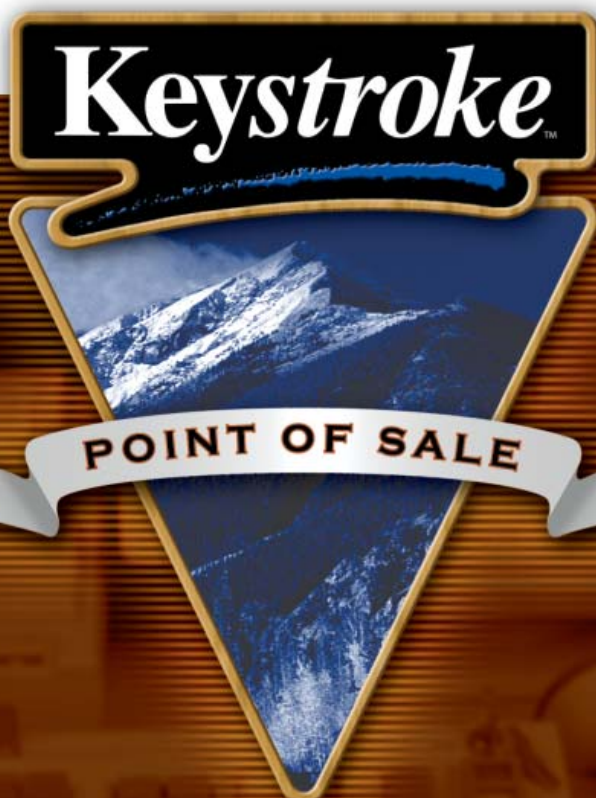


# *Quick Start Guide*



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THE CLEAR CHOICE IN RETAIL AUTOMATION

[www.KeystrokePOS.com](http://www.KeystrokePOS.com)

## Software Installation

The first step in getting started with Keystroke POS is to install the software.

To begin...

1. Insert the Keystroke POS CD into your computer's CD drive and select **Install Keystroke Point Of Sale**.
2. Select the appropriate install option and follow the on-screen instructions.
3. After the installation is complete, launch Keystroke POS from the Windows® start menu.

That's all there is to it!



Installing Keystroke POS on a stand-alone computer using default settings is that simple. However, the Keystroke POS system offers many installation and configuration options to provide enhanced performance and security which may be needed in certain environments.

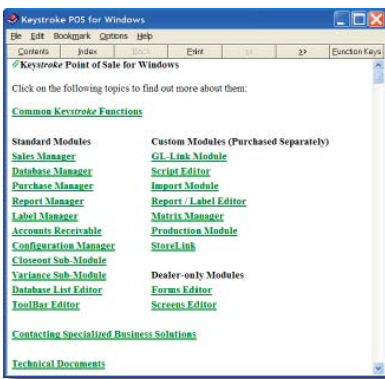
Some installations of Keystroke POS may require background knowledge and experience to optimize the system configuration. For example, there are multiple methods of installing and launching Keystroke POS on networked computers using multiple POS Workstation Licenses. The best method for your business will depend on the network technology and other criteria being used.

SBS strongly recommends the assistance of an Authorized Keystroke POS dealer to properly install the software, configure peripheral hardware devices, and provide initial training. This is especially important in network and multi-location environments and when integrating with other systems such as third-party Extensions or accounting applications.

*Note: Reference information regarding installation options is available in the on-screen Help system under Index entries for "Network Installations" and "Startup Switches".*

## Finding Help

Keystroke POS includes a comprehensive on-screen Help system.



To access the Keystroke POS Help system, use the Help menu or press **F1** for context-sensitive Help from anywhere in the system.

Once in the Help system, there are a variety of ways to locate the information you need.

- Click hyperlinked words or phrases (highlighted in green)
- Use the navigation bar (buttons along the top)
- Use the Contents or Index functions (select from navigation bar)
- Use the Find feature to search for specific words (available in Contents and Index functions)

The Keystroke Help system is based on the Microsoft® Windows Help engine which offers a variety of useful features and options. Use Bookmark to mark pages for later reference, and Annotate to add your own personalized notes. See the Windows Help menus for additional options.

