PayGo SP
Go! Guide
Installing and Setting Up Your New PayGo System

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Installing PayGo SP

PayGo Overview

PayGo is a collection of database tables working in unison. These tables contain the “brains” of PayGo. For you to use the PayGo database files, an application called FileMaker needs to be installed on all computers on which you wish to run PayGo. FileMaker reads the PayGo database files and serves as the control center; letting you view, create, and edit records.

PayGo can be used in one of four configurations. These configurations are: Single Workstation, Host-Client, Server-Client, and multi-site.

Single Workstation

In this configuration, there is one computer that contains FileMaker Pro and the PayGo database files. As its name implies, the major limitation of this configuration is that all PayGo related work such as making sales, receiving inventory, printing labels, and customer marketing must be done from the single computer.

Host-Client

This configuration may be used for up to five (5) computers, although a maximum of three (3) is recommended. All computers in this setup need to have FileMaker Pro installed. One computer, known as the Host, will also have the PayGo database files installed. Ideally, the Host computer will be used strictly for PayGo related functions, and will be the better of your computers.

> As sales are typically the driving force of any business, it may be beneficial to make a register computer the Host computer, as you will still be able to make sales in the event of a network failure.

The Client computers connect to the Host computer through a network to read and modify the PayGo database files.

Server-Client

Similar to the Host-Client configuration, the Server-Client configuration has one computer that hosts the PayGo database files, and other computers that connect to files in order to read and modify the files. However, the Server-Client configuration does not have a five(5) workstation limitation. Using a server, the workstation limit is increased to 250 computers connected to the server at any one time.

The computer that hosts the PayGo database files requires the installation of FileMaker Server. While it is possible to install FileMaker Pro on the server computer in order to connect to the database files, it is recommended that the server computer be used strictly and solely as a server, in order to maintain a stable environment.

Host Computer Installation (Single or Multi-User):

Once you have your computer(s) setup and networked, if necessary (Hint: if you will have more than one computer running PayGo, it is necessary), you are ready to install the PayGo program.

For single workstation or Host-Client configurations, the first step is to run the PayGo Host installer on the computer you have determined will be the Host.

If you are installing from a PayGo CD, the PayGo Host Installer will be on the PayGo CD. If you have downloaded the host installer, you may run the installer from where you downloaded it.

1. Run the program named “PayGo SP Host Installer” from the PayGo CD you inserted in the computer. Follow the prompts to go through the installation.
2. **Mac**: Start PayGo from the link that was added to your Mac OS X Dock

   Note: Mac OS X 10.4 or higher is REQUIRED for PayGo 4.0 to function correctly.

   Windows: Start PayGo from the link that was added to your Windows Desktop.
3. **Software activation**: On first run of the software you will be required to activate your software using the product keys you obtained from Christian James, Inc.

If you are initiating an install of a Host computer setup for use with multiple computers – you should take note of the network IP address of the host computer for later use on your client computers.

Where can I locate my computer's IP address? (Windows XP)

1. Go to your "Start" menu.
2. Click "Settings" or “Control Panel”.
3. Click “Network Connections”.
4. Double-click “Local Area Connection”.
5. Click the “Support” tab. Your IP Address is listed here.

   Note: If you are going to run more than one copy of PayGo, it is recommended that you set a static IP address for your host machine. This will ensure that it does not change, causing errors in the host/client communications.

Where can I locate my computer's IP address? (Mac OS X)

1. Go to the "Apple" menu in the upper left-hand corner of your screen.
2. Go to "System Preferences".
3. Click the "Network" system preference icon.
4. When the area loads, Click the "Configure" button.
5. Make sure the "TCP/IP" tab is highlighted. Look for a field named "IP Address". This is the network address your computer is currently using on your network.

Client Computer Installation (Multi-user or Client-Server):

Follow these instructions to install the client software, which enables any client workstation to connect to a host or server computer that is hosting PayGo files. The PayGo Client Installer will need to be run on the computers which will operate as Clients. The PayGo Client Installer can be found on your PayGo CD, or at the location to which it was downloaded.

