Getting Started Guide
Crafter's Edition

The purpose of this document is to guide you through some of the first steps to set up TRS after installing the software. It includes information on setting some of the more important options, as well as some hints/tips on things that should be done before beginning serious data entry or running live with the system.

This is not an installation guide. This guide assumes that you have already installed the TRS software and/or hardware, and that everything is up and running. This guide makes reference to chapters of the *TRS User's Guide*. If you do not have a printed copy, you can be find the document on the TRS CD or on the JMM website, which you can print out for reference. The references are made to chapters only, as the page numbers may change. Use the Table of Contents to find the specific reference.

Set Up Security

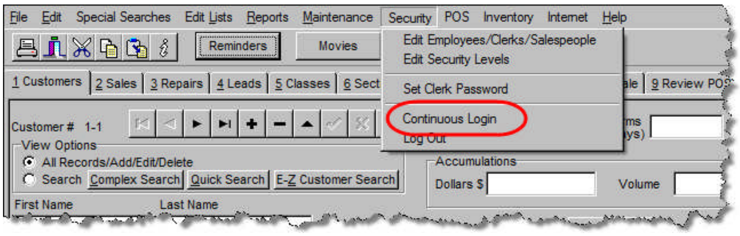
Many functions of TRS are protected, and require a security code to access them. TRS comes set up with a default administrator user. Initially, you can access any protected function by entering the following security code: admin-5555. This means the Clerk ID is **admin**, and the password is **5555**. It is recommended that you change the password as soon as possible. At that point, you can also define new security levels and add additional users. From the TRS menu, go into **Security>Edit Employees/Clerks/Salespeople**. The explanation of how to set these up can be found in the *TRS User's Guide* in **Chapter 18**.

Tips for Security Settings during Initial System Setup

When initially setting up your system, you can save many keystrokes by temporarily turning off the security levels. There are two recommended options for turning off the security:

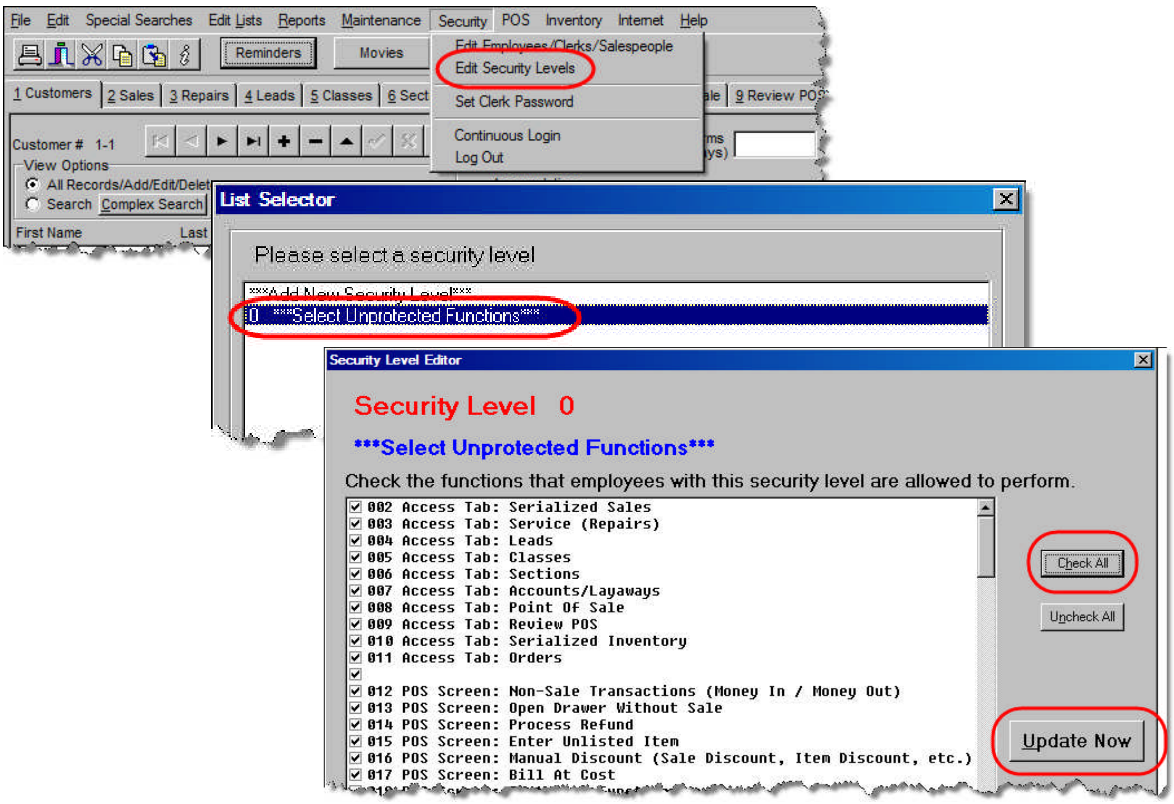
1 - Create a Continuous Login

Go to **Security> Continuous Login** from the TRS menu. Using this method, once you put in the password, it will be in effect until you go to **Security>Log Out** or exit TRS.



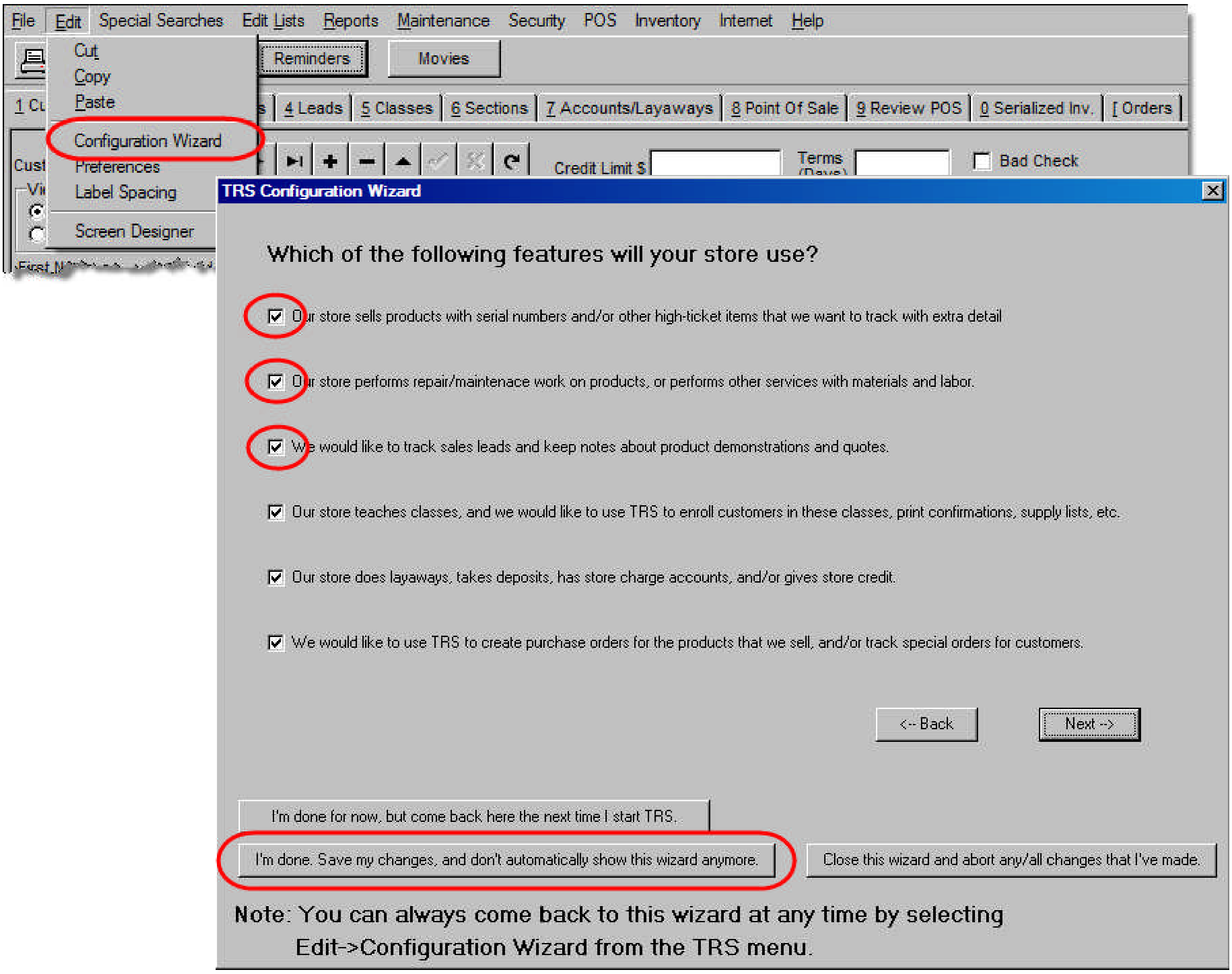
2 - Turn Off all the Security for Now and Re-enable it Later