The About Keystroke function located on the Keystroke Help menu includes a variety of specific information about your system installation.

Here you'll find your Keystroke POS Serial Number, the currently installed Version and Build, and SBS contact information. The About Keystroke function also provides a historical Error Log, Status of your Keystroke installation, and System Information about your computer.



## System Overview

Help your business get the most out of the Keystroke POS system by taking time to review the general layout of the software and the extensive capabilities it offers. While some features may not apply to your business, knowing what is available and how the system is designed is certain to help you make better use of the system and improve your long term experience.

The base Keystroke POS system is comprised of seven main modules, shown below.

A variety of common functions, such as the Calculator, Calendar and Time Clock, are also available on the Utilities menu within each module.

Customizable Toolbars are typically placed along the top, bottom, or sides of the screen. These can be used to program keyboard macros for repetitive tasks or easier access to commonly used functions.

The message bar, along the bottom of the screen, is the first place to look for quick tips pertaining to the current task. Information such as date, time, Register Number, and the current Clerk are also shown here.



In Keystroke, the Database Manager serves as the storage area for your data. With inventory, for example, a quantity on hand (QOH), purchase cost, and selling price is stored for each item, and there are several ways to record changes in the data. Sales (and returns or negative sales) are recorded in the Sales Manager, Purchases should be recorded in the Purchase Manager, and “other” changes due to theft or other shrinkage are recorded in the Variance function.

Many first time users of a POS system are initially inclined to want to change or edit the QOH in the Database Manager. However, for most businesses it is important that any change in the QOH be recorded as a transaction. Otherwise, there is no record of when or why the QOH changed, and really no “inventory control” which is often the main reason for using a POS system.

When getting started with Keystroke POS, keep in mind that the system is only a tool. Use it to record information that will help you to make better business decisions. The more effort you put in to setting up the system and your data, the greater the system will benefit your business.

## Configuration and Settings

Your Authorized Keystroke POS Dealer is a great resource to help you with initial setup. Your dealer’s services will be especially important if your business demands integration with other systems or has any other unique requirements. Following are a few of the basic setup tasks to review with your dealer after the initial installation and hardware configuration are completed.

**Company Information** - Enter your business name and other information in the Configuration-Settings-Name/Address function. This information is used on transaction documents and reports.

**Sales Tax** - Sales Tax rates are managed in the Configuration-Tables-Tax function. Most retail businesses are required to track more than just a single tax rate. Keep in mind some items or services may not be taxable, and you may be required to collect for, and report to multiple taxing authorities. Tax Codes are assigned to Inventory items and Tax Tables to Customers.

**Payment Types** - Review the default methods of tender in the Configuration-Tables-Sales Payment Types. There are a variety of optional settings for each Payment Type. If you accept credit cards or other electronic payments, ask your dealer for assistance in setting up a merchant account with Mercury Payment Systems, and configuring the proper Authorization Method(s).

**Transaction Forms** - Most businesses have specific preferences on the information to be included and the layout of printed sales receipts, invoices, and other forms. Keystroke includes many standard forms to select from, or your dealer can customize forms for your business. Most forms are assigned in the Configuration-Tables-Print Buttons function.

**Other Settings and Parameters** - Keystroke POS includes dozens of other settings and parameters throughout the system to allow you to determine how the system will work for your business. The default status of most system settings are intended to work for most installations, so it is not necessary to review every parameter available.

## Database Setup

Having data properly organized is critical to how well your new POS system will work for your business. It is absolutely essential that you take time to plan how your business will look up inventory items (and other data), and equally important how you will want to report on the data.

You don't have to enter all of your inventory items (and other databases) before you can start using the Keystroke POS system to record sales. By setting up just a few inventory records to departmentalize your sales, you can begin using Keystroke to record sales almost immediately. However, if you take this approach, don't lose sight of completing the work necessary to take full advantage of the system.

