you set the prices you charge in your store. Pricing is an important subject and has its very own chapter. Consult the pricing chapter for information about setting the pricing in your store.
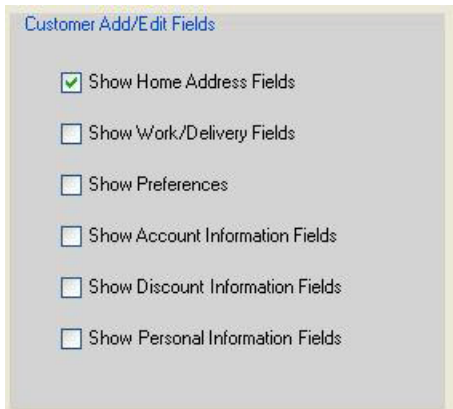
Customer Configuration

Use the Customer settings to determine which customer fields appear when you add and edit customers and also to determine the starting field for customer lookups.

We usually find customers by their...

- ◉ Last Name
- ○ Home Phone
- ○ ID#
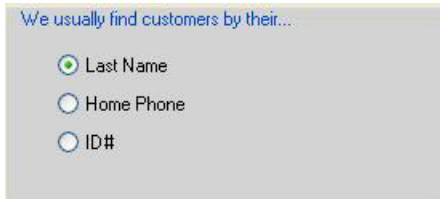
The Customer Find preference determines which field to start on when you are looking up a customer. Some stores like to find a customer by Last Name, other like to use the customers home phone number. Set the check by your desired preference.

You can decide which customer fields are important to you to gather for each new customer you add to your system. If you only care about the customers name and phone number, uncheck all of the fields shown below. Or you can check the box for each field group you want to appear when adding or editing customer information.

Customer Add/Edit Fields

- ☑ Show Home Address Fields
- ☐ Show Work/Delivery Fields
- ☐ Show Preferences
- ☐ Show Account Information Fields
- ☐ Show Discount Information Fields
- ☐ Show Personal Information Fields

On the Customer Add/Edit screen there is a button named "Show All Groups" that can be pressed and you will see all of the possible customer fields.

Adjustments Configuration

The Adjustments settings allow you to define such things as discounts and environmental taxes.

Figure A. Configuration | Adjustments.

Figure B. Customer setting for an employee discount in the Customer Add/Edit fields.

Set the discount (or addition) amount per discount type. Discounts percentages are entered with a NEGATIVE amount (ie; -30.00 for 30%).

To set an employee discount follow these steps:

1. Using the Add customer operation from the Command Center, add the employee as a customer if not done so already.

2. In the Customer Add/Edit screen click on the "Show All Groups" button to show all customer fields.

3. In the Discounts area as shown in figure B above, set the Discount Type to "Employee" and acept the changes.

4. In the Configure | Adjustments area set the employee discount amount and check each deparment from 1001 to 1011 that the employee receives a discount for as shown in figure A above. Only departments that are checked are giving discounts.

Remember to set discount amounts to a negative amount for example: -30.00 is a 30% discount. Amounts entered as positive numbers will ADD to a customers amount not SUBTRACT.

Environmental Tax

You can set an environmental tax to be charged on a per department basis as shown below.

The example above shows a 3% environmental tax that will be charged on department 1001 (Dryclean) only. Check the box for each department you want an environmental tax charged for.

IMPORTANT: Check with your local, state, and national regulations to determine the legal issues of charging an environmental tax. It is the end-users responsibility to make sure you are collecting the correct amount of taxes as determined by your municipality or local government.

Security Configuration

Security settings allow you to "lock down" your system so that others can not make changes to such things as configuration, pricing, viewing reports, etc. Security is a detailed subject and has its own chapter. Consult the Security chapter for more information on security in your store.

Communications Configuration

The Communications settings determine how your ProfitMaker system communicates with the outside world.
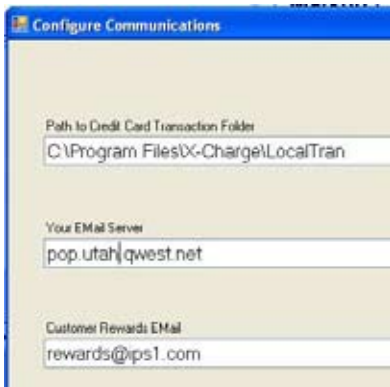
t
Path to Credit Card Transaction Folder

This is a folder on your computer where credit card transactions are stored so that the credit card processor can find them. The normal settings are:

Single Station Systems: C:\Program Files\X-Charge\LocalTran

Server / Workstations:
Server: C:\Documents and Settings\All Users\Documents\LocalTran
WorkStations: \\Server\SharedDocs\LocalTran

64 bit Windows: Change the above settings from
"Program Files" to Program Files (x86)

On Server / Workstation systems the above settings should resolve to the same physical location on the Servers LocalTran folder.

Your EMail Server

This is your EMail Servers setting. You will obtain this information from your Email service provider. This setting is used for such things as when EMail notifications are sent to customer about orders that are ready to be picked up.

Customer Rewards EMail

This setting is used to send Customer Rewards information to the Cleaner Promotions staff to give customers their rewards points. This setting will be supplied by PTS when you get set up with Cleaner Promotions to start a rewards program. Contact Personal Touch Systems for details.

Ticket / Tag Configuration

Use the Ticket and Tag configuration settings to determine what will appear on your printed Tickets(Invoices) and Tags (Wet Tags).

New Orders / Edit Orders Fields   **Pickup Ticket Fields**

If the box is checked then that field will appear on the printed Invoice/Receipt.

Tag Printer Settings

The Tag printer settings are used to let ProfitMaker know which type of Tag printer you have connected to your computer. The screen shown below are for a system as sent from our offices.

Note: As of Profitmaker v6 the Star 742 is the preferred Tag Printer we recommend.

On some printers (SRP-270) you will need to set how many tear off lines are needed so you can grab the tag after it is printed. This setting will advance the

paper by the number of lines so that it is not still down inside the printer. This will result in some wasted paper but is unavoidable due to the physical characteristics of the printer.

Tag Number is Same As Ticket Number
If this box is checked, and tags are configured to be printed in the Hardware section, then tags are automatically printed with Tag Numbers that match the Ticket (Invoice) number.

If not checked then you will be presented with a Tag Entry screen that will let you enter the Tag Number, Color, and Lot numbers for each order. This information will be printed on the Ticket (Invoice) if the "TagInfo" box is checked on the Ticket Layout.

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Pricing

ProfitMaker pricing is powerful and flexible. You can quickly enter prices for Departments, Items, and Upcharges. Each Department can have multiple Items, and each Item can have multiple Upcharges assigned to it. ProfitMaker pricing is grouped into 3 main sections:

Departments: These are the main processing areas of your store like Dryclean, and Laundry.
Items: Departments can have Items assigned to it like Shirt, Pants, Blouse, etc.
Upcharges: Each Item can have its own set of upcharges like Silk, Sequined, etc.

Pricing Menu

The Pricing operation is started from the Command Center by selecting the Configure | Pricing option as shown in figure 1 below.
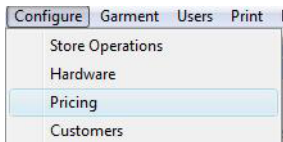
Departments

There are 12 possible departments numbered 1001 thru 1012. Department 1012 is reserved for adjustments, coupons, voids, discounts, etc.

Department#   Dept Name   Invoice Group   Tag Style

Invoice Group: All groups are printed on the same Invoice.
Tag Style: Determines the type and size of the tag printed for garments in that department.

Items, Upcharges

As you select Departments by clicking on a department row, or using the enter key to go from row to row in the departments table, the corresponding Items for the selected department will show in the Items table. Likewise, as Items are selected, the corresponding Upcharges for the selected Item are shown in the table. Next, we will explain each of the three main ares.

Departments

You can have up to 12 departments. Dept 1012 area is reserved for pricing adjustments as explained later in this chapter.

Department Fields

The fields shown in the departments table are as follows:

DeptID.

This is the ID number assigned to the department. There are 12 departments numbered from 1001 to 1012. You can not change these ID numbers. You can change the description of the DeptID and its pricing, etc.

Department

This is the text that shows on the department button for selection when entering orders.

Description

This is a optional description of the department for your use as desired.

Group

You can group your departments by assigning them a group number from 1 to 12. The groups can then be printed, and processed together.

Tag Style

You can select the style of tag that will be printed for the department currently selected. Tag styles allow different types of information to show on the tags. Figure 4 shows the Tag Style selection drop down window.
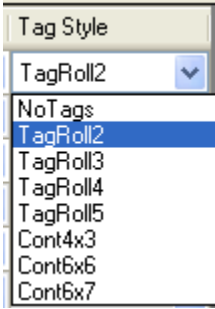
The tag styles are as follows:

TagRoll 2 :Tag Roll stock (3" wide) by 2 lines.

       EX: 1234556 FRI 123456   DRY Shirt

TagRoll 3: "   "   "   " 3 lines: DOE, J 234-3454 S:L F:H

TagRoll 4: "   "   "   " 4 lines.   Promised: 10/17/05 4PM

TagRoll 5: "   "   "   " 5 lines.   "Customer Notes"

Cont 4x3: Continuous Tags(4" wide) by 3 lines. LPCC tag style

Cont 6x6:   "   "   "   " (6" wide) by 6 lines.

Cont 6x7:   "   "   "   "   (6" wide)   by 7 lines.

Items

Items are the Shirts, Pants, Blouses that are contained within a department. It is in this table that you will enter prices, number of process days, and item quanties along with the pictures, tax rates and other important information that will determine how orders are priced

Figure 5. Items list.

Item Fields

The Items table fields are explained as follows:

ItemID

This is an identifier for this Item. Items are numbered from 20000001 to 29999999 (you can only use 90 items per department however). The ItemID can not be changed, but the text associated with the Item can.

IMPORTANT NOTE: It is important to remember that if you change an Items text from Shirt to Pants, the data collected is by ItemID and you will have multiple sales to the same ItemID but with different meanings. It is usually recommended

that you don't change the overall meaning of an item once sales have been made to it.

Button Text
This is the text that will appear on the Items button for selection when entering or editing orders.

Ticket Text
Optional if you want different text to appear on the Ticket/Invoice when it is printed, you can enter it here. If left blank, the Button Text will be used.

Tag Text
If you want different text to appear on the Tag when it is printed, you can enter it here.

Price
This is the amount that will be charged to your customers when this Item is selected.

Days
This is the number of days it normally takes to process this Item. This is used to calculated the estimated due date and processing times. Entering 1 day would signify that the item would be ready for pickup tomorrow.

Qty
This is the number of pieces this Item is comprised of and determines the number of tags that are printed and the number of pieces that are processed by your store. A shirt for example would be a Qty of "1" and a 2-Piece Suit would normally be a quantity of "2".

Cost
This is the optional amount it costs you to process this garment.

Tax
If sales tax should be charged enter the tax rate to use. Normally, tax rate 1 is the standard tax rate used. Tax rates are defined in the Store Configuration section of the Configure area. Setting the tax rate to 0 means that no tax will be calculated for this item

Pictures
To make Item selection easier and more intuitive, you can assign a picture to each item in your table.
If desired, there are blank pictures for each department if you don't want a picture.

Qty	Cost	Tax	Picture	Text File
1	$0.00	1		
1	$0.00	1		

Figure 7. The picture column of the Items table.

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To assign pictures to Items in the table simply click on the picture cell for the desired Item and the Picture Gallery screen will appear. The Picture Gallery will show you pictures you can assign to Items. Simply select the group of pictures that is most likely to contain your desired picture from the tab selections and then click on the picture you want to assign to the item selected in the table.

Figure 8. The Picture Gallery contains hundreds of pictures you can assign to an Item simply by clicking on its picture.

Text File
The Text File column lets you assign a text file to be printed when this Item is put on an order. A text file is used to print disclaimers, reminders, and other special processing for particluar items. Figure 9 shows a Leather Item selected from the Items list and a "LeatherRelease.txt" file selected as the file to be printed when- ever this item is put on an oder.

Figure 9. Special Text File printed when this item is put on an order.

Sale Start/End Price
Often times you may have Sales for particular items (garments) in your store. You can set the Sale start date, the end date, and the Sale price to be used. Then, when a garment is selected for an order and it falls within the Sale start and end date range, it will use the sale price instead of the normal price. Using this mehod you can enter sales way in advance of the actual sale date and the sale pricing will start and stop automatically. Figure 10 shows the entry of the sale dates and price after clicking on any of the 3 sale fields.

Figure 10. Sale date and pricing enry.

Figure 11. Sale dates and price selected entered into Items table.

Reward Points

ProfitMaker has the exclusive Customer Rewards program built in for your use. The reward points field lets you enter the amount the customer receives in reward points for each item. If the Reward Points are left blank then the Price is used as the amount of reward points awrded.

Figure 12. Reward points to be awarded to the customer when this item is put on an order.

Upcharges

Like Items that assigned to Departments, Upcharges are assigned to each Item. Items can have up to 18 upcharges per item. Upcharges are used to make extra income for your store by alerting the user to special processing to be added to garments as they are etered.

Figure 13. Upcharge fields.

Upcharge Fields

UpchargeID
This is an identifier for this Upcharge. Upcharges are numbered from 40000001 to 49999999 (you can only use 18 Upcharges per Item however). The UpchargeID cannot be changed, but the text associated with the Upcharge can.

IMPORTANT NOTE: It is important to remember that if you change an Upcharges text from Silk to White (for example), the data collected is by UpchargeID and you will have multiple sales to the same UpchargeID but with different meanings. It is usually recommended that you don't change the overall meaning of an Upcharge once sales have been made to it.

Button Text
This is the text that will appear on the Upcharge button for selection when entering or editing orders.

Ticket Text
Optional if you want different text to appear on the Ticket/Invoice when it is printed, you can enter it here. If left blank, the Button Text will be used.

Tag Text
Optional if you want different text to appear on the Tag when it is printed, you can enter it here. If left blank, the Button Text will be used.

Price
This is the amount that will be charged to your customers when this Upcharge is selected.

Days
This is the number of days it normally takes to process this Item. This is used to calculated the estimated due date and processing times. This days amount is used to calculate the order due date.

Qty
This is the number of pieces this Upcharge is comprised of and determines the number of tags that are printed and the number of pieces that are processed by your store. Most often, Upcharges have a Qty of zero because they are not con-sidered a garment. However, If the Upcharge is for something like a "Belt" it would be appropriate to enter a Qty of 1 because it is a separate piece.

Cost
This is the optional amount it costs you to process this garment and is used to help you determine your cost of doing business.

Tax
If sales tax should be charged when this Upcharge is added to an Item, enter the tax rate to use. Normally, tax rate 1 is the standard tax rate used. Tax rates are defined in the Store Configuration section of the Configure area. Setting the tax rate to 0 means that no tax will be calculated for this item Figure 6. Shows the tax rate drop down list used for selection of the tax rate.

Walkthrough : Changing the Default Pricing

Now that you understand all of the fields for the Departments, Items, and Upcharg-es lets walk you through setting the prices for your store. ProfitMaker ships with a default set of Departments, Items, and Upcharges that are appropriate for most stores. All you need to do is change the text, pricing, Qty, and days for each item and you are ready to start taking orders. Lets get started...

1. From the Command Center, choose Configure | Pricing. You will see the Pricing screen.

2. Click on the DRY CLEAN departmet row.

3. Notice that the Items for the DRY CLEAN department shows in the Items table.

4. Click on the first Item in the list - Shirt- in the Price olumn.

5. Enter the amount (price) that your store charges for Shirts and press the EN-TER key.

6. Repeat step 4 for each garment.

7. Next, position on the "Days" column and enter the number of days this item takes to process for your store. Press the ENTER key after each days entry to move down to the next row.

8. Change the Qty for each garment if necessary. This is the number of "Pieces" this item is made up of for tracking in your store.

9. Now, all of the DRY CLEAN items are changed. Repeat step 2 for Laundry, then Alter-Ations, etc.

Adjust Pricing
Often, you will need to raise or lower your prices. The Adjust pricing feature lets you change all Items showing in the table at the same time, by a set or percent-age amount. To change your pricing follow these steps:

1. Select the Department you want to change prices for (ie DRY CLEAN).

2. When the Items to be changed are showing in the table enter the amount of the pricing change you desire and select the 'Percent" or "Fixed" option button as shown in figre 14.

Figure 14. Shows 10.00 percent (10%) price adjustment settings.

3. Click on the "Start Adjust Prices" button.

4. After confirming that you want to adjust the prices. All Items in the current table will have their price adjusted according to what you slected.
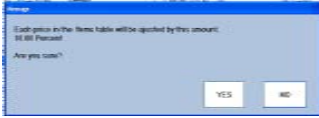
ItemID	Button Text	Ticket Text	Tag Text	Price
20000001	Shirt	Shirt		$1.99
20000002	Blouse	Blouse		$1.99
20000003	Dress	Dress		$9.00
20000004	Skirt	Skirt		$4.25

Figure 15. Before executing a 10% price icrease.

ItemID	Button Text	Ticket Text	Tag Text	Price
20000001	Shirt	Shirt		$2.19
20000002	Blouse	Blouse		$2.19
20000003	Dress	Dress		$9.90
20000004	Skirt	Skirt		$4.68

Figure 16. After the prices have been adjusted by 10%

REMEMBER. To lower prices, the Price Adjustment amount shown in Figure 14 would be set to a negative amount (ie; -10.00).

Discounts

The Discounts settings allow you to assign discounts based on customer type. Figure 17 shows the discount fields.

Description	Percent Discount
PrePay Discount	-2.00
Discount Level 1	-5.00
Discount Level 2	-10.00
Employee	-15.00
Wholesale	-25.00
Owner	-100.00

NOTE. Make percent discounts NEGATIVE to subtract from standard pricing.

Figure 17. Discount settings for each of the discount types that can be assigned to customers.

Discounts are assigned based on the settings of the discount setting selected when customers are added or edited. (See the Customers section of this guide for setting customer discounts). Shown below is the customer discounts settings for the Owner of the store who gets a 100% dicount.
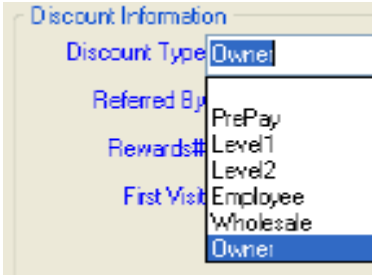

Figure 18. Customer disount setting drop down list with an Owner type selected.

When the Discount Type is set to blank, standard (no discount) pricing is used.

Pleats

We bring special attention to "Pleats" because they are a good example of items that need special consideration when doing your pricing. Lets say you are entering your pricing for Drapes and you charge by the pleat. You would enter an item called "Drapes" with a base rate (which might even be $0.00) and then add an upcharge called "Per Pleat" at say $2.00. Then when a customer comes in to have drapes drycleaned you would follow these steps for drapes with 20 pleats.:

1. Press the Dry Clean department button. All the dryclean items appear.
2. Press the Drapes Item button.   The upcharges for drapes appear.
3. Press the "20" quantity buttons (2 then 0).   A quantity of 20 shows.
4. Press the "Per Pleas" upcharge button.

At this point you have 1 drape to be drycleaned that has 20 pleats as shon below.

Figure 19. Shows 1 drape item with a 20 pleat upcharge. The base rate on the drapes in this example is $1.00 and each pleat is $2.00 for a total charge of $41.00.

Copy Departments

To make entry of pricing easier you can copy one departments pricing to another department. Follow these steps to copy one department to another. In the steps below we will copy the Dry Clean department to the Clean Only department and adjust the pricing down by 10%.

1. Enter the pricing for the DryClean department as explained earlier in this chapter.

2. Click on the "Copy Department" button to the right of the Departments list.

3. On the left of the screen select the department you are copying (DryClean)

4. On the right of the screen select the department you want to copy to (Clean Only)

5. Enter the Adjustment Amount. 6. Click on the "Start Copy" button and accept the warnings about copying the department.

ProfitPlus
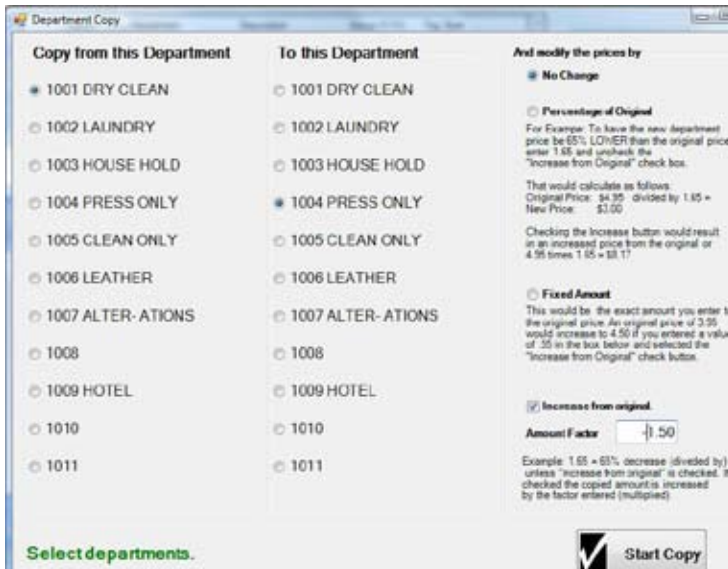
Clearing Item Information

You can clear all of the entries for a garment Item by using the Clear buttons.

Click on one of the buttons shown above to clear all entries for the item in the column. Clicking on the "Clear Button Text" button, for example, will set the text for all entries for the Deparment selected to blank. In the picture shown above, by clicking on the "Clear Tag Text" button, all of the Tag Text will be cleared for the Dry Clean department. You will be prompted to make sure you really want to clear the text before it is done.

The Clear Buttons are usefull when you are entering pricing for items from scratch and do not want to manually erase the existing text.

Employee Functions

ProfitPlus

These functions help you manage users of the ProfitMaker program in your store. Employee are anyone who can login, clock in/out, or do other functions on the computer. Employees have different access rights depending on their status. An employee can be a regular employee, a supervisor, manager, or owner. You use the Employee Functions to add and edit the things the employees can do.
NOTE: Through out this guide, a User and an Employee means the same thing.

Adding A New Employee/User

To add a new employee follow these steps:

1. From the Command Center tool bar at the top of the screen, select the "Add/ EditUser" option.
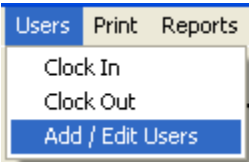
2. Now you will see the Users and Employees screen. Select the Add New Employee button.

3. You will now see the fields that you can enter Employee/User information into.

User ID: Automatically entered for you and can not be changed. It starts at 1.

Access Code: This is the code you will use to Logon, Clock IN/OUT with. It should be a code that is secure enough that it can not be used by other employees, but easy enough to enter when needed.

70   **First Name/Last Name**: Enter the user/employees first and last name.

Access Level: This is the level of ability that this employee or user has. In the security section of the ProfitMaker configuration you can enter what leve is required to perform a particular function. Any user that has that access level can perform the tasks associated wih that function.

Access Level Priority. Each higher access level can perform the functions allowed by the lower access levels. For example: A SUPERVISOR can perform any functions for itself as well as those below it ie; - EMPLOYEE. Likewise, a MANAGER access level allows it to perform Manager, Asst. Manager, Supervisor, and employee functions. An access level of Owner can perform all functions.

How Access Levels are used in Security.
In the security section of the ProfitMaker Configuration you can setup security levels that are required to perform different functions. The screen shot below shows an example of several settings for ifferent functions.

Notice that the "Config" fields that should not be changed after initial setup are set to have Manager level where common functions like Customer Add is set to "ALL". The access level you set for each user/employee can therefore be used in the security section to determine what features of the ProfitMaker program they can use and what information they can view.
Consult the Configuration | Security chapter and section for more information about security and its use in your store.

SSN: The Social Security Number field is optional. It can be left blank. IMPORTANT. Do not let unauthorized users or employees see others SSN numbers.

Hire Date: This is the date this employee/user was hired or entered into the system. It is optional.

Employee Notes: You can optionally enter up to 50 characters of notes for the employee.

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Accept New User/Employee

To save the information you entered, click on the accept button. To abort the adding of a new user / employee, slect the Cancel button.

Navigating Employee Records.

When you first enter the Employee/User information screen you will see the information for Employee User ID = 1. At the top of the screen you will see the navigation buttons that let yo select different users.
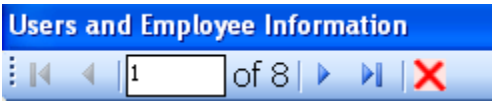
Notice the VCR like arrow buttons that let you go to the first record, last record, and increment one record at a time forward or backward. The screen shot above shows that employee 1 of 8 is currently being viewed.

Deleting Employees

The navigation buttons also contain a red X. Click on this red X to delete the current employee showing on screen. NOTE: You can not delete Employees that have Clock In/Out records. Click on the "Clear All Hours" button below the Clock IN/OUT fields to clear the employees time clock information and then you can delete the employee.

Employee Clock IN/OUT records

When an employee record is shown on screen, all of their clock in ad out records are also shown.

ProfitPlus

Clock IN / OUT

The Profitmaker Time Clock is a very convenient way to have your employees clock in and out during their work shifts. To clock in, simply click on the Time Clock button, enter your Access Code that you were assigned when added to the users/employees database. Then select the "IN" button on the time clock screen. Likewise, clock out with the same procedur but select the "OUT" button.

When you clock in or out your emplyee name and access level are shown on screen as well as you clock status as shown below.

DEAR, JANE   IN

EMPLOYEE
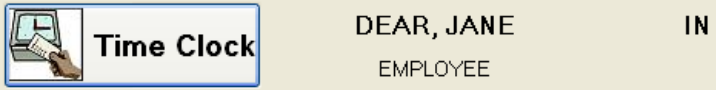
Log In
You can also let the system know who you are byclicking on the LOGON button.

You will enter your access level just like you were doing a Clock In / Out but, of course, you are not clocked in when you Log In. Just like clocking In / Out, a Log In shows the information for who just logged in on the bottom portion of the command center screen.

Cancel A Log In

If you wish to cancel your log in and erase your information from the screen, simply press the Clear Log In button, and the current Log In information is erased and no one is logged on.

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ProfitPlus

Employee Time Card Reports

A useful feature of the ProfitMaker Time Clock is the ability to print the employees time card hours in a way that makes it easier to enter into your payroll system

(NOTE: Payroll processing is a complicated subject that is different for each state and is beyond the scope of ProfitMaker. It is a simple matter however, to get the time clock hours summary and give them to your payroll processing company, or enter them into QuickBooks Payroll Processing for example).

The Time Card reports are in the Reports | IntelliReports | Management section.

The Time Clock Hours Report lists just the total hours worked, whereas the Time Card Activity report shows ClockIn / Out dates and times in detail.

You can include the Hours Worked report with the employee paycheck so they can see the hours they are being paid for. Each employee's hours print on a separate page.

The Work Schedule report prints a Schedule you can post so your employees know what hours to work.

