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# 10 Steps to Getting Started with Cash Register Express

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Your copy of Cash Register Express (CRE) must be registered before use. To register your software, choose **Register** from the **File** menu at the **Login Screen**. Cash Register Express will prompt you for your activation number; enter the serial number located on the side of your CRE box.

After entering your activation number, Cash Register Express will access the pcAmerica registration server over the internet to register your software.

**NOTE:** The registration process requires an active internet connection. If you do not have an internet connection, please contact pcAmerica's customer service department to manually register your software.

For more information see **Step 2** of the **10 Steps to Getting Started** section of the manual.

## Table of Contents

1. [Plug in the Equipment](#)
2. [Install and Start Cash Register Express](#)
3. [Add Your Employees into the System](#)
4. [Configure a Few Setup Options](#)
5. [Create Your Inventory Items](#)
6. [Configure Your Inventory and Function Buttons](#)
7. [Login to the System](#)
8. [Ring in Some Items](#)
9. [A Few Basic Every Day Functions](#)
10. [Complete the Transaction](#)

## 10 Steps to Getting Started

### Step 1 - Plug in the Equipment

The first step of setting up your point of sale system is plugging in the equipment. Some of the devices require **hardware drivers** which is what your computer uses to talk to each piece of equipment.

Step by step instructions on how to plug in your new POS hardware, peripherals and install drivers are located at:

- <http://faq.pcAmerica.com/hardware>



**Pole Display**

Your Pole Display allows customers to quickly and easily view their transaction as it is being entered into the system.



**Cash Drawer**

Store cash for the day in one safe and convenient place. CRE features an antitheft setting to only allow employees to ring in a transaction with the cash drawer closed.



**Barcode Scanner**

Scan items effortlessly and fast with a bar code scanner.



**Receipt Printer**

Receipt printers allow your customers to have an itemized breakdown of their transaction. CRE will also enable you to place your company logo and bounce back coupon on the receipt.

For more detailed information about hardware and hardware configurations please see the **Hardware Setup** section of the manual.

**Note:** These are common connection arrangements. Depending on the equipment you purchased, your connection arrangements will vary.

## 10 Steps to Getting Started

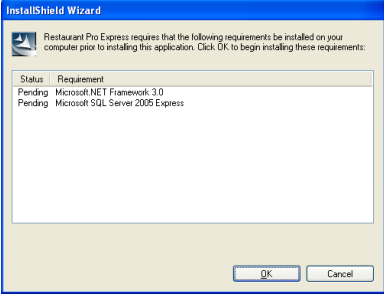
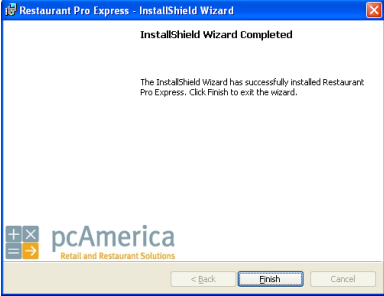

### Step 2 - Install and Start Cash Register Express

Below are instructions on installing Cash Register Express and starting it for the first time.

You must be logged onto your computer as an Administrator with full access rights in order to properly install Cash Register Express.

If you have multiple stations within your store, it is very important that you **install the server first!** We also recommend you read the **Configure Multiple Stations** section later in this manual.

If you have multiple stores communicating to a corporate office, it is recommended you sign up for a pcAmerica training session to ensure you fully understand the process.

	<ol style="list-style-type: none"><li>1. Insert the Cash Register Express CD into the CD-ROM drive. Before installing CRE the installer will scan for any prerequisites. Whatever is listed on this screen <b>MUST</b> be installed prior to the CRE install. If nothing on this screen is installed you will get prompted to select ok to install everything.</li></ol>
	<ol style="list-style-type: none"><li>2. After all prerequisites have been installed the CRE installer should automatically launch and bring you to the next step.</li><li>3. After the install has completed select <b>Finish</b> to exit the wizard.</li></ol>
	<ol style="list-style-type: none"><li>4. Select <b>Next</b> to begin the configuration process. You will be asked a series of questions that will determine how your system is installed.</li></ol>