1. Run the program named “PayGo SP Client Installer”.
2. **Mac**: Start PayGo from the link that was added to your Mac OS X Dock.
   Windows: Start PayGo from the link that was added to your Windows Desktop.
3. **Software activation**: On first run of the software you will be required to activate your software using the product keys you obtained from Christian James, Inc.

Server Installation – for users with FileMaker Server only

When using PayGo in a Client-Server environment (**only users who have FileMaker Server**), you must do the following steps before installing PayGo.

NOTE: Most customers with FileMaker Server are usually assisted by Christian James through this process.

1. **IMPORTANT**: If you are initiating an install of a Server for use with multiple computers – you should take note of the network IP address of the server computer for later use on your client computers. Please refer to the section earlier in this document if you are not familiar with how to find your network IP address.
2. Insert your PayGo CD into your Server computer. Run the program named “PayGo SP Server Installer” from the PayGo disc. Follow the prompts to go through the installation process.
3. Follow the “Multi User Installation for Client Computer(s)” above on each client that you wish to have connected to your Server.
4. FileMaker Server must be allowed to host runtime solutions, and the CJI extension must be registered with FileMaker Server. Contact CJI support or review FileMaker Server documentation if additional assistance is required.

If you are not installing hardware, you may skip to the “Getting Started In PayGo” section of this document at this point.

Installing the Star Receipt Printer - Mac OS X Instructions

The Star Receipt Printer is the supported receipt printer for the Mac OS X platform. This printer will connect to your computer using a USB port.

The steps for connecting the printer are as follows:
NOTE: The following steps should only be performed by an individual comfortable with installing hardware and software onto Mac OS X-based systems.

1. Remove printer from the box. Find and connect the power cable to the back of the printer. **Do not turn on your printer.**
2. An “A/B” style USB cable (Item #112920) will be shipped with your order to connect the receipt printer. This is a putty/gray colored cable that is about 6 feet long. Each end has a different type of connector. Simply match up the proper ends for your computer and the receipt printer and connect it to an open USB port on your computer or a **powered** USB hub that is connected to your computer.
3. Run the Star Printer driver installer found on the CD shipped with your receipt printer.
4. **Turn on the printer** using the switch on the side of the unit.
5. Open your computer’s “Macintosh HD”, then the “Applications” folder, and then the “Utilities” folder. You are looking for “Printer Setup Utility” – double-click to launch this application.
6. Inside the Print Setup application, click “Add” – on the window that comes up, near the top, there is a drop down menu. You will have a “Default Browser” view which you should see a USB printer labeled with “TSP” as part of it’s name. If you do not, check your connections and make sure you have installed the printer driver from Step #3, and try again.
7. Click the “TSP” printer and then click “Add”. The program will add the printer to the system. We recommend setting your receipt printer as your default printer.
8. To make sure that PayGo is “pointing” to the receipt printer, go into “Workstation Setup” on the Main Menu of PayGo. Click the Workstation tab near the top of the screen. Set #5 Receipt Printer Name to your Star Receipt printer. Set #6 Full Page Printer Name to an 8.5x11 Printer attached to the computer (if applicable.)

Installing the Star Receipt Printer – Windows Instructions

The Star Receipt Printer is the supported receipt printer for the Windows platform. This printer will use a USB port on your computer to connect.

The steps for connecting your printer are as follows:

NOTE: The following steps should only be performed by an individual comfortable with installing hardware and software onto Windows-based systems.

1. Remove printer from the box. Find and connect the power cable to the back of the printer. (Do not turn on your printer).
2. An “A/B” style USB cable (Item #112920) will be shipped with your order to connect the receipt printer. This is a putty/gray colored cable that is about 6 feet long. Each end has a different type of connector. Simply match up the proper ends for your computer and the receipt printer and connect it to an open USB port on your computer or a **powered** USB hub that is connected to your computer.