Go to **Security>Edit Security** levels (enter the admin password when prompted). Click "Select Unprotected Functions" and click OK. Click "Check All" then "Update Now".



Turn Off Module Tabs Your Business Does Not Use

From the TRS menu, go to **Edit>Configuration Wizard**. When the initial screen displays, click the "Click Here to Begin" button. The following screen displays.



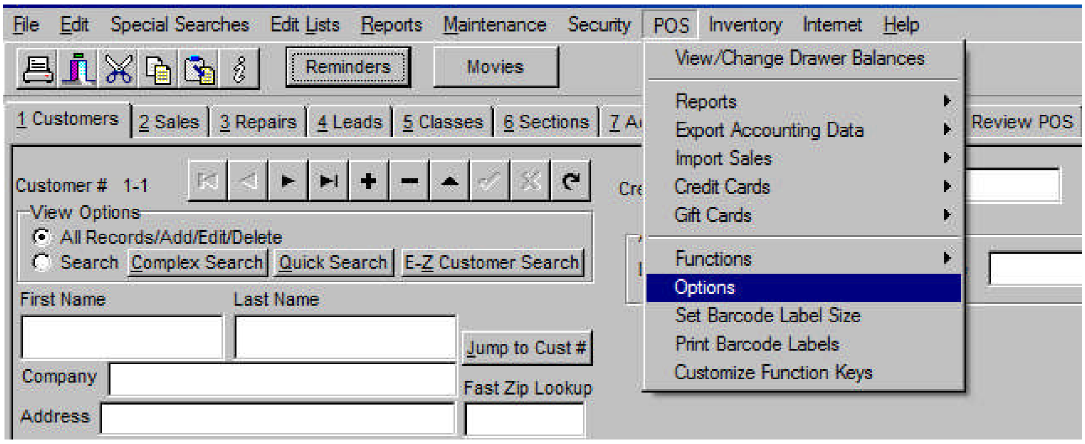
To turn off the tabs in TRS you will not be using, click the checkboxes to de-select them. The features listed below (circled in the screen above) are the typical ones your store will not use.

- Our store sells products with serial numbers and/or other high-ticket items that we want to track with extra detail.
- Our store performs repair/maintenance work on products, or performs other services with materials and labor.
- We would like to track sales leads and keep notes about product demonstrations and quotes.

When you have finished making the selections, click the "I'm done. Save my changes, and don't automatically show this wizard anymore." button.

Set System Options and Preferences

From the TRS menu, go into **POS>Options**.

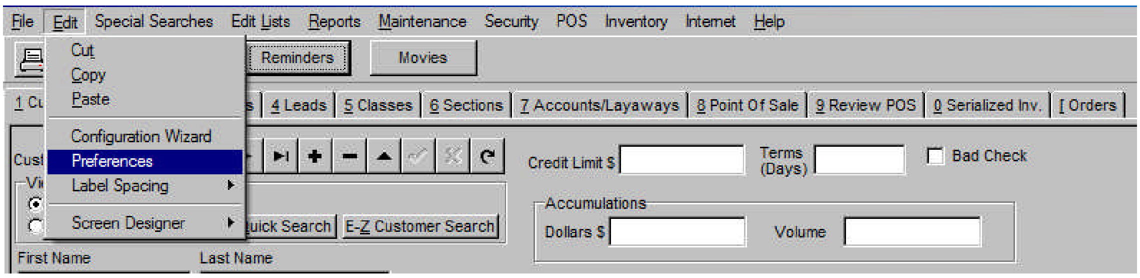


These settings customize and define the various options available in TRS. These options are divided into module tabs as follows:

- Hardware – defines printer, cash drawer, and pole display options.
- Taxes – defines tax rates and applications.
- Department Options – apply department codes to repairs, classes, and so forth.
- Printing – define numerous options for receipt and label printing.
- Inventory – define parameters for generating bar codes, set defaults for new inventory items, and options for ordering.
- Customer Rewards – define specifics of accumulating volumes, dollars, and reward goals.
- Miscellaneous Options – define numerous options such as clerk login parameters, using POS categories, calculating commissions, discounts and more.