ZKey Report

One important function an employee/user performs each day is running the ZKey report. This report shows till balances and sales statistics the the user/employee. The ZKey report is started by selecting the ZKey btton from the Command Center screen.
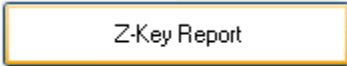
What shows on the ZKey Report

The information that shows on the ZKey report depends on how your system is configured. If you require a log-in for every order then you can specify which employee and date/time range to view till counts for. If you don't login by employee, you can view till counts for all ransactions during a date/time range.

The amounts shown on the ZKey Report are determined as follows:

Employee: ALL - All sold orders during the date/time start and end are shown.

      DOE, JANE - Only orders sold by Jane Doe are shown.

Date/Time Start: This is the starting date and time. Any orders SOLD that are at or after this date and time will show on the report.

Date/Time End: The ending date and time. Any orders SOLD that are on or before this date and time wil show on the report.

See the Reports section of this manual for more information on the ZKey report.

ProfitPlus

Security

ProfitMakers security lets you decide who can access the different parts of the program. You can make the security settings from the Configure toolbar on the Command Center screen as shown in figure 1 below
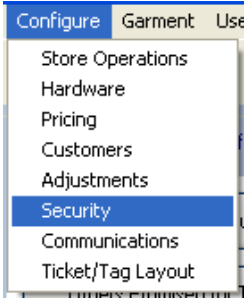
Figure 1. Starting the Security section from the Command Center Configure tool bar.

Security is either enabled or disabled. When you enter the Security section you will see the Security button. If security is turn on or enabled you will see the button as shown in figure 2 below. If security is turned off or disabled the button will say "Security is DISABLED.
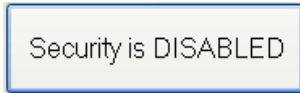
Enable Security

When you first enter the Security section of the Configure program the button will show that security is disabled. To enable security, click on the button that says "Security is DISABLED". You will then be prompted to enter a Security Password on the keyboard screen. Enter a password that you will be able to remember and save it somewhere secure where you can find it when needed. After you enter the password, you will be prompted to save it to your security database as shown in figue 2.

Figure 2. Shows a password of DOG being saved.

IMPORTANT!
No one knows the password you type in for your security but YOU!. Write it down and save it in a secure place till it is needed again. There will be a charge to try and figure out what password you typed in and saved.

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Now that we have saved the password "DOG" it is shown in the securityID row number 1. Also, the enabled flag has been set which meams all access to the checked features will be checked before allowing access to them. Figure 3 shows the current security field settings including our DOG passord.

Figure 3. Current security settings.

The security fields contain information about how security will be checked in your system as follos:

Figure 4. Security Fields

Security ID: This is simply a number assigned to each security row.
Enabled: If checked, this Area and Item of the ProfitMaker program will have restricted access.
Security Area: The area of the ProfitMaker program being secured. ie: the FILE toolbar menu.
Security Item: The actual item in the program that is part of the area. ie; Export
Access Level Required:
      This is the minimum access level required to use this part of the program.

The access levels are ALL, EMPLOYEE, ASST.MANG, MANAGER, OWNER. An Owner can access all parts of the program. A Manager can access all Manager parts plus all Asst. Mang, and Employee parts. So higher level users can access lower level users parts as well as their own.

Logging: if checked, any access to this part of the program will be logged to the exceptions database.

ProfitPlus

Access Levels

The access levels let you determine which parts of the program can be accessed by different types of users. The order of precedence for usersare:
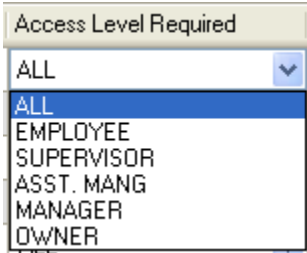
Figure 5. Access levels.

ALL:	No restrictions on access.
EMPLOYEE:	The lowest level of access. Use this setting for non critical, and day to day operations users who are regular employees.
SUPERVISOR:	Employee supervisor. Can access all employee settings as well.
ASST. MANG:	The assistant manager. Can access supervisor, and em ployee sections too.
MANAGER:	Can access all sections of ProfitMaker except those set to Owner.
OWNER:	No restrictions on access.

Save Settings

You can check, uncheck, and set access levels for each of the rows in the security database. After you have made all of your changes, click on the "ACCEPT" button to save the changes to the database. Click on the Exit button if you do not want to savethe changes.
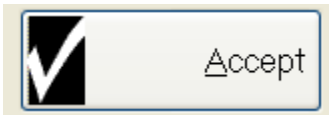
Disable Security

If you decide to turn-off security for some reason simply click on the "Security is ENABLED" button. You will have to enter your Security Password before you can tur off security.
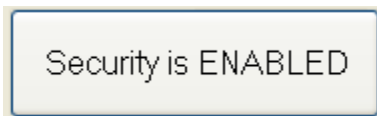
Figure 6. Click on this button to disable security.

Lost Security Passwords

In the event you forget or lose your security password we at Personal Touch Systems will have to try and dechipher what was typed in so you can access your security settings. Because your system security is important, not even us as developers of ProfitMaker know what code you typed in.

As an incentive to have you remember your passwords, we charge a minimum of $50 to try to dechiper your password so it is important that you do not lose it.

ProfitPlus

Customers

This section will explain the different operations you can perform on customers such as adding new customers, editing existing customers, and showing customer history. Lets start by showing you how to add a new customer. From several places in ProfitMaker you will see the NEW button for adding a new customer.

Clicking on the "New" button will bring up the Customer edit fields that you can enter customer information into as shown below:

The above fields are the default fields that every customer needs to have filled out. This is the minimum information for a customer that is added to your system. Of course, there are many more customer information fields that you may, or may not, be interested in tracking at your store. The customer fields can be shown by clicking on the "Show All Groups" button. This button will cause all of the customer fields to be shown on screen.

Customer Flags

There are several flags that can be set for customers to help you setup how they are used throughout ProfitMaker. The flags are:

VIP - Check this flag if the customer is a VIP customer. The customer info will show with a pink colored background and the VIP logo. This helps you identify your important customers.

Business - Check this box to signify that this customer is a business. This will

cause the store name information as well as ticket line amounts and totals to NOT appear on the ticket. This is handy for orders that are processed by you but sold by another business.

Taxable - Check if the customer pays tax for their orders.
Alert - An alert flag.
Long Distance - a flag to let ProfitMaker know if the customers phone number is longdistance. The customer data is divided into several groups or types of information. They are

Home information:	Home address, home, email, etc.
Work Information:	Work address, employer, and other work related fields.
Personal Information:	SSN, birth date, etc.
Preferences:	Payment method, starch and finish preferences.
Discounts:	Discount information.
Account Information:	Charge account, credit card and other charge information.

Customer Configuration Settings

You can set which fields show on the screen when you add new customers by using the Config | Customer settings from the Command Center ool bar.
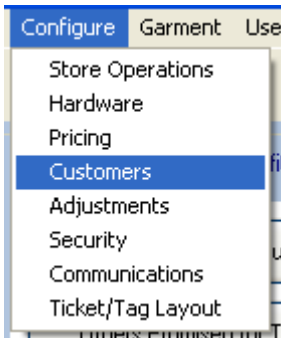
This will bring up the Customer Configuration settings. Check the box next the each type of customer information you want to appear when adding new customers. Each of the customer sections will be explaned next.

ProfitPlus
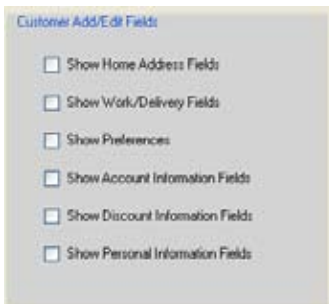
Home Fields

The home address, phone etc. for thecustomer.

Work Fields

Shows customers employeer, work address, and email for where the custoer works.

Personal Information

This is the customers SSN, birth date and drivers license inormation.

ProfitPlus

Customer Preferences

This is the customers preferred payment method and the type of starch and finish they like. These options will be used as defaults when customer orders re added.

Customer Discounts

Here you can set the type of discounts the customer receives and customer referral infrmation.

Customer Account Information

Set the customers credit card information and charge account sttus here.

ProfitPlus (sidebar)

Edit Customers

You will most likely need to edit customer information as home phone numbers change, work changes, etc. To edit exiting customer information.

1. Start the Find customer operation. Either click on the Customer Find button or enter the iinformation directly if you are at the Command Center.
2. Find the customer by entering their Home phone, last name, or customer number.
3. Change each of the customer fields as desired.
4. Click on the "Accept" button.

Customer History

The Customer History feature of ProfitMaker lets you see all or part of the orders that the customer has processed in your store. Any time you see the Customer History button shown below you can click on it to view the history for the selected-customer.

Select a customer from the list of customers showing and then click on the history button to bring up the Customer Hisory Form. The main customer history form starts by showing all Orders in your system for the selected customer shown at the top of the screen.

Click here to see a complete Customer History Report

ProfitPlus

Customer History Report

The Customer History Quick Report is a very useful tool that lets you see complete details about a customers sales history. It even has a graph so you can get a visual picture of their sales.
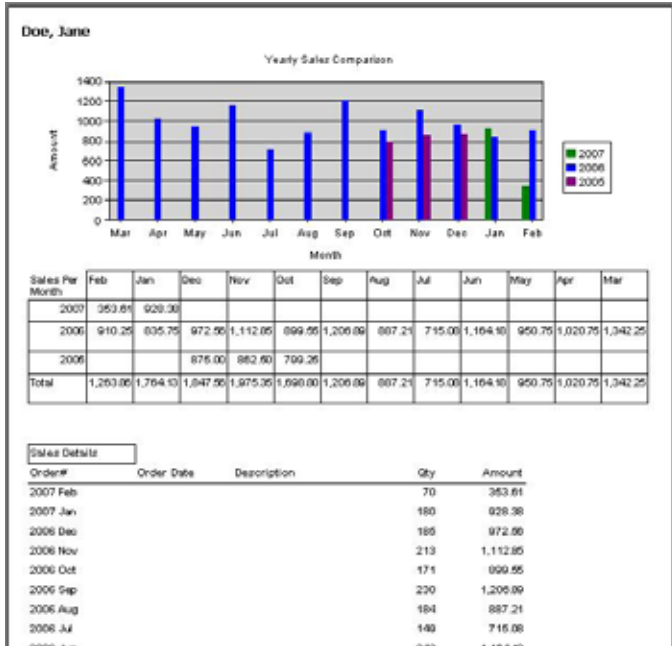
Monthly Sales Detail   Sales by Month Matrix for each year.   Sales By Year Graph

Click on the + on the Report View to Drill Down into History Details for each order.

Show Order Ticket

You can view the Order Ticket in print form by double clicking on the order or by highlighting an order and then clicking on the View Selected Order button. This will show the ticket as it would be printed. Also, you can click on the Print Order button to print the Ticket to your Detailed Printer.

Order Filtering

You can use the filter buttons at the top of the screen to let you view only se-lected types of orders for this customer. For example, you may only want to see the orders ready to be picked up. To view just the orders ready to be picked up.

1. Click on the "Show Orders Ready For Pickup" check box to make sure it has a check mark showing.
2. Click on the "Show In Process Orders" and the "Show Orders Picked Up" check boxes and make sure there is NOT a check mark. As you check and uncheck the Order filter check marks you will see the list change to display only those orders you have requested.

Order Status

In the Orders list showing on screen you can see the Status of each order. The statuses are explained as follows:

NEW : These are New Orders generated with the Quick Ticket function and have no details about the order.

DETAIL: These are New Orders added with the "New Order" function and they have details about the order including the customer, and possibly information about the garments.
(Note: New and Detail orders are ready to be Edited, and/or Assembled)

EDIT: These are Orders that were either "New" or "Detail" orders but they have been edited to add upcharges and markup information about the garments.

ASSEMBLE: These are Orders that are ready to be picked up and sold to the customer.

PARTIAL: These are Orders where some of the items on the order have been picked up and some have not.

SOLD: These are orders that have been picked up by the customer.

On Account Customers

Customers can put amounts due On Account if you set their customer settings to allow it in the customers "Terms" setting. A setting of COD means the customer pays by cash, check, or credit card when they pickup (or drop off if prepay) their garments. Any other setting lets ProfitMaker know that they can put amounts due "Store Account"

To see customers thave amounts due on account run the Customers | Accounts reports. Customer Accounts reports will show all orders that have amounts due.

Statements

You can print statements for customers that have amounts due on account. The reports section has Customer | Statement reports that will print a statement for each customer that has orders that are not paid and have had amounts put on account. Personal Touch Systems sells Statements paper with the tear off stub the customer can send in with their payments.

ProfitPlus
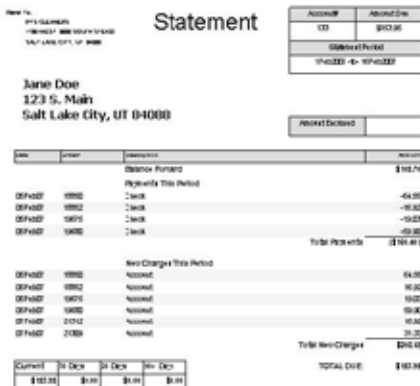
Billing

You may have customers that are responsible for payment for a group or groups of customers. For example, you may have hotel accounts or business accounts that make payments for orders done for each room# or office. To accomplish this type of billing follow these steps:

Billing Responsibilty Customer Setup

1. Setup a customer that will be the billing responsibility such as "Hotel Rowanda".

   a. From the Command Center press the +**New** button to add a new customer.

   b. Name the customer: **First name:** "Hotel" **Last Name:** "Rowanda" or what ever you want and enter the address, phone, etc.

   c. Click on the "Show All Groups" button to show all customer fields.

   d. Change these fields:

   Pays By: On Account

   Terms: Net 15

   Add or change other fields as needed for your customer.

   e. Accept the changes for the customer.

2. Setup a Route Item. Add a *RT* item to Dept 12 in the Config. After a *RT* is added you can select it to allow entry of room/office numbers and customer names to the order. See the Pricing section for more ifo on adding a *RT* item.

3. Add Orders to the Billing Responsibility Customer. As orders come in from rooms, or offices, add the orders to the Customer you added in step 1 above. After all items are added to the order, select the Adjustments Department and select the *RT* Route item. After selection, you will be prompted to enter the customers name, room/office number, an route or stop number.

4. Now you will see the route (hotel room number) information on the ticket. Goa-head and finish the ticket.

Logout Orders

When the orders are done, and ready to deliver to the hotel, you can use the standard pickup method and put the amounts due "On Account". Then at the end of the billing period use the Customer | Statemtns report to build statements that fit nicely in a #10 envelope to send to the hotel or business responsible for payment.

Batch Pickup

Also, you can use the Batch Pickup option from the Command Center | File tool-bar. You enter each order that is to be delivered back to the hotel into the Batch Pickup screen. By grouping all the orders that will be delivered or sent to the hotel together, it is very simple to scan (if you have a barcode reader) or type in each order into the list to set the status to SOL and the amount due put On Account.

Quick Tickets

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The purpose of the Quick Ticket functionality of ProfitMaker is to allow you to generate a ticket quickly and easily when a customer comes in to drop off garments for you to clean. Quick Tickets differ from Detailed Tickets in that a quantity is entered for each department (i.e.: Dryclean, Laundry, etc.) and that is all. No "Details" about the garments are needed at the time Quick Tickets are generated. If details about garments are needed then use the "New Order" section for entering new "Detailed" tickets.

Creating Quick Tickets

To create a quick ticket follow these steps:

(Note: In the following example the word "Click/Touch" means to touch the button with your mouse, or your finger if you have a touch screen)
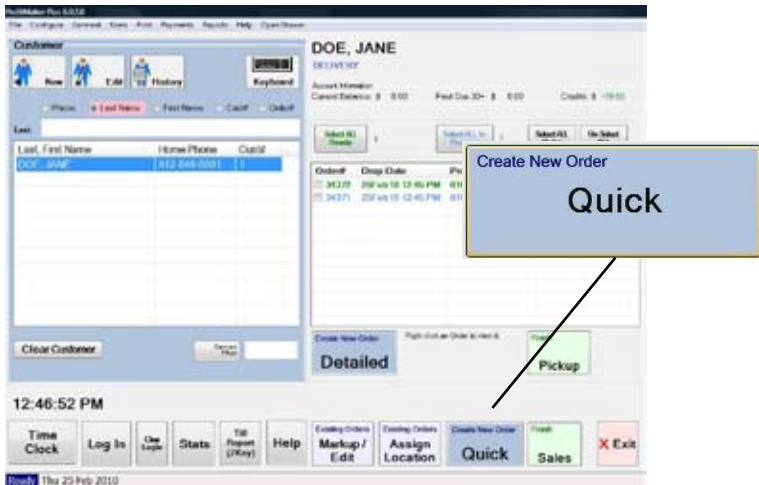
Picture of Command Center - Quick Ticket

1. Click on the Quick Ticket button from the "Command Center" screen.

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Picture of the Quick Ticket main screen

2. Enter the quantity of garments that the customer is dropping off for each type of processing to be done; i.e.: Dryclean, Laundry. For example: if a customer is dropping off 5 shirts to be drycleaned
press the DryClean Department button, then press the "5" quantity button and notice the quantity will appear in the box below the department. Then click on the next department, Laundry, and enter a 2.

3. Now, you can optionally enter a phone number, name, or other identifier about the customer in the customer info field.

4. Then click, touch, the ACCEPT button to add the order and print a ticket.
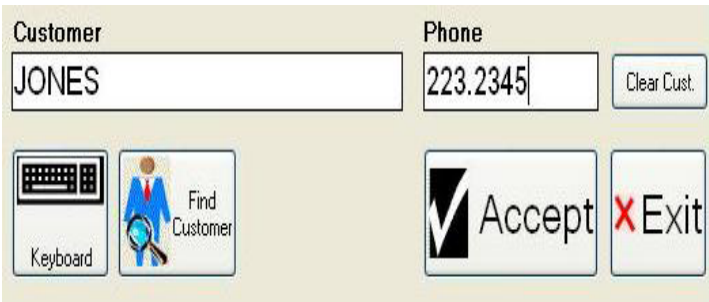
Your quick ticket will be built and an Order Number will be created. The Order Number will show on the ticket along with the garment quantities for each department, as well as any customer information you entered
5. Put the quick ticket with the garments and send them to be edited, detailed, and upcharged.

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ProfitPlus

Ready-On Date Calculation

The Button on the lower right of the keypad is the Ready-On Button. Ths button shows the calculated Ready On date. Press the button to change the ready on ate.

03/24/2005
5 PM
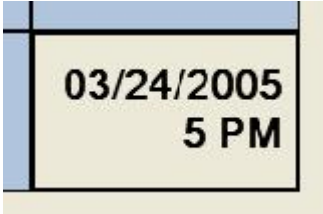
Calcuated Ready-On Date

The Calculated Ready-On Date is determined from the configured Standard Processing days setting and the Pickup Time for the current day of the week. The standard processing days is added to todays date. If the current time of day is later than the Cut Off Time, then the Days to Add after Cutoff time is added to the standard processng days.

	Open	Day Of Week	Cut Off Time	Days to add after cutoff	PickupTime
▶	☑	Monday	15 pm	1	16 pm

Store Hours of Operation.   Standard Number of Processing Days: 3
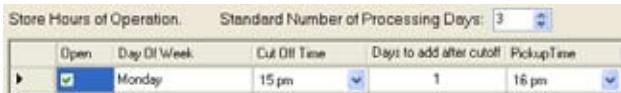
Allow Garment Days to Override Processing Days Flag

This flag determines the processing days used to calculate the Ready On date. The settings are:

   Checked: Each garments processing days setting is used to calculate the Ready On date.

   Not Checked: Ony the Configure | Store Operations | Standard Processing Days setting is used.

☑ Allow garment days to override processing days.

Printing Quick Tickets in advance.

Some times you might want to print Quick Tickets in advance so that you can have an order number ready for the customers "BEFORE" they come in. This type of quick ticket would only have an Order Number and a place for you to write in the garment totals for each department. At anytime during your day, use

the Quick Ticket option to print a number of tickets without any quantities and then use these tickets when the customer comes in by just writing in the garment quantities and then placing the Ticket with the garments and sending them on down the processing line to be detailed / upcharged. To print Quick Tickets in advance;

1. Press the Accept Button. A new order is created and a blank ticket is printed.
2. Repeat step 1 for each advance Qucik Ticket desired.

Drive Up WIndows and Quick Tickets

If you have a drive up window in your store and you don't have a computer or remote terminal you can print Quick Tickets in advance as explained above. Print some Quick Tickets without customer or department quantities and have them ready to use at your drive up window. Then after filling them out at the window, use the Markup / Edit operation to enter information about the customer and order.

Adding Details to Quick Tickets

When it is time to add details to a ticket you use the "Assembly" option of Profit-Maker. You will enter the details about each piece for the Order Number on the Quick Ticket. See the section of this users guide for "Assembly" for more details about marking up the Order.

Quick Tickets Print Setup

The Quick Ticket printing is determined by the Hardware Configuration Settings for your store, and for the station doing the Qick Tickets.
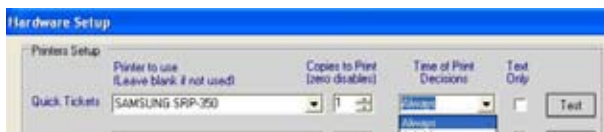
The printer that Quick Tickets uses, the number of copies, and whether the system asks you, or always prints the Quick Tickets is set here. See the configuration section of this Users Guide for more information on setting up your hardware.

See Also*: Hardware Configuration*

New Orders

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New Orders are Quick or Detailed tickets and is where you will perform a lot of your daily work in ProfitMaker. New Orders are just that, NEW. There are two ways to enter new orders in ProfitMaker.

The first way is to use the Quick Ticket function (see figure 1). Quick Tickets don't allow any detail to be entered about garments being dropped off nor does it care if you enter customer information. The "New Orders" function lets you put as much or as little detail about the new order as you want. Later, you may want to use the "Assembly" function to markup the garments further, add locations, and assemble the garments into a finished order

Figure 1. Quick Tickets Menu button.

Figure 2. Detailed Menu button.

This chapter will concentrate on the "Detailed" operation. See the "Quick Ticket" chapter for information on entering Quick Tickets.

Creating a New Detailed Order

You can start a Detailed Order by clicking on the "Detailed" button on the Command Center screen. You will then see the New Order entry dialog screen.

 The basic steps for entering a new order are:
1. Find the customer. You can find customers directly from the Command Center customer
search screen, or the Customer Find dialog will appear if there is no current customer.
2. Click on the Detailed button.
3. Select the Department that the garments the customer is dropping off belong to.
4. Select the quantity of the Items.
5. Select the Item button that describes the garment.
6. Select any upcharges (like Silk), colors and patterns to describe the garments.
7. Repeat these steps for each garment you are entering for the new order. After all items are added to the on screen invoice, select the "Finish" button to print the customer ticket and/or tags.

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Figure 2. New Order Detailed Screen.

The New Order screen contains a lot of information to help you enter orders as follows.

1. Customer Information
2. Order Entry View
3. Department / Items / Upcharges / Colors / Patterns
4. Commands

We will break down each part of the screen and explain it in detail.

Customer Information

The customer information shows who the current customer is. Also, there are command buttons that can be used to change the information as neede.

Figure 3. Customer Information

New Customer Button

The New button lets you add a new customer. See the Customer chapter for information about adding new customers and the customer information screen.

Find Customer

Select the Find button to find a customer if the current customer is not the cor-rect one.

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Customer Text

The Customer Text box shows the customer number, name, address, and phone number for the currently selected customer.

Pickup Date and Time

The date and time showing in the Pickup area is the configured date that this order will be ready for pickup based on your Configure | Store Operations | "Standard Number of Processing Days" setting. Or if the "Allow Garment Days to override processing Days" is checked then the date is calculated by the item on the order that takes the most number of days to process. Click on the Date and the calendar will appear and the Pickup date and time can be changed.

Starch / Finish Preferences

The Starch and Finish fields show the customers pre-defined preferences that were set when the customer was added. These values will be printed on the ticket / tags and pertain to the entire order. (Note: individual starch and finishes can be set for each item on the order and is explained later in this chapter).

Customer Notes

Just below the customer starch and finish area is where any notes about the customer are shown.

Vip and Discount Information

If the customers VIP flag was set when they were added then the VIP icon will appear and the background color of the customer information will be shown in pink instead of white to alert you to the fact that this customer is a VIP - Very Important. Also, any discounts assigned to the customer are shown above the VIP icon area.

Order Entry View

The Order Entry view area shows the order as you are building it. Each Department shows in the department color (ie; Dryclean = blue, Laundry = Pink, etc)

Figure 4. Order Entry
with a Laundry "Shirt" showing a "Extra Starch" upcharge that added .25 cents

Subtotal
Environmental Tax
Sales Tax
Total

96

Figure 5. As garments are added to the order, they are totaled at the bottom.

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Departments and Items Section

The Departments and Items section of the New Order screen is where you will select the items that will appear on the order. This section of the New Order screen has several distinct parts in itself. These parts are as shown below:
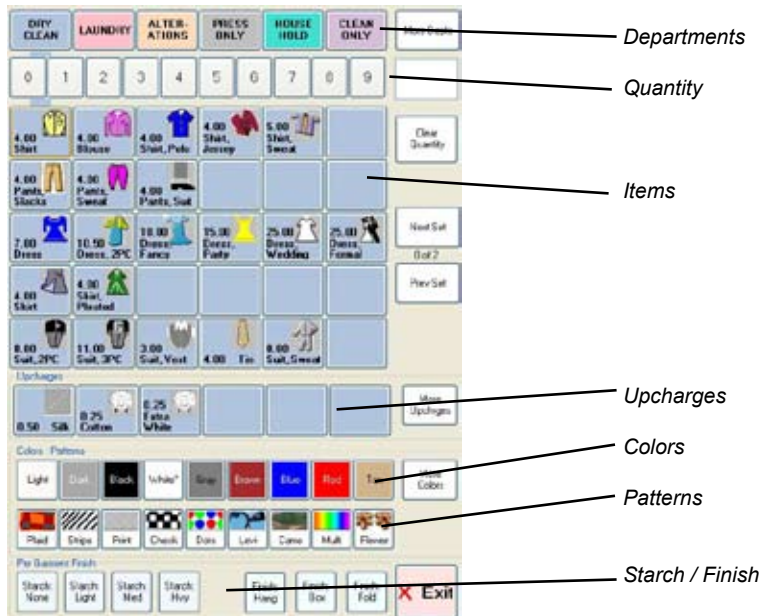
Figure 6. Shows the sections of the Departments and Items of Order screen.

Commands

At the bottom left of the New Order screen are the command buttons. The command buttons are used to perform special functions as well as finish the order when you have completed the entry of ll items.

Figure 7. Commands.

Finish Pay Now

Select this button when you are finished adding items to this order and the customer is paying now. (This can be turned off in the Store Operations "Customers Never Pay On Dropoff" check box.)

