

# The Raiser's Edge™

Point of Sale Guide

**020112**

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# What Is In This Guide?



In the *Point of Sale Guide*, you learn how to exchange information between Microsoft's *Store Operations* and *The Raiser's Edge*. You can also learn about the following.

- "Install Point of Sale" on page 4
- "Navigate in Point of Sale" on page 7
- "Utilities and Housekeeping" on page 10
- "Update The Raiser's Edge" on page 13
- "Update Store Operations" on page 19
- "Print Membership Cards" on page 25
- "Transaction Reports" on page 26

## How Do I Use These Guides?

*The Raiser's Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

# Point Of Sale



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Blackbaud's *Point of Sale 7* enables you to exchange information between Microsoft's *Store Operations* and *The Raiser's Edge*.

**Note:** *Store Operations* was formerly *QuickSell Commerce*.

*Store Operations*, formerly *QuickSell Commerce*, provides flexibility for configuring your point of sale systems, and supports multiple point of sale devices, such as scanners and printers, connected to your computer.

Through *Point of Sale*, you can transfer constituents entered in *The Raiser's Edge* into *Store Operations*, where you can establish them as customers. You can also establish individuals who are not constituents, such as spouses, contacts, and people who receive *The Raiser's Edge* membership cards, as separate customers in *Store Operations*. With *Point of Sale*, you can produce a statement that contains items, prices, quantities, and dates for all charges created in *Store Operations*.

You can be update *The Raiser's Edge* with actions, notes, attributes, and *Store Operations* phone and email information for all constituents who have made purchases in *Store Operations* (including purchases made by their relationships, such as non-constituent spouses, contacts, and membership cardholders). Additionally, you can specify that new customers in *Store Operations* be entered as constituents in *The Raiser's Edge* based on items they purchased. *Point of Sale* also enables you to print membership cards for *Store Operations* customers.

Before you install *Point of Sale*, visit our website at [www.blackbaud.com](http://www.blackbaud.com) to make sure your equipment meets the minimum system requirements.

## Frequently Used Terms

**Customer record.** *Store Operations* stores personal information such as name, address, and account information in a customer record. When you load constituent records from *The Raiser's Edge* into *Store Operations*, the information is stored in customer records.

**Additional field.** An additional information field is a customer field you can define in *Store Operations*. Most customer fields in which you need to store information in *The Raiser's Edge*, such as name and address, already exist in *Store Operations*. However, for some information in *The Raiser's Edge*, no comparable field exists in *Store Operations*. You can use additional fields to store this information. Additional fields in *Store Operations* are the same as "spare" fields in *QuickSell 2000*.

You must create at least two additional fields in *Store Operations*, one to store the *Raiser's Edge* record number of customers and another to store the date the last membership card was printed. You can create other additional fields and map fields in *The Raiser's Edge* to them. For more information about additional customer information fields, see your *Store Operations* documentation. For more information about mapping fields in *The Raiser's Edge* to additional customer fields, see "Configuration" on page 10.

**Transaction.** A transaction is a purchase processed in *Store Operations*.

## Considerations

When you use Blackbaud's *Point of Sale*, consider the following:

- *Point of Sale* supports only dates formatted by Date/Month/Year. Dates in any other format are not supported.
- *Point of Sale* supports multiple stores. However, each store must have a separate *Point of Sale* license. Separate *Point of Sale* licenses are not required for each register used within a store.

Additionally, separate licenses for *The Raiser's Edge* are not required for each store. Different installations of *Point of Sale* in different stores can access the same database in *The Raiser's Edge*.

- Phone and email information added in *Store Operations* can be automatically updated in *The Raiser's Edge* through *Point of Sale*. However, when you update address information for customers in *Store Operations* who are also constituents in *The Raiser's Edge*, the changes are not automatically reflected in *The Raiser's Edge*. You must update the address information on the constituent record from within *The Raiser's Edge*.

