# CashWiz Programming

**All programming starts by touching Main Setup ➤ and the appropriate setup Screen. The setup screens are used as follows;**

**Location Setup** Sets up name of business, sales tax rate and whether or not to print receipts.

**Clerk Setup** Sets up names of clerks for tracking sales or shifts.

**Department Setup** Sets up departments to break down sales for product, sales and x-z reports.

**Product Setup** Main key for adding or editing product items. Changes name, price, department, modifiers and taxes for individual items.

**Modifier Setup** Sets up groups of modifiers which can then be assigned to a particular key.

**Happy Hour Setup** Sets up the days and times for the two happy hours.
*Note: Happy hour prices are set up under the product setup menu.*

**Password Setup** Sets up passwords for reports and specific areas of programming.

**Inventory Setup** Sets up inventory items and units for tracking inventory.
(Currently under construction.)

**Special Setup** Sets up hardware configurations for printers, cash drawers etc.

## Setting Up Departments

Main | Setup ➤ | Department Setup

In this mode you can Add Delete Edit departments.

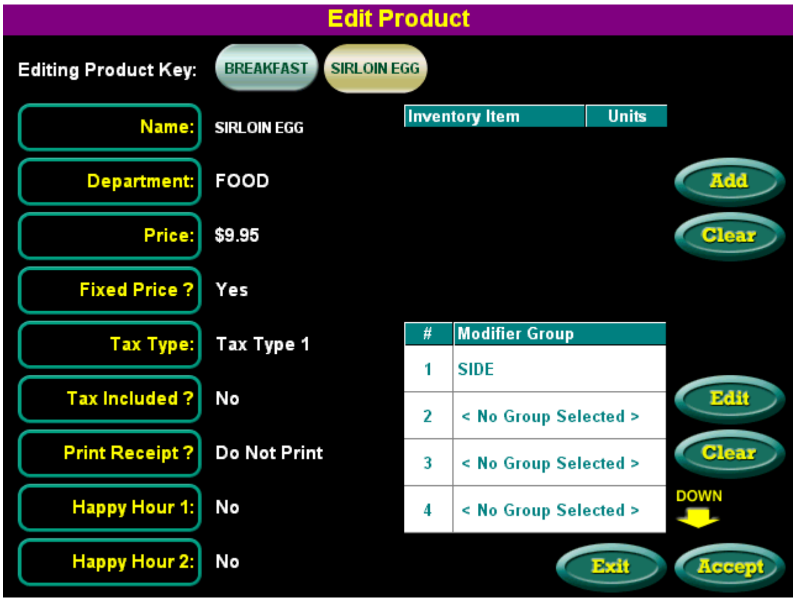
## Adding or Editing a Product Item

Main | Setup ➤ | Product Setup

Select main and/or submenu key and hit Edit

In this mode you can add a new item and change the following.

- the name of the item
- the department of the item
- the price of the item
- the price from fixed to open
- the item from tax included to tax not included
- the tax type
- the happy hour prices
- the modifiers for the item




## Setting Up Modifiers

Main | Setup ➤ | Modifier Setup

In this mode you can Add Delete Edit departments.

## Setting Up Happy Hours

Main | Setup ➤ | Happy Hour Setup

1. Select Happy Hour 1: or Happy Hour 2: and choose time.
2. Select days for happy hours by choosing YES for days desired.

## Setting Up Clerks

Main | Setup ➤ | Clerk Setup

In this mode you can Add Delete Edit clerk names.

## Setting Up Passwords

Main | Setup ➤ | Password Setup

1. Select report or item to password protect and hit Edit
2. Type password and hit OK
3. Type password again and hit OK Exit

## Changing Passwords

Main | Setup ➤ | Password Setup

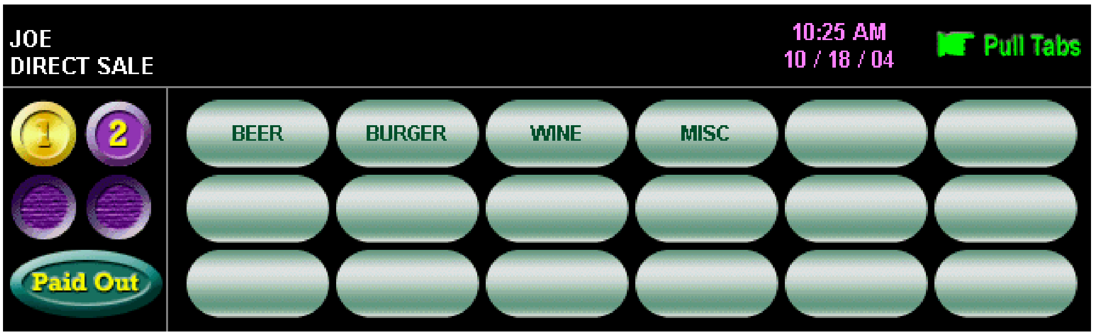
1. Select item and hit Edit
2. Type old password and hit OK
3. Type new password again and hit OK
4. Type new password again and hit OK Exit

## Changing Sales Tax

Main | Setup ➤ | Location Setup

Select Tax Rate 1: or Tax Rate 2: and type rate.