The explanation of these options can be found in the *TRS User's Guide*, in **Chapter 2**.

Another area of TRS with system options is **Edit>Preferences**.



Here, you can add additional contact information that prints at the top of receipts, define options for the customer screen (such as setting a default state and naming spare fields) as well as browser and monitor options. Also set here is whether to show the Reminders when the system starts. The explanation of this screen is found in **Chapter 2** of the *TRS User's Guide*.

Determining the Order in Which to Set Up the Modules

There is no "correct" order in which to set up the modules or screens in TRS. Since the system revolves around your customers, probably starting with the customer database is the most logical step. From there, you could set up "generic" Items IDs in POS Products (see the Entering Your Inventory "Tip" below) so you can start ringing up sales immediately. Next, you could implement Classes and/or Repairs. You can also start using the Sales module right away. Until you have the Serialized Inventory entered, you can simply type the serial number of the machine in that field.

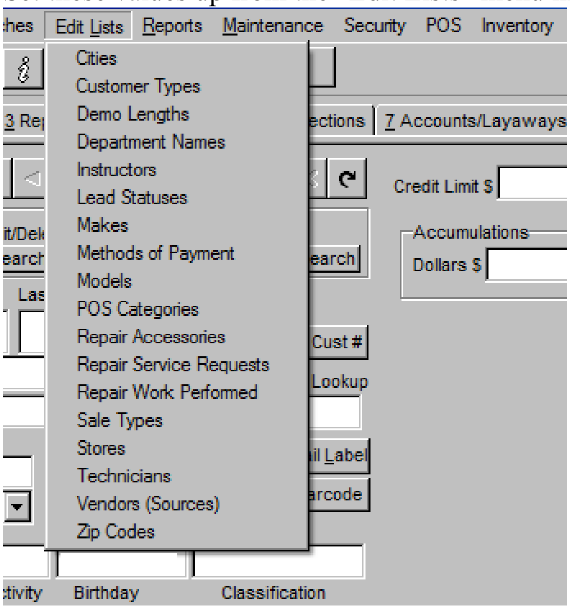
Ideally, having more than one person entering this initial information will speed the process immensely. Entering the products in the inventory database is usually the biggest project, so having additional staff members doing that can move the process along much quicker.

Before implementing each module, there are certain lists that must be set up first from the Edit Lists menu. These are discussed in the next topic. Refer to the *TRS User's Guide* for more information on setting up each of the TRS modules.

Set Up Lists

Lists contain the values that will display in the drop-down field entries throughout TRS. In many instances you can type the entry for the field; however, for consistency in storing and reporting data, selecting from the drop-down list is important. (When selling or setting up serialized inventory it is imperative.)

Set these values up from the "Edit Lists" menu in TRS.



Instructions for entering data in these lists can be found in the *TRS User's Guide*, in **Chapter 2**.

The following table summarizes which modules of TRS use these drop down lists. As you implement each module, you can use this table to determine which lists must be set up first.

Module Tabs	Lists Used for Drop-Down Options
Customers	Customer Types (Classification) Cities Zip Codes
Classes	No drop-downs
Sections	Instructors Methods of Payment
Accounts/Layaways	No drop-downs
POS	POS Categories (optional)
POS Inventory	Preferred Vendor Department Names

Module Tabs	Lists Used for Drop-Down Options
POS Vendor Products	Vendors
Orders	Vendors Ordered by (Salesperson) Stores

There are other lists on the Edit Lists menu that only apply to the modules that are not applicable to your business (Repairs, Sales, Leads and Serialized Inventory).

Because of the impact on your records, several of these lists require special attention and planning. Following is a discussion of those lists.