## 10 Steps to Getting Started

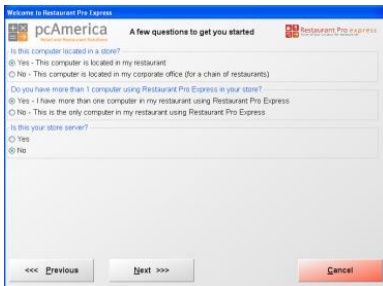
### Step 2 – Install and Start Cash Register Express



5. **Cash Register Express** will prompt you to select your industry type, select **A Retail Store**. Otherwise, choose **A Corporate Office for a Chain of Stores or Restaurants ONLY IF** this computer is an office computer in your corporate office (not an office computer in a retail store).



6. The next screen in the wizard will be the **Database Selection** tab.
  - Select **Configure This Computer** to start a NEW database. To connect to your server please see the **Configure Multiple Stations** section later in this manual for more information.



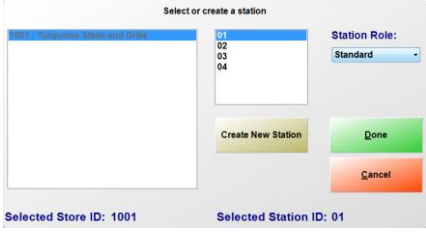
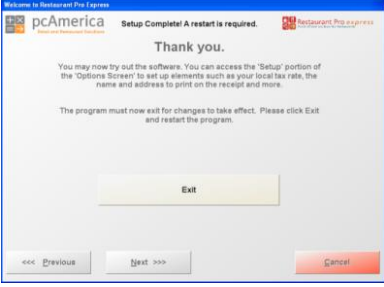


7. You will need to answer a series of questions to help configure your system properly.



8. If you are connecting more than one computer in your store to a server you must select the right server that station will be connecting to.

## 10 Steps to Getting Started

### Step 2 – Install and Start Cash Register Express

	<p>8. To setup a <b>Store Server</b> you will need to choose the appropriate <b>Store ID</b> by highlighting it. In addition, you need to select a <b>Station</b>. For connecting a <b>Station to a Store Server</b> please see the <b>Configure Multiple Stations</b> section later in this manual.</p> <p><b>Note:</b> Every station must have a unique number.</p>
	<p>9. After you have configured your system select either <b>Begin</b> or <b>Exit</b> and restart the program.</p>
	<p>10. In order to gain access to your new software you must now register it. Select the <b>Register Now</b> tab and scan or enter the registration number that came with your software. You must have an internet connection to register your software or call your customer service representative (1-800-722-6374 x278) to guide you through the manual registration process.</p>
	<p>11. If you are not connecting to a corporate office, Cash Register Express will proceed to the <b>Login Screen</b> after a brief loading process. If you are connecting to a corporate office, you will be prompted for the corporate office information before progressing to the <b>Login Screen</b>.</p>

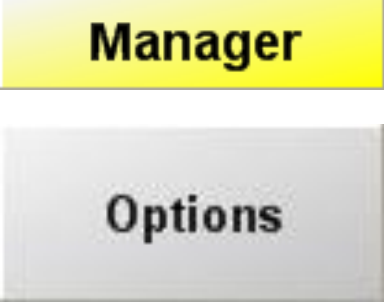

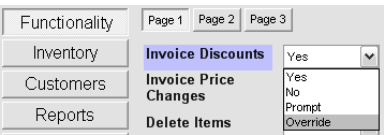
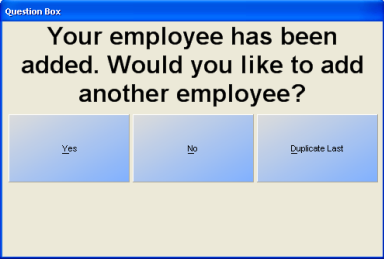
For a detailed installation guide please see the link below:

- <http://faq.pcamerica.com/maintenance/cre-rpe-installation>

## 10 Steps to Getting Started

### Step 3 - Add Your Employees into the System

Employees are configured within the **Employee Maintenance** screen of Cash Register Express. Cashiers and servers must be added into the system before they can log in and ring up sales. Other types of employees can be added and their hours tracked within CRE, even if their jobs don't require them to use the POS. The steps below describe how to add your initial cashier into CRE; the **Employee Maintenance** section later in this manual will describe additional employee options, job codes and how to record employee hours.