Clear Line Item

The currently highlighted line item in the order is erased from the screen.

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Add Comment

You can type in a comment to be added to each garment

Modify Item

This allows you to modify the amount and quantity of the item selected as shown below. This comes in handy when you enter, for example, 6 shirts on a new order and then during Markup you discover that it is really 5 shirts. Select Modigy Item and change the quantity to 5.

Finish Pay Later

Finishes the order, saves it, prints it and lets you start over. Customer will pay when they pickup.

Totals

Shows subtotal, misc taxes (environmental) sales tax, and the total amount due.

Automatic Items

You can configure Items that will automatically appear on New Orders. The most common use of Automatic Items is the EPA charge that stores use to collect an environment charge automatically from their customers. Automatic Items show on the Order when it is first created and therefore the employee can not forgt to add it.

| 1 | ADJUST ORDER   EPA *AUTO* | 0.25 |

Qty	Desc	Amount
1	EPA *AUTO*	0.25

Figure 7. Shows an EPA item automatically added to an new order.

Configuring Automatic Items

You configure automatic items in your Item Pricing area. (See the configuration section of this manual for pricing information). Any Item that is added with button text of *AUTO* will automatically be added to the invoice.

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Clearing Automatic Items
You can remove an Item that was automatically added to a new order simply by highlighting it in the list and clicking on the "Clear Line Item" button.

Quantities
When you are entering departments, items, upcharges, colors and patterns you can enter a quantity for each item. For example to enter 5 dry clean shirts, 3 red, 2 white follo these steps.

Figure 8. Shows the quantity buttons with a quantity of 5 selected.

1. Click on the DryClean department.
2. Click on the 5 quantity button and then click on the Shirt button. (adds 5 shirts)
3. Click on the 3 button and then the RED button. (adds 3 Red to the shirt).
6. Click on the 2 button and then the WHITE button (adds 2 White to the shirt).

Clearing Quantities
If you need to clear a quantity after you have selected it simply click on the "Clear Quantity" button to the right of the quantity buttons.

Holding an Order
Holding an order allows you toput Items on an order and then save it to complete later. Usually, this is done when you are marking in an order and a customer comes in and interupts the marking process. You can save the order being marked in, help the customer and then bring back the order and continue with the markup. Simply press the "Finish Pay Later" button and the current customer and the items on the Order are saved to a disk file.

Unolding an Order
Orders that were saved earlier can be found by
> 1. Enter the Order# in the Find Customer area of the Command Center
> 2. Click/touch the Markup / Edit button on the Command Center.
> 3. Select the Order from the list of orders for this customer.

Add Comment
Comments can be added to any item on an order. When a comment needs to be added to an item follow these steps:
1. Select the Item in the Order list (if it is not currently selected).
2. Click on the "Y" button. You will see the comment entry screen below.
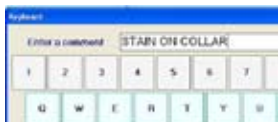
Figure 9. Shows screen where a comment about a collar stain is entered.

After you finish enter the comment, click on the ENTER button to accept the comment or the ESC button to abort te comment entry.

1	DRY CLEAN	Dress	9.00
STAIN ON COLLAR			

Figure 10. Shows the comment added to the dress item on our order.

Finish Pay Now

Once your order is complete, selecting the "FINISH - Pay Now" button will save the order, print it, and take you to the payment window. The printing that takes place is determined by how your system is configured to print (see the Configuration | Hardware section of this manual).

Finish Pay Later

If your customer pays at pickup rather than on drop off, you will select the "Finish - Pay Later" button to complete the order, print tickets and tags (if configured) and start over ith another order.

New Order Description Buttons

When a new order is added, you will use the description buttons to add the garments the customer dropped off to the order. The descripion buttons are Departments, Items, Upcharges, Colors and Paterns, and Finish Preferences. Each of these description types are explained below. (NOTE: the text and pictures that show on the buttons can be changed in the Configuration | Pricing ara).

Departments

Figure 11. 1st set of 6 department buttons.

Selecting departments is easy. Simply click on the department desired of the 12 departments that are possible. 6 departments show on the New Order screen at a time. Click on the "More Depts" button to see the 2nd set of 6 departments and then again to see the 1st set of departments and so on. After you click on a department, the 1st 30 items that are defined for the selected department show in the Items buttons. The text that shows on the department buttons can be changed and

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Items

Every department can have up to 3 sets of 30 items for a total of 90 items per department. If more than 90 items is needed, use another department. With 12 departments and 90 items each, there can be 1,080 items in your store. After a department button is selected, the first 30 items show on screen. To view more departments, click on the "Next Set" and/or the "Prev Set" buttons to se sets 0, 1, or 2.

Figure 12. Shows 30 items for the Dryclean department.

Upcharges

For every Item there can be 18 (3 sets of 6) upcharges. When you click on the Dryclean department it shows the Shirt Item, and then by clicking on the Shirt Item, the upcharges for Shirt are shown on the buttons. You can view 6 of the 18 possible upcharge at one time. Click on the "More Upcharges" button to see the second and third ets of upcharges.

Figure 13. Shows Upcharges for the Shirt item

Colors and Patterns

Same as upcharges, you can add color and pattern descriptions to any garment. Once the Item is selected, clicking on the Color and/or Pattern button will add that description to the item in the order. There are several sets of colors that can be selected by clicking on the "More Colors" button. Only one set of paterns is available.

Figure 14. Shows Colors and Patterns descriptions that can be added to an Item. 101

Per Garment Finish Preferences

Sometimes it is necessary to add special starch and finish preferences to items on an order. When an item is selected, click on the starch and/or Finish preferences and the descriptions will be added to theitem in the order.

Figure 15. Shows the Starch and Finish preference options that can be added to an item.

Status Bar

At the very bottom of the New Order Screen is the status bar. The status bar shows the current state of operations performed, error messages, and the current date.

Exit and No Sale

The Exit and No-Sale buttons allow you to terminate the order entry at anytime without finishing it. Exiting the New Order takes you back to the Comand Center screen.

Reprint Orders

The top tool bar contains the "Orders" option. With this option you can view and reprint orders that are Active and Sold.

Select either Active Orders or Sold Orders.

Active Orders

Sold Orders

Markup & Edit

ProfitMakers Markup & Edit operation lets you markup garments and assemble them into completed orders. You normally use this feature after Quick Tickets or New Orders are entered and you want to add more detail to the order or edit the finished garments.

Starting Markup Operation

The Assembly operation is started from the Command Center by Clicking on the Assembly button or pressing the F4 function key.

Figure 1. Starting the Markup operation from the Command Center

After the Assembly operation is started you will see a screen that will show all Quick Tickets that need to be marked in and the detailing buttons (just like a New Order screen) that let you assign details to an order.

Figure 2. The Markup Screen showing all Quick Tickets to be marked up and details added to order.

Marking Up Garments
The process of marking up garments is simple by following these 6 steps:

1. Click on the Order to be marked up in the Orders List.

2. If the Order is a Quick Ticket, the Customer Find screen will apper

Figure 3. Find Customer window.

3. Select the customer that belongs to this order by searching by Phone, Name, or Order Number

| 04/23/05 | JOHNSON, CHRIS | 5 |
| 04/23/05 | | |

Figure 4. Customer assigned to a Quick Ticket

4. Select each item that is on the order from the item buttons on the right half of the screen by;

        A. Select the department the garment belongs to.

        B. Select the garment description.

        C. Optionally add upcharges, colors and patterns to each garment

Figure 5. Marked up Quick Ticket for Order# 492

5. Optionally, add a Rack Location to the garment if it is completed. (This can be done later also).

Figure 6. Assigned Rack location for order# 492

6. Select the "Save Order" button to complete the order markup and save the information. You will see the "ORDER 492 UPDATED" message on the bottom of the screen if there were no errors.

Selecting Ticket Types

At this point, the Order we marked up is now removed from the Quick Tickets list and placed with the "Edited" tickets list if no rack was assigned, or in the "Assembled" list if racks were assigned. You can select each type of list from the options buttons at the top of the Assembly screen

Figure 5A. Shows the Quick Tickets selected.

Command Options

There are several command options available from the Assembly screen. They are:
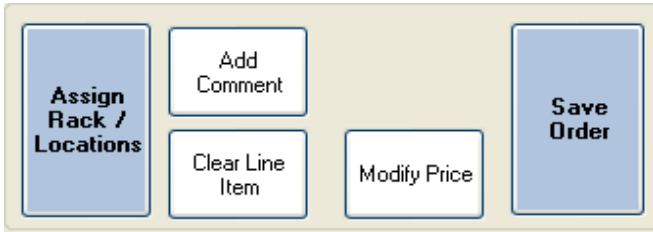
Figure 7. Command Buttons

1. Assign Rack / Locations   : Assign finish garment locations to orders and flag as assembled.
2. Add Comment   : Add a comment line to individual items.
3.Clear Line Item   : Remove the selected item from the list.
4. Hold Order   : Place the current order on hold to be recalled later.
5. Save Order   : Save the Order changes made.

Placing an Order On Hold

Sometimes you may be right in the middle of marking up garments when a customer comes in and needs attention. Placing an order on Hold lets you save the work you have done on the current order, help the customer, and then recall the order. To place an order on hold and then recall it follow these steps:

1. Select an Order and add items to the order as desired.
2. Click on the "Save Order" button.   •
3. Do another function like make a pickup, etc.
4. Come back to the Assembly area and click on the "Show Edited Tickets" button. You can then complete the markup of the customers order.
NOTE: You may want to have the Configure | Hardware | Tag Printer set to "Ask" you if you want to print tags so that they are not reprinted when you save the order.

Change Customer for an Order

If you want to change the order a customer is assigned to double click on the order in the list. A sreen will appear asking you if you want to change the customer. Select "Yes" and you can find the new customer using the Customer Find operation. After accepting the new customer, it will be assigned to the order.

Change Promised Date

After you have entered a Quick Ticket or New Order you may need to change the promised date. Double click on the Orders List and you will see the change customer screen, then you will see the screen asking you if you want to changed the promised date. Select "Yes" and a calendar will appear with the current promised

date highlighted. Select the new promised date and time and click the Accept button on the calendar. The Order will be updated with the new Promised Date. The Promised Date is also known as the Ready-On Date.

Modify Item

Sometimes it is necessary to change the quantity or price of an item on the order. To do this:

1. Click/touch on the item to be modified.
2. Click/touch the "Modify Item" button.
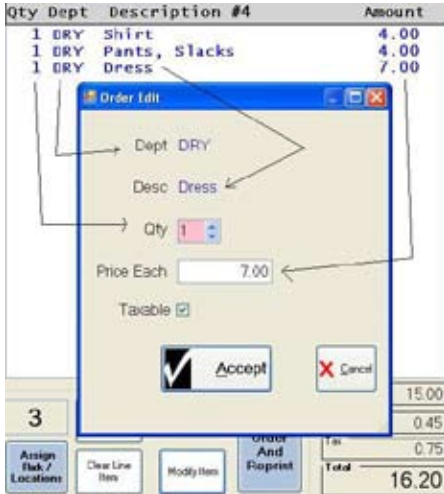
You can change the quantity and price of the item. The quantity will be mulitplied times the price each and will then be shown as the amount on the order when you press the Accept button.

Racking & Locations

Racking in ProfitMaker is the process of assigning finished garments a location, or rack, in your store. Even if you don't have a "Rack" type method of storing garments you still can use the Racking feature to let your employees know where to find garments when customes come in to pick them up. Rack locations can be a single numeric value, a range of values, names, letters or any other type of system you desire. Racking simply assigns one or more values to an order so it can be found in your store.

Start the Racking operation by selecting the "Assign Rack Locations" button. You will then see the Racking screen. It has several fields of interest:

Order#   : This is the Order Number that is being assigned a location
Location   : This is the location value, or the starting value if multiple locations are used.
Range of Locations : Check this box if you want to enter a starting and ending range of locations.

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To : This is the ending location in a multiple location situation.

Existing Locations : If the order selected already as locations assigned, they wil show in this list.

Status List : As each order is assigned locations, the status will show in the list. Errors will appear in red.
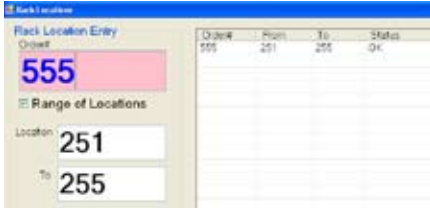
Figure 9. Range of Rack Locations entered.

Batch Location Entry

You can enter racking locations using a barcode reader by scanning ticket numbers and rack barcodes. To enter locations using a barcode reader follow these steps:

1. Scan the ticket number.
2. Scan the location barcode.
3. If Range of Locations is used, scan ending location barcode.

Important! *When you are not watching the screen, it is very important that you scan a ticket, then a location, then a ticket, then a location each time so the correct value is entered into the Order# and Location fields. Check you work by looking at the status list after you have completd your scanning.*

Order#	From	To	Status
490	123	125	OK
490	200	210	OK
123			Order Not Found
201			Order Not Found

Figure 10. Racking status showing orders racked "OK" and orders not found.

Wireless Scanners

Batch location entry is an ideal place to use a wireless scanner. They are used just like a wired scanner in most cases but you will be a longer distance from the computer screen so it will be important to scan the ticket then the location and to be careful with the scans.

Deleting Rack Locations

To delete a rack or location that has been entered for an order follow these steps:

1. Enter the Order number into the Order Number field. Existing racks and/or locations will show in the window.

2. Click or touch on the rack location to be deleted.

3. Confirm the deletion by selecting "es" at the prompt.
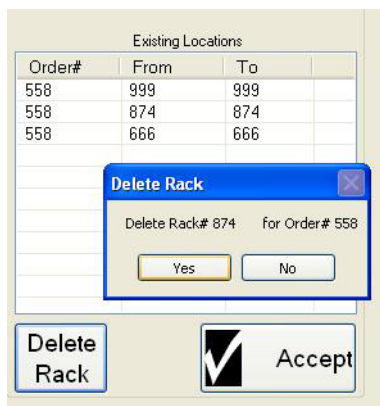
Figure 11. Deleting an existing rack location.

Rack Locations by Customer Last Initial

You may assign garments to alphabetical locations using the customers last name initial. So, Jane Doe would be hung in the "D" area on your finished garments slick rail. Profitmaker can automatically assign the customers last initial thereby saving you from having to type it in manually.

To automatically use the customers last name initial, go to Configure | Store Operations. Then, set the check box that is labeled

Then when you enter Order Numbers into the "Rack Location Entry" the customers last initial will automatically be entered into the Orders location From and To fields.
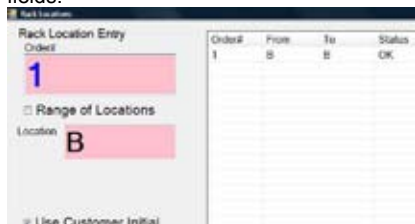
Assigning Locations to Finished Orders

ProfitMakers Assembly operation lets you assign hanging or location information to completed orders. You normally use the assembly feature after you have finished assembling garments into finished orderes that are ready for the customer to pickup.

Assign Locations

The Assembly operation is started from the Command Center when you click/touch on the Assign Location button.

Existing Orders
Assign Location

Figure 1. Starting the operation from the Command Center

After the Assembly operation is started you will see the locations entry screen.

Order# entry

Click here to allow a range of locations.

After entering an order# and assigning a location, the resulting status shows here.

Enter the Location (or range of locations).

Any existing locations for this order show in this list.

Delete any existing locations

Any other orders for this customer.

Assigning Locations or Racks in ProfitMaker is the process of assigning finished garments a location, or rack, in your store. Even if you don't have a "Rack" type method of storing garments you still can use this feature to let your employees know where to find garments when customers come in to pick them up. Locations

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can be a single numeric value, a range of values, names, letters or any other type of designation you desire. This is simply a method to assign one or more values to an order so it can be found in your store. You will see the following fields:

|	
Order#	: This is the Order Number that is being assigned a location.
Location	: This is the location value, or the starting value if multiple locations are used.
Range of Locations	: Check this box if you want to enter a starting and ending range of locations.
From	: This is the starting (or only) location of an order.
To	: This is the ending location in a multiple location situation.
Existing Locations	: If the order selected already as locations assigned, they wil show in this list.
Status List	: As each order is assigned locations, the status will show in the list. Errors will appear in red.
Email Customers	: Check this box to EMail customers a notice that their orders are ready.

Location/Rack Range Entry
If you check the "Range of Locations" check box, you will be allowed to enter a range of locations.
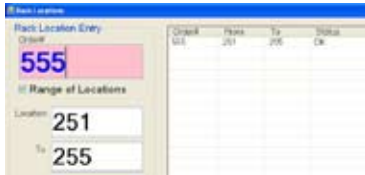
Batch Location Entry
You can enter racking locations using a barcode reader by scanning ticket numbers and rack barcodes. To enter locations using a barcode reader follow these steps:
1. Scan the ticket number.
2. Scan the location barcode.
3. If Range of Locations is used, scan ending location barcode after starting location.

Important! When you are not watching the screen, it is very important that you scan an Invoice barcode, then a location, each time so the correct value is entered into the Order# and Location fields. Check your work by looking at the status list after you have completed your scanning.

Order#	From	To	Status
490	123	125	OK
490	200	210	OK
123			Order Not Found
201			Order Not Found

Figure 4. Status showing orders racked "OK" and orders not found.

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Deleting Existing Locations

To delete an existing rack or location that has been entered for an order follow these steps:

1. Enter the Order number into the Order Number field. Existing racks and/or locations will show in the window.
2. Click or touch on the rack location to be deleted.
3. Confirm the deletion by selecting "Yes" at the prompt.
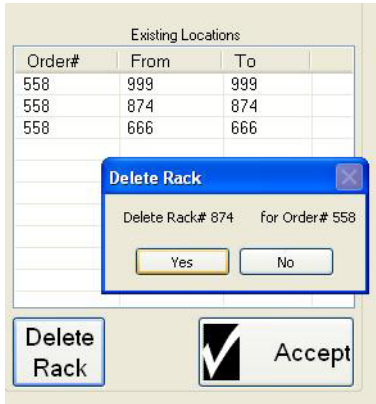
*Figure 5. Deleting an existing rack location.*

EMail Order Status to Customers

You can EMail a message to customers to let them know their orders are ready for pickup. When you first enter the Assign Locations screen, check the EMail box.

Figure 6. Email message to customers check box.

When checked, after you exit the Assign Locations screen, all customers who have Home or Work EMail addresses entered into their Customer data record will receive an EMail notifiying them that their orders are ready to be picked up.

EMail Message

Here is an example of the EMail message your customer will receive.

From: "Your Store Email Address";   (As set in Configure | Store Operations)
To: "Customers Email Address";   (As set in Customers Record. Home 1st, Work 2nd)
Subject: Jane, Your Order is Ready.";

Msg: Mr. Drycleaner
          801-649-6691
          Order#: 123456
          Dropped off: 07/18/06
          Is ready for pickup
          We appreciate your business.

Email Configuration

In order for EMail to work you must have the following:

1. An EMail account setup on your computer.(Contact your local internet service provider).

2. The ProfitMaker Configure | Communications | "Your EMail Server" setting must be set to the Email server provided by your internet service provider.

NOTE: You can purchase inexpensive EMail accounts from such service providers as Yahoo and Netzero for as low as $9.95 per year. Contact them for details.

Rack Locations by Customer Last Initial

You may assign garments to alphabetical locations using the customers last name initial. So, Jane Doe would be hung in the "D" area on your finished garments slick rail. Profitmaker can automatically assign the customers last initial thereby saving you from having to type it in manually.

To automatically use the customers last name initial, go to Configure | Store Operations. Then, set the check box that is labeled

☑ Use Customer Initial for Rack Location

Then when you enter Order Numbers into the "Rack Location Entry" the customers last initial will automatically be entered into the Orders location From and To fields.
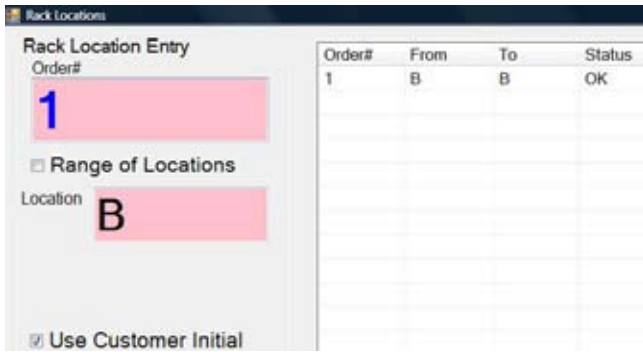
Pickups

The Pickups operation in ProfitMaker is where you will go when customers are ready to pickup their garments and pay for them. The Pickup operation is started from the main screen by clicking on the Pickup button.
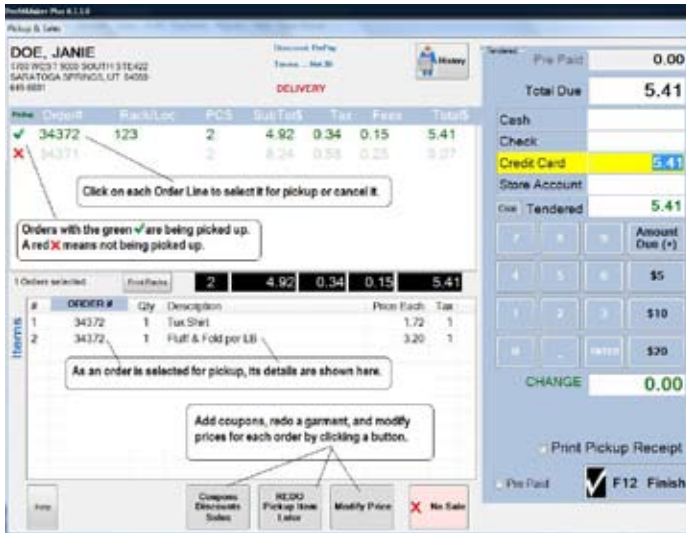
Pickup Screen Layout

The Pickup screen is divied into 4 key areas:
1. The Customer Orders List   3. The Payment Tendered Fields
2. The Order Details List   4. The Command Buttons

Customers Orders List

When a customer is selected, either from the command center screen or from the pickup and sales screen, their information will show in the upper left of the Pickup window. A colored background and logo signifies a VIP customer has been selected. All orders the customer has in your system that are either Detailed, Edited, or Assembled are shown in the Orders List.

Orders selected for pickup

You select an order to be picked up by touching/clicking on it in the orders list. When an order is selected for pickup a green check mark will appear under the pickup column. Orders with a red x are not being picked up. All orders that are checked for pickup have the individual order totals added together and shown at the bottom of the orders list. The Total$ is shown in the tendered area.

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Figure 3. Pickup list on left has no orders selected, on right the first order is selected for pickup.

Selecting Orders to be Picked Up.

Click on the Order the customer is going to pickup at this time. You can select as many orders as desired and they will be combined onto a single total to be paid with one payment. When the orders are selected, the details about the order are shown in the Order Details List shown below. Only one orders details can be shown at a time.

Order Details List

When a customers order is selected, the details of that order are shown including the Qty of garments, the description, and the unit price for a single garment along with the defined tax rate being used. You can click on any item in the Order Details list to select that item to modify its price, flag as pickup later / redo and other options explained later in this chapter.

#	Order#	Qty	Description	Item Price	Tax
1	27	1	Shirt	1.99	1
2	27	1	Blouse	1.99	1
3	27	1	Blouse	2.00	0
4	27	1	Sundress	3.00	0

Figure 4. Details List shows each item on order# 27 that was highlighted in fig 2.

Tendered Fields

The Tendered fields are where you will enter the payments that customers are making to you. The active tendered field is highlighted in yellow so that it is plain to see which payment type is seleced.

Figure 4. Each SELECTED order is totaled, and then that total is tendered.

Navigating the Tendered Fields

NEXT FIELD: When you first enter the tendered fields you will be positioned on the "Cash" payment field or the setting in the Customers "Pays by" preference. To move to the next field simply press the Enter key, or the Down arrow key.

PLUS KEY: The + key puts the amount currently due into the active field
MINUS KEY: The - key will erase the current amount in the payment field.

Tendered Field Buttons

These shortcuts help you enter amounts paid fast and error free:
AMOUNT DUE: The currently owed amount will be put into the active field.
$5, $10, $20: If customer is paying with a $5 bill, click the $5 button.
As amounts are entered, the change or balance still due is calculated and shown inthe box below the tendered fields to give you a visual guidel

Figure 5. Shows the Total Due order #27 which is $9.24 (8.98 + .26 tax)

Figure 6. Shows exact payment made of $7.73 in cash. User clicked on the "Amount Due" button so 7.73 was entered automatically to avoid errors.

Figure 7. Shows cash payment of $10.00 and change due of $2.27. User clicked on the $10 button to avoid keying errors.

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CreditCard Payments

Creditcard (and DebitCard)payments are very common and are handled quickly and easily in ProfitMaker. To process a creditcard follow these steps:

1. Position to the Carditcard payment field.
2. Press the "Amount Due" button, or press the + button, and the exact amount owed will be entered into the credit card tendered field.
3. Press the F12 Finish button.
4. A Credit Card processing window will appear with prompts for information.
5. After the credit card information is entered press F12 again to process it.
6. You will see an approval or denial message box.
7. A Receipt is then printed with a customer signature area and payment data.

NOTE: Credit and Debit card processing requires activation, contact PTS at 1-800-950-6767 for detais.
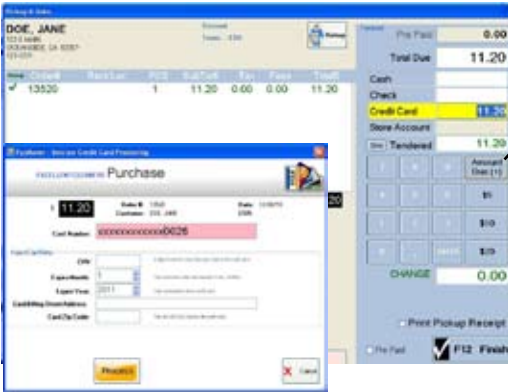
NOTE: Always click on the Amount Due button to enter amounts. This helps eliminate keying errors.

Figure 8. Shows the credit card entry screen ready to swipe a credit card.

After a successful charge you will see a validation window for confirmation that the charge went thru as shown below:

Finish the Order

As soon as payment types and amounts are correctly entered you can click on the Finish button or press the F12 function key to start processing the Pickup / Sale. When a transaction is started the Orders, Order Details and other pertinent files are updated in your database and a receipt is printed if desired

Figure 9. The Finish button is used to complete the transaction

Printing Receipts

If and how receipts are printed is determined by your configuration settings. The Ticket Layout for Pickup Tickets determines what will appear on the ticket (See Configure | Ticket/Tag Layout) and the hardware settings will determine where the ticket will print (See Configure | Hardware | Pickup).