There are several methods of entering database information in Keystroke POS. If data such as inventory is available in a spreadsheet, a previous system or other computer file, speak to your Authorized Dealer about importing the data. However, this may be a good time to review how your data was previously organized, and how you might be able to improve how you use your data.

There are also numerous methods and tools available for manually entering database records. For example, some features worth looking into include **Default** data settings, **Merge** functions, **Search & Replace**, all located on the Database Manager menus.

One of the most useful aspects of Keystroke POS is that you don't have to go to the Database Manager to enter or edit data. From almost anywhere the system, you can press **F12** to Query the database, then **F3** to edit a record, or to add a new record press **INS** or **F2**.

But again, the most important thing is to plan, plan, plan. Organize your data, especially inventory, for the long term, and pay special attention to how the data will look on the reports you need. Here are a few tips to get you started.

### Clerks and Other Users

Create a Clerk record for anyone who will use the system, and assign Passwords and Security Levels. Higher Security Level numbers represent more restrictions. Be sure to assign a zero (0) Security Level to at least one Clerk who is an owner or trusted manager. This allows access all to all functions – higher Security Level numbers are more restrictive.

### Inventory

Pay special attention to how you utilize the indexed fields (Stock Number, Product Code, Class, Manufacturer, and Description), and the grouping fields (Department, Category, and Location). If you sell clothing, you may need the Matrix Manager; for repackaged inventory you might use Production module or Scripting. Just remember, there are many, many features available and other considerations. Work with your local dealer to get the best results!

### Customers, Contacts & Vendors

These databases are fairly self explanatory, with one exception: Contacts are a subset of Customer records. Use Contacts to record additional information about each Customer, such as alternate addresses, family members, employees of a business customer, or for certain types of customers even separate projects or vehicles.

## Security Issues

Keystroke POS offers many ways to help you protect your business assets. Resources range from relatively obvious and proactive features such as Passwords and Security Levels, to less apparent and more passive measures such as using Keystroke's powerful audit trail and the inherent benefit realized from using transactions to record all changes to inventory QOHs.

Below are some of the security issues and available features most businesses should consider.

**Clerk Database** – Require all employees to log in as a unique Clerk with a Password, and assign an appropriate Security Level to each Clerk.

**Security Levels** – Review Security Levels assigned to specific functions (Configuration-Tables).

**Hardware** – Maintain file servers and copies of data in secure locations.

**Wireless Networks** – Use hardware and software capabilities to protect unauthorized access.

**Audit** – Review settings in Configuration-Settings-Parameters function.

**Credit Card Data** – Review and adhere to payment card industry (PCI) security guidelines such as VISA® CISP and MasterCard® SDP.

**Monitoring/Recording Systems** – Consider the use of an integrated security system such as the Talon DVR (Digital Video Recorder). See Configuration-Hardware-Security Feed.

This information is not intended to represent a complete list of potential concerns. Please consult with your local Authorized Keystroke Dealer to learn more about these topics and other ways to protect your business assets.

## Modules & Extensions

Many businesses require additional features that extend beyond the diverse capabilities of the Keystroke POS base system. Add-on features for Keystroke POS are available in two categories – Custom Modules and Extensions.

### Custom Modules

- **General Ledger Link** – for QuickBooks®, Sage BusinessWorks®, Peachtree® by Sage, CYMA®, and other accounting systems. Includes the Keystroke to QuickBooks® Interface Extension.
- **Script Editor** – powerful triggers for clerk reminders, up-sells, component builds, tagalong items, item substitutions, etc.
- **Matrix Manager** – efficiently track inventory with multiple sizes, colors, or other criteria.
- **Importer** – add or update database records.
- **Production** – manage batch item assemblies.
- **Report Editor** – edit or create custom reports (press **F3** in Form list). An exclusive component of the User Bundle and Enterprise Edition.