	<ol style="list-style-type: none"> <li>1. Select the <b>Manager</b> or <b>Options</b> button.</li> <li>2. Enter the administrator password (default: admin) where applicable.</li> <li>3. Select <b>Administrative</b> then, <b>Employee Maintenance</b>. Only the administrator can access this screen.</li> </ol>
	<ol style="list-style-type: none"> <li>4. Select the <b>Add Employee</b> button to create a new employee record. Assign a unique Employee ID (which could be their initials or some other unique identifier), password and a <b>Display Name</b> that prints on the receipt. If you would like to assign a secure login card to this employee, swipe the card in the <b>Card Swipe ID</b> box.</li> </ol>
	<ol style="list-style-type: none"> <li>5. Assign security permissions by selecting the dropdown list and selecting Yes (the employee can do this), No (they cannot), Prompt (they can with manager's permission) or Override (they can and are a manager for this function).</li> </ol> <p>For more information see the <b>Top Five Employee Permissions and Uses</b> section of the manual.</p>
	<ol style="list-style-type: none"> <li>6. Select the <b>Save</b> button. Your employee has been added! Add any additional employees you wish to configure and then select the <b>Exit</b> button to go back to the Login Screen.</li> </ol>

For a detailed guide on adding and configuring employees in CRE please see the link below:

- <http://faq.pcamerica.com/software/employees/creating-employees>

## 10 Steps to Getting Started

### Step 4 - Configure a Few Setup Options

Cash Register Express has hundreds of built-in features that can be turned on or off. The **Setup Screen** includes many of these options, organizing them into multiple tabs. You can access the **Setup Screen** from the **Login Screen** by selecting the **File** menu and **Setup Screen** – you must use the administrator password to enter this screen (default: admin). Global settings only need to be configured once for all stations while settings that are not global need to be configured once at each station. Below is a chart of recommended feature settings:

Feature	Tab	Retail Clothing Store	Grocery Store	Global
<b>Prompt Cashier ID</b> , requires a cashier to login for every check.	Invoice Settings	X		
Change the <b>Receipt Size</b> to <b>Short Receipt</b> to print only the most important information.	Receipt	X	X	
Enter the company information that prints on the receipt.	Company Info	X	X	X
Enter necessary credit card information if you are processing credit cards through Cash Register Express.	Payment Processing	X	X	
<b>Allow credit card swipes on invoice screen</b> will allow credit cards to be swiped on the invoice screen.	Station Specifics	X	X	
Create text that will print on the bottom of a receipt as a coupon.	Coupons	X		
<b>Quick Tender</b> will show the amount of change on the invoice screen, eliminating a touch from every transaction.	Quick Invoicing & Alerts	X	X	
<b>Reason Codes</b> allow you to choose a reason why you are accepting a return.	Invoice Settings	X	X	X
<b>Combine lines</b> items scanned multiple times will appear on the same line item.	Invoice Settings	X	X	

You can read about the other settings and options in the **Setup Screen** in our **F1 Help Section** built into Cash Register Express. You can also get detailed information about the setup screen from the link below:

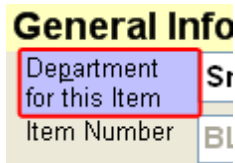
- [http://faq.pcamerica.com/file-lockers/pdf-locker/Setup\\_Screen.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Setup_Screen.pdf)