3. Turn the Printer **ON.**
4. Windows should start to auto-detect the printer and bring up a “Found New Hardware” Wizard.
5. The wizard may ask “Can windows connect to Windows Update to search for software?” Say “No” if you see this prompt and click “Next”.
6. Now it’s time to install the Star Printer’s software driver. Run the Star Printer driver installer found on the CD shipped with your receipt printer.
7. In the printer setup dialog, select the “Search removable media” and “Include this location in the search” checkboxes, and then click the “Browse” button. Make sure your PayGo CD is in the drive. Browse the CD to the “Printer Drivers” folder, then to the “Star” folder - click the “Open” button.
8. Click “Next” to start the search for the driver. When the search is complete, a window should appear with the list of drivers matching the printer connected.
9. From the list, select “Star TSP100 Raster Printer with status monitor”or similar and choose the “Next” button.
10. The Driver will begin to install. You may get a warning about the driver not being digitally signed. Select “Continue Anyway”. The printer driver should now install itself. If you receive any prompts asking for more driver files, simply point them to the same folder on the CD you found earlier (usually D:\Printer Drivers\Star)
11. After the installation is complete, Go to your “Start” menu, then “Settings” then select “Printers and Faxes”.
12. Your new printer should be listed here. Right click on it using your mouse and go to “Properties”.
13. On the printer properties page, select the “Raster Print Options” tab. Under the “Drawer 1” dropdown box, select “Document Top”. Click OK.
14. To make sure that PayGo is “pointing” to the receipt printer, go into “Workstation Setup” on the Main Menu of PayGo. Click the Workstation tab near the top of the screen. Set #5 Receipt Printer Name to your Star Receipt printer. Set #6 Full Page Printer Name to an 8.5x11 Printer attached to the computer (if applicable.)
15. Click the “Set” button next to this label. A print dialog should come up with your Star TSP receipt printer listed. Click “Print” to proceed with setting your printer.
16. Your receipt printer is now available for use in PayGo.

Installing the Barcode Label Printer with Keyspan Adapter – <u>Mac OS X Instructions</u>

IMPORTANT: PayGo does NOT use the printer drivers that ship with the Barcode printer. Do not install any programs from the Cognitive Blaster CD.

IMPORTANT: DO NOT PLUG THE KEYSPAN ADAPTER INTO A USB HUB AS IT MAY CAUSE LOCKUPS WHEN PRINTING LABELS. PLUG THE UNIT DIRECTLY INTO ONE OF YOUR MAC'S OPEN USB PORTS.

To allow PayGo to communicate with the barcode label printer, you need to use a Keyspan Serial Adapter and the software that comes with it. This adapter is connected to a USB port which emulates a serial port on your Macintosh computer. To set up the Cognitive barcode printer to print, do the following:

1. Make sure PayGo is closed on the system you are installing the adapter on.
2. Using the barcode printer serial cable (included), connect the barcode printer to the Keyspan adapter. **Do not plug the Keyspan Adapter into the computer yet.**
3. Keyspan includes a driver install CD with the unit. The installer on this CD will place the software on your Mac to allow it to interface with the barcode printer.
4. Put the Keyspan disc into the computer. Run the installer program on the Keyspan Serial Assistant CD.
5. Follow the instructions provided by the software. (The installer will instruct you when to plug the Keyspan adapter into your computer, which will also connect your barcode printer to your computer) Next, you have to set up PayGo so that it knows which serial port to send print requests to.
6. Start PayGo, from the Menu Screen, click on "Workstation Setup" and then the Workstation Tab. From the Serial Port List, select the proper port and copy this Port Name into the COM Port field.
7. Click on "Ports". A list of available COM Ports should appear.
8. Copy the port your Keyspan is using from the ports list to the "COM Port" field. Typically on Mac systems you will see a line labeled "modem", then a line labeled similar to "USA-19HS….P1.1" or "KeySerial1. Port 1 on the Keyspan adapter would generally end in "P1.1" on the list.
9. Make sure after copying the port name that it is exact (case sensitive), and also that there are no extra spaces or enter characters after the port name.
10. Power up the printer. Load your labels in a face up direction as they go in the printer. You are now ready to print labels.