You can override the configuration settings at Pickup Time by checking the "Print Pickup Receipt" option above the F12 - Finish button. A printer must be defined in your hardware configuration for a ticket to print. But, if you have the configuration settings set to not print on pickup, checking this button will cause 1 copy of a receipt to print anywy.

Figure 10. Shows an example ticket (invoice) that was printed.

Transaction Status

After a Pickup transaction is "Finished", the receipt (optional) is printed, and the databases are updated. A transaction status message shows at the bottom right 119

of the screen that shows pertinent information about the transaction including error messages if the operation faile

Pickup complete for 488 Change due: 2.27 .

Figure 11. A status message shows at the bottom of the screen showing the order # and change due.

Command Buttons

There will be many times when it will be necessary to modify what is showing on the Pickup screen and the orders that are being Picked Up. At the bottom of the screen there are several command buttons that allow you to modify orders.
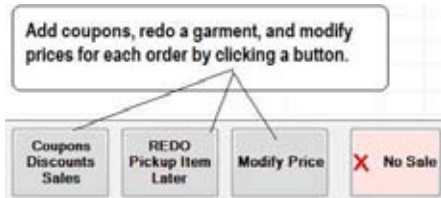
Figure 12. The option command buttons

Modify Price:	*Change the price of an item at Pickup Time.*
Coupons & Discounts:	*Shows Coupons, Voids, Adjustments, or other special pricing.*
Pickup Later:	*Flags a line item as being picked up later.*
No Sale:	*Exits the Pickup operation and prints a "No Sale" ticket.*

Modify Price Button

Select the modify price button when you need to change the price of an item on the screen. Follow these steps:
1. Click on an item in the Pickup List to highlight it.
2. Click on the "Modify Price" button.
3. Enter the new price in the dialog screen shown.
4. Click on Accept to make the new price replace the old price. (This order only)

#	Order#	Qty	Description	Item Price	Tax
1	487	1	Blouse	2.50	1
2	487	1	Jacket	8.25	1

Keyboard

Enter New Price   2.50

Figure 13. Shows the original amount of 1.99 modified and changed to 2.50 using "Modify Price"

Coupons and Discounts

ProfitMaker comes with several Coupons and Discounts pre-defined in the Adjust Order Department (Dept 12). Click on the Coupons Discounts button and you will see the buttons for each of the items defined for your store. To select an item from the buttons shown.

1. Clck on the quantity button *(if no quantity is selected, it defaults to a quantity of 1).*
2. Click on the button for the Discount, Void, Coupon or other item you desired.
3. The Item and the amount calculated is shown in the lower right of the screen.
4. Click on the Accept button to have the item selected show in your Pickup List.

Figure 14 shows the "10% Coupont" elected.

#	Order#	Qty	Description	Item Price	Tax
1	487	1	Blouse	2.50	1
2	487	1	Jacket	8.25	1
3	487	1	10% Discount	-1.02	1

Figure 15. After a discount is selected in figure 12, it shows on the pickup list.

Discount Calculations

Discounts are calculated and added to your Pickup list depending on how they are configured and the keywords used. Here is a brief description of keywords but consult the Adjust Pricing chapter for more details:

ALL   Causes the calculation to be determined by all items currently on the list.

LAST   The calcuation is taken from the last item on the list.

EXCEPT Allows entry of an "exception" explanation text and the amount to be used.

ASK   A screen will appear that will "Ask" you for the price to be entered.

Coupons On Multiple Order Pickup

Coupons can only be added to a single order at a time. This is because of sales and environmental tax calculations. As each order is selected, its details are shown in the details list below the orders list. Select each order that a discount is being added to and add the coupon one order at a time. Change the price of the coupon if needed.

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Pickup Later / ReDo

Many times when customers come in to pickup their orders they are not able to pay for all garments, don't want a certain garment, or the garment is a REDO. For these cases you can use the "Pickup Later" button to remove a single item from the the current order and place it on a separate new order that can be picked up at a later time.

To Flag an Item as "Pickup Later" follow these steps:

1. Click on the Item in the Pickup List to be picked up at a later time. It should be highlighted in blue.

2. Click on the "Pickup Later" button. You will see a message letting you know that the selected item will be removed from the current order and a new order will be created for the item to be picked up later. (ProfitMaker puts it on its own order because payments made on the current order would be overriden by a payment on the item being picked up later were it not moved to a new oder).

3. This item to be picked up later is now moved to its own order as shown in figue 16.

Figure 16. Shows the Jacket has been flagged as a Redo and its price was changed to 0.00.

Remove Order

Orders are selected for pickup by clicking on them. When a green check mark is next to an order it is being picked up. When a red X is next to an order it is not being picked up. Picked up orders are totaled, orders not being picked up are not included in the total.

No Sale

Select the No Sale button when a Pickup transaction is terminated. A no sale causes an exception to be logged, and a No Sale receipt to be printed. These actions are taken to help you identify employees who are viewing tickets and not transacting them. The No Sale receipt print lets the employee know that they have been monitored. Note: A Pickup printer must be defined for No Sale tickets to be printed).

Batch Pickups

This feature allows you to enter orders that are to be set to Picked Up / Sold status and the amounts due put On Account. This is a handy feature for those that have outside vendors that they do cleaning for and you want to set them to SOLD as they go out the door to the vendor. Then, you can use the Batch Pickup feature to quickly enter the orders that are for the vendor as follows:

1. Select the Batch Pickup option from the Command Center | File | Batch Pickus on the tool bar.
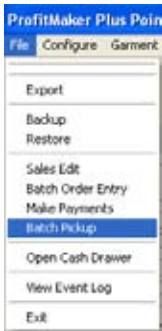
2. You will then see the Batch Pickup Order entry screen. Simply enter each order that you want to have a status of SOLD and the amount due put ON ACCOUNT for the customer the order belongs to. Nothing is processed for the orders until you press the Accept button so you can put orders into the list just to vew them if you want.
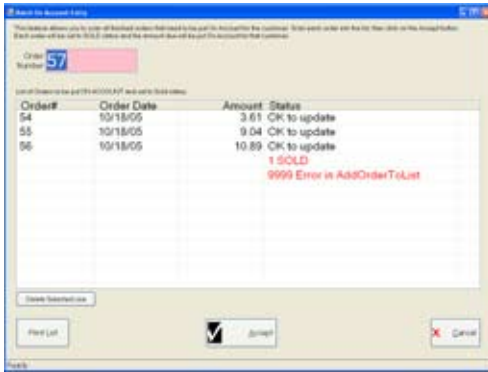
Figure 17. Shows orders entered into the list that will be set to Sold status and the amounts put on account for the customer.

Delete Orders in List

Select this button to delete an order that is in the list.

Print List

This will print a copy of the list and its current contents to the printer defined for "Detailed" tickets. You can print the list before your accept them to check it, and then again after accepting the orders and processing them.

Accepting the Orders List

Press the ACCEPT button to process each item in the list (those that are OK to process). After selecting Yes from the acceptance warning screen each order in the list will be set to SOLD status and the amout due put ON ACCOUNT.
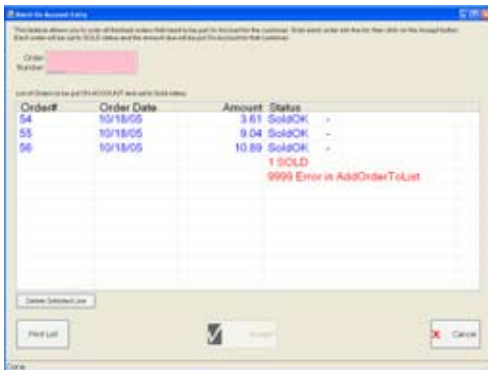

Figure 18. After accepting the orders in the list, they are set to Sold status on put On Account.

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Handling Delivery/Route Vendors for Pickups

If you do cleaning for outside vendors, the Batch Pickup option is handy for setting them to SOLD status before they go out the door to the vendor. There are several steps used to accomplish this as breifly outlined here. The senerio is this:

1. Enter New Orders. Orders come in to your store to be cleaned. They come from outside (or yourself) vendors that collect orders from customers to be cleaned. The vendor may be a wholesaler you do business with or a hotel you have a contract with. The one common fact is that a single vendor is paying for a number of orders. So, first enter the orders into ProfitMaker using the New Order feature:

   a. Bring up your Vendor as a customer for a New Order.

      1. They probalby have their taxable flag unchecked (not taxed).

      2. They have their customer type set to Wholesale (or any other type that gives a discount).

      3. The "IsBusiness" flag is checked ON. This makes tickets that print not show your store information and line item and other total amounts are not shown (regardless of the Ticket/Tag settings). The idea of no totals showing is that your Vendor is going to charge the full amount and not what you charge them.

      4. Use the *RT* item on the Adjustments screen to enter the customers name, phone, and route number is needed. This will print on the ticket as well as in the statements that go to the vendor.

      5. Finish the New Order and print tickets/tags as desired.

2. Process the Orders. As with any New Order you have to process the garments as necessary. You may or may not want to use the Racking feature depending on your store needs.

3. Use the Batch Pickup feature. You enter each order that is to be sent back to the vendor into the Batch Pickup screen as described earlier in this chapter. By grouping all the orders that will be delivered or sent to the vendor together, it is very simple to scan (if you have a barcode reader) or type in each order into the list to set the status to SOLD and the amount due put On Account.

4. Bill the Vendor. At the time of month that you do your billing, select the Statements report and print statements that can be sent (and optionally EMailed) to the vendor.

5. Get Paid. Use the "Make Payments" feature to log payments made from the vendor.

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PrePaid Orders

Some stores require customers to prepay for their orders. Others allow customers to prepay if they want to. To enter amounts pre-paid during the pickup operation follow these steps:

1. At the pickup screen make sur the "PrePaid" check box is checked.

2. Then enter the amount the customer is paying into the cash, check, or credit card field.
3. A PrePaid receipt will print (if configured to do so).

Picking Up PrePaid Orders

When customers come in to pickup PrePaid orders you follow the same proce-dures as for normal pickups (explained earlier in this chapter). The only difference is that any amounts that were prepaid show at the top of the payment window an are deducted from the amounts owed.

Click on any of the tendered fields, cash, check, ccard, which will cause the F12 Accept button to appear and finish the transaction. No money needs to be col-lected because it was paid when it was dropped off.

Sales Tax

Every order in ProfitMaker is its own entity. As such, sales tax is calculated on a per-order basis. This is too avoid rounding errors in totals calculations as shown below:

Order#	SubTotal	Tax(6.4%)	Total
1	1.00	.06	1.06

Your total tax liability for 10 of the same order would be .60 cents

Now, if 10 of these orders were combined together and tax was calculated on the total of all 10 orders the calculation would be:

Order#	SubTotal	Tax(6.4%)	Total
1-10	10.00	.64	10.64

Your total tax liability for 10 orders would be .64 cents.

Needless to say, this can add up over time. To avoid this rounding error ProfitMaker treats every order separately and calculates sales tax and env. tax on each order separately. When multiple orders are picked up at the same time each orders individual sales tax is added together to get a total.

ProfitMaker Credit Card Processing

ProfitMaker 6.1 and higher contains the needed features to satisfy the credit card industry security mandate for PCI-DSS compliance. All companies that process credit cards must meet these requirements by July 2010 or face penalties from the credit card processing companies like Visa or Mastercard.

Why do you need to do this?
ProfitMaker v6.1 now uses XPressLink to process cards in a secure way. ProfitMaker 6.1 does not store, process or transmit cardholder information. It is very important that you eliminate any and all stored credit card information from your stores database so that you (as the end-user drycleaner) are not subject to violation of these rules.

View Credit Cards On File.
From the top tool bar select: Configure | Customers
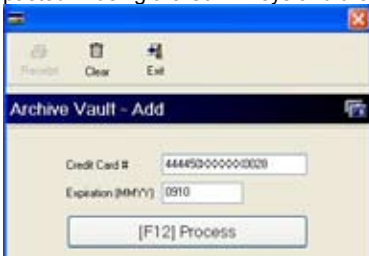

View the un-secure Credit Cards in the list.
All of the stored cards should be in an encrypted token form. In the above screen shot you can see that DOE, JANE has an un-secure credit card# where Jeffrey Bauer has a secure credit card token. The un-secure credit card number needs to be converted to a secure token immediately.

Convert the Credit Card#'s to Tokens. Click on the "Convert CC#'s to Tokens" button. For each customer that has a Credit Card # instead of a Token you will be presented with a dialog asking you to enter the customers credit card number and expiration date.

HINT: If you hold down the Ctrl button (keep holding it down) and press the V button (Ctrl V) the customers credit card number will be pasted into the conversion window for you automatically. All you have to do then is enter the expiration date in the form MMYY (MM= month like 12 for december) and YY = Year like 10 for 2010).

You can see in the screen shot below that DOE, JANE's credit card number was pasted in using the Ctrl-V keys and the expiration date was entered.

Now press the F12-Process button (or the F12 function key) and the un-secure credit card will be converted into a secure token and stored in the credit card vault on the remote processors computer (not yours).

Repeat these steps for all of the Credit Cards you have stored.

Validate Tokens
Click on the "Validate Tokens" button and each of the stored tokens in the list will be validated for correctness for processing. On the right column of the list for each customer you will see the message "SUCCESS" to indicate that the credit card token is valid. Credit Card "tokens" are used just like credit cards on file were used before. Now, when you use the "Card On File" feature of ProfitMaker the token is passed instead of the credit card number. The token is converted to a credit card number at the processors (Global Payments, Concord) site. You don't type in the token it is passed in automatically.

Order Adjustments

ProfitMaker has a predefined department that lets you adjust orders as needed. Adjusting an order might be to add extra processing charges, give discounts, or void items on an invoice.

ProfitMaker comes with the Adjust Order department already setup with several adjustments ready for you to use. They are:

10% Discount *LAST*	: 10% discount on the last item entered on the invoice.
Dollar Off Coupon	: Subtracts $1.00 dollar from the invoice.
VOID *ALL*	: Void the entire invoice.
Same Day Service	: Adds $5.00 to the invoice.
10% Discount *ALL*	: Calculates a 10% Discount off the subtotal
5% Fee *ALL*	: Calculates a %5 fee charge for the current subtotal.
REDO	: Puts a REDO line item underneath a current garment.

Keywords

ProfitMaker uses several keywords while processing Items that you select from the department lists. Each keyword causes a different action to take place.

LAST	: Use the price of the LAST item on the invoice for a discount.
ALL	: Use the subtotal of all Items on the invoice for a discount.
ASK	: Ask the user to enter the price of the item.
REDO	: Adds a Redo line item for the last item on the invoice.
VOID	: Voids the entire invoice.
EXCEPT	: Exception dialog appears to ask for reason and amount.
PROMO	: Promotional items that pop up for addition to the order.
RT	: This flag causes the Name/Phone/Route customer information box to appear allowing entry of route or delivery information.

Discounts

Discounts are negative amount items that give the customer a reduced amount owing on the order. Discounts with the keyword *ALL* calculate the discount amount based on all line items on the order. Discounts with the keyword "LAST* calculate the discount based on the last line item.

Last Item Discounts

Put the item to be discounted on the invoice.
Press the "More Depts" button until you see the "Adjust Order" department
Select the "10% Discount *LAST* item button.
A discount line item is added to the order and the amount is calculated as 10% of the last line tem amount. See figure 2.

1	ADJUST ORDER 10% Discount *...	-0.20

Qty	Desc	Amount
1	Shirt	1.99
1	Blouse	1.99
1	10% Discount 'LAST'	-0.20

Figure 2. 10% Discount off the last item in the list.

Entire Invoice Discounts

Put the item(s) to be discounted on the invoice until all items are added.
Press the "More Depts" button until you see the "Adjust Order" department
Select the "10% Discount *ALL* item" button.
A discount line item is added to the order and the amount is calculated as 10% of the ntire order. See figure 3.

1	ADJUST ORDER 10% Discount *...	-0.40

Qty	Desc	Amount
1	Shirt	1.99
1	Blouse	1.99
1	10% Discount *ALL*	-0.40

Figure 3: 10% Discount off ALL items on the list.

Subtotal Discounts

Follow the steps listed above for adding a discount for the entire invoice, but add only the items to be discounted and add the discount. Continue adding the items that are not discounted. You will now have items showing followed by a discount for those items, and then followed by the items that are ot discounted. See figure 4.

Figure 4. Shows a 10% discount given for the first 4 items in the list (Shirt, Blouse, Skirt, Gown
and then the non-discounted items "Button Fix" and Leather Cleaning are added after the discount has been calculated.

RT Route or Delivery Flag

You can set the *RT* item in the Adjustments department of the Pricing configuration to have the program ask you to enter the customer name, phone/room#/stop# and Route#. This is a free form method of tracking customer information informally if the full Route package is not used.
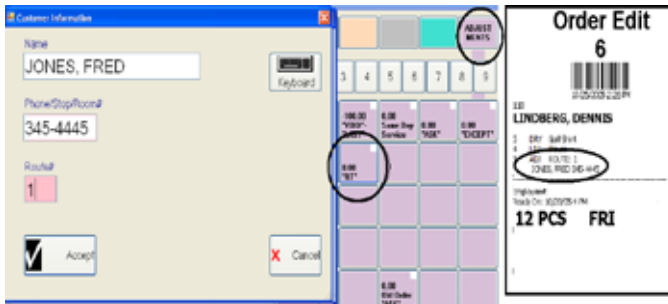
Add On Items

Add on Items are Adjust Order items that are not discounts, but are additional charges. An example would be an extra processing charge for same day service. ProfitMaker comes with several Add On items predefined in the Adjust Order Department.

$5.00 Same Day Service item. Selecting that item will add a $5.00 charge to the invoice

5% Fee *ALL*:   Adds a 5% fee based on the current subtotal of the invoice.

It is important to note that Items defined in your Adjust Order database must have a positive amount so that it is ADDED to the invoice. A negative amount is SUBRACTED from the invoice. See figure 6.

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1	ADJUST ORDER 5% Fee *ALL*	0.65

Qty	Desc	Amount
1	Shirt	1.99
1	Blouse	1.99
1	Dress	9.00
1	5% Fee *ALL*	0.65

Figure 6. A 5% add on fee has been calculated for ALL line items on the order so far.

Voids

Voids in ProfitMaker are used to cancel items on an invoice. The void can be for the current item you are working on or for the whole invoice. Voids are added as Items in the Adjust Order Department and ProfitMaker comes with several voidss already for you to use. They are:

VOID *ALL*   : Enters a negative amount lne item equal to the items currently showing.

1	ADJUST ORDER VOID - *ALL*	-16.98

Qty	Desc	Amount
1	Shirt	1.99
1	Blouse	1.99
1	Skirt	4.25
1	Gown	8.75
1	VOID - *ALL*	-16.98

Figure 7. Shows a void amount calculated for the 4 items above it and added to the invoice. The offsetting negative void amount effectively voids the items above it in the order.

Automatic Item Entry

A very powerful and handy feature of ProfitMaker is its ability to automatically add items to an order. These Items are called "Auto Addons". Whenever an order is started via the "New Order" function the Items database will be scanned to find any items with the *AUTO* keyword. Those Items that you have entered that have the *AUTO* keyword as part of the item name will automatically be added to the order when it is created. This feature can be used to automatically add an EPA or Environmental charge t an order so the employees don't forget to do so.

Figure 8. Shows an automatic line item added to an order for an EPA environmental charge.

Adding an EPA or Environmental Charge

As mentioned above, you can use the *AUTO* keyword in an Items description to have it automatically added to an order. Follow these steps to add the *AUTO* keyword to an Item in your pricing table for an EPA or Environmental charge:

1. Go to the Configure | Pricing option from the top tool menu of the Command Center screen.

2. ProfitMaker ships with the last department set up with Adjust Order departments and an item in that department called "EPA *AUTO*. You can use this item as is or change it as needed. Remember, the *AUTO* keyword must be part of the Button Text of the item if you want it to automatically be added to new orders. See figure 9.

3. When a new order is created via the "New Order" operation from the Command Center the 1st line items on the new order will be any and all items that have the *AUTO* keyword in their button text. See Figure 8.

*Figure 9. Shows an EPA Item set with the *AUTO* keyword and a price of .25. Figure 8 shows this item added to an order.*

Deleting Automatic Line Items

Automatic line items are just like anyother line item on an order and can be deleted by highlighting the line item and clicking on the "Delete Line Item" button at the bottom of the New Order Detail screen.

REDO

Often it is necessary to redo a garment for a customer who is not satisfied with the work performed. ProfitMaker offers a simple and fast way to redo a garment and track it for your records. To redo a garment follow these steps:

1. Start a Detailed Order
2. Find the Customer.

3. Put the Item to be redone on the ticket just like you would if it were a new garment.

4. Press the "More Depts" button until you see the Adjust Order department.

5. Select the "REDO" item of the Adjust Order department.

You will see a "REDO" line item appear underneath the garment to be redone with the same pricing as the garment but with a negative amount that will offset the gament and make its cost zero for the customer. See Figure 9

1	ADJUST ORDER REDO	-1.99

Qty	Desc	Amount
1	Shirt	1.99
1	REDO	-1.99

Figure 9. A REDO Item added to an invoice that cancels the Item above it.

Tax Flag

Just like any other Item in your Pricing table, REDO, Discounts, Auto Items are taxed according to the tax flag that you set. If no tax is to be calculated on an Item, set its value to zero. If the item is taxable then select the pricing table from 1 to 5 that fits the tax status of the item. Most Items will use tax flag number 1 whose actual tax value is set in the Configure | Store Informatio menu option from the Command Center top menu. See Figure 10.

Default Tax Rate	6.6	percent
Second Tax Rate	0.00	percent
Third Tax Rate	0.00	percent
Candadian PST Rate	0.00	percent
Value Added (Commercial)	0.00	percent

Figure 10. Shows tax values for tax rates 1 = Default, 2nd, 3rd, 4=Canadian, 5=Commercial.

Processing Days

Order Adjustment items all have a Processing Days and Quantity value that can be set for each of them just like any other item. It is important to set the process-ing days to 0 if you do not want the Ready On Date calculated using an Order Adjustment Item. There may be an occasion where setting the Days field to a value other than blank (or zero) would be handy. For example, you may have an Order Adjustment Item that will make an order unavailable for pickup for 7 days and therefore you would want to set the Days field to 7 so that the ready date would ake the 7 days into account when it is calculated for new orders.

Figure 11. Shows an Adjust Order Item with the "Days" field set to blank and the tax flag set to 1 = Default tax rate. A blank days field is the same as a zero value.

Customer Discounts

You can set different discount levels for each customer in your database. Discounts determine how much each item selected and put on the ticket will cost the customer. The possible discount levels are

None: No discount is applied.

PrePay: Applied to all orders that will be PrePaid.

Level 1: Use this to apply a general discount.

Level 2: Another general discount level that can be given.

Employee: The employee discount

WholeSale: The price your wholesale customers will pay (can also use Level1, Level2 if you have more tha 1 wholesale discount level.

Owner: The discount the owner gets.

Figure 12. A Customer is set to get a Level 2 discount in the Customer Edit function.

When customers come in to your store and are selected for a new order the discount level they are set to will determine what price shows on the ticket as you build it. The following screens show how pricing is entered onto a ticket for a customer with a Level 2 discount setting and the configuration for Adjustments has the Laundry Department (DeptID = 1002) set to No Discount.

1. We would first use the Confguration | Adjustments option to setup how our discounts will work

In Figure 14 we show how to set the Laundry department (1002) to NOT give discounts by un checking all the discount levels for deartment 1002 (Department 1002 is set to Laundry in this example).
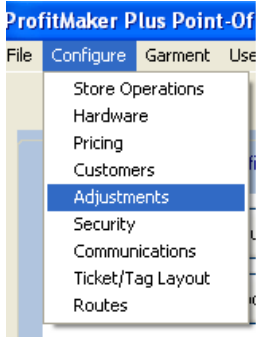
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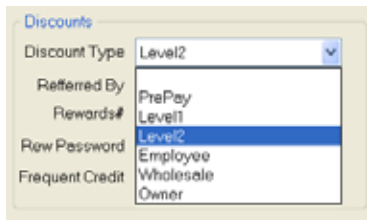*Figure 13. Menu selection to set Discounts in Configure | Adjustments.*

Figure 14. The adjustment settings for each discount level.

2.Now that our discounts have been defined, when we add items to a ticket, the discount levels are used to determine the amount charged for each item. FIrst we add a Dryclean - Shirt to our ticket. Because this customer is a Level 2 discount customer and the Dryclean department is configured to allow discounts the amount chaged is 10% off the normal amount charged to non discount customes.
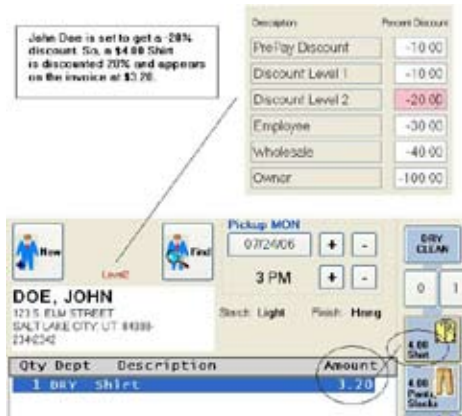
Figure 15. Shows a Dryclean - Shirt added to the ticket and 20% Level 2 discount applied.

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Promos

Promotional items are used to make sure that your employees don't forget to offer special items for sale to the customer. This can be things like Soap, Bleach, Hangers, etc.

You can add Promotional items to your order adjustments also. Promotional items are entered into the Adjustments Department 12 with the keyword *PROMO*. When you finish entering a new order, or at Pickup Order time, any items in the Adjustments Department that have the keyword *PROMO* in the button text field will pop up automatically for selection.

To use Promo Items follow these steps.

1. First, if you want promotions to appear when customers drop off, you just check the "Shw Promo's at drop off" flag in the Config | Store Operations area.

Figure 16. Store Operatoins check box to allow promo's at th time of drop off.

2. Define the Promo's in your pricing database.

Figure 16. Using the Configure | Pricing function, this shows 3 Promo items. Beach, Soap, Hangers.

3. When adding a new order (if step 1 above is checked) or doing a Pickup, after you press the Finish button, all promotional items ill appear in a dialog windows for selection as shown in figure 17.

Figure 17. The Promo items are shown at Finish time for you to select.

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4.Suggest the items shown on screen to the customer to purchase. Select the quantity and then the item button the cutomer desires. If nothing is selected, click on the Cancel button.

Sales Edit

Sometimes it becomes necessary to edit orders that are in the computer. This is usually done by an owner or manager that needs to edit the raw information in the sales order database. Care must be taken when using this feature because it is possible to modify sales amounts and other critical pieces of information that should only be done by the owner/manager. This function is password protected to keep unwanted employees from performing these operations.

To perform a Sales Edit start byselecting the function from the Command Centers main screen toolbar.
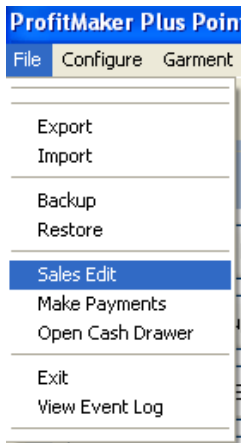
Figure 19. Shows the Command Center toolbar selection for a Sales Edit.