Department Names

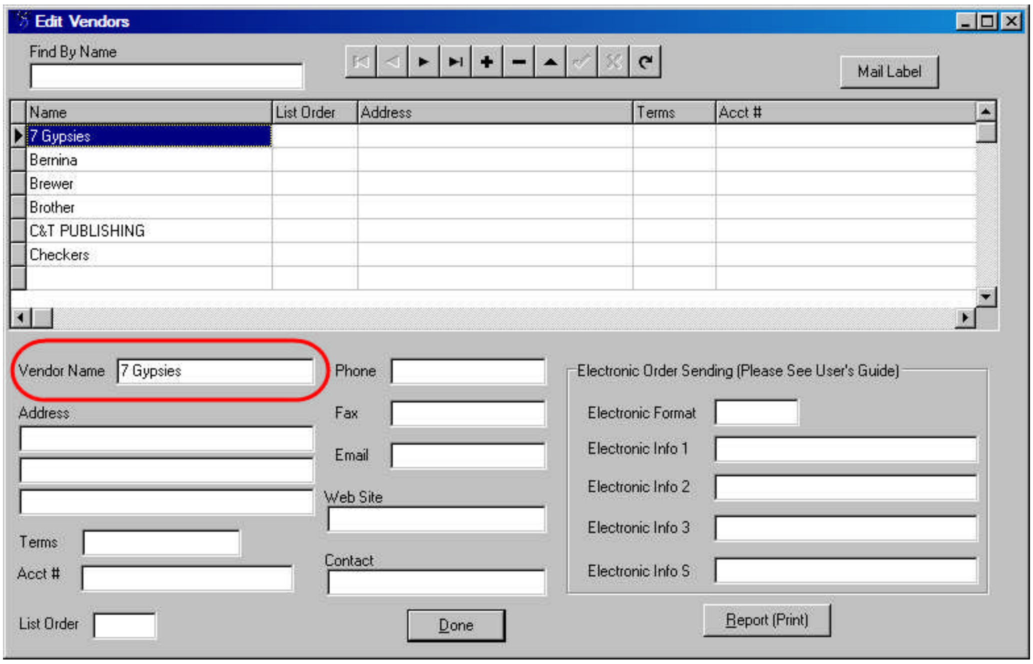
It is important to decide on your department structure before you enter your inventory or begin entering sales in POS.

Departments are used to categorize and accumulate sales totals (like "profit centers") and to export sale totals to Quick Books(optional). In addition, they allow you to easily search by department and run reports, set up sale specials or perform "mass edits" on products.

TRS departments are numeric and can be assigned a name. The name will appear in drop-down lists for easier data entry. When running reports based on Departments, they will be subtotaled in sets of 100. More information about how departments are named and grouped can be found in **Chapter 2** of the *TRS User's Guide*.

Vendors (Sources)

It is very important to set up this list of vendors before you begin entering inventory. At the very least, enter the vendor names here. Later, when you are entering your inventory, select your vendors from the drop-down list for consistency. Although you may be allowed to manually type vendor names in the fields, using the drop-down list assures consistency in reporting, source listings, and ordering.



The Electronic Order Sending section is discussed in the "Sending Orders Electronically" section of **Chapter 14** of the *TRS User's Guide*.

Zip Codes

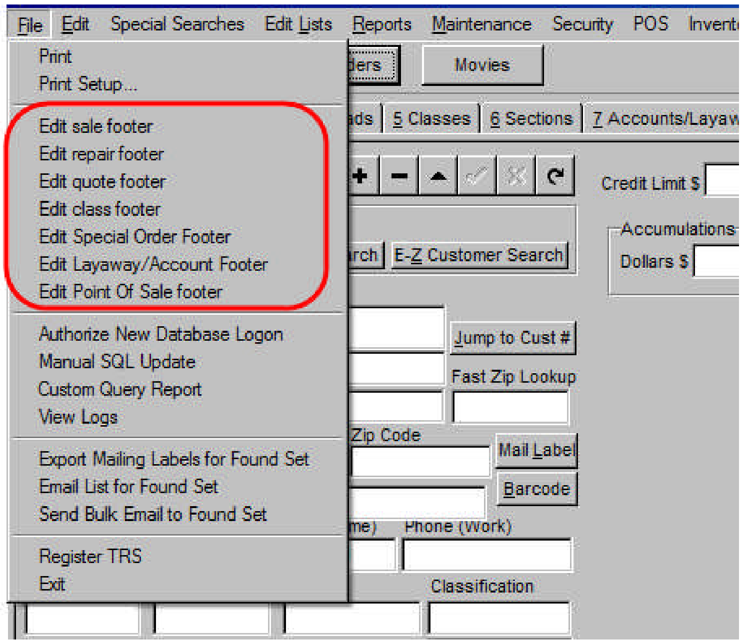
While not absolutely necessary for data entry, it is nice to set these up. These are used for the "Fast Zip Lookup" feature in the Customers module. When entering a new customer, if you fill in the zip code in the "Fast Zip Lookup" field and press "Tab", it will automatically look up and fill in the city and state if you have that zip code set up here (see **Chapters 2 and 3** of the *TRS User's Guide*).