Installing the Barcode Label Printer – <u>Windows Instructions</u>

IMPORTANT: PayGo does NOT use the printer drivers that ship with the Barcode printer. Do not install any programs from the Cognitive Blaster CD.

To allow PayGo to communicate with the barcode label printer, do the following:

1. Make sure your computer and barcode printer are **OFF**. Plugging a live serial cable into a system can cause electrostatic damage and is not recommended.
2. Using the barcode printer serial cable (included), connect the barcode printer to an available serial port on the back of your PC.
3. Turn your computer **ON**.
4. Turn your barcode printer **ON**.
5. Start PayGo, from the Menu Screen, click on “Workstation Setup” and then the Workstation Tab. From the Serial Port List, select the proper port and copy this Port Name into the COM Port field. See diagram in the Mac barcode setup instructions.
6. Power up the printer. Load your labels in a face up direction as they go in the printer. You are now ready to print labels.

Installing the Barcode Scanner (Mac or Windows)

To set up your scanner you will need to locate the scanner and the scanner USB connection cable.

NOTE: Do not plug the scanner into a non-powered USB port (such as an Apple Keyboard) or a USB hub that does not have its own AC power adapter; it does not have enough power to operate the scanner properly.

Plug the scanner’s USB connection into an open USB port on your computer or your USB hub.

The scanner needs to be programmed to work correctly with PayGo. Using either the programming sheet sent with the scanner (if applicable), or by downloading the scanner programming sheet from the Christian James, Inc Website (www.christianjames.net/downloads.html), follow the directions from the sheet to program the barcode scanner.

Installing the Cash Drawer Cable

The cash drawer cable (included in your cash drawer box) goes from the back of your cash drawer to the back of your receipt printer. It will look similar to a phone cable. Connect the drawer cable to the back of your receipt printer and to the cash drawer.

Installation Finished

We hope that your PayGo installation goes well. We realize that for even the veteran computer user, installations can sometimes be tricky. We strive to keep the unexpected from occurring.

You should now read on to the next part of the document to get started in PayGo!

Getting Started In PayGo

Your First Login

After installation, it's time to log into PayGo. To launch the solution, do the following:

On a Windows-based system, there should be an “Open PayGo SP” icon on your desktop.
On a Mac-based system, there should be an icon added to your OS X desktop to start PayGo SP.

This will launch the FileMaker Pro application and will proceed to open the PayGo database files.

On your first time starting PayGo after activation (covered in the install part of this document earlier), you will encounter the following screens and window prompts:

1. PayGo will prompt you for your company name, address, and tax rate information in a series of dialog screens. Any information you do not know on these screens can be skipped by leaving the fields blank and clicking “Continue”. They can be entered later inside “Company Setup” on your Main Menu in PayGo
2. You will be presented with a short tutorial on what trigger fields mean and other information about our software.
3. You will then see a PayGo Login Screen: You are now ready to enter the PayGo system. To login, do the following:

    - Click on Login (or hit the enter key on your NUMBER keypad). You will be prompted for a username and password.
    - **The default username is: paygo**
    - **The default password is: paygo**.
    - Enter the default username and password into the PayGo login box and press “Enter” on your keypad (or click OK)
    - You can define your own logins/passwords in the “Employees” section on the main menu.

Defining Your Workstation Name and Type

You can easily define workstations (computers) to behave differently depending on how you want to use PayGo. For instance, if you're using PayGo on a workstation that serves much like a cash register, you will want to define your workstation in PayGo to be recognized as a "Retail – Oneshot" workstation. This is the default setting.

By defining your workstation as "Retail – Oneshot", PayGo will know what to do when you create an invoice and what to do when you post that invoice. In contrast, if you are a reseller or you do mail order, you do not want to process an invoice the same way that a retailer processed the sale of an item such as a candy bar. A reseller or mail order business would want to track quotes, special orders, orders, order fulfillment and payments. This is not necessary for selling something like a candy bar to an in-store customer.