- When you load constituents in *The Raiser's Edge* as customers, *The Raiser's Edge* internal record number is assigned as the account number in *Store Operations*. Once this account number has been assigned, do not change it on the customer record. *Point of Sale* uses this number in conjunction with *The Raiser's Edge* record ID in several areas; changing it can result in losing customer data and records not updating.

## Upgrade Store Operations

*Point of Sale 7* interfaces with *Store Operations*, formerly *QuickSell*. If you use *QuickSell 2000*, you must upgrade before you can interface with *Point of Sale 7*. If you currently use version 2.2 of *QuickSell 2000*, you cannot upgrade directly to *Store Operations*; you must first upgrade to *QuickSell 2000* version 3.01.

For information about how to obtain *Store Operations*, contact your Blackbaud sales representative.

## Upgrade QuickSell 2000 from Version 2.2 to Version 3.01

If you currently run *QuickSell 2000* version 2.2, you must upgrade to version 3.01 before you can upgrade to *Store Operations*.

### ► Upgrade from QuickSell 2000 v.2.2 to QuickSell 2000 v3.01

These steps are intended to provide an overview of the upgrade process. For more detailed information about upgrading, see your *QuickSell 2000* documentation.

1. Restore any archived journals.
2. To close all open batches, run Z-reports on all registers.
3. Back up the *QuickSell 2000* database.
4. To install *QuickSell 2000* version 3.01, run the Setup from the *QuickSell* Installation CD provided by Blackbaud.
5. In *QuickSell Doctor*, run **Upgrade Database Structure**.

## Upgrade QuickSell 2000 Version 3.01 to Store Operations

If you run *QuickSell 2000* version 3.01, you must upgrade to *Store Operations* before you can exchange information with Blackbaud's *Point of Sale 7*.

### ► Upgrade from QuickSell 2000 v3.01 to Store Operations

These steps are intended to provide an overview of the upgrade process. For more detailed information about these steps, see the *Store Operations* online help file.

1. Run *QuickSell Doctor's* Repair and Compact Utility.
2. Back up the *QuickSell 2000* database.
3. Install *Store Operations*.
4. Create a blank *Store Operations* database.
5. Import the *QuickSell 2000* database into *Store Operations*.
6. Review Administrator, Manager, and Configuration settings for accuracy. Many existing *QuickSell 2000* options have changed and many new options were added in *Store Operations*.

# Install Point of Sale

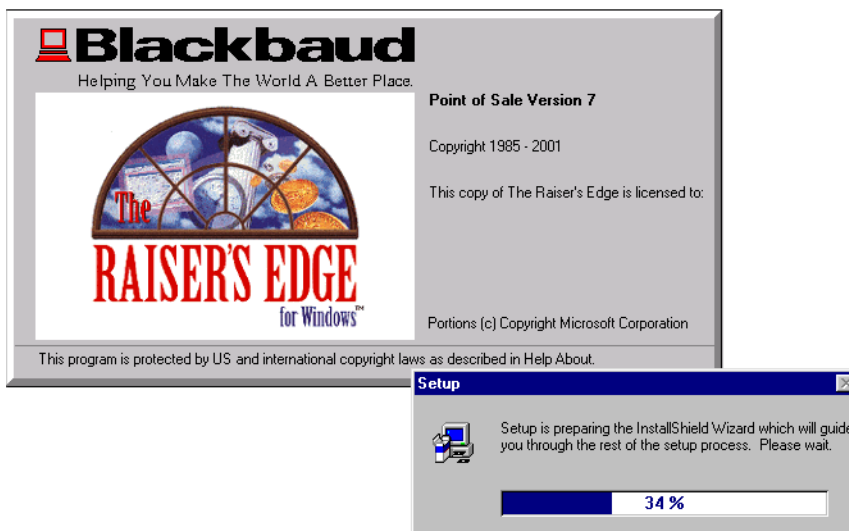
During the installation process, you must specify the location where you want to install *Point of Sale*. After installation, before you can log in for the first time, you must enter the path to the *Point of Sale* database folder. *Point of Sale* locates your *Store Operations* database automatically.

**Note:** *Point of Sale 7* works only with *Store Operations* (formerly *QuickSell Commerce*).