POS Categories

If you need to categorize entire sales, set up those categories here. One typical use of categories is to separate store sales from web sales. You made not need to use this feature of TRS.

Set Up Footers

From the TRS menu, select File. The options for editing several footers will display.



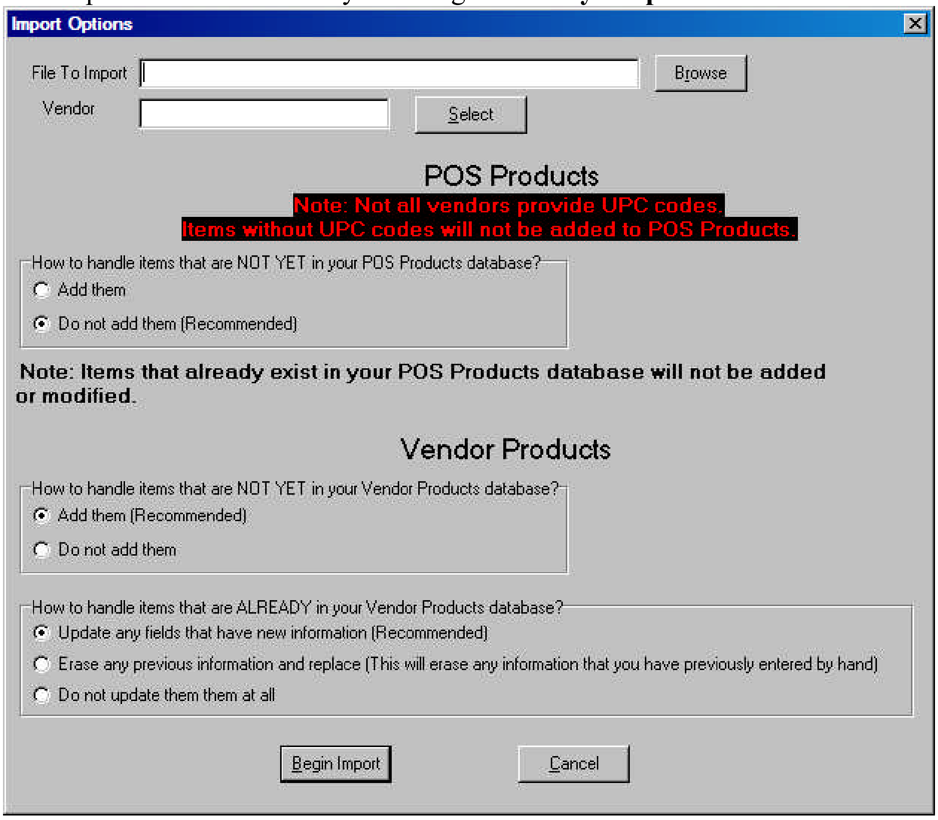
These are footers that print at the bottom of receipts and forms. You might use these to explain your return policies, class cancellation policies, etc. You will only need to edit those that apply to your store, so you can skip the sale, repair, and quote footers. The *TRS User's Guide* describes the footer(s) that correspond to each tab in the corresponding chapter – for example, the point of sale footer will be described in the "Initial Setup for POS" topic of **Chapter 10**.

Import Vendor Product Lists

Many vendors make their product lists available for import into TRS. This feature can save a lot of time and effort when you are setting up your inventory. Many of these vendor files are available from JMM Software. You can download them from the JMMSoftware.com web site in the "Customer Only" area.

To access this portion of the web site, you will need your store's user name (the JMM Customer Number) and password (initially set to your store's zip code, but can be changed later).