Next, Select the date range for the tickets you want to edit by entering a From date and a To date. All orders with an Order Date that isequal to or between these dates will be shown in the list of Orders.
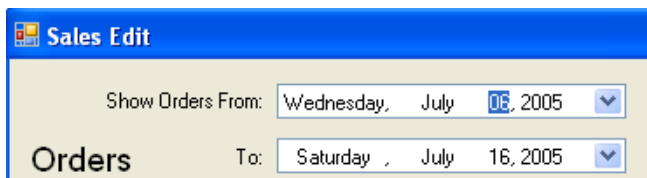
Figure 20. Shows the date range entry that selects the Orders that will be shown in the list of Orders.

After the date range has been entered, all Orders that fall within that range of dates is shown in the list.

Figure 21. Shows the list of Orders that fall within the date range selected.

As each line of the Order is selected in the list, the ine item details for that order are shown in the Order Details list.

Figure 22. Line item details for the Order line selected. (Order# 14 in this example)

You can edit most fields as needed. (WARNING. Make sure you enter valid data into each field. See how other fields above or below the field being edited look and copy that data format).

Changing Order Amounts

If an order amount needs to be changed you can do that in the Order Details List.

First, select the Order by clicking on the Order line in the Orders List (see figure 21). Next click on the "OrderDetailsAmount" field whose line item amount needs to be changed. Enter the desired amount and press the enter key. You will then be positioned to the next details line item (if any). Continue editing amounts as desired. Click on the Exit button when done.

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Refunds

When you need to give a customer a refund it is simply a matter of transacting an order with a negative balance.

1. Find the customer
2. Select Pickup from the Command Center
3. If the customer does not have any orders, create a new sales order when prompted to do so.
4. Select the Coupons Discounts button.
5. Select the "Except" item button to add an exception.
6. Enter "Refund" or any other text into the description field.
7. Enter the amount of the refund into the amount field.
8. Add the exception to the order.
9. Finish the order and give the refund back to the customer.

Credit Card Refunds

Credit card are done from the "Orders" tool bar option at the top of the screen.

1. Click on the "Sold" option.

2. Select the date or date range that the order to be refunded is in.
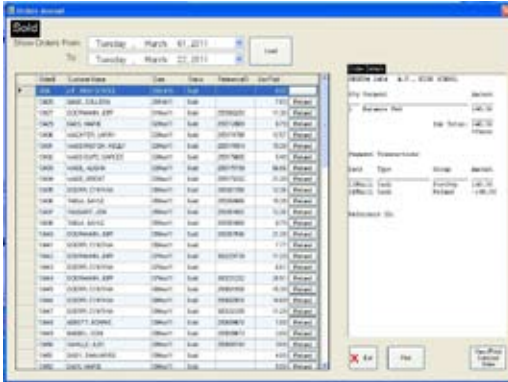
3. You will see the orders in the list. Click on the "Refund" button for the order that you want to refund.

4. Verify the refund and follow the screen prompts.

The Reports | Management | Payment Types List report will show refunds given. Also, all refunds are logged into the exceptions report.

Departments

ProfitMaker Departments are used to group the different types of processing you do in your store into groups, or categories, so that you can process them as needed

ProfitMaker starts you out with several default departments already defined and ready to use. Some of them are:
DRYCLEAN
LAUNDRY
ALTER ATIONS

Each of the departments can have up to 90 items that describe the actual garments being processed.

DEPARTMENTS   QUANTITY   ITEMS FOR SELECTED DEPARTMENT

Figure 1. Dryclean department items showing the 1st 30 of 90 possible items for the department


Defining Departments

You have 12 departments available for you to name whatever you would like. ProfitMaker comes pre-configured with these departments:

1001	: Dryclean	1007: Not Used, change as needed.
1002	: Laundry	1008: Not Used, change as needed.
1003	: Alterations	1009: Not Used, change as needed.
1004	: Press Only	1010: Not Used, change as needed.
1005	: House Hold	1011: Not Used, change as needed.
1006	: Clean Only	1012 : Order Adjust

To Modify the departments for your stores needs, follow these steps:

1. Select the Configure | Pricing option from the menu at the top of the Command Center screen.
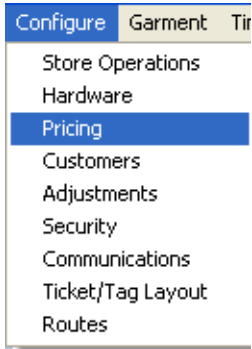
2. Position into the Departments grid and use the arrow keys to position on a department.

3. Modify the department columns as needed. The information is saved once you click on the accept button at the bottom of the screen. Use your mouse and the sliders on the bottom and right of the departments grid to see more columns and more departments.

Printing

Departments are printed on tickets for Quick Tickets, and New Orders. The Ticket will look something like this

Printing Departments to Separate Tickets

Sometimes it is desirable to print different departments to different tickets. This can be accomplished by assigning department "Group" numbers. All departments default to group 1. If, for example, you would like Alterations to print to a separate ticket you would set its Dept Group number to 2. All departments of group 1 will print on a ticket and all departments of group 2 will print on a separate ticket. You can have up to 12 separate department groups (1 per department).

DEPARTMENTS		
Dept	DeptName	DeptName
1	DRY CLEAN	Drycleaning
1	LAUNDRY	Laundry
2	ALTER- ATIONS	Alterations
1	PRESS ONLY	Press Only
1	HOUSE HOLD	Household
1	CLEAN ONLY	Clean only

Figure 2. Shows the Alterations•department set to group 2 so that it will print on a separate ticket.

All items on an order will have the same Order Number regardless of the ticket they print on. Also, each separate ticket printed will have tax calculated separately for each ticket. At pickup time the entire order will be grouped back together and taxed, and totaled correctly.

NOTE: It is important to remember that if a discount is given on all items on an invoice, it will print on the ticket for which department group it is defined. You may have to add separate Order Adjustments for departments that are in different groups.

Printing Departments to Different Printers

Along with printing different departments to different tickets, those different tickets can be printed to a different printer. So, for example, if you want Laundry to print on a separate ticket, and on a different printer then you would set the department group to be different, and, you would assign a different printer in the Department Printer column. If the printer name is left blank, then the configured printer in the hardware section will be used.

Printing Special Processing Text Files

Some departments in your store may require special or outside processing where a release or other type of form may be needed for the customer to sign. Each garment in every department can have a "Text File" that can be printed whenever that garment is put on an order. See Figure 3.

Figure 3. A text file named "LeatherReleaseForm.txt" that will be printed to the LaserJet 4 printer on the PTS-Server.

Creating Special Processing Text Files

The file to be printed needs to be created with the NotePad program that comes with windows. You can start it by:

1. START | All Programs | Accessories | NotePad.

2. Type in the text to be printed. ProfitMaker comes with a file named "LeatherRe-leaseForm.txt" that you can use as a starting point. It is located in the ProfitPlus subdirectory on your computer.

3. Save the File. It must be saved to the ProfitPlus subdirectory so that it can be found when needed.

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Accounts

ProfitMaker Accounts are used to allow your customers to pay for your services on a periodic basis. You may have customers who pay you weekly, bi-monthly, monthly etc. and you want to store up their orders so the customers can pay, or make payments, on the amounts owed to you.

Apply Payments

Payments are just the customer is making a payment on amounts owed. Usually, they store up orders until at some point in time they make a payment to you. As a recap from the Pickup Chapter, amounts are put "On Account" when the garments are picked up, delivered to the customer, etc.

Figure 1 shows the amount of $105.39 being put on a customers account from the Pickup operation.

Figure 1. Amounts owed are put on account at time of Pickup

Store Account Setup

Before a customer can put items on a Store Account they must have two things set in their customer record as follows:
1. The customers address, phone, etc. should be complete and accurate.
2. The customer terms can not be COD. The terms must be set to Net 10, 15, Credit Card Daily, or some other type of terms that mean the customer will not be paying at the time of pickup.
After an amount is put on account, an optional receipt is printed to the "Pickup" printer defined in your hardware configuration settings. Figure 2 shows an example receipt printed

Figure 2. Printed receipt shows the amounts were paid by "Account".

Make A Payment

Lets show you how to apply a payment made by a customer. To start the process, follow these steps:

1. select the Payments | Payments On Account option from the tool bar at the top of the Command Center screen as shown in the figure below

Figure 3. Make Payments is started from the Command Center | File tool bar.

2. All customers who have account terms that is not COD are shown in the drop down list. Select the customer who is making the payment from the list by clicking on their name.

Figure 4. After a customer is selected, all "On Account" amounts are shown in the list.

3. Now, you should see all payments owed in the list for the customer selected. You must now click on the payment type option of Cash, Check, or Credit Card depending on how the customer is paying.

Pd	Order#	Transaction Date	Original Amount	Group	Due Date	Memo	Balance Due	Payment
☑	0	2/6/2007	3.00	Charge	2/6/2007	Credit for overpayment	-31.88	
☐								
☑	20242	1/19/2007	7.63	Charge	2/18/2007		7.63	
☐	20245	1/18/2007	2.54	Charge	2/18/2007		2.54	
☐	21182	2/9/2007	13.21	Charge	3/11/2007		13.21	

Figure 6. The "Cash" payment type is selected and we are ready for the amount paid to be entered.

4. After you select the payment type, the Amount Paid field will highlight in a colored background and you can enter the amount paid. Also, the Accept button will become "Enabled" and ready to be clicked.

Press the Enter key after entering the payment amount and the amount paid will be distributed to the amounts owed. Orders that are completely paid in full will have the PD box checked (Paid).

	Pd	Order#	Transaction Date	Original Amount	Group	Due Date	Memo	Balance Due	Payment
▶	☑	20242	1/19/2007	7.63	Charge	2/18/2007		0.00	7.63
	☑	20245	1/19/2007	2.34	Charge	2/18/2007		0.00	2.34
	☐	21192	2/9/2007	13.21	Charge	3/11/2007		3.18	10.03
＊	☐								

Figure 7. Payments distributed to the orders.

At this point the payments have been distributed but they are not committed yet. If the payments look correct, click on the Accept button to update the data files. You will see one more summary screen that you can verify the payments to be made. Select Yes to apply the payments.

•

After the payments are applied a receipt will print. If you selected a payment type of Credit Card you will be shown the credit card processing screen if it is config- ured to be shown. in the hardware configuration settings.

Figure 8. The Accept button starts the process of applying the paymentt and a receipt will be printed.

Note: Printing of the receipt is done to the "Sales or Payments" printer you have defined in your Hardware | Printers settins.

After the optional receipt is printed, a message will be shown letting you know the payment was applied to the customers account.

425.80 Cash payment accepted.

Figure 9. After all payments are processed, a message shows the payment was accepted.

When payments are applied the On Account amount in the Orders database is decreased by the amount paid and the payment used (cash, check, creditcard) amount is increased by the amount paid. Also, a payment row is added to your Payements database that reflects the date, amount paid, employee ID, and the order number the payment applies to. If you were to lose your payments database for some reason, the amounts On Account would still reflect the amount owed by customers but the history of their payments would be unavailable.

Giving Customers Credits

Some stores will give credits to customers who like to pay in advance. If customers pay you more than they owe you a credit is given to the customer. Credits due to the customer are shown in red in the orders list. As you put orders On Account for customers the amount they owe you adds up. Periodically, you should Apply Credits against the orders that are owed. To apply credits to customers simply click on the "Apply Credits" button at the bottom of the Payments screen.

Figure 10. After applying credits, the credit is distributed across the orders owed and the credit is deducted.

Using Store Credits

You may want to Bater with friends, other businesses, etc. who you would trade your services for theirs. The people you barter with would pay with "Store Credit". Store credits are not cash, checks, or credit card payments. They are payments for services or other things you provide to the customer you are bartering with. To use store credits, follow the standard procedure of putting the orders On Account for the customer. Then, when you want to pay the orders with a Store Credit simply select the Store Credits method of payment. No money is collected or exchanged.

Messaging features of ProfitMake lets you communicate with Users, other stores. User Messages are viewed, added, and deleted from the User Messages screen. Also, you can EMail messages to others from the User Messages screen.

User Messages

The employes and others in your store can send messages to one another using the In-Store messaging feature. The following will explain how to send, manage, and delete messages.
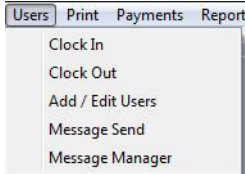

Figure 1. The User Messages list as shown on the Command Center screen.

You must first Log In so you, as the sender, will show in the "From" field. Click on the "Message Send" button. You will be shown the User Messages screen where you can use the tool bar at the top of the screen to navigate thru messages.
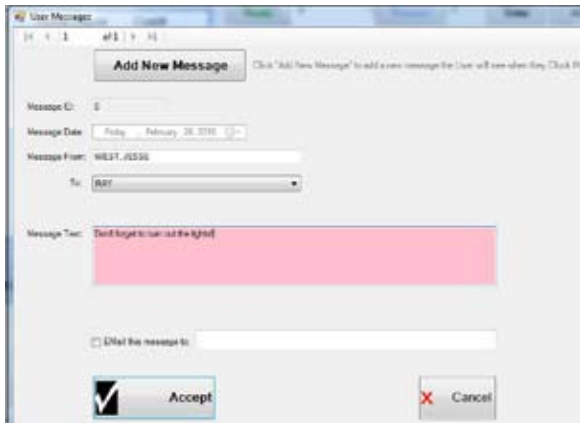
Figure 2. The User Messages screen with the tool bar shown at the top of the screen.

Navigating the messages is easy using the VCR style buttons on the top tool bar. The tool bar shows the current message ("1" in our example) and the number of total messages ("2"). Use the < and > buttons on the tool bar to navigate from message to message.
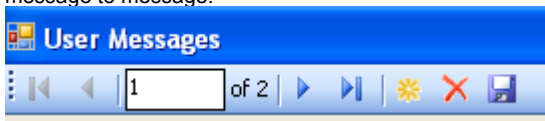
Figure 3. The messages tool bar.

Send a New Message

To send a new message click on the "Add New Message" button. This will clear all the fields so that you can enter the From, To, and message information. (you must be Logged IN).
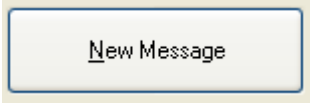
New Message

Figure 4. The button to press to add a new message.

1. You, as the Sender, will show in the "Message From" field.
2. Select the message recipient by using the drop down list after the "TO" prompt. All available users will be shown in the list for you to select from.
3. Type in your message in the "Message Text" box and click on the Accept button.

You message will then be sent to the recipient. They will see the message each time they clock in until you delete the message.

Message Management

When you select the Message Management option you will see all of the Messages that are active. From here you can view and delete messages as needed.

Delete Messages

To delete a message follow these steps in the Message Management screen.
1.Find the message you want to delete in the list of messages.
2. Highlight the message line and click on the red **X** button on the tool bar.

Notice that the tool bar counts will show an updated value for the current message and the total number of messages. Be sure to set "Security" on Configure | Security | Message Manage so that employees don't delete or change messages if you don't want them to.

EMailing Messages

It is very easy to EMail a message to someone. It is not necessary to ADD a new message to EMail one to someone either. Follow these steps to EMail a new or existing message:

1. If desired, click on the ADD New Message button (this is optional).
2. Enter your name in the FROM field.
3. Enter the name of the person who will get the EMail in the TO field.
4. Type in your message.
5. Make sure that the check box "EMail this message to " check box is checked.
6. Click on the ACCEPT button.

Figure 5. The Accept button to add a message and/or send an EMail.

EMail Configuration

Before you can EMail a message to someone you must configure your EMail settings. On the Configure | Communications setup screen you will need to enter the name of your EMail Server.
Contact your EMail provider to obtain this information. Enter the Server name in the text box provided on the Coommunications settings screen as shown in figure 6.
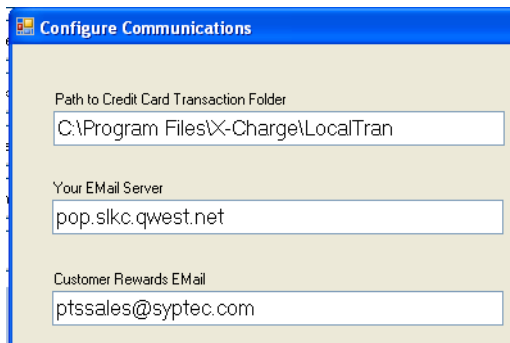
Figure 6. Configure communications settings.

Event Logs

ProfitMaker and Windows logs important events that happen in your computer to event logs. These logs are sometimes useful when troubleshooting a system. There are 3 types of event logs. Application Events,   System Events,   Security Events

You can view the events that happen in your system by selecting the "View Event Logs" option from the File menu on the Command Centr toolbar.

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Viewing Events

After you select the "View Event Log" option you will see the Event log screen. It will be blank to start with. You can view any of the 3 events by clicking on the option button at the top of the screen. As you click on each type of event, the entries for that event are shown in the list.
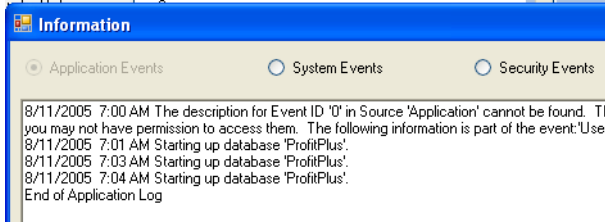
Clearing Events

Event logs can get large so it is a good idea to clear them once in awhile. First select the event log to clear by selecting it as mentioned in Viewing Events above, then click on the Clea Log button.
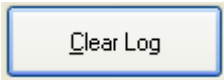
EMailing Events

You may be asked to EMail an event log to us at Personal Touch Systems. The PTS Email address is listed below the EMail button. Click on the button and the current event log will be EMailed to the email address shown blow the button.
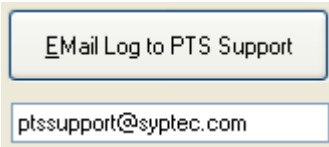
Note: You must have EMail installed on your computer and your stores EMail address entered in the Store Information configuration area.

Garment Utilities

The Garment Utilities section of ProfitMaker lets you perform searches and do inventories of the garments in your store. Garment search is handy when there is a garment in your store that does not have any tagging on it. Garment Inventory is used to do an item by item inventory of your store.

Figure 1. Garment Search menu item selected.

Garment Search

The Garment Search option is started from the Menu at the the top of the Command Center screen

Garment search can be used when you need to find which order a garment belongs to that has no tagging on it. You can search by Ticket Text, .Color and/or Pattern. For example, we have a Red Shirt in our store and we do not know who it belongs to. First, enter "Shirt" in the seach text box. Then click on the down arrow to the right of the Colors list box and select "Red" from the list as shown in figure 2. Then click on the "Start Search" button and all matching tickets will show in the list. You can enter colors, patterns and anything else in the search box. ProfitMaker will search for any tickets that have any text in them that match the entry.

Figure 2. Shows a search for "Shirts" with a color of Red.

Next, click on the down arrow for the Patterns list and select a pattern or leave it blank so that patterns are not used in the filtering of garments.

Last, click on the "Start Search" button to start the search. All Orders that have "Red" and "Levi" as descriptors will be shown in the list where you can use the Order# shown to locate the information in the ProfitMaker Assembly operation or anywhere else that an Order# is used.

Figure 3. Click on the Start Search button to find your garments.

View/Print Order

You can view or print the Order Ticket on screen or on your detailed ticket/invoice print by click/touching on an order in the list then click/touch "View Selected Order" or "Print Selected Order" buttons.

Guidelines for Garment Searching

The following guidelines will help you find garments quickly and easily when searching:

1. You can enter anything in the search box, ie; Garment names, colors, patterns, etc.
2. The search will match any part of the garment text, not just the first part.
3. If a color is entered, only garments with that color are shown. Same for patterns.

Inventory

Use the ProfitMaker Inventory feature to do a physical inventory of the garments in your store with the help of the computer. Using a barcode reader (preferrably wireless), you can scan every ticket in your store and then press the "Process" button and the computer will scan all of the tickets in your computer database, compare to the tickets you scanned into the list, and then will print a "Missing Order List" for those orders that the computer thinks are in your store but you did not scan.

Start An Inventory Session

To do an inventory follow these steps:

1. Start the Inventory program from the Command Center | Garment | Inventory menu option.
2. You will then see the Inventory list screen with the Ticket Order# field highlighted in yellow. Scan each Ticket in your store.
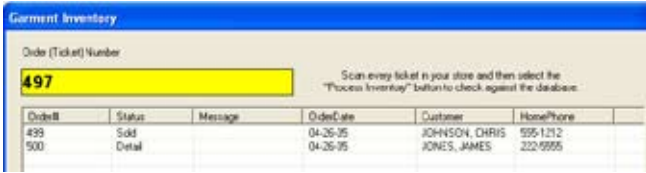
Figure 2. Entry of Order Numbers via scanner into the Inventory List
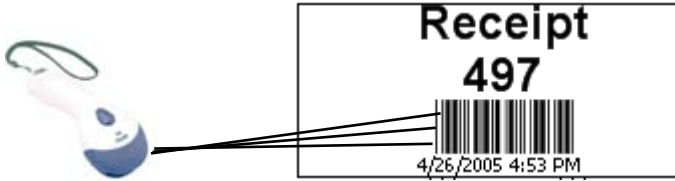
3. When you are done scanning all of your tickets into the list select the "Process Inventory" button. You will be asked if you are sure you want to continue because this operation will effectively erase the list of items you have entered. If you are sure you want to process the list, select YES. If you have more scanning to do, select No.
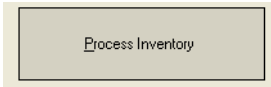
Figure 3. The Process Inventory button starts the program checking your inventory.
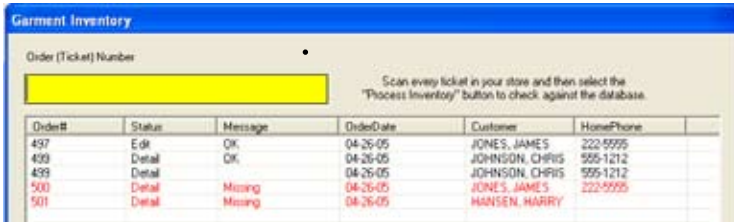
Figure 4. Processed inventory list showing the missing orders highlighted in red.

Sorting the Missing Orders List
You can arrange the list by clicking on any of the column headers to sort by that column. For example, click on the Customer column heading and the list will be sorted alphabetically.

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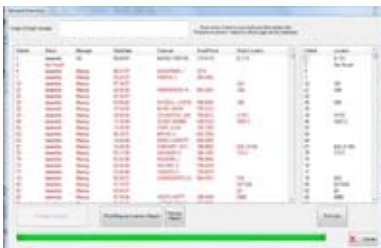
Printing the Missing Orders List

If you would like a hard copy of the missing orders, you can now select the "Print Missing Inventory Report" button or the "Print List" button.

Print Missing Inventory Report is designed for an 8 1/2 x 11 sheet of normal report paper.
Print List is designed for 3" wide receipt paper.

This will list only the missing orders on a list after you select the printer you want to print to.

Figure 5. Prints a list of missing orders after the list is processed.

The missing inventory list is also store in a file called "InventoryYYYYDDMM.txt" where YYYY is the year (2010), DD is the day of the month, MM is the Month of the year. This file can be viewed or printed at a later time if needed and can be opened in a text file program like Windows NotePad.

ProfitPlus

GarmenTRAK

Helps you cut down on tagging in your store. Print a garment label once, press it into the garment and then use that label as the tagging method.

1. Find Customer.   2. Find Garment.   3. Select Starch/Finish   4. Add/Print
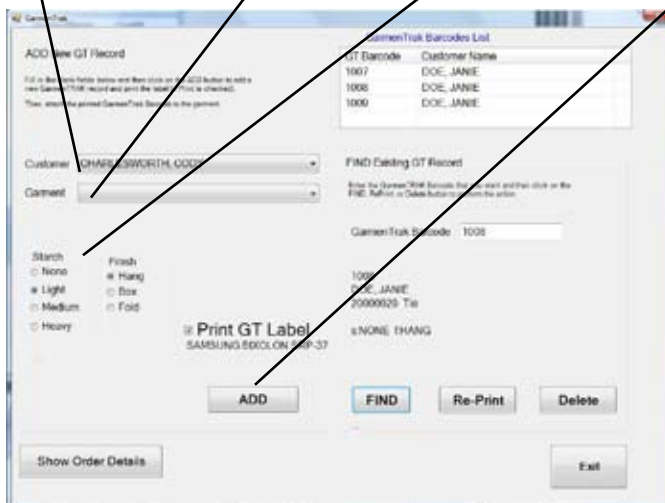
How It Works
Add a New Garment

1). When a garment is added (tagged) for the first time, click on the GarmenTrak button on the main screen (or from the top tool bar "Garment" option) to add the garment and (2) print a (3) label.

(4) Heat Press the label into the garment. That garment is now permanently tagged and labeled.

> *GarmenTRAK labels are special labels that will survive repeated dryclean and washing cycles and can be heat pressed into garments. They are printed with use a special printer and ribbon.*

Each time the garment comes into the store simply scan the barcode and the customer comes up automatically, a new order is added, and the garment is added to the order.

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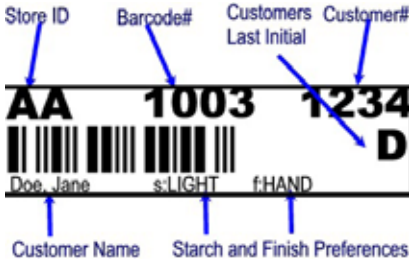
Figure 6. A printed GarmenTRAK barcode label.

Assemble orders together by GT Barcode or Customer#.

Find Existing GarmenTRAK barcodes

After a GarmenTRAK barcode has been added you can find it again by entering the barcode number and clicking on the FIND button. This will show you all details about that barcode. This is used in-case you find a barcode not attached to any garment, etc.

After the first barcode is scanned you can enter other GarmenTRAK barcodes on the Detailed order screen simply by scanning each GarmenTRAK barcode.

Re-Print Barcodes

First enter the GarmenTRAK barcode and Find it. Then click on the re-print button to print the barcode label again. To add a GarmenTRAK barcode to a garment and NOT print it, simply uncheck the "Print GT Label" button.

Delete Barcodes

First enter the GarmenTRAK barcode and Find it. Then click on the Delete button to remove it.

GarmenTRAK Setup

The only then that needs to be setup for GarmenTRAK is the printer that will be used to print the heatseal barcode labels. First install the GarmenTRAK printer following normal Microsoft Windows printer installation procedures. Then go to the top tool bar at Configure | Hardware and set the "GarmenTRAK Labels" printer that you have just installed.