### Extensions

- **Integration Toolkit** – dozens of specialized programs for reporting, integrating, etc.
- **Contract Pricing** – customer price schedules for individual items.
- **MultiStore** – data polling, consolidation, and management tools for businesses with multiple locations running Keystroke POS.
- **QwikTouch** for Keystroke POS
- E-Commerce Integration
- Business Intelligence Software
- Wine Club Billing
- UPS Worldship Integration
- ...and many more.

**Custom Modules** are developed by SBS and represent more commonly applicable add-on features. Most Custom Modules are included in the **Keystroke POS User Bundle** and can be accessed from the Custom option on the Main Menu. **Extensions**, may be developed by SBS or 3<sup>rd</sup> party developers, and are typically accessed from the Utilities-Extensions menu.

For more information about these and other add-on solutions, consult with your local Authorized Keystroke POS Dealer or visit [www.KeystrokePOS.com](http://www.KeystrokePOS.com).

## Peripheral Hardware

Keystroke POS supports many types of hardware devices available for retail applications, including most manufacturers and most types of connectivity.

- Electronic cash drawers (basic, compulsive)
- Receipt printers (thermal, inkjet, impact)
- Barcode scanners (hand-held, in-counter)
- Barcode label printers (thermal, laser)
- Programmable keyboards
- Customer pole displays (LED, LCD)
- Touch-screen monitors
- Digital signage displays
- Electronic change dispensers
- Magnetic credit card readers
- MICR check readers
- ATM/debit PIN pads (limited models)
- Signature capture (limited models)
- Electronic scales (free standing, in-counter, large-scale truck)
- Deli-scale labeling systems
- Portable data collectors - for physical inventory, purchase receiving, sales line busting
- Video monitoring security systems



While some brands and models are certain to perform better than others, your local Authorized Keystroke POS Dealer is the best source for specific product recommendations.

Software configuration settings for most devices are located on the Hardware menu in the Configuration Manager module. Additional information is also available in the on-screen Help system. While SBS technical support services are also available to assist, an on-site technician is the best approach for installation and troubleshooting of many hardware related issues.

## Other Resources

Development of the Keystroke POS system began over 20 years ago by the same three friends who own and operate Specialized Business Solutions. For these guys, it's more than a business, it's a way of life. And SBS is more than a software company, we are a service company.

Whatever needs your business may have, please don't hesitate to call us directly. If we can't do it, we'll try to steer you in the right direction. That said, please recognize that over the years, we've worked hard to develop solid business partners who share our interests and commitment to doing good business. Several of these partners are described below, along with other important resources we hope you will find useful.



### Authorized Keystroke POS Dealer

Your local Authorized Dealer is perhaps the most important resource available to you. While every dealer's individual knowledge and experience will vary, SBS works closely with our dealers to ensure your satisfaction. We strongly recommend you work with the Authorized Keystroke POS Dealer from whom you purchased the system.



### Powered by Mercury

SBS partners with MPS to provide reliable, secure, and fully integrated payment processing software with Keystroke POS. To obtain a merchant account for accepting credit cards, ATM/debit cards, checks and gift cards through Keystroke POS, call MPS at 800-846-4472 ext.4165 or visit [www.MercuryPay.com](http://www.MercuryPay.com).



### Training and Technical Support Services

While your local Authorized Dealer serves as your primary source for training and technical assistance, SBS offers these services to backup your dealer. SBS sponsored training seminars provide an excellent review of software capabilities, but are no match to personalized training your local dealer can provide. For plan options and pricing, please refer to the Support Services flyer or call SBS at 800-275-4727. Our normal business hours are 8am – 6pm mountain time, weekdays.

### [www.KeystrokePOS.com](http://www.KeystrokePOS.com)

The Keystroke POS web site is an important resource where you'll find a wealth of information about SBS and of course, Keystroke POS software. Visit the site regularly to find current information about new developments and upcoming events, share experiences with other users on the User Forum, download software updates, and locate information about other resources available to your business.



*Specialized Business Solutions*

800.359.3458 or 970.262.1720

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