The import feature is found by selecting **Inventory>Import Vendor Products** from the TRS menu.



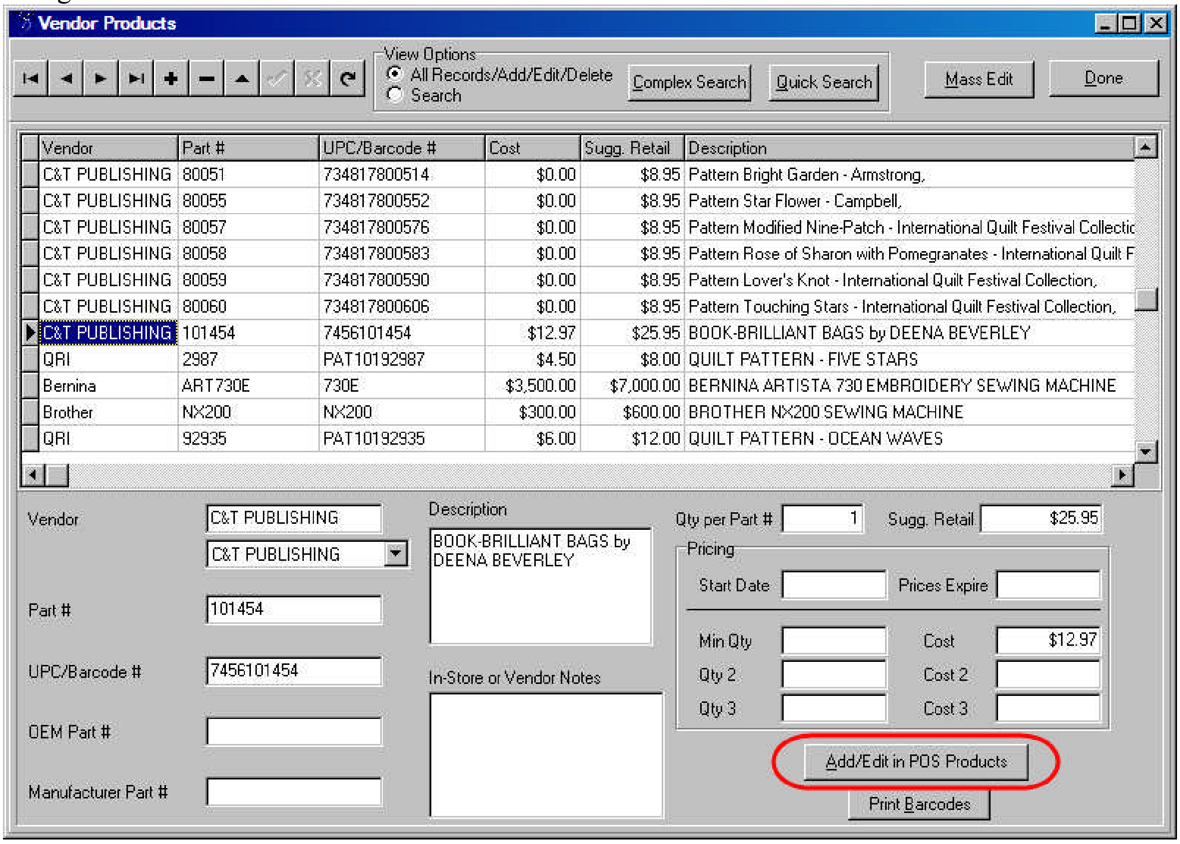
Fill in the necessary fields on the Import Options screen. JMM recommends that you "Do not add" items that are not yet in your POS Products database. Refer to **Chapter 12** of the *TRS User's Guide*.

Once the vendor product list is in TRS, you can then select the items you do carry in your store and have the system add them to your POS Products Inventory. This leaves your inventory product list less cluttered.

Entering Your Inventory

Adding Items from Vendor Products to POS Products

Once you've imported the desired vendor products, you can indicate those items you have on hand and add them into the POS Product Inventory. Begin by selecting **Inventory>Edit Vendor Products**. Use "Quick Search" to select a vendor. Then, select the Part # to add to inventory and use the "Edit" button to make any changes to the fields on this screen. Then click the "Add/Edit in POS Products" button.