## 10 Steps to Getting Started

### Step 5 - Create Your Inventory Items

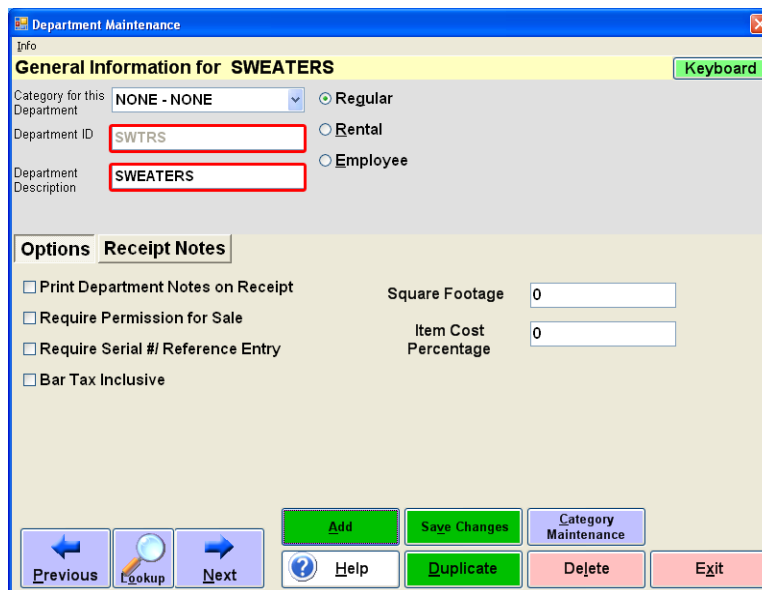
Your goods are separated into separate groups called **Departments**. A few examples of departments are **Sweaters, Pants,** and **Fruits**. Departments are used to organize your inventory items on screen as well as on reports. After your departments are created, you create items inside of each of your departments.

To begin creating your inventory items, select the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin). Navigate to the **Inventory Maintenance** screen inside of the **Administrative** tab.



To add a new department, select the blue **Department for this Item** link in the top left of the screen. This will bring you to the **Department Maintenance** screen.

Select the **Add Department** button, type in a department ID (ex: SWTRS) and description (ex: SWEATERS) and select **Save**. After adding the department, select **Exit** to return to the **Inventory Maintenance** screen.





## 10 Steps to Getting Started

### Step 5 – Create Your Inventory Items

To add a new item, select the **Add Item** button on the bottom of the **Inventory Maintenance** screen. The required information is on the top one-third of the screen:

- The **Department** this item will be inside of (ex: SWEATERS).
- A unique **Item Number** (ex: SW1001, or the barcode of the item).
- A **Description**, which will print on the receipts (ex: short sleeve v-neck).
- Your **Cost**, which is the price you pay.
- The **Price you charge** the customer.
- An optional **# In Stock** value if you track stock levels.
- Various tax options can be selected, if you charge tax for this item.

General Information for Short Sleeve V-neck			
Department for this Item	SWEATERS	Item Type	Standard
Item Number	SW1001	Cost	\$4.17
Description	Short Sleeve V-neck	Price you charge	\$18.99
		# In Stock	25
			<input checked="" type="checkbox"/> Tax 1 <input type="checkbox"/> Bar Tax
			<input type="checkbox"/> Tax 2
			<input type="checkbox"/> Tax 3

Select the **Save** button and the item will now be added to your inventory list. See the next step to change the default format of your button and customize the touchscreen with your own colors.

For a complete breakdown of all options in Inventory Maintenance please see the document below:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Inventory\\_Maintenance\\_Screen.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Inventory_Maintenance_Screen.pdf)

For detailed instructions on adding inventory please see the link below:

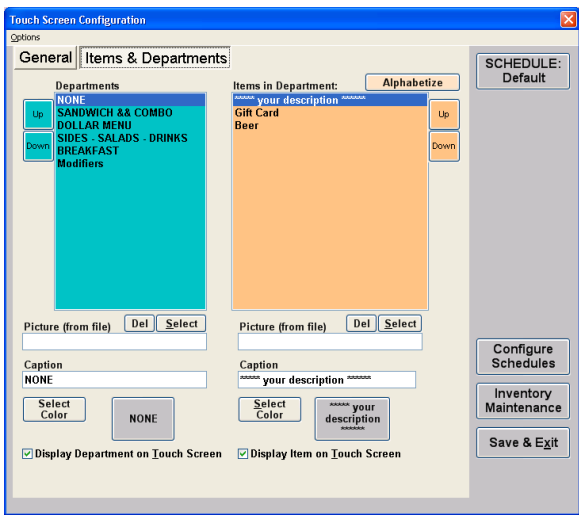
- <http://faq.pcamerica.com/software/inventory/creating-new-inventory-items>

## 10 Steps to Getting Started

### Step 6 – Configure Your Inventory and Function Buttons

The invoice screen, where sales are ring up is a highly customizable screen. By default, inventory items are displayed in the order you add them. The buttons are added to the screen using a default color.