Intelli Reports

ProfitPlus contains many useful reports that allow you to get the information stored in your computer into a viewable format. You can view the reports on screen before printing them. Also, ProfitMaker reports are "intelligent" and can be modified as you view them. You can Drill Down, Drill Thru, and otherwise expand the reports to show only as much or as little information as you desire.

Reports	Help	Open Drawe
Intelli Reports		
EMail		
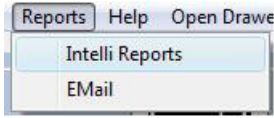
Start the reports operation from the Command Center tool bar at the top of the main screen.

Report Categories

ProfitMaker Plus - Intelli Reports

Select a report.

My Favorites Drop Offs Pick Ups Production Customer Sales A/R Management

A list of Reports you have saved.
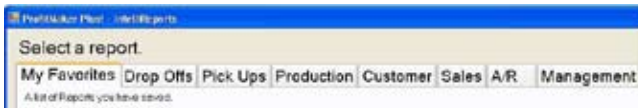
The reports are divided into 8 categories as described below

My Favoties: You can put any of the reports from the other 7 categories into My Favorites.

Drop Offs: Reports specific to new orders and garments dropped off.

Pick Ups: Orders that have been picked up are shown in these reports.

Production: These reports help you manage the production and tracking of garments in your store.

Customer: Reports specific to customers and customer management like mailing labels.

Sales: Some interesting reports that allow you to track sales in your store.

A/R: Accounts Receivable reports like Statements and Account Aging help you get paid.

Management: Time Card, Voids, Balance Till and other management reports are here.

To select a specific report, simply touch or click on the report button.

Graphs

There are several Graphing type reports. Graphs show you information in a visual manner instead of in a textual manner like most reports. Graph reports have selection buttons like the one shown below:

Drop Off Report   Graph

ProfitPlus *(vertical text in left margin)*

My Favorites

There are lots of reports in ProfitMaker with new ones added all the time. You may only need to use a few of them in your store. In order to make it easy to get at the reports that you like the best you can store them in the My Favorites screen. The favorites you store are simply reports from the collection of reports available gathered together on one screen.
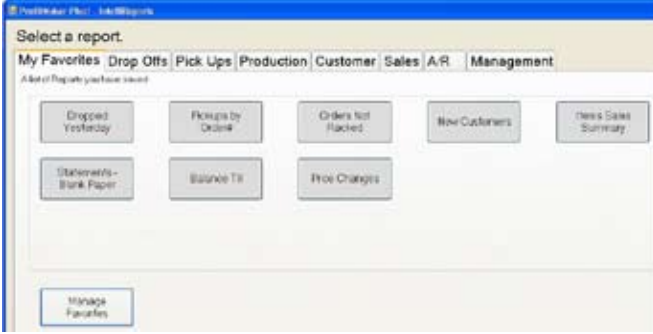
This shows 8 reports saved in the My Favorites screen.

Manage Your Favorites

To add and remove reports from Your Favoties click on the Manage Favorites button. The left side shows all of the available reports in a tree view. The right side shows the selected reports that will appear in the My Favorites screen. By clicking on the +/- button next to each report category you will see the available reports. Highlight the desired report in the list on the left and then click on the Add to Favorites button. Likewise, click on a report in the right side list of favorites and then click on Remove From Favorites to clear it from the list.
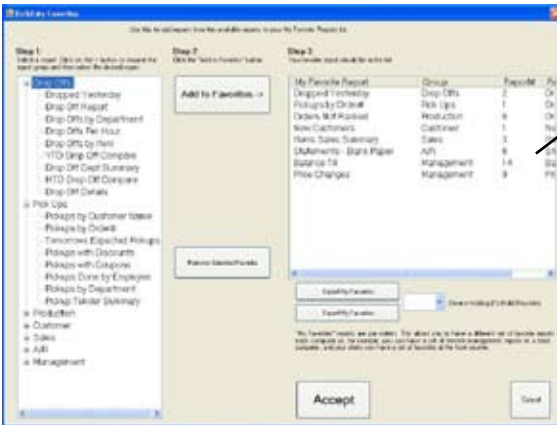
Reports put here show on the My Favorites screen.

Viewing Reports

After ProfitPlus Intelli Reports are selected they show information in a PreView window. This window shows the report data in a changable form. The reports preview window has several options:

Page#

Navigation Buttons

Print

Print Layout

Page Setup

Export

Zoom VIew Size
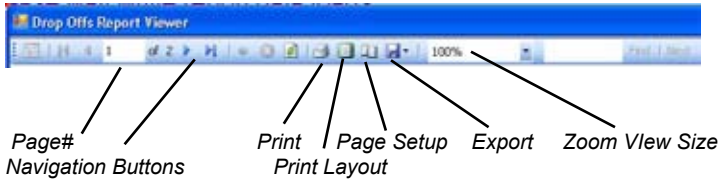
Navigation Buttons: These buttons let you move thru the report a page or page(s) at a time.

Page#: If you want you can enter the page number you want to view.

Print Layout: This shows you how the report will look when printed.

Page Setup: Lets you adjust margins, and other paper settings before printing.

Print: Prints the report to a printer attached to your comuter.

Export: Lets you send the report information to an Excel or other file formats for other computers. Zoom: Lets you increase of decrease the size of the report on screen.

Follow these steps to view reports.

1. Select the report and date range. (Explained later in this chapter).
2. Select any drill down or drill thru options (Explained later)
3. Click on the Print Layout button. This will show you how the report will look when printed.
4. If desired, Zoom in or out to see data bigger or smaller.
5. Use the Navigation buttons to page thru the report.
6. Click on the Print button when you are ready to print the report.

Drill Thru and Drill Down

Several of the ProfitMaker reports allow you to Drill down and Drill thru the data shown. Drilling capability is indicated by the presence of a + or - sign next to a data row on the report.
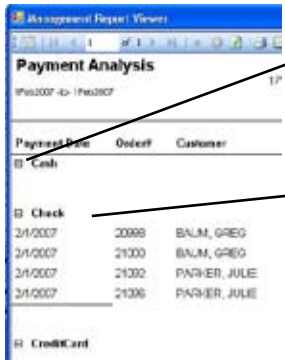
Click on the + / - buttons to drill down and show more detailed data.

The checks are Drilled Down and expanded to show details but the Cash and CreditCards are Drilled Up to show only summary information.

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Exporting Reports

You can export any report to an Excel or CSV compatible format file. This allows you to take reports and store information home or to a main office for consolidation of data and other reporting. For example, you may want to export sales information from several stores to files that are merged together into an Excell Spreadsheet allowing you to view consolidated sales information for all stores. (Excel is a Microsoft Spreadsheet program available at most computer outlets and office supply stores).

To export a reports data simply run the report and then click on the Export button. You will then be prompted to select Excel or PDF format. (PDF is a viewable format that can not be edited. Select Excel and then select the name of the file you want to save the data to. You may want to select a Flash drive like drive E: so that the report data can be removed and taken to another computer.

Printer Selection

After you run a report and then click on the Print Layout button you can print the report to a printer by selecting the Print Button.

After selecting the Print button you will be shown a list of all of the printers installed on your computer.

Highlite the desired printer, select the number of copies, and click on the Print button. If you want to just print a specific page enter the page number desired in the box and check the pages button.

NOTE: Printers are installed with the WIndows Add Printer routine explained in the "Windows Guide" portion of this manual.

Report Date Range

Most reports will prompt you to select a starting and ending date range to filter the data in the report. You can make quick selections of date ranges by clicking on the options to the right of the Date Entry screen.
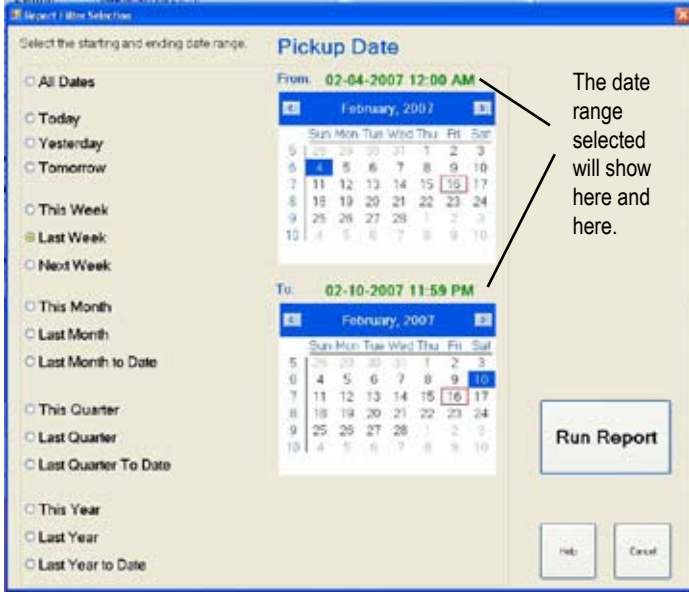
To select a date range either click on the range options or click on the calendar.

Sometimes a date range is not needed at which time the date range screen will show but you will not be able to select any dates. An example of this is the Month-to-Date and Year-to-Date Drop Off compare reports. These reports use the current date so no date selection is needed.

Run Report

Once you have entered your date range and/or other filters click on the Run Report button to view the report on screen. A mesage stating the "Report Data Loading.... Please wait" will let you know when the data from your data files is being loaded and then a message about "Building Report..." will show while the report itself is being formatted for viewing.

Multiple Page Reports

If your report has more than one page you can view each of the pages using the tool bar navigation controls at the top of the screen.

Drop Off Reports

Drop off reports help you keep track of garments dropped off for cleaning at your store. The current drop off reports are:

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Drop Off Report	Drop Off Dept Summary
Drop Off Yesterday	Drop Off Dept Details
Drop Off by Department	Year-to-Date Drop Off Compare
Drop Offs per Hour	Month-to-Date Dropp Off Compare
Drop Offs by Item	Drop Off Graph

Pickup Reports

Orders that are picked up by customers and sold thru ProfitMaker are reported on using the Pickup   Reports. Pickup reports help you keep track of what orders went out the door. The Pickup Reports are:

Pickup by Order#	Pickups with Coupons
Pickup by Customer Name	Pickups by Department
Tomorrows Expected Pickups	Pickups Tender Summary
Pickups With Discounts	Pickups Done by Employee
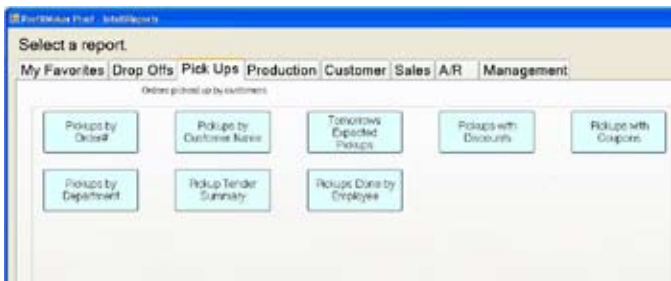
Production Reports

These reports help you manage production of garments in your store. Using the Production reports a store owner can see if the times taken to process garments are abnormal. Also, helps find orders that may have slipped thru the cracks and disappeared. The Production Reports are:

Item Workload	Orders Not Racked
Department Workload	Order Aging
Item Production Times	Racked Orders by Order#
Department Production Times	Racked Orders by Name
Production by Employee	Racked Orders by Rack#

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Customer Reports

Finding which customers are coming in the most and which haven't been in for awhile is where the customer reports help you. Print mailing labels, post cards, and other marketing reports to see your inactive customers, reward active customers, and track birth days. Also, credit card reports help you find and manage out of date credit cards.

New Customers   Birth Days
VIP Customes   Credit Cards Expiring
Inactive Customers   Credit Card Customers
Customer History   Customer List
Discount Customer List   Top Customers by Sales$
Discounts Given

Mailing Labels

The Customer reports let you print some of the report data formatted to fit on standard Avery 5160 or compatible mailing labels. To send the report results to mailing labels follow these steps:

1. Click on the Mailing Labels option at the bottom of the Customer Reports screen.

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2. Run the report with the date ranges desired.
3. Click on the Print Layout button at the top of the Report Viewer screen to view the report.
4. Load Avery 5160 or compatible 1" x 2 5/8" labels into your printer.
5. Click on the Print button and print the labels.

Post Cards

You can also print Customer reports to standard 4 UP post card stock available at most office supply stores. ProfitMaker will print the address side of the post card with your store name, address, etc. and the customer address. You would have to print an Advertisement or Coupon on the other side of the post card. Also, we have pre-printed postcards like "Happy Birthday" and "We miss you" in stock. Just call 800-950-6767 to order post card stock.

Sales Reports

Checking the pulse of your stores sales has never been easier. For example, the Sales Comparison report will show you how this year is stacking up against last year. Compare Customer sales and Item Sales, and how many sales employees are making.

Customer Sales Summary   Employee Sales Summary

Customer Sales Details   Sales Period Comparison
Item Sales Summary

A/R Reports

The Accounts Receivable reports help you with amounts owed to you from customers. It has Statements, Account Aging, and other reports designed to help you collect money owed to you. Statements can be printed to blank paper or you can purchase professionally printed statements from us.

Who Owes Money   Statement Details
Account Aging by Customer   Statements - Blank Paper
A/R Summary   Statements - Form1
Payments Made
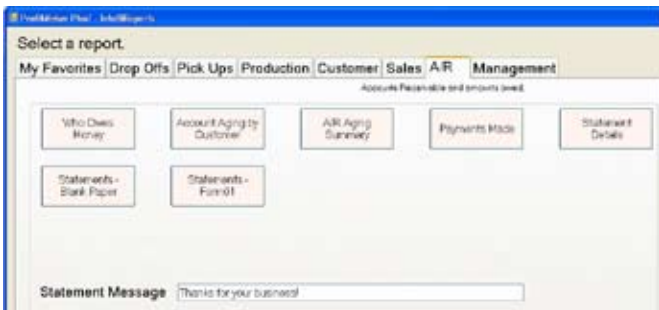
Management Reports

The Management Reports let you see the underworkings of your store. Are employees giving too many discounts. How many Voids were there last month. Show me the Suspicious orders for last week. All of this and more are available with the

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Managerment reports. The reports include:

Voids by Employee	REDO's	Employee Work Hours
Discounts by Employee	Payment Analysis	Create Work Schedule
Exceptions	Time Clock Hours	Price Changes
Payment Types List	Price List by Dept	Price List by Item
Exceptions Summary	Balance Till	

Exceptions Reports

The Employee Exceptions List report is of special mention because of its value to your store. As employees or users of ProfitMaker make "exceptions" to prices, Redo garments, remove orders, and lookup orders, they are logged into the exceptions database and can then be viewed by the store owner/maager (see configure | security for how to limit acces to reports).

There are severl types of exceptions that can be filtered when looking at this report:

General, Warning, Critical, CashControl, CustomerControl, OrderControl, Rack-Control, Suspicious.

Another valuable area of the Exceptions Reports are the Suspicious Orders Suspicious Orders have been brought up on the Pickup screen and then have been not sold to the customer. This can be an indication that the order was looked up by an employee, sold to the customer, and then not transacted thru the computer. Check the orders in this list against the rack locations to see that they are still in the store and have not ben mistreated.

<div align="center">

Exceptions List
Friday, August 12, 2005 12:00:00 AM

</div>

Ex Date	Order#	Type	Description	Amount	EmpID
08-11-05	6	CashControl	Price change: 0.75 to 0.75	0.75	-1
08-11-05	10	CashControl	Price change: 2.00 to 2.00	2.00	-1
08-11-05	14	CashControl	Price change: 1.99 to 1.50	1.50	-1
08-11-05	14	CashControl	REDO Shell	1.99	-1
08-11-05	11	CashControl	Price change: 1.88 to 1.00	1.00	-1
08-11-05	16	CashControl	REDO Turtle Neck	1.99	-1
08-11-05	16	CashControl	REDO Turtle Neck	1.99	-1
08-11-05	17	CashControl	REDO Child Pants	2.25	-1
08-11-05	17	CashControl	REDO Child Pants	2.25	-1
08-11-05	21	CashControl	REDO Shorten Hem	5.00	-1
08-11-05	19	CashControl	Price change: 3.00 to 1.25	1.25	-1
08-11-05	-1	CashControl	Cash Drawer Open	0.00	1191
08-11-05	-1	CashControl	Cash Drawer Open	0.00	1191
Total 13				21.97	

ZKey Report

The ZKey Report is used when it is time to cash out a till and count its contents. Also, the ZKey report shows useful statistics for the time range entered. To run a ZKey Report:

1. Select the ZKey Report button from the Command Center screen. You will then see the Till Counts screen.

2. Enter an Employee Access Code if you want to see sales done against that code for the date range Or, leave it blank to see ALL transactions for the date/ time range selected.
 The cash values are entered as counts of monies not actual values. You would,

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for example, enter 23 in the dimes field, not $2.30.

3. Verify the value of all the checks and credit cards you have collected during the time period desired. These fields hold the dollar amounts, not counts as mentioned above.

4. You can select what type of information you want on the ZKey report by checking or not checking the option buttons.

Show Tender Amts:
Shows the till tender fields informationand amounts you enter.

Show Statistics:
Shows statistics about sales

```
ZKEY Report
11/18/2005 20:15 PM
Employee: Jan
TOTALS for 11/09/2005 7 AM
to 7 PM

                Cash:     80.08
              Checks:    728.75
        Credit Cards:    772.11
          On Account:    156.04

     TOTAL BUSINESS:  1,736.98

     YOUR TILL COUNT
              Coin:       1.08
     $1       Ones:       9.00
     $2       Twos:
     $5      Fives:      20.00
    $10       Tens:      40.00
    $20    Twenties:    100.00
    $50      Fifties
   $100     Hundreds:
   TOTAL TILL COUNT:    170.08
           + Checks:    728.75
      + Credit Cards:   772.11

    Your Till Total:  1,670.94
  -Starting Till Amt:   100.00

   Amt Tendered Total:  1570.94
  Computer Calculated:  1580.94
             SHORT:    (10.00)

SIgnature_____
```

```
STATISTICS

Department      Pcs   $Amount   %Total
DRY CLEAN        92    587.17     37.1
LAUNDRY          87    181.85     11.5
PRESS ONLY        6     19.00      1.2
HOUSE HOLD        2     50.00      3.2
CLEAN ONLY        2     50.00      3.2
I/O DELIVERY     78    625.03     39.5
ADJUSTMENT        3    (30.00)     1.9
-----------   -----  ---------  ------
SubTotal        192   1483.05
    Tax                 97.89
   TOTAL                580.94
```

```
Department  Cash   Checks  CredCard  OnAcct
DRY CLEAN   74.84
LAUNDRY             72.32    60.45
PRESS ONLY         225.75   315.90
HOUSE HOLD          23.00    20.00
CLEAN ONLY         130.00   120.00
I/O DELIVERY       250.00   205.25   145.03
ADJUSTMENT                  (20.00)
-------------------------------------------
            74.84 681.07   721.60   145.03

New Customers: 14
```

6. Click on the Accept button to print the ZKey report. The report is printed to the Detailed Ticket printer as defined in the Hardware Configuration.

Exporting ProfitMaker Data

The export feature of ProfitMaker lets you transfer data from ProfitMaker into a text type file that can be loaded into Excel and/or QuickBooks. The files that can be exported are:

Customers: Name, address, phone, etc.
Sales: Sales information.
Rewards: Rewards points awarded to customers.

Each of these types of exports will be explained in this chapter.

Starting the Export Operation

The Customer Export feature lets you send customers that have been entered into your computer out to a Customer.csv file. The Customer.csv file can then be opened in Microsoft Excel or imported into QuickBooks*. Importing custom-ers into QuickBooks is explained later in this chapter. To export your customers follow these steps:

1. Start the Export operation from the Command Center screen toolbar by select-ing Export.
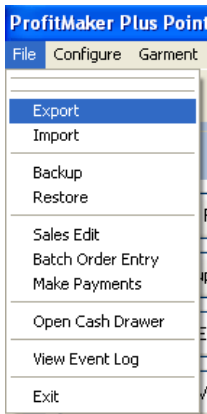
Figure 1. Export Menu   *Figure 2. The main export screen.*

2. You will then see the Export Screen. It is divided into 3 sections: Customer, Sales, and Rewards as shown in figure 2. At the export screen you will need to make the settings desired for each of the 3 export sections Customer, Sales, Rewards as explained next.

Exporting Customers

You can export customers based on their first visit to your store. This is handy for exporting new customers as the come in. For example, say you want to load all customers that came in last month into Excel or Quickbooks. Follow these steps:

QuickBooks importing was tested with version 2005. Other versions may or may not work.

1. Select the first date field and enter the starting date of the customers first visit to your store.

Figure 3. Customers export settings.

2. Select the TO date to set the ending date to match.

3. Check the "Export Customers to File: check box.

4. Enter the name of the file that will hold the exported data. Microsoft Excel and Intuits Quickbooks programs both expect the extention of the file to be .CSV so it is recommended that you name the file something like CustomerExport.csv.
Use the BROWSE button to select a location on your computer to store the file. In our example, we have selected the A:\ floppy drive so that the data is transfered to removable media.

5. Continue on to the Sales Export settings if desired. Or, click on the Accept button when you are ready to export the data.

After the data has been stored in the file you named above you can open the file in Excel and/or QuickBooks as explained later.

Figure 3A. Example of customerexport data imported into Excel.

Export Sales

You can export the sales made in your store for any date range desired. Sales exported data can then be loaded into Excel (not QuickBooks as of this writing). To Export sales information:

Figure 4. Sales export settings.

1. Select the first date and enter the starting date of the SOLD orders to export.
2. Select the TO date to set the ending date to match.
3. Check the "Export Customers to File" check box.
4. Enter the name of the file that will hold the exported data. It is recommended that you name the file something like CustomerExport.csv. Use the BROWSE

button to select a location on your computer to store the file. In our example, we have selected the A:\ floppy drive so that the data is transfered to removable media.

5. Continue on to the Rewards Export settings if desired. Or, click on the Accept button when you are ready to export the data.

Export Customer Rewards

As you make sales to customers they build up rewards points. These points can then be used by the customer to buy stuff at our Customer Loyalty store. Before the customer can use the points they have acquired the points must be exported to the Cleaner Promotions site via EMail. This can be done on a daily or weekly basis. To export the customer rewards follow these steps:

1. Select first date field and enter the starting date of the SOLD orders to export.
2. Select the TO date to set the ending date to match.
3. Check the "Export Rewards to File: check box.
4. Enter the name of the file that will hold the exported data. It is recommended that you name the file something like RewardsExport.csv. Use the BROWSE button to select a location on your computer to store the file. In our example, we have selected the A:\ floppy drive so that the data is transfered to removable media.

EMailing Exported Data

You can EMail the exported files to your home, work, or other computer. At the computer you email the data to you can open and work on the data using Microsoft Excel or Intuit QuickBooks. To EMail the files follow these steps:

1. After you have exported the data to the files named in the boxes (ie; CustomerExport.csv) the data is ready to be EMaiedl. If you haven't exported the data to be EMailed yet, do it now.

2. Set the EMail address of where you want the exported data files sent.
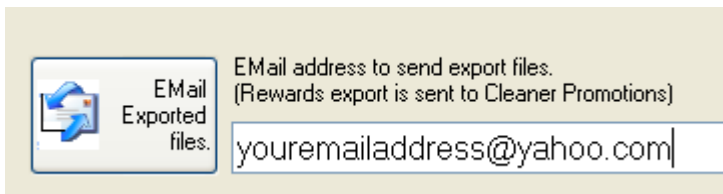
Figure 5. The EMail button and the destination EMail address text box entry.

3. Click on the "EMail Exported Files" button. You will be asked to comfirm your selection and then the files will be EMailed to the address entered in the text box as shown in figure 5.

IMPORTANT: The next page shows the settings that need to be made before EMail will work.

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EMail Setup

Before EMail will work on your computer it must be setup and configured. The following must be in place before EMailing.

1. You must have EMail installed on your computer. ie: hotmail.com, yahoo.com etc. If you can send EMails from the ProfitMaker computer, then you can email data.

2. You need to know the name of the EMail server installed on your machine. You can normally get this information from the EMail program installed on your computer.
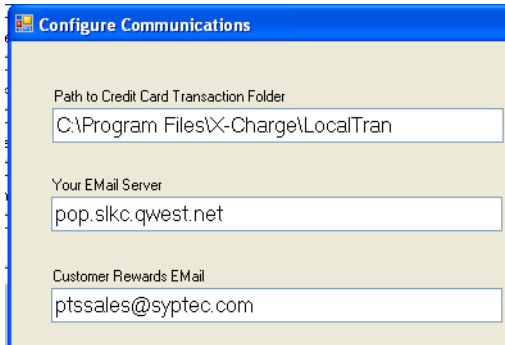
Figure 6. EMail settings.

Your Customer and Sales exported data will be EMailed to the address you specify on the Export screen, via the EMail server you entered in the Communications configuration setting as shown above. See the Configure | Communications section of this guide for details about making configuration settings.

Customer Rewards EMail

The Customer Rewards points awarded to customers when they pickup orders is transfered to the Personal Touch Systems EMail system. The values transferred are then loaded into the web site so the customer can spend their reward dollars. To export your customer rewards points to PTS the Customer Rewards EMail must be set as shown in figure 6. As of this writting the address is ptssales@syptec.com. This may change in the future and can be set to an updated EMail address simply by typing it in. Also, if you want the information EMailed to you first, and then you can forward it to PTS then simply enter your EMail address here.

Backup

The ProfitMaker Backup feature lets you save your data to a secure location in case you need it. Your computer hardware could fail, your store could catch on fire, or your equipment could be stolen. If you have a backup of your data it is possible to reload another system, and then load your backed up data (see the Restore operation) and you will be running again.The backkup process copies the valuable store information from its location on your computer to another location. Your backup data contains customers, orders, settings and other info.

Start Backup
To start the backup operation, select the Backup option from the File Tool bar.
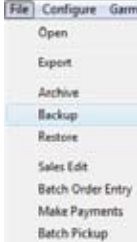
Figure 1. Start the backup program from the toolbar on Command Center screen.

Backup On Shutdown
Also, you can start a backup when you exit ProfitMaker by selecting the Backup button from the Shutdown screen as shown in Figure 2.

Once Backup is selected, you will see the Backup screen as shown next.

Figure 2. The backup dialog screen.

To do a ProfitMaker data and log backup follow these steps:

Step 1: Click on the browse button next to the backup disk drive list and select your backup device from the list of devices that are on your system. Select the disk you want to back up your data too. Note. The disk you select must be large enough to hold the backed up data.

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Step 2: Click on the Start Backup button once you have selected where your backups will be written too. Usually, you will select a disk drive that represents removable media such as a Flash drive.

Step 3. Confirm that you want to continue the backup.

After confirmation, you will see the backup progress messages and the success message:

Backup completed to G:\ProfitPlus2005-8-9-9-57.MDF

IMPORTANT! It is very important that you backup to different backup sets at least every day and take a backup set off site (away from your store) in case of fire or equipment theft.