## Selling Products




1. Select clerk.
2. Select main product key.
3. Select product item key.
4. Select quantity by touching +
5. Enter product cost by using 10 key pad for open price items or touch Add For fixed price items.
6. Touch Accept to finalize sale or select another product item Add and Accept to finalize sale for multiple items.

**Note:** For determining change for the customer; recording checks; or recording credit cards, touch Tender after Add enter amount tendered and select Cash Check or Charge before touching Accept

## Voiding Sales

Re-ring the original transaction substituting the Void key for the Add key.

## Refunding Money

Re-ring the original transaction substituting the Refund key for the Add key.

## Promo's or Comps

Ring in a transaction substituting the Promo key for the Add key.

## CashWiz Inventory System

***Before starting inventory tracking you must first decide several things.***

1. You must decide which product items you want to track.
2. You must decide what ***Base Unit*** to use for each product you track. (The base unit is the smallest portion or size of the product item. For example, a single can could be the base unit for a case of beer. Likewise, an eighth ounce of liquor could be the base unit for tracking a bottle of vodka.)
3. You must also decide which sizes, other than the base unit, you wish to use to track your purchases and sales.(For example, for beer you may have a base unit of a can, but buy and sell by can, 6pk, 12pk or case. You could also have a base unit for liquor of an eighth ounce, yet sell it by an ounce shot.)
4. You must decide what ***Report Unit*** you want your inventory report to show. (Do you want your beer in inventory reported by the can or by the case?)
5. Finally, you must decide whether you want to use the ***Quick Add*** and ***Quick Adjust*** features to track your inventory. Those features are designed for those who wants speed and are only interested in tracking quantities not cost averages or inventory values.

## Setting up a Base Unit

A base unit is the smallest size or portion of a product item.

Main | Inventory ➤ | Unit Setup | Add

Type name of new unit OK Is this a base unit? Yes

## Setting up a Unit other than a Base Unit

Main | Inventory ➤ | Unit Setup | Add

1. Type name of new unit OK Is this a base unit? No
2. Select a **base unit** from the list by touching the name and press OK
3. Enter the multiplier (# of base units in the new unit) Accept
4. Press Add to add another unit item or Exit

## Setting up Product Items to Track

Main | Inventory ➤ | Item Setup | Add

1. Type name of new item OK
2. Select a **base unit** from the list by touching the name and press Accept
3. Select a **report unit** from the list by touching the name and press Accept
4. Press Add for another new item or Exit

## Adding Items into Inventory through Quick Add

***Quick Add*** is a fast and easy way to enter items into inventory for those who want to track quantities only and are not concern with inventory value.

Main | Inventory ➤ | Quick Add

1. Select item from the list by touching the name or the first letter of the name to scroll to The item and press Add
2. Type # of units purchased OK Touch name of next item Add
3. Enter # of units purchased OK Accept

## Applying Inventory Items to a Product Key

***This process starts the inventory tracking.***

Main | Setup ➤ | Product Setup

1. Select the product key you want to add inventory tracking to Edit
2. Touch Add for the inventory item. Quantity:
3. Enter quantity of Base Units that you want taken out of inventory with each purchase OK Accept
4. You can add a second inventory item by touching Add again or exit by by touching Accept

## Adjusting Quantities of Items in Inventory through Quick Adjust

**Report** **Inventory Report ➤** **Quick Adjust**

1. Select item from the list by touching the name or the first letter of name to scroll t the item.
2. Press **Adjust Quantity** and enter new quantity **OK**
3. Touch name of the next item to adjust **Adjust Quantity** Enter new quantity **OK** **Accept**

## Adding Items into Inventory with Invoice Information

**Main** **Inventory ➤** **Enter Invoice Information**

1. Select distributor **Accept**
2. Enter invoice # **OK** and enter invoice date **OK**
3. Enter invoice amount **OK** **Accept** **OK**
4. Select name and size of purchased item.
5. Touch **Quantity:** and enter # of items purchased **OK**
6. Touch **Price Per Item:** and enter item price **OK** **Accept**
7. Touch **Add** to continue with additional items or **Exit**

## Adjusting Quantity of Items in Inventory that have cost averages

### *For those not using Quick Adjust or Quick Add*

**Report** **Inventory Report ➤** **Summary Report**

1. Select item **Adjust Quantity** and enter adjustment date **OK** and enter new quantity

   **OK** **Accept**

2. Select new item or **Exit**

## Inventory Report

### *Count Sheet*

**Report** **Inventory Report ➤** **Count Sheet** **Print**

This report gives you a list of all items being tracked and allows you to take inventory counts from 3 locations.

**Note:** If items are entered into inventory through **Quick Add** there will be no dollar values!

### *Summary Report*

**Report** **Inventory Report ➤** **Summary Report** **Print**

This report shows quantities, units, average cost and total value of items being tracked.