To change the look of your invoice screen, and configure function buttons and best sellers, select the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin). Navigate to the **Touch Screen Configuration** screen inside of the **Setup** tab and go to the **Items & Departments** tab.



The functions in the **Items & Departments** tab are used to change the order, color, caption and picture of your menu buttons. You can also choose to make certain items or departments invisible.

- To change the color of a department or menu item button, select the department (in the left list) or menu item (in the right list) and select the **Select Color** button.
- Change the order of your departments or menu items by selecting them from the list and using the **Up** or **Down** buttons.

When you are finished making changes, select the **Save & Exit** button. Your saved changes will display the next time you log into the invoice screen.

**TIP:** Changes made to the inventory screen on one terminal automatically update ALL terminals in real time. You do have the ability to design different screens for specific terminals in your store without affecting the other terminals. To do this, select the **Configure This Station Individually** option from the **Options** menu on the top of the screen.

If this is checked, any layout changes made within **Touch Screen Configuration** will not affect other terminals.

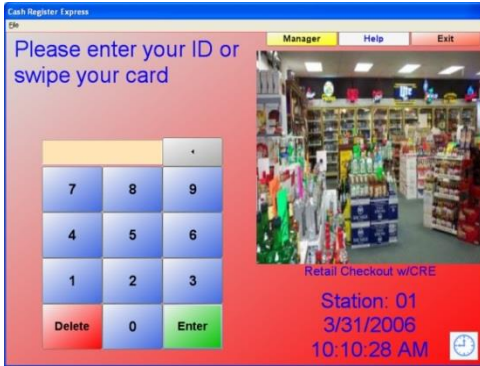
For a detailed guide on using the touch screen configuration window please see the link below:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Touch\\_Screen\\_Configuration.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Touch_Screen_Configuration.pdf)

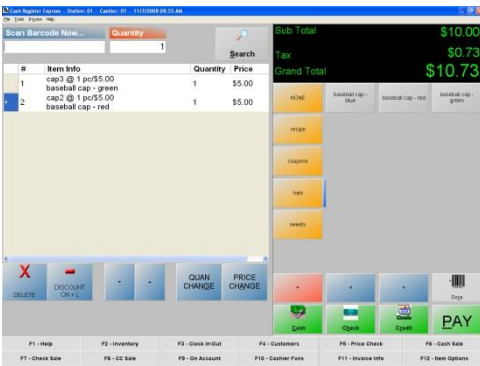
## 10 Steps to Getting Started

### Step 7 - Login to the System

Cashiers must login to Cash Register Express before they can ring up customers or enter orders. The **Login Screen** prompts cashiers for a user name and password, or alternatively the cashier can swipe their card to gain access.



1. To log into CRE, simply enter your ID and password (the default is "01" and "admin"), enter the employees id or swipe the secure login card you previously configured in the **Employee Maintenance** screen from Step 3.



2. Once you have logged in, the CRE invoice screen will appear. Once your system is setup, most of your pos experience will take place in the invoice screen. From this screen you can easily access many of the setup options and do all of your establishments invoicing.

A secure login card helps prevent one cashier from logging in as a different cashier (which is a hole for theft). Without a secure login card, cashiers must type in a user name and password, which is visible to others close by. The only way to log in with the card is to swipe the card, protecting the cashier's cash bank from others trying to steal money. You can purchase these cards from pcAmerica directly.



## 10 Steps to Getting Started

### Step 8 - Ring in Some Items

Ringin up an item is easy. Simply select the TS Lookup button then select the department the item is in (examples: sweaters, T-shirt, cigars, equipment, etc). While viewing the inventory for a specific department you can then select the items you would like to add to the invoice. You can also scan the barcode of the item with the barcode scanner (if one has been purchased), the item will then be added to the invoice grid automatically.