The Edit Products screen will display the selected item. Adjust the Current Inventory and any other fields as necessary. A full discussion of these fields can be found in the "Adding New Products" section of **Chapter 11** of the *TRS User's Guide*.

Adding Items Directly to POS Products

For those items that weren't imported as vendor products, go directly to POS Products Inventory (**Inventory>Edit POS Products**) and enter them manually. Be sure the vendor information (**Edit Lists>Vendors (Sources)**) is already set up so you can indicate the Preferred Vendor for each item. Detailed information about POS Products can be found in **Chapter 11** of the *TRS User's Guide*.

Tip: Because setting up your entire inventory can be a process completed over a period of time, it is recommended that you set up generic items so you can begin using POS to track your sales immediately. Start by setting up an item for each of your departments. For ease of entering items quickly when ringing up sales, you can use the department number as the Item ID (then you can type in the ID instead of scanning a generic barcode), such as 100 for Notions, 300 for Fabrics, 400 for Adhesives, and so forth. You can keep a list by the register for easy reference. Click the "Don't Track Inventory" checkbox for these items. This keeps the system from accumulating a negative quantity on hand and/or from alerting you that the item is out of stock.

Some customers approach setting up inventory by entering new items as they receive them. Each time an order arrives they set up those inventory items and then go back and input items already in the store as time permits.

Adding Inventory Item in POS Sales

Another approach to entering inventory items that weren't imported from vendor lists is when ringing up sales in POS, select the "Enter Unlisted Item" button and enter the items as you go. Be aware, this can be time consuming and cause the customer(s) to have to wait for the sale to be completed.

Same Items, Different Vendor

Often you can order the same item from more than one vendor. It is advantageous to have that item in your POS Products Inventory only one time. All of the other vendors from which you may order that item will list in the product record as Sources; however the Item ID/Barcode must be the same. If each vendor puts a different barcode on their product packaging, you will need to decide which one you wish to use in the inventory (typically the one the Preferred Vendor uses) and re-label the others with that barcode.

To make this whole process work, the UPC/Barcode much match exactly in each Vendor Product record – the Vendor Product information is linked to the POS inventory through that field. Each Vendor Product set up with the same UPC/Barcode will display as a Source in the POS Product. The vendor order quantities and prices will be shown in the "Sources" grid on the products screen.

You can either double-click in the Sources grid on the Product Inventory screen or access the Vendor Products module (**Inventory>Vendor Products**) directly to make these entries.

Tip: Even though you may be adding a product in the POS Inventory, that Vendor/Part # may already be set up in Vendor Products. Instead of trying to add the vendor/part, start by Quick Searching for the product. If it already exists, just edit the UPC/Barcode # to correspond with the Product Inventory. If not, then you can add the vendor/item. This can save you many keystrokes because you could enter all the data as if to add it, only to find it already exists and you need to edit the existing record.

Backing Up Your Data

It is ***extremely important*** that you make frequent backups of your data. And, now during startup is a great time to get in the habit! Losing all this important data and having to start over would not be pleasant or productive.

Backing up is fast and easy. Go to the Total Retail Solutions program group (Start/All Programs/Total Retail Solutions) and select Backup Data Sender. Refer to **Chapter 17** of the *TRS User's Guide* for step-by-step instructions.

Tip: USB Flash Drives are a simple way to store your backups.

Customizing Your Screen Setup

TRS provides you with the ability to customize the way each screen displays on your system. Using the import/export feature, you can even share designs with other users of TRS. Typically, this is something you might do later, after you become familiar with the system and your particular needs.

You may also wish to customize your screen to take advantage of touch screen technology. If you purchase a touch screen computer from JMM Software, your system will come pre-loaded with a layout that works best in a touch screen environment.

For more information about customizing the screen setup, refer to **Chapter 2** of the *TRS User's Guide*.

Next Steps…

Once you've done these things, you should be ready to do some test sales and start playing around with the day-to-day functions of the software. If you'd like training, contact JMM for information about our online training sessions. Another resource is the TRS Training Movies. These can be viewed by clicking on the "Movies" button at the top of the TRS screen. You can also join the TRS online Yahoo User Group (for details go to www.jmmsoftware.com/forum.html). Of course, the ***User's Guide*** is the most complete source of information about TRS.