Below are definitions of the different workstation types in PayGo:

Retail – Oneshot: This type is the default invoice screen for PayGo SP. It contains both the items on the sale and the payment buttons on one screen (unlike the Retail – Basic layout, which separates these)

Retail – Basic: Similar to the Oneshot layout, only the Pay screen is separated from the main list of items on the sale.

Café: This setting changes your invoices to suit a Café style store, where only a few items are on the menu and you want them to be immediately accessible without searching for them.

Retail – Touch: Same as Cafe Screen.

Back Office: Similar to Retail – Basic at this time.

Mail Order: The Invoice screen is laid out similar to a quote, which enables you to place items on an invoice and choose to generate an order for the items. This setup is useful for Internet and Mail Order businesses.

To define the workstation type and name your workstation, log into PayGo SP and follow these steps:

1. From the Menu Screen of the workstation that you are defining, click on the "Workstation Setup" Button. A window will appear. Click on the "Workstation" tab near the top. In the upper left-hand corner of the window, there is a "Workstation Type" field.
2. Change your Workstation setting (if necessary – the default "Retail – Oneshot" is usually sufficient).
3. Click on the "Name Workstation" button.
4. Enter your desired workstation name in the "User Name" field (on Mac, make sure to select the "Other" radio button as well so it will use your new User Name). Make sure this name is unique as it stores all settings related to your workstation setup.

5. Close the Workstation Setup screen when finished.
6. Log out of the program and log back in to make the changes take effect.

Defining Employees

To use PayGo, you and your employees must have an individual employee record (a login and password). Without a **unique** login and password, your employees will not be able to login to PayGo.

It is important to assign each of your employees their own employee record. PayGo lets you define different levels of access, for example, you can prevent certain employees from entering the purchase order or inventory screens.

It is also important that each employee have their own employee record and access code for tracking purposes. PayGo can track a user's activity in the program by logging who made changes to forms and other information in many places in the program.

IMPORTANT: **By default**, PayGo has a default employee with the name “**paygo**” and password “**paygo**”. This sample user account should not be deleted until you create your own employee account and password with an access level of 1.

To establish employee user accounts, do the following:

1. From the Menu screen, Click on “Employees”
2. A list of employees in the system will appear. Click on the “New employee” button to create a new employee record. A blank employee screen will appear. The "Information" tab is opened by default.
3. Enter employee information into available fields. **First and last name are required.**
4. Click on “Add User Account”.
5. A dialog titled “Setup Access To PayGo” will appear asking you to define a User Name and Password for your new employee. Define a unique username and provide a password for the employee to log in to PayGo.
6. Select a proper access level for the employee and click “OK”. Access levels can be customized or created by clicking on the Company Access Level Setup tab. By clicking in the field below Privilege name, you can create new privileges to assign to employees. Setting each of the sections of PayGo listed to either 1, 2, or 3 will define how much access the privilege set has to PayGo.

The employee will now have access to log in.

Defining Department, Class and Category

To help you track your inventory, PayGo allows you to define your own departments, classes and categories. Many reports break down and summarize data with the values you've defined in these three fields. The department field in particular is extremely important to use in your inventory and can save immense amounts of time later if set up in advance.

To create or edit a department, you must do the following:

1. From the Menu Screen, Click on "Define Departments". A Department Setup window will appear.
2. From the Department Setup screen, click on New Department
3. Enter a Department Name.

Another important reason to define your departments is that it helps with consistency. Each department holds "default" values that are automatically populated on the inventory record. Any time you define a Department value on an inventory item, PayGo looks to the Department's default values and then uses those values to auto-enter data into the corresponding fields in the inventory record.

The remaining fields on the department screen are optional and are explained below:

Taxable1 and Taxable2 (T or N): By selecting "T" to these, PayGo will automatically update the Taxable preference when you select a department for your items in the inventory database. This saves significant amounts of time over manually selecting these values when items are created.

Default Label: Sets the default style of barcode label to print for inventory records that belong to this department.