The screenshot displays the Cash Register Express software interface. At the top, there's a menu bar with 'File', 'Tools', 'Invoice', and 'Help'. Below it, a 'Scan Barcode Now...' button and a 'Quantity' input field (set to 1) are visible. A search icon and 'Search' button are also present. The main area is divided into two sections: an invoice grid on the left and a department selection menu on the right. The invoice grid shows two items:

#	Item Info	Quantity	Price
1	7095001058 @ 1 pc/\$2.99 METAL CORKSCREW	1	\$2.99
2	9780785810131 @ 1 pc/\$8.99 AMER BAR & COCKTAIL BOOK	1	\$8.99

The department selection menu on the right shows a grid of buttons for various departments: LIQUOR, AMER BAR & COCKTAIL BOOK, AMER SANKY KEG PUMP, BUTANE LIGHTER, BEER, LEMON, LIME, METAL CORKSCREW, WINE, ORANGE, SMALL EURO PUMP, SMALL KEG PUMP, NON ALCOHOL, THE COCKTAIL BIBLE, WAITERS CORKSCREW, WINE MADE SIMPLE, TOBACCO, and MISC ITEMS. Below the menu are buttons for 'DELETE', 'DISCOUNT Ctrl + L', 'QUAN CHANGE', 'PRICE CHANGE', 'Cash', 'Check', 'Credit', and 'PAY'. A 'Barcode scanner window' is also indicated. The bottom of the screen features a row of function keys (F1-F12) with their respective actions.

Sub Total: \$11.98  
Tax: \$0.84  
Grand Total: \$12.82

Annotations:

- Items ordered so far on this invoice with Quantity and price (points to the invoice grid)
- Department selection buttons (points to the department selection menu)
- Item buttons; touch an item to add it to the order (points to the department selection menu)
- Barcode scanner window (points to the barcode scanner icon)

For detailed instructions on invoicing in Cash Register Express please see the link below:

- <http://faq.pcamerica.com/software/invoicing/general-invoicing-in-cash-register-express>

## 10 Steps to Getting Started

### Step 8 – Ring in Some Items



If the item is not listed on the touchscreen and it does not have a barcode to scan, select the **Search** button.

This option lets you search the entire inventory for the item.

Item Number	Description	Price	Stock	Description 2	Vendor Part Num
000000000	TAYLOR FLAD TAWNY PORT 750ML	12.99	16		85624
0000070106	SOLE STUFFED SCALLOPS & CRAB	4.25	5		33582
0000070129	CHICKEN LEG & THIGH	2.79	12		30852
00100	DEPOSIT ON KEG	10.00	4		
00201	COORS LT KEG 15.5 BBL	74.95	3		00201
00202	COORS LT KEG 7.75 BBL	45.95	2		00202
0044506006	SEA DOG BLUEBRY WHEAT 6 PK	7.99	11		673004
00702	MILLER LT HALF BBL	74.95	0		00702
00704	MILLER LT QUARTER BBL	45.95	1		00704
00948777	HEINEKEN 24 OZ NR	2.99	32		301012
010	Credit Card Charges	1.00	1000		
01212901	PEPSI 20OZ	1.29	112		00129
01213007	DIET PEPSI 20OZ	1.29	91		00130
01213104	MTN DEW 20 OZ	1.29	0		
01215908	AQUAFINA WATER 20OZ	1.19	277		00159
01218701	DOLE ORANGE	1.89	30		00187
01219300	DOLE APPLE	1.89	0		

Category: No Category Selected | Department: No Department Select | Vendor: No Vendor Selected

Item Number: 01215908 | Description: AQUAFINA WATER 20OZ | Vendor Part Num: 00159

Buttons: Select, Cancel

At the search screen find the item in your inventory using the many features of filtering inventory described below:

- On the right of the screen you can select the item type to filter the displayed inventory by.
- On the bottom of the grid you can use the dropdowns to filter out the inventory based on the Category, Department, or Vendor that the Item is part of.
- At the bottom you can search for the item based on text entered and by how to search through the inventory. After finding the item you would like to add to the invoice, highlight it, click the **Select** button, and the item will then be placed on the current invoice.