Deleting Existing Backups
It may become necessary to delete backup sets that exist on your removable media. This usually happens when your backup device becomes full with old backups. In figure 5 beow, you can see a list of existing backups that were shown when the "View Backup Files" button was pressed. To delete backup files:
1. Click on the "View Backup Files" button.
2. Highlight the file to delete.
3. Press the DELETE button on your computer keyboard, or right click your mouse and select delete.
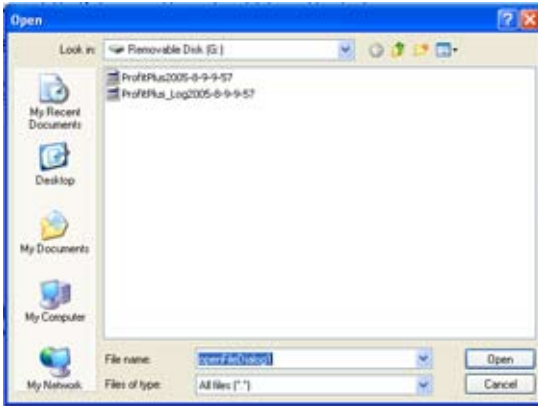
Figure 3. List of backup files on the selected backup disk drive.

4. Confirm the deletion by clicking on the Yes or OK button. **WARNING. This cannot be undone.**

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NOTE: You will usually select the oldest backup file from the list of files that are on the backup file list. The backup files are named like: ProfitPlus2005-8-10-12-44.MDF where 2005-8-10 represents August 10th, 2005 and 12-44 is 12:44 time of day.

Restoring a Backup

If ProfitMaker Plus is not running, you can restore a database using the SQL Server Manager Studio Express tool by following these steps:

WARNING! These steps will overwrite any existing data you have on your computer and will replace it with the data from the backup. Data that will be overwritten includes Customers, Orders, payments, etc.)

1. Start by using Windows Explorer to find the file "RestoreDB.bat" on the Profit-Maker Plus CD. Double click on it to run the RestoreDB batch file.

2. You will see the SSME program startup screen with the SERVER\SQLExpress info filled in.

3. After SSMSE is started, on the "Connect to Server" screen the Server name should be: SERVER\SQLEXPRESS Click on the "Connect" button and you will see the following:

4. In the Query screen right hand panel, you will see, or you can type in, the following:

Use Master
RESTORE DATABASE ProfitPlus FROM DISK = 'database file name'

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(database file name is the name of the backup file like   **E:\Profit-Plus2010_1_27_8.Bak**   and **E:** is the backup drive that the backup file is on.)

5. Click on the `!Execute` button at the top of the SSMSE screen.

6. You should see a "Backup Successful" type of message in the lower right panel when the backup is complete.

7. Exit the SSMSE program and start ProfitMaker Plus. The data from your backup should now be usable.

Restoring the Application Configuration file
The settings you make in ProfitMaker for each station that tells it information like your store name and address, the hardware connected to each computer, etc. is stored in the Application.Config file. When you do a backup (or each time you check the "Backup Config File" check box) your settings are saved to the save place that your data is backed up to. If you need to reload the settings for any station you can simplyfollow these steps:
1. Click on the "Find Backup Files" button.
2. File the "Applicatoin.Config.Bak" file that was backed up.
3. Click on the "Restore Config File" button.

NOTE: Clicking on the Restore Config FIle button will overwrite any current con-figuration settings (including store name) that are on your system.

You will then see a confirmation screen letting you know that your application settings were restored.

Truncating Log Files
The ProfitMaker backup program truncates the log file and shrinks it. It is impor-tant to do regular database backups to 1. Protect your data, and 2. shrink the log file so it does not get too large.

DataBase Files
The Profitmaker database files are stored in this location C:\Program Files\Mi-crosoft SQL Server\MSSQL.1\MSSQL\Data   as shown next.
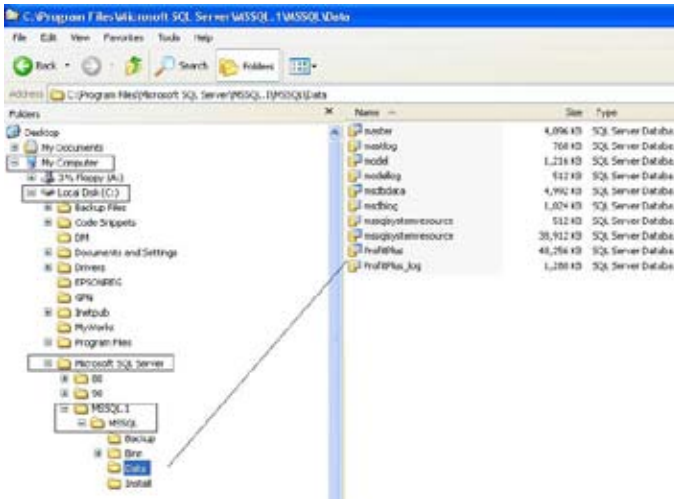
The database files can be moved, copied, and backed up as long as ProfitMaker or SSME is not running.

Archiving Old Data

As you enter data into your Profitmaker system over the years your computer may begin to become full. The Archiving function lets you send old data to an archive file that can then be taken off and stored somewhere else until needed.

NOTE: Before performing any of the below operations - **BACKUP YOUR DATA**.

Archiving

To archive your data simply set the Archive Date as shown below. Every "Sold" order in your database that has a Sold Date BEFORE the date you enter into an archive file. It is highly recommended that you selecty small periods of time to archive such as per quarter. The default date is set to 1 year in the past from the current date. Once you have set the date click on the "Archive Orders" button.

ProfitPlus

Deleting Database Data

Sometimes it is necessary to delete data in your computer and start over from the start. For instance, if you are starting a new store and are practicing entering orders, you could delete all the orders once you have finished practicing. The delete data options are:

Clear Exceptions

Exceptions are logged anytime something unusall happens like a price change, re-do, void, customer delete, etc. You should regularly check your exceptions log to check for theft, etc. After checking the exceptions log you can clear them using this operation.

Delete Orders/Transactions

This button will delete all Orders, Order Details, Payments, Racks, Tags, Clock In/Out. Use this operation when you want to start over after practicing. This option does NOT delete customers, employees, pricing or config settings.

Delete All Data

Select this button when you want to clear ALL information in your store including Customers, Employees, Orders, Order Details, Payments, Tags, Racks. Your pricing and config settings are not deleted. Use this operation when transferring your pricing information from an existing store to a new store.

Security Settings IMPORTANT!

Don't forget to set security to keep employees or unwanted deletion of your data. All deletions performed are logged to the Exceptions database. See Configure | Security | File | Archive in the security settings.

WIndows Guide

ProfitMaker uses the Windows XP or 7 operating system from Microsoft Corpora-
tion as the "Engine" that makes all the features of ProfitMaker work. There are
several common procedures, and tools that are necessary to run your com-
puter. While ProfitMaker support will try to help you use the standard Windows
programs, it will be very helpful for yourself to learn to use these common tools
- much like learning to drive a car. Chevrolet built your car, but you are expected
to know how to drive. No, you don't have to be a computer expert to use these
tools, just be willing to "learn" much like learning to drive. So, lets get started.....

Windows Explorer

Windows Explorer allows you to navigate through your entire computer system
to view programs, and possibly help retrieve miss placed documents. To access
Explorer right click with your mouse on the Start Button (lower left hand corner
of your screen). Scroll up to Explore, click on it, it opens up a screen that allows
you to see all of your programs on your computer. From there you can run a
search or search yourself for an item.
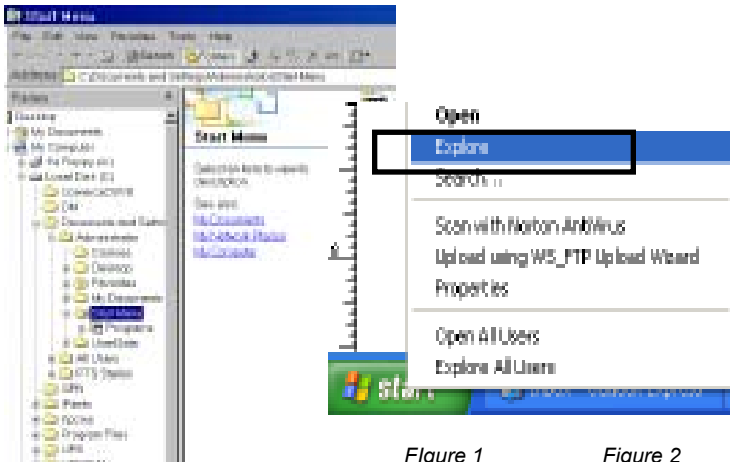
FIgure 1   Figure 2

Figure 1 shows what the Explorer window looks like.
Figure 2 shows the start menu after right clicking on the Start button.

PLEASE NOTE: These directions are for Windows XP. Go to www.profitmaker.
com to find updated instructions for Windows 7 as they become available.

Start Button

The start button is in the bottom left corner of the screen. To get started click on the Start button, you will see several different items to choose from, i.e. programs, search, documents, etc...

Using your mouse scroll up to programs and let your pointer sit for a second; a dialog box with more programs will appear to the right, these are the programs you will use. Anything with an arrow to the right of a word when the mouse pointer is set on will produce another box with more programs.

Figure 3 shows the Start Button

Shutdown

When you are finished with yor computer for the day you can shut it down. To do this go to start, click shut down, a dialog box will appear asking if you want to shut down your computer, click yes. Should the computer freeze hold the CTRL, ALT, and DELETE keys on your keyboard to get the same result

Figure 4 shows Shut Down from the Start Button menu

Figure 5 shows the Shut Down box. Click OK when ready for the computer to shut down.

Windows Desktop

The desk top shows the programs you have selected to be short cuts. They appear as icons on the main page of your computer. To open a program application double click on the program desird.

FIgure 6. shows what the desk top may look like showing all of the different programs.

Starting Programs

You can start a program either using the start button in the bottom left corner of your screen or from your desk top. From the desktop choose the program desired and double click on it. From teh start menu, using your mouse scroll to Programs, scroll to the program desired and click on it with the mouse. If you don't see the program right away look for arrows to the right side of the menu items, leaving your mouse on an item with an arrow will produce another menu.

•

The Keyboard

The keyboard is used to type in names, addresses, numbers, documents, ect.. However, your keyboard can be used in a similar fashion as the mouse, to navigate your way around the computer screen. Using a combination of keystrokes can save time, or if the mouse is not working or a program not responding. For example, CRTL ALT DELETE will exit out of a program that is not resonding, or shut down the computer.

The Mouse

The mouse is what you will use to navigate on your computer, opening documents, and selectiing items on the computer screen. The mouse generally has two buttons, left and right. The left button is used in general opening of documents and selceting things. Right clicking on an item will usually bring up a dialog box with a list of commands, such as properties, exlpore, or other various commands depending upon what it is you clicked on. Properties will tell you more about the program you are using, what size it is, name general info.

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ProfitPlus

Adding Printers

ProfitMaker can use just amount any printer that Windows can print to. You use the Windows Add New Printer program to add printers to your computer. You may, for example, want to connect a Report Printer that you purchased to your ProfitMaker computer. Most new printers come with installation programs that are used to enable the printer to be used. If your printer did not come with an installation program you may be able to use the Windows Add New Printer option as follows

1. From the Start Button select the "Control Panel" otpion.

2. From Control Panel, select the Printers and Faxes icon by left clicking on it with your mouse.

Printers and Faxes

3. Select the "Add New Printer" ption
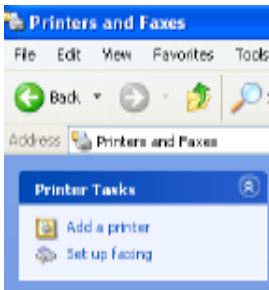
Every printer is different and it would be impossible to explain the procedure for every printer. Generally, you can just follow the Windows Install Printer wizard as it guides you thru the installation process. Consult your printer supplier or manufacturer for more information if necessary.

As a convienience we provide drivers for the printers we have used in the past and presently.

Go to **http://www.profitmaker.com/Drivers.aspx** to download drivers.

Windows 7
Windows 7

ProfitPlus

ProfitPlus

Installing ProfitMaker - Windows 7 (or Vista)

1. Make sure Windows 7 is installed and running with all current patches and updates installed.
2. Name your Computer "**Server**" via the Control Panel. VERY IMPORTANT!
3. Create user **POS** (upper case) with password **pos** (lower case) and make it an administrator.
4. Login as POS now.

Install SQL Server Express

ProfitMaker Plus ver 6 uses SQL Server 2005 Express which we will help you install now.
Follow these steps exactly.

    A. Insert the CD labeld "SQL Server Express 2005 sp3" into your computer.
    B. From the CD "Open Folder to View Files" of the CD -
           Double click on the "SQLExpr_Adv_2005_sp3" file to start it.
    C. Allow "Microsoft SQLServer" to make changes to your computer?   -> YES.
    D. Accept the license agreement terms by clicking   -> Next.
    E. "Welcome to Microsoft SQL Server Installation Wizard"   -> Next.
    F. You will get sucess for each of 15 options (ignore the IIS feature required error).   -> Next.
    G. Now you need to fill our the Registration information for SQL Server - this is very important!
    H. Registration Information
      1. Name: "Server" Company: "Microsoft"
      2. Install Advanced Features (but not the SDK for developers) as shown in figure 1 below:
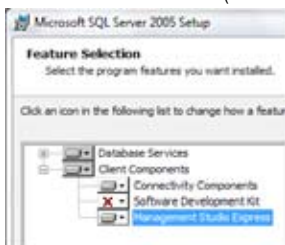
Figure 1. Make sure the Feature Selections are as shown.

      3. t Windows Authentication Mode IS selected   -> Next.
      4. c User Instances (NOT checked).
        c Add user to the SQL Server Admin Role. Checked.   -> Next.
      5. Microsoft now wants to collect information. Check or uncheck both boxes.   -> Next.
      6. Click on the INSTALL button and wait for completion. You will see the files installed as
shown in figure 2. Then click on the FINISH button to complete the SQL Server installation.
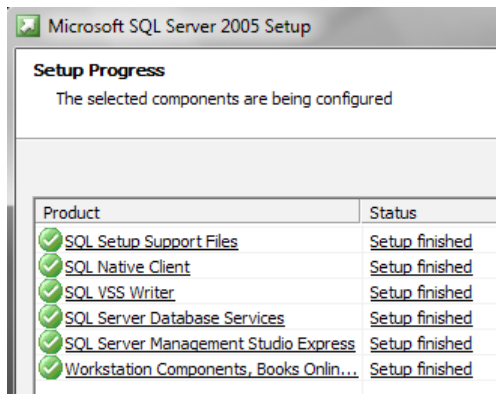
Figure 2. Make ure there is success for all the feature installation setups.

ProfitPlus

ProfitPlus

Install ProfitMaker 6 Software:

1. Insert PM6 disk and wait for autoplay to start.   Click on the "Run Setup.exe" and see "Preparing to install...." message.

2. You will see the "Welcome to ProfitMaker Plus 6 Setup Wizard".

3. Click -> Next 3 times to accept the defauts.

4. You will get a warning about "User Account Control. Allow "D:\Setup.msi for CD/DVD" by selecting "YES".

5. Wait for the install to complete and then click on the "CLOSE" button.

6. Explore to C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data and approve access.

7. Share the PTS folder with everyone.

> A. Set sharing on the PTS Folder.
> Right click on PTS | Sharewith | Advanced Sharing | check "Advanced Sharing" button
> Share the folder | click on "Permissions" button | Everyone | Full Control.

> B. Set Security permissions on PTS Folder.
> Right click on PTS | Sharewith | Advanced Sharing | Secutity Tab | Edit | Add
> "Server\POS" and give Full Control.

Now you need to attach the ProfitMaker database files to SQL Server.

1. Explore to the ProfitMaker CD (usually the D:\ drive) and double click on the "AttachDB.sql" file found there.

2. SQL Server Management Studion Express should start with the following shown on the screen:

Server Name:	SERVER\SQLExpress
Authentication:	Windows Authentication
UserName:	Server\POS

> Click on the "Connect" button.

3. You should now see the AttachDB.sql information as shown in figure 3 below:

4. Click on the !Execute button to start the attachment.
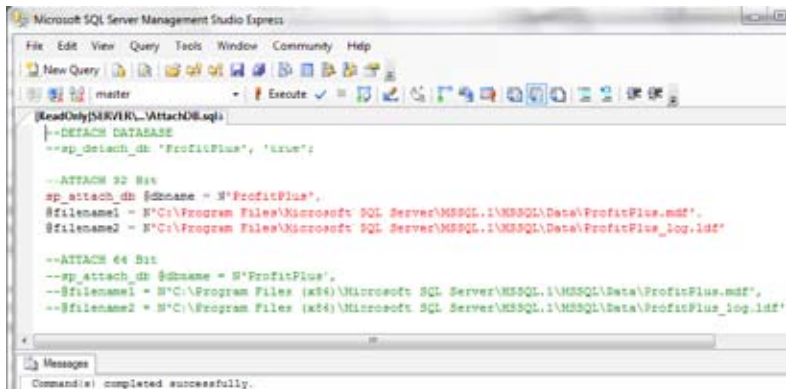
5. After execution, you should see the "Command Completed Successfully" message.

Exit the SQL Server Management Studion Express operation and say NO to save the file when asked. ProfitMaker should now be runable by clicking on the ProfitPlus6 icon on your computers desktop.

Personalize your Desktop

Change screen resolution to 1024 x 768 and autohide your bottom task bar.

ProfitPlus 6 Users Guide

The ProfitMaker installation program put an icon on your desktop for the electronic version of the ProfitMaker 6 users guide. Double click on the users guide icon to open it up. You can seach for topics, print specific pages, etc. as you need. The users guide is a PDF document and requires the free Adobe Reader which can be downloaded from   http://get.adobe.com/reader/

Note For Vista Only - Database Read-Only. (not needed for Windows 7)
On Windows Vista computers you have to remove the ReadOnly status from the ProfitPlus database. Follow these steps:
1. Start SQL Server Studio Management Express and connect using the default settings (SERVER\SQLExpress)
2. In the selection box on the left,   right click on   Database: ProfitPlus.
3. Then select   Properties | Options | State

Printers Setup

1. **Star TSP143** Thermal Invoice Printer   - Windows 7 - 32 bit
    A. Install the software from the CD included with the printer. (use XP/Vista)
    B. Plug in the USB cable and power on the printer. It should finish installing the software.

    Star TSP143 Thermal Invoice Printer   - Windows 7 - 64 Bit
    A. Put Star 100 CD into computer (or use the Common Files folder).
    B. Plug in the printer | Power on | connect USB (will get an error about not installed, ignore it)
    C. Right click on Computer | Manage | Device Management | Other Devices
    D. Right click on "Star TSP143..." | Update Driver Software | Browse My Computer = Star CD
    E:\WinVista Next-> Install Drivers.

2. Star TSP700 (742) Printer.
    A. Need the "Star700 driver disk" or location of the drivers.
    B. Plug in the printer | Power on | connect USB (will get an error about not installed, ignore it)
    C. Right click on Computer | Manage | Device Management | Other Devices
    D. Right click on "Star TSP742..." | Update Driver Software | Browse My Computer = Star CD
    E:\WinVista Next-> Install Drivers.
                                                            •
3. Wet Stock Tag Printer.
    A. Manually install a "`Generic / Text Only`" printer to the same port as the TSP742 installed in step 2. (Usually uses USB002). In the ProfitMaker Config | Hardware you will set the Tag printer to use the "`Generic / Text Only`" as the Tag Printer.

Cash Drawer Setup

1. In PM6 | Configure | Hardware - Cash drawer port is usually USB001 (same as Star TSP143).
    Remember! The cash drawer connects to the back of the Star TSP143 thermal printer.

XCharge Install (Credit Card Processing)

Xcharge and XPressLink can be installed from the ProfitMaker CD from files at this location:
`E:\Drivers\XCharge` (replace E: with the drive where the PM+ Cd is located if needed)

Double click on the XC7.1.1.exe (or latest version) program to install XCharge
Double click on the XCClient.7.1.1.exe (or latest version) program to install the XClient.

1. Set XCharge printers to the installed receipt printer and set copies, etc. as desired.
2. Set PM6 | Configure | Communication Settings | Path to Tran Folder =
"`C:\Program Files\X-Charge\LocalTran`. (see 32/64 bit differences)
 (Make same it is the same as the XCharge installation setting)

There may be other credit card processing company options other than XCharge that are compatible with ProfitMaker. Use the documentation included for that processor if needed.

ProfitPlus

32 Bit / 64 Bit Differences.

The only differences between a 32 bit and 64 bit Windows 7 installation is security settings and paths to data. These differences are shown below:

32 Bit - C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data

64 Bit - C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Data

As you can see, 32 bit uses Program Files and 64 bit uses Program Files (x86).

Windows XP

In most cases these preceding instructions will work for older Windows XP installations. The major difference will be the security settings and permission settings. Consult your WIndows XP help and documentation for information as needed. Below are the legacy instructions used prior to version 6 of ProfitMaker.

Installing ProfitMaker - Windows XP (SP3 or higher required)

ProfitMaker Plus 6 comes on a CD that contains the installation programs for ProfitMaker Plus as well as SQL Server 2005 and the Microsoft .Net framework. In order for ProfitMaker to work in your store you need to install ProfitMaker and then link it to the SQL Databases. The steps below are all standard "Windows" procedures. If you are not comfortable using such things as Windows Explorer and other Windows programs please arrange for someone who is comfortable with Windows to assist you. Follow the instructions below:

(NOTE: Installation procedures may have changed after this guide was printed. Any installation instructions included separately and dated after Jan 2010 should be followed instead.)

Minimum System Requirements

Windows XP (Home or Pro) service pack 2 or higher, Windows 7 Home or Pro 32 bit / 64 bit

CD Rom Drive Pentium - 1.5ghz CPU or higher	80 Gig Harddrive
1 Gig Meg Ram (2Gig reccommended)	FLASH backup USB drives.

Basic System Setup.

It is assumed that the following are in place before you start the ProfitMaker Installation:

aNew Windows XP or Windows 7 installation with no other "outside" programs installed.

      (it is best to start with a fresh, new installation of Windows XP/7).

aComputer meets minimum system requirements.

aYour computer must be named "SERVER". (use Start | Control Panel | System | Computer Name)

Installing on Windows XP 32 Bit

1. Install the ProfitPlus 6 CD

Put the ProfitMaker CD enclosed with this package in your CD Drive. The installation program will start. Follow the steps on the screen as follows:

- Press the "Accept" button for the .NET Framework 3.5

- Press the "Accept" button for the SQL Server 2005 Express Edition

- Press the "Accept" button for any other programs included with ProfitMaker.

Wait while the installation program is "Copying required files".

On completion, you will be asked "Setup must Reboot before proceeding". Select YES and wait while computer reboots. After reboot

- The installation of SQL Server 2005 Express Edition will continue. Wait while it completes.

2. Install ProfitMaker

Now you will see the Profitmaker Plus installation setup wizard.

- Click on the Next> button 3 times and the program will begin installation.

- When the installation is complete. Click on the Close button.

3. Install the SQL Server Management Studio Express

a. Find the file "SQLServer2005_SSMSEE" on the ProfitMaker Plus CD and double click on it.

b. Follow the installation instructions using all the default settings by clicking on the NEXT button.

c. Make sure the name is `Server.` (company does not matter)

d. The last button is the INSTALL button which will start installing the software.

4. Attach The DB

Before you can use ProfitMaker version you must attach the database to it. There is a file on the ProfitMaker CD named "AttachDB". Use explorer to browse to the ProfitMaker CD until you find the AttachDB file and follow these steps:

a. Double left mouse click on the **AttachDB** file to start SQL Server Management Studio.

b. You will see the "Connect to Database Engine" screen with

server name = SERVER\SQLEXPRESS.

Left mouse click on the "Connect" button.

c. Click on the **!Execute** option at the top of the screen to execute the AttachDB file.

d. Click on the red X at the upper right of the screen to exit SQLServer Management Studio.

5. Enter Your Store Information.

Start the ProfitMaker Program by clicking on the Icon on your Windows Desktop. You now need to type in your Store Information. On the CD case that came with ProfitMaker is a label that contains your Store Information and registration number. At the top of the ProfitMaker Command Center screen select the **Configure | Store Operations** tool bar option. At the store operations screen type in the store name, address etc. EXACTLY as it is shown on the label. If you type in a single character, space, period or other character that is different than the label your registration number will not match and you will get an error message to that effect. Change the store info as needed.

6. Installation is Complete.

You can now start the ProfitMaker program by clicking on the ProfitMaker 6 icon that was installed on your windows desktop.

ProfitPlus

ProfitPlus (vertical sidebar text)

Deleting An Existing ProfitMaker Plus Database

Before you can restore a database you must delete the current ProfitMaker Plus Database. There is a program on the ProfitMaker Plus CD called "DeleteDB". To run the DeleteDB program follow these steps:

WARNING! This will delete all your customers, orders, etc. from your computer. Do a backup and make copies of your valuable data if necessary.

1. Put the ProfitMaker Plus CD into your computer. Wait for the install program to start and CANCEL it immedediately.
2. Using Windows Explorer or My Computer, browse to the ProfitMaker CD.
3. Locate the "DeleteDB" file on the ProfitMaker CD.
4. Double click on it. You will see a short screen appear and then disappear. That's all it does. Your data is now deleted.

Restoring a Backup File

You can restore a database using the SQL Server Manager Studio Express tool by following these steps: **WARNING!** These steps will overwrite any existing data you have on your computer and will replace it with the data from the backup. Overwritten data includes Customers, Orders, payments, etc.)

1. Start SSMSE by going to
```
Start | All Programs | Microsoft SQL Server 2005 |
SQL Server Manager Studio Express
```

2. After SSMSE is started, on the "Connect to Server" screen the Server name should be: `SERVER\SQLEXPRESS`
Click on the "Connect" button.

3. Click on the `New Query` Button at the top left of the SSMSE screen.

4. In the New Query screen right hand panel, type in the following:

```
Use Master
RESTORE DATABASE ProfitPlus FROM DISK = 'database file name'
```

(database file name is the name of the backup file like **E:\ProfitPlus2010_6_27_8.Bak**
and **E:** is the backup drive that the backup file is on.) and don't forget the single quotes.

5. Click on the **!Execute** button at the top of the SSMSE screen.

6. You should see a "`Backup Successful`" message in the lower panel when the backup is complete. If errors, you may need to contact our support.

7. Exit the SSMSE program and start ProfitMaker Plus. The data from your backup should now be usable.

Converting Data
Converting ProfitMaker 200x Databases

Converting old versions of ProfitMaker (ie; 2000, 2001, 2003) to ProfitMaker Plus.

Things to Consider:

A complete ProfitMaker 200x to ProfitMaker Plus conversion is not possible at this time. However,
you can convert all of your customers and active tickets (those hanging on your racks) into Profit Plus.
Here are a list of things for your consideration:

1. After converting to ProfitMaker Plus, have a ProfitMaker 200x station setup that you can view old data from.

2. Before converting, run all of your Reports including a RACK location report just in case an order or ticket does not convert.