Printing Preference: By selecting "One Per Item", PayGo will print one label per line item that you are receiving on a Purchase Order. If you select "Number on Hand", PayGo will print the amount of labels corresponding to how many items were received on the Purchase Order.

Fixed Margin: Allows you to define the fixed margin (in decimal percentage form) for items in the particular department. **NOTE**: Placing a value in this field will cause PayGo to update the Our Retail field under the specified department for every item in that department.

Qty Popup – Unit (Y or N): By selecting "Y" here, PayGo will ask for the quantity in a pop-up box whenever an item from this department is scanned to sell on an Invoice, otherwise it will assume a quantity of 1. Most users leave this on "N". The unit is the unit of measure for the items in the department.

WebImageName (Only applicable to HostPayGo service): not currently active at this time.

Sort Order (Only applicable to HostPayGo service): relates to the order of sorting of department names on the web. Most customers can ignore this.

Max Count / Min Count: You can define default Maximum and Minimum counts to have in stock that will be used on related inventory records.

Req Serial# (Y or N): This setting will force all items in the department to require serial numbers to be entered on the invoice when sold.

Color (Bold) R,G,B: This setting allows you to enter a color code in the form of a number (0 to 255) to colorize your department.

Department Notes: A place to store notes about your department.

Touch Screen Indicator: Defines the sort order on the Cafe and Retail-Touch Screens.

Misc Tax (#3) Tax Rate: Allows you to define a special tax for certain departments, not to be used for local or state tax.

Defining Classes (optional)

Within each department, you can define an endless number of classes (essentially, a sub-department). To do this, do the following:

1. From the “Department List” screen, click on the Department to which you wish to add classes.
2. In the “Department Setup” screen, click on the “Class Name” field (located on the middle of the left side of the screen).
3. Enter the class names that you desire.

Defining Categories (optional)

Within each Class, you can create categories (essentially, a sub-class). To do this, do the following:

1. From the “Department List” screen, click on the Department.
2. Under the Classes section, go to the desired class and click on the New category button(the blue box). A Category Entry screen will appear.
3. In the Category Entry screen, enter the categories you desire for the class.

Inventory Basics

Adding Inventory to PayGo Overview

To properly track and sell your inventory, you must first have an inventory record for each item. Inventory may be entered through either the New Inventory button from the Main Menu, or from the Create New Inventory and Order it button from the Purchase Order Screen.

If you are an existing business migrating from a prior point-of-sale program to PayGo, you may be able to import much of your previous data into PayGo. This can be rather complex and we advise you to contact us if you wish use this option.

Step 1: Adding a New Vendor to PayGo

A vendor name is required to create Purchase Orders. The first thing you should do is enter all of your vendors into PayGo. To do so:

1. From the Menu Screen, Click on “New Vendor”. A blank Vendor Entry Screen will appear.
2. Enter your vendor information in the screen that pops up and click the “Close” button when you are finished.
3. Repeat the process for all of your current vendors.

When complete, you will be able to use any of these Vendors on your Purchase Orders to start adding inventory to your system.

Step 2: Creating a New Purchase Order

The Purchase Order does many inventory management tasks for you. When receiving items placed on a PO, PayGo automatically updates the On Hand totals in the inventory database. When closing a PO, PayGo updates Last and Average Costs in the inventory database.

If you choose not to use to do purchase orders, you will need to keep your inventory records up to date manually.

To create a new PO, do the following:

From the Menu Screen, click the “New PO” button. A new Purchase Order screen will appear.

Select a vendor from the Vendor Name drop-down field. Once selected, all of the vendor's information will be filled in automatically.

You may also create a new vendor by clicking the New Vendor Button, and filling in the desired information.

You now have a new Purchase Order. Please see the documentation below on adding items to a new Purchase Order as there are many variables to consider.

Step 3: Creating New Inventory In PayGo To Add To Your PO

If the item is new, you must create it in PayGo before entering it onto your purchase order.

Inventory may be created and added to the PO using the “Create New Inventory and Order It” button, located on the top of the Purchase Order screen. Using this feature allows you to immediately create an item on the fly and add it to the current PO.