For detailed instructions on invoicing in Cash Register Express please see the link below:

- <http://faq.pcamerica.com/software/invoicing/general-invoicing-in-cash-register-express>

## 10 Steps to Getting Started

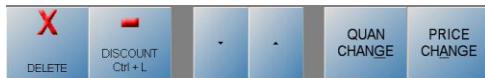
### Step 9 – A Few Basic Every Day Functions

You can access additional functions by selecting the tabs on the bottom of the invoice screen. Below is an explanation of each of these buttons.

**Note:** These buttons can be hidden from the touchscreen by selecting Display Setup from the Setup section of the Manager/Options screen. The Toolbar option is checked it will be displayed.

F1 - Help	F2 - Inventory	F3 - Clock In/Out	F4 - Customers	F5 - Price Check	F6 - Cash Sale
F7 - Check Sale	F8 - CC Sale	F9 - On Account	F10 - Cashier Fxns	F11 - Invoice Info	F12 - Item Options

<p><b>F1 – Help</b> a shortcut to the Help section.</p> <p><b>F2 – Inventory</b> a shortcut to the <b>Inventory Maintenance</b> screen.</p> <p><b>F3 – Clock In/Out</b> a shortcut to the Time clock screen.</p> <p><b>F4 – Customers</b> a shortcut to the <b>Customer Maintenance</b> screen.</p> <p><b>F5 – Price Check</b> this is where you can check the price and stock level of an item.</p> <p><b>F6 – Cash Sale</b> this will ring up the current invoice as a cash sale.</p>	<p><b>F7 – Check Sale</b> this will ring up the current invoice as a check sale.</p> <p><b>F8 – CC Sale</b> this will ring up the current invoice as a credit card sale.</p> <p><b>F9 – On Account</b> this will ring up the current invoice on account.</p> <p><b>F10 – Cashier Fxns</b> a shortcut that will take you to the Cashier Functions screen.</p> <p><b>F11 – Invoice Info</b> a shortcut that will take you to the Invoice Properties screen.</p> <p><b>F12 – Item Options</b> this button controls whether or not the item options are visible.</p>
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#### Item Options

- Delete** -- This will delete the currently highlighted item on the invoice grid.
- Discount** -- This will discount the highlighted item on the grid, not the entire invoice.
- Down** -- Will scroll down to the next item on the invoice grid.
- Up** -- Will scroll up to the next item on the invoice grid.
- Quan Change** -- Will allow you to change the quantity of an item on the invoice grid.
- Price Change** -- Will allow you to change the price of an item on the invoice grid.



- Void Invoice** – This will void the entire invoice.
- Hold Invoice** – This will allow you to pull up an invoice that has been placed on hold.
- TS Lookup** – This will bring up an on screen layout of your items and departments.
- Options** – This will bring you to the View Options screen.

## 10 Steps to Getting Started

### Step 10 - Complete the Transaction

Step 10 is the most important part of the transaction – accepting payment (money) for the goods/services that your establishment offers. The three most common forms of payment in most retail stores are cash, credit/debit cards and gift cards.



To pay for a transaction, select the appropriate button (PAY). This will bring open the amount-tendered screen.

You can also select one of the Quick Tender buttons which will bring you to an appropriate screen based on the tender type selected.

CRE also gives the ability to quickly ring in items and put them on a customer's account.



Cash Register Express's amount tendered screen is built for speed and flexibility. The default amount is always the exact amount remaining for the invoice. To enter a payment, enter in the amount and select the payment method. If paying by gift card, credit\debit card or check, CRE will ask you for more information. You can also enable one-touch quick payment buttons (in the **Quick Invoicing & Alerts** tab of the **Setup Screen**) for the most common tender amounts. CRE supports split tendering, meaning you can pay with more than one tender type.

**SPEED TIP** - Pay by credit card without touching a button; our unique **swipe-and-go** feature allows you to pay by credit card or gift card without touching a button. All you need to do is swipe the credit card on the invoice screen and it will process the card. This is the fastest way to pay. This option can be configured on the **Station Specifics** tab of the **Setup Screen**.

**Congratulations!** You've rung up your first sale inside of Cash Register Express. You've covered the basics and can now use your new point of sale system. The remainder of this manual includes some useful information for configuring and using your Cash Register Express point of sale system.