3. Do a test conversion so that you can get all the kinks out before going live. You can start over by following these steps:
A. Install ProfitMaker Plus on your computer.
B. Do a ProfitMaker Plus BACKUP.
(This will make a "fresh" copy of your data that you can restore later).
C. Follow the conversion steps below to convert the data into ProfitMaker Plus.
D. Test the converted data in ProfitMaker Plus.
E. To revert back to a fresh (no converted data) version of ProfitMaker Plus:
    1. Put the ProfitMaker CD into your computer.
    2. On the CD there is a file called "RestoreDB". Double Click on it.
    3. Type in the Path to the backed up data file you did in step E. and finish the restore.
    4. Run your Monthly Statements report for customers that owes you money.

Warnings:
1. Customers are converted to ProfitMaker Plus with different customer numbers.
2. Tickets are converted by reading the old ticket info and adding a new PM+ Order so converted orders can be looked up by Customer Name, or phone, but NOT by the old Ticket Number.
3. Converted Tickets are added using the Department Name as the Item description such as:

QTY	DEPT	DESCRIPTION
1	DRY	Dry Clean

        (a Drycleaned shirt is therefore described as "Dry Clean")
At this time we have no way of finding the description of the item from the old ProfitMaker because the description is stored as a number (0-9) in PM200x and not a textual description.
4. Customer history is not converted.

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Conversion Steps:

1. Assumes there is a C:\Profit where Butil.exe is and C:\Profit\Data folder where the data files are.

   A. Convert the Old ProfitMaker Customer, Ticket, Ticket Detail, and Racks files into .REC files.   At the C:\Profit MSDos prompt type:

>   Butil data\Customer.dta   data\CUSTOMER.REC
>   (converts customers to a .REC file)

>   Butil data\Ticket.dta   data\TICKET.REC

>   Butil data\TDetail.dta   data\TDETAIL.REC

>   Butil data\Racks.dta   data\RACKS.REC

2. Use the "ConvertBTR" program. The path to the files will be C:\Profit\Data____.REC

   A. Convert the Customers ("Convert Customer") button. Don't do the SPOT conversion.

   B. Convert the Tickets, Ticket Details, and Racks.

       1. Select the "Convert Tickets" button.
       2. Select the "Load Tickets" button and the C:\Profit\Data\TICKET.REC file will convert and be shown in the list.
       3. Select the "Load Tickets Details" button and the C:\Profit\Data\TDE TAILS.REC file will convert and be shown in the list.
       4. Select the "Load Racks" button and the C:\Profit\Data\RACKS.REC file will be converted and will show in the list.

   C. Now after the Tickets, Ticket Details, and Racks lists are filled, select the "Convert into PM+" button and the list information will be converted into the ProfitMaker Plus DB.

   D. Back at the main ConvertBTR screen select the "Load Accounts" button.

       1. Load each of the statements you printed from your old ProfitMaker system into the list.
       2. You will enter the Customers new ProfitMaker Plus customer number (not their old number)
       3. After entering about 10 to 20 statement amounts, click on the "Process Orders" button to load the amounts customers owe into the Profitmaker Plus database. These orders description will show as whatever you enter in for each Account.

ProfitMaker Support

8am to 5pm Mon-Fri Except Holidays (see www.profitmaker.com for holiday schedule)

801.649.6691

ProfitPlus

Deleting An Existing ProfitMaker Plus Database

Before you can restore a database you must delete the current ProfitMaker Plus Database. There is a program on the ProfitMaker Plus CD called "DeleteDB". To run the DeleteDB program follow these steps:

WARNING! This will delete all your customers, orders, etc. from your computer. Do a backup and make copies of your valuable data if necessary.

1. Put the ProfitMaker Plus CD into your computer. Wait for the install program to start and CANCEL it immedediatly.
2. Using Windows Explorer or My Computer, browse to the ProfitMaker CD (Usually the D: drive).
3. Locate the "DeleteDB" file on the ProfitMaker CD.
4. Double click on it. You will see a short screen appear and then disappear.
That's all it does. Your data is now deleted.

Restoring a Backup

If ProfitMaker Plus is not running, you can restore a database using the SQL Server Manager Studio Express tool by following these steps:

WARNING! These steps will overwrite any existing data you have on your computer and will replace it with the data from the backup. Data that will be overwritten includes Customers, Orders, payments, etc.)

1. Start by double clicking on the RestoreDB.bat file on the Profitmaker CD or start the SSMSE program by going to
```
Start | All Programs | Microsoft SQL Server 2005 |
SQL Server Manager Studio Express
```

2. After SSMSE is started, on the "Connect to Server" screen the Server name should be: `SERVER\SQLEXPRESS`
Click on the "Connect" button.

3. Click on the `New Query` Button at the top left of the SSMSE screen or use the RestoreDB.bat file as a template to start with.

4. In the New Query screen right hand panel, you will see, or you can type in, the following:

Use Master
RESTORE DATABASE ProfitPlus FROM DISK = 'database file name'

ProfitPlus

(database file name is name of the backup file like   **E:\ProfitPlus2006_4_ 27_8.Bak**   and **E:** is the backup drive that the backup file is on.)

5. Click on the `!Execute` button at the top of the SSMSE screen.

6. You should see a "Backup Successful" type of message in the lower right panel when the backup is complete.

7. Exit the SSMSE program and start ProfitMaker Plus. The data from your backup should now be usable.

<u>ProfitMaker Support</u>
8am to 5pm Mon-Fri Except Holidays (see www.profitmaker.com for holiday schedule)

801.649.6691

ProfitPlus

Networks
Server Setup Windows 7

These steps are for a networking professional and therefore detailed explainations are not needed. Please consult your computer provider if help is needed.NOTE: Muli-Station ProfitMaker systems require a Registration License that ends in -PRO like 1234-PRO (-SGL) licenses only allow a Single computer to run PRofitMaker.

1. Build a "**Server**" as explained earlier in this document, with printers, etc. and everthing setup. You must have a user created named `POS` (upper case) with a password of `pos` (lower case)

    a. Log in now as user POS.

2. Build a 2nd "Server" (that will become a workstation) as normal with printers, etc. and all setup.

3. On 2nd Server.

    A. Rename to "**Workstation1**" (Computer | Properties)

    B. Make sure system network properties is set to Workgroup: **Workgroup** on all computers. This is done via the Windows Control Panel - Search help on "Workgroup" if necessary.

    C. Restart for changes to take effect.

4. Connect to a netork hub with standard cables (Windows 7 auto-recognizes a hub, but not a crossover cable).

    A. Both Server and Workstation should recognize and connect as "Unidentified Network".

    B. Use Explorer | Network to turn on "Network Discovery" on both computers.

        1. Make sure its set to "Private **WORK** Network" and not "Public".

    C. On Server and WS you should be able to view files on each to confirm they are connected.

5. On Server, then Workstation, Set "Surface Area Configuration" to

        Local/Remote TCP/IP, and SQLBrowser to automatic. Reboot.

6. WS has to have a -PRO license or it will give a warning and will not start ProfitMaker.

7. Now Server has to allow WS to access thru firewall.Alllow these programs in FireWall:

    A. C:\Program Files\Microsoft SQL Server\90\Shared\ sqlbrowser.exe

    B. C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\ sqlservr.exe

      (Program Files (x86) for 64-Bit computers)

8. Turn on "Network Discovery" in the Network and Sharing Center in the WORK network area.

A Simple Network Test

A simple way to see if your Server and Workstation are "talking" to each other and otherwise connected is to use the following sequence of tests:

1. Click on the WIndows Start button on your Workstation that is connected to your Server.

2. In the search window type   `\\Server.` You will see the contents of your Server computer. Continue to navigate to the

`\\Server\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data`

folder. If you can do this without error you are connected from Workstation to Server. If not, you probably don't have your permissions set correctly.

Please Note! This is a windows networking problem NOT a ProfitMaker problem.

Server Setup Windows XP Pro *(SP3 or higher)*

1. Run Network Setup Wizard using the following settings

  a. Other network setup type.

  b. This computer belongs to a network without an internet connection.

  c. Turn ON file and printer sharing from the Server.

  d. Workgroup name: WORKGROUP.

  e. Turn off "Notify if disconnected.

  f. From Control Panel | Folder Options | Turn Off Simple File Sharing.

  g. Just finish the Wizard.

2. Add SqlServer.exe and SqlBrowser.exe to Windows FireWall exceptions.

3. Run SQL Server Express Surface Area Configuration program.

  a. Set "Local and Remote Connections" to TCP/IP Only

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b. Set SQL Server Browser to Automatic start
(SQL Database Engine should also be set to automatic start)
b. Reboot Server and Workstations for changes to take affect.

Workstation Setup

Repeat the steps above for each ProfitMaker Workstation. Basically, the only difference between a "Server" and a "Workstation" is the respective computer names.
64 Bit Networks
The only difference for 64 Bit Windows .vs. 32 Bit Windows setup is that anywhere you have "Program Files" in a directory path you need to substitute "Program Files (x86)" instead. Some of the places that need to be changed are:

-- ProfitMaker | Configure | Communictions | Path to Credit Card Trans Folder

Changing a Workstation to a ProfitMaker Server

If for some reason your Server becomes unoperable you can turn a Workstation into a Server following the next steps: (Note: Assumes system was originally setup as a Server from PTS (after 3/19/2010).
1. Take down, power off Server and remove from network.
2. Use Computer | Properties to rename the Workstation computer name to "**Server**".
3. Copy or Restore the database files below from the Server onto the Workstation (which is now the Server) at

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\ProfitPlus.mdf
C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\ProfitPlus_Log.ldf
Replace (Program Files) with (Program Files (x86)) if you have a 64 bit system

Note: If you have a .BAK backup file instead of the MDF and LDF files follow the **RestoreDB** directions in this users guide Appendix A.

XCharge Setup (Call XCharge for specific processing or merchant questions)
This will help you install the XCharge credit card processing software. It is important that XCharge 7.1 and later and XPressLink 7.1 and later are installed to use with ProfitMaker 6 and later.

1. Run the latest XCharge installation program on ProfitMaker CD. (Should be 7.1 or later).
2. Make sure the path to the transaction folder is set the the shared documents folder on Server.
   a. Create a LocalTran folder in C:\Documents and Settings\All Users\Documents\LocalTran
   b. On workstations, point the path to X-Charge tran folder to the servers shared folder above.
        (ie; \\Server\SharedDocs\LocalTran
   c. Set the ProfitMaker Communications path to XCharge" to the local folder on server and the
        path to the servers local shared folder on the workstation.
   d. Communications. It is best to use high speed internet connections. If a phone line and modem is used, set to: 1200 Baud.   7 Data bits   1 Stop Bit   Even Parity on the modems com port.

XClient Setup

ProfitMaker 6 and later now uses XClient 7.1 and above to process credit cards separately from ProfitMaker. ProfitMaker no longer stores any credit card data. See Appendix A for installation.

PCI-DSS Compliance

ProfitMaker v6.1 now uses XPressLink to process cards in a secure way. ProfitMaker 6.1 and later does not store, process or transmit cardholder information. It is very important that you eliminate any and all stored credit card information from your stores database so that you (as the end-user drycleaner) are not subject to violation of these rules. Keep up to date about credit card processing at **www.profitmaker.com/CreditCard.aspx**

Paymover by Payment Processing Inc.

As of version 6.2 (April 2011) ProfitMaker uses Payment Processing Inc's Paymover software to process credit cards within the ProfitMaker Program. Payment Processing Inc is the only approved processor for ProfitMaker. When you first purchase one of our systems or the ProfitMaker software the credit card team at PPI will contact you to get you started using the built in processing. This is the fastest, easiest way to do credit card processing and provides you with the best overall rates.

Top 10 Reasons to use the Built-In Credit Card Processing

We are often asked why you should use the built-in credit card processing instead of what you have now or other seemingly less expensive options. Let us help with your decision:

1. ProfitMaker built-in processing is easier to use.
2. One Step processing is faster and less error prone.
3. Little or no hardware costs. Its built into the software.
4. No terminal clutter on your counter.
5. As many stations as you like can process with a single internet connection.
6. Lowest overall processing rates. Sure your bank advertises 1.4% but thats misleading.
7. Use Card-On-File for credit card payments that are recurring each month and card is not present.
8. ProfitMaker Order# to Creditcard transaction ID matching for easier problem solving.
9. 24/7/365 processing help with Answer-The-Phone response.
10. Backed by Payment Processing Inc. the drycleaning industry leader.

So, answer this question! If its less expensive, has better rates, and is easier to use why are you not using it? We'll bet you get signed up, so now lets get you set up. Follow the instructions below:

Paymover Setup.

1. You will need a Merchant Account Number provided by PPI. This is a very long number and should be kept secret and stored safely and securely.

2. From the ProfitMaker Main Screen (Command Center) select the **Config | Hardware** option.

3. In the Config Hardware screen, set the following selections: Note: Manager Logon access is required to be able to see the credit card processing options.

A. Make sure "Built In" is selected.

B. Select the Send To Option:
    Paymover : If using an Encrypted Mag Stripe Reader.
    Paymover IPad: If using a Magtek IPad Credit/Debit device.

C. Merchant#:   Enter the Merchant Account# provided to you from PPI.
(The other fields are not used so you do not need to set them).

Save your settings.   Complete the above steps at every station that will process credit cards.

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PCI-DSS Compliance
ProfitMaker v6.2 is fully PCI compliant. Both the IPad and Swiper are encrypted at the swipe so no credit card information is ever available or viewable by anyone.

Keep up to date about credit card processing at
www.profitmaker.com/CreditCard.aspx

Call PPI at 800.774.6462
Option 1 - Sales
Option 2 - Technical Support
Option 3 - Customer Service
Option 5 - Risk & Security

Paymover Encrypted Swipe Setup.
If you are using a Magtek Encrypted reader to swipe credit cards, follow these steps:

1. Make sure "**Paymover**" is selected in the "Send To" drop down list.

2. Enter your Merchant ID assigned to you by Payment Processing Inc.
3. Press the Accept button to save your confirguration settings.
4. Plug the Magtek Encrypted Swipe into an open USB port on your comuter.

Ok, you are now ready to process credit cards thru ProfitMaker. Now run a test transaction.

Paymover Encrypted Swipe Test.
(Note: This is a live test and will put a .51 cent charge on the credit card used for the test)

If you are using a Magtek Encrypted reader to swipe credit cards you can run a simple test to make sure it is working. Make sure you have followed all of the Setup steps before attempting the test:

1. From the Config | Hardware section click on the "Test CreditCard" button.
2. The Credit Card processing screen will appear with a .51 cent charge showing.
3. Swipe a credit card thru the Magtek Encrypted swiper.
4. The test transaction will process and you will see the Approved (or Declined) window.

IMPORTANT! As soon as you see the .51 cent deposit in your checking account you will know that everything is working as it should be.

Processing Credit Cards using the Magtek Encrypted Swipe

When customers come in to pick up their garments they will likely pay by credit card (debit cards require the IPad). To process a credit card thru the ProfitMaker software follow these steps:

1. From the Main "Command Center" screen, select the customer, and the orders they are picking up and click on the Pickup button at the bottom. (See the section on Pickups if necessary).

2. Put the amount owed into the "Credit Card" tender field. **MPORTANT**! To help avoid keying errors always use the "Amount Due" button to enter the amount instead of typing it in. This is much faster and avoids errors.
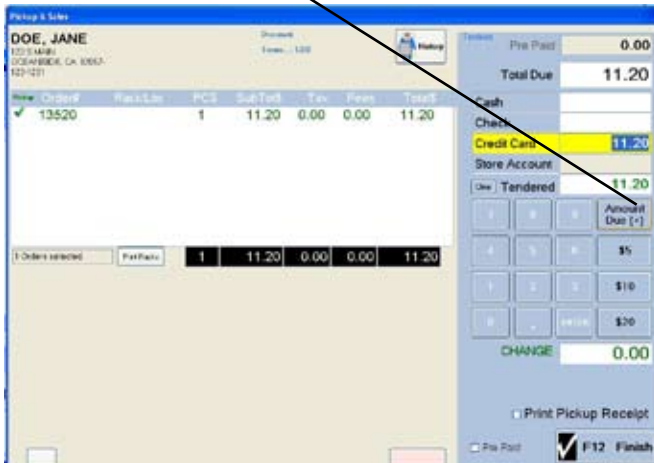
Setup Option: In customer setup you can set the "Pays By" to Credit Card and the amount due will automatically be filled in as shown above in the yellow box.

3. Click on the "F12 - Finish" button (or press F12) and select the number of copies of the receipt that you want printed. Usually this is 2 so you have the customers sign yours and give them a copy.

4. After you press the Accept button you will see the Credit Card processing screen as shown:

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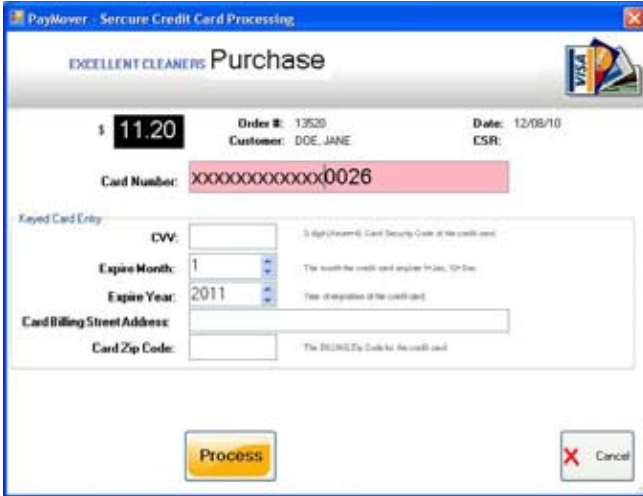
5. You have the choice of swiping the credit card or manually entering it. Here are the differences:

A: **Swiped Cards**. The best way to process credit cards is to have the customer swipe the card thru the magnetic stripe reader attached to your computer. This gets you the best processing rates and is the fastest. When you or the customer swipes their card the processing starts immediately with no further action required by you. You then see either the Accept or Declined message and a receipt will print.

B:. **Manual Entry** of card information is possible if needed (Notice, your processing rates are not as good as if the card is swiped). Follow these steps:
   A. Enter the credit card number (debit cards are processed as credit cards)
   B. Enter the security code.
   C. Enter expiration Month and Year.
   D. Enter the street address of where the credit card bill is sent. (optional)
   E. Enter the Zip Code of where the card bill is sent. (needed for the best processing rates)
   F. Click on the Process button or Press F12

The credit card will be processed and either Accepted or Declined and a receipt will print that the customer can sign.

Paymover IPad Setup. (The IPad is required for processing Debit Cards as debit).
If you will be using a Magtek IPad for processing Credit/Debit cards you will have to set the configuration accordingly.

1. Connect your IPad to any USB port on your computer.

2. Make sure Paymover IPad is selected in the Config | Hardware | Credit Card in the "Send To' option.

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Paymover IPad Testing.
If you are using a Magtek IPad Debit to swipe credit cards you can run a simple test to make sure it is working. Make sure you have followed all of the Setup steps before attempting the test:

1. From the Config | Hardware section click on the "Test CreditCard" button.
2. The Credit Card processing screen will appear with a .52 cent charge showing.
3. Click on the "Start" button and follow the IPad prompts.
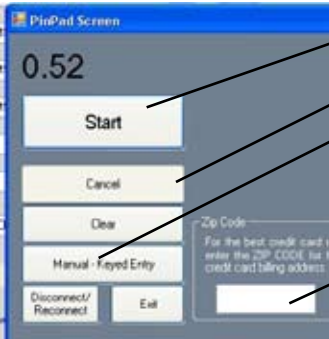
Press Start to begin prompting the customer for their card information.

You can Cancel or Exit at anytime

Click on the "Manual - Keyed Entry" button if the credit card won't swipe and you need to manually type in the information.

Make sure to enter the credit card Zip Code to receive the best rates.

4. As soon as all selections on the IPad have been entered you will see the Accept Payment button. As soon as you click the Accept Payment button the charge will be processed and either Approved or Declined.

IMPORTANT! As soon as you see the .52 cent deposit in your checking account you will know that everything is working as it should be.

Paymover IPad Use.
During normal operations you will process Credit / Debit cards thru the IPad. The normal sequence of its use are:

1. From the Main "Command Center" screen, select the customer, and the orders they are picking up and click on the Pickup button at the bottom. (See the section on Pickups if necessary).

2. Put the amount owed into the "Credit Card" tender field. **MPORTANT**! To help avoid keying errors always use the "Amount Due" button to enter the amount instead of typing it in. This is much faster and avoids errors.

3. You will now see the IPad processing screen.
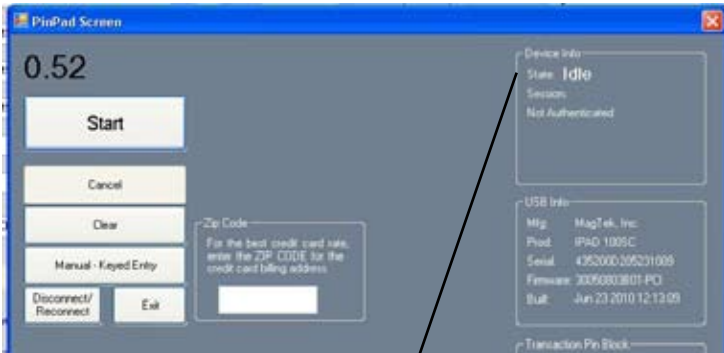
A. Click Start. You can view whats going on in the Status Window.
B. Wait for the Customer to swipe their Credit / Debit card and make other selections.
C. On completion of entry by the customer you will see the "ACCEPT" button on your screen.
Click the "Accept" button to process the card.

Manual Card Entry
If for some reason a credit card will not swipe you can manually enter the data. Click on the "Manual" button and then have the customer enter the card#, Expiration month/year, and the security code from their card. After entry, the ACCEPT button will appear and you can process the card.

Zip / Postal Code
To receive the best card processing rates you need to enter the Zip Code that the customers credit card bill is sent to. This is just another security measure to prevent fraudulent card use. Enter the ZIP code before you click on the "Accept" button to start processing.

Customer Relations Manager

The CRM module of ProfitMaker allows you to store more information about your customers that will help you manage your professional relationship with them. This helps promote good business decisions when it comes to refunds, redo's and other non profit operations in your store. CRM is in ProfitMaker version 6.2.0.2 and later.

This information is helpful when trying to decide how to handle problems with customers. By viewing sales information for past years as well as the current year you can make educated decisions about how to handle refunds, garment replacements, etc. **Note: We provide this information for your use and descretion and it is not intended to reflect any customer in a negative way.**

How to Access the CRM:

From the ProfitMaker main screen:

> 1. Select a customer as you normally do.
> 2. When the customer is selected you will see their name in bold.
> 3. Click on the "CRM" button.

The CRM dialog screen will open and show information about the selected customer.

The Customer Relations Manager has 4 parts :

PART 1 - Customer Name and Account Info

The top of the screen shows Account Balance, Past Due, First Visit, and Credits. These fields give you a snap shot of the customers account information.

PART 2 - Customer Notes Grid

The Notes grid allows you to add notes and alerts for the customer.
Let's say the customer wrote you a bad check. You would add a line to the notes grid that has:

> Date (the date this note was added),
> Status (anything you would like to help you track this note).
> Alert Check Box. Check this if you want to see it on your data graph.

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See Order#. Type in the order number you had a problem with.
Then you can click on the Order and view the ticket at any time.
Details: This is information about this note and/or the note itself.
Type anything you want in here in the description field
Press the ACCEPT button to save what you entered.

PART 3 - $Collected Analysis Grid and Graph
At the top of the screen you will see the "Show Customer Analysis" button.
Click on it to see the $Collected Analysis Grid and Graph.

$Collected Analysis Grid : This will show you the average amounts collected for ALL
your customers as compared to the current customer for the year selected. The top part
of the grid compares THIS YEAR's average for all customers against the current selected
customer. The bottom part of the grid shows the information for the selected year. You can
change this year by typing in a year in the past or clicking on the up/down arrows.

Note: The amounts shown are "Actual Dollars Collected".
Why? Because if your customer never pays you then that isn't income. Also, your brother-
in-law who gets free cleaning is probably your best customer by piece count so we don't
want to compare counts. The best way to see the true value of a customer is by compar-
ing how much you actually collect from them.

RATING COLUMN: A rating is assigned to the customer based on the comparision against
the average in your store. THIS IS AN ARBITRARY RATING and should only be used as
you see fit in your store.

> *F = less than 25% of all customers*   *cust/ALL < .25*
> *D = less than 50% of all customers*   *cust/ALL < .50*
> *C = same average as all customers*   *cust/ALL < 1*
> *B = 1.5 times average*   *cust/ALL < 1.5*
> *A = 2x the average*   *cust/ALL < 2*
> *AA= 3x the average*   *cust/ALL < 3*
> *AAA= 4x or greater than the average*   *cust/ALL >= 4*
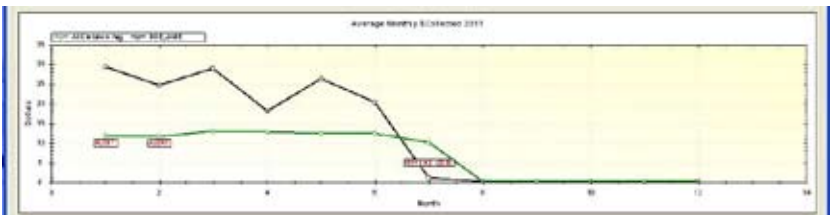
$Collected Analysis Graph : This will graph the two amounts so you can visualize the
amounts on the graph. The Green line is the average for all your customers and the black
line is for the selected customer.

YEAR SELECTION

You can select any present year or in the past to see how the customer compares against the average. The numeric year selection defaults to the previous year. Just use the up/down arrows or type in the desired year. Then press the REFRESH button to re-draw the grid.

The selected customer is shown in a green line on the graph.

The average for all customers is a black line.

The graph is laid out by month where 1 = January, 12=december.

ALERTS and REFUNDS

Use this information to get a fast indication of how much "trouble" a customer is or isn't.

Any Alerts you checked in the Notes grid at the top will be shown in the graph.

Any refunds given will also be shown above the month they where given.

$Collected Analysis Graph : Graphs the average amounts collected ALL your customers as compared to the selected customer. Select any year from the numeric button and click on

the refresh button to redraw the graph for the selected year.

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PART 4 - EMail

As a convienience, you can send EMail to your customer from this screen.

(If you have EMail installed on this computer).

EMailFrom: This is your Store EMail address. Enter or change it as you see fit.

Your store EMail is entered in the **Configure | Communications** area.

EMailTo: This is your customers email address. Enter any valid email.

Your customers home email will be filled in here IF it is entered and

EMail OK is checked.

Subject: The subject line of the email sent to your customer.

Message: This is the body or content of your message.

When you have valid EMail addresses entered, click on the "Send" button and wait for the confirmation of the email sent.

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