To use the “Create New Inventory and Order It” feature:

1. From the new purchase order, click on the “Create New Inventory and Order It” button. An Inventory Item Quick Entry Inventory Window will appear.
2. Enter data into available fields on the screen.

   IMPORTANT: We HIGHLY recommend at the minimum to fill in “Item Name”, “Department”, “Vendor Item # (SKU)”, “Cost” and “Our Retail”. These fields will give you all the information required to complete the purchase order.
3. Click on “Save” when you are finished. You will receive a prompt asking how many of this item to order. Enter a value.
4. You will then receive a prompt asking what do next, choose “Done”.
5. You will then receive a prompt asking if you wish to jump to the inventory screen for the item. Choose “No”.
6. PayGo will automatically create a record in the Inventory database to store your new item, and it will proceed to add the item to the current PO.
7. Once you have completed a few new items using this section, you must always ask yourself when adding items into PayGo, "Is the item that I'm ordering already in my inventory or is it a new item?” If the item already exists in PayGo, you should follow the “Reordering existing inventory on the PO” section below.

Adding Inventory via “New Inventory” Screen

We **HIGHLY** recommend at the minimum to fill in “Item Name”, “Department”, and “Our Retail” on non-reorderable items.

Quickly adding items can be accomplished from the following areas of PayGo:

- **From the Menu Screen**: Click on “New Inventory”. A new record will be created and the Inventory Screen will appear. Fill out the available fields required and click “Save”. If you have many items to create, you may want to switch to List View by clicking on the button. This allows for easier tabbing through of fields.
- **From the Inventory View Screen**: Click on the New Item button. A blank record will appear. Fill out the available fields required and click “Save”.
- **From the Purchase Order Screen**: (See earlier in the document for details.)

NOTE: While viewing an inventory record, you can click on the “Duplicate Record” button. This will give you a copy of the previous inventory record with a new Item ID number. It will retain most of the data from the previous record you were on as well. Be careful with this feature as to not create too many duplicate records with the same names, you may get confused!

Reordering existing inventory on the PO (Optional Section)

There are two(2) ways to add an existing item from your Inventory to a PO.

Typing or scanning: If you know the Vendor Item Number, UPC, ISBN or old ID you can do the following:

1. Type or scan the number into the yellow “Search for Item to Order” field.
2. Press “Enter” on your number pad on your keyboard (or press CTRL+Enter on PC laptops – Macs use Command+Enter on laptops). PayGo will search the inventory database for the item entered and will place the item it found on the purchase order.

Find Inventory Search: This feature allows you to search and view items that you have in your inventory from this vendor (or also search all of the items in your inventory database for one to select).

1. Click the “Find Inventory” button. If you select the vendor on the resulting find screen, PayGo will search for items in your inventory database that are ordered from the vendor you specified on the PO. If you leave the vendor name blank on the search, PayGo will search your entire inventory (if you want relevant results, this is not recommended).
2. Click on the Select checkbox of each of the items you want to order and click the “Add Selected to Current PO” button. The items you selected will then be placed on the PO.

Invoicing Basics

Creating a Till (Optional)

PayGo lets you create a till tracking record to keep track of the amount of cash/checks/cards taken in each day. PayGo will still track payment methods regardless of whether tills are enabled. Tills are useful for reconciling your cash drawer with what the program says you took into your shop each day.

The first step to “turning on” till tracking is to define the default starting till amount. This is done by following these steps.

From the Menu screen:

1. Click on “Workstation Setup”.
2. Look for option #7 under the Invoice tab, titled “Default starting till amount”.
3. Enter your starting till amount (Leave this field blank if you do not wish to enable till tracking.
4. Click Close to return to the Menu Screen.

To start a till, simply start a new invoice. PayGo will automatically check to see if you have a till tracking record open and if you do not, it will prompt you to set up a new till.

Creating a New Invoice

Here are the most common steps to starting and posting an invoice:

1. From the Menu screen, click on “New Invoice”. A new invoice screen will appear. Your cursor will be located in the “Search Item” field. A customer name search field is above this, which can be used if you require customer names on invoices.
2. Scan your item's barcode or type in its Item ID (if you have Vendor Item ID, UPC or ISBN for the item filled into an inventory record, these work also) into the “Search Item” field. If you are typing the Item ID, press “Enter” on the number pad on your keyboard to “trigger” the search.
3. Repeat the previous step for each item being purchased.
4. Click the method of payment. The program will place the Amount Due into the “Amount” field as a default. Enter the amount received from the customer.
5. Click on “Post”. PayGo will post the invoice and print out a receipt. **(If you are using credit card processing provided by Christian James and it has been set up and you select a credit card payment method and Post, a credit card swipe screen will appear for you to swipe the customer’s credit card.**)

Customer Basics

Adding a customer from the Invoice screen

From the Invoice Screen:

1. Next to the “Customer” field, click the “New” button.
2. Enter your customer information. We recommend inputting at least the customer’s first and last name, or if a company, the company name.
3. Press the “Save” button and the new customer will be placed on the current sale.

Adding a customer from the Main Menu

From the Main Menu:

1. Click the “New Customer” button. This will start a new record and bring up the Customer Entry Screen.
2. Enter your customer information. We recommend inputting at least the customer’s first and last name, or if a company, the company name.

Finding an Existing Customer from an Invoice Screen

NOTE: The customer must already exist in the customer database.

1. On the invoice screen, Click on the “Customer Search” field.
2. Type in all (or part) of the customer’s first name, last name, company name or entire telephone number in the fields provided.
3. Press the Enter key on the number pad on your keyboard to execute the find.

Click on the desired customer from the list, and the customer will be placed on current invoice.

Performing Finds from the Main Menu

Clicking on any of the Find buttons from the Main Menu will bring you to a screen similar to the one shown below.

The two search records shown, the first record is searching for customer names starting with an “L”. The second record is searching for customers who live in the state of Minnesota. Because both records are part of Request #1, the search is for customers whose name begins with an “L” AND who also live in Minnesota. So this search will only find those customers who satisfy both criteria.

If, instead, the second record was changed to be part of Request #2 (by changing the 1 to a 2 in the Request # field) it would search for customers whose name begins with an “L” OR who live in Minnesota. The search results will display a cumulative list of both searches.

In other words, if search records are part of the same Request number, it does an “And” search, and if they are in different request numbers, Paygo will do an “Or” search.

Search requests that are run frequently can be saved by clicking the Save Find button. Name the request in the dialog box that opens, and you can quickly perform the saved find request by selecting it from the Quick Find Search field.

Conclusion - Support For PayGo

This guide covers only the basics of PayGo and we encourage you to use the online help at our website, http://www.paygopos.com/ - click the “Support” link on the title bar of the web to find our searchable web answers database and help ticket system options. Many of these documents include help clips and movies to get you going on features in the program. For instance, typing in “Purchase Order” (without quotes) on the search form will return many documents on how to work with purchase orders.

We also have a message board system called “PayGo People” which is a place to talk with other PayGo users about PayGo features and point of sale in general. We highly recommend you visit this site and get to know everyone. You can find this board at http://www.paygopos.com/bb/. We look forward to seeing you there!

System Requirements - Windows

Hardware Requirements**:**

Intel Pentium 4 (or AMD Athlon XP) Processor or Later
256MB RAM required, 512MB recommended
20GB Hard Drive with at least 5GB free
CD-ROM Drive required, CD-RW Drive recommended (For backups)
Network (NIC) card and network setup required for Multi-user configuration.

Software Requirements:

Windows 2000 (SP4) or Windows XP SP2

System Requirements - Macintosh

Hardware Requirements:

Power Macintosh G4 700MHz Required, G5 or higher recommended.
256MB RAM required, 512MB recommended
20GB Hard Drive with at least 5GB free
CD-ROM Drive required, CD-RW Drive recommended (For backups)
Network (NIC) card and network setup required for Multi-user configuration.

Software Requirements:

Mac OS X 10.4 - “Tiger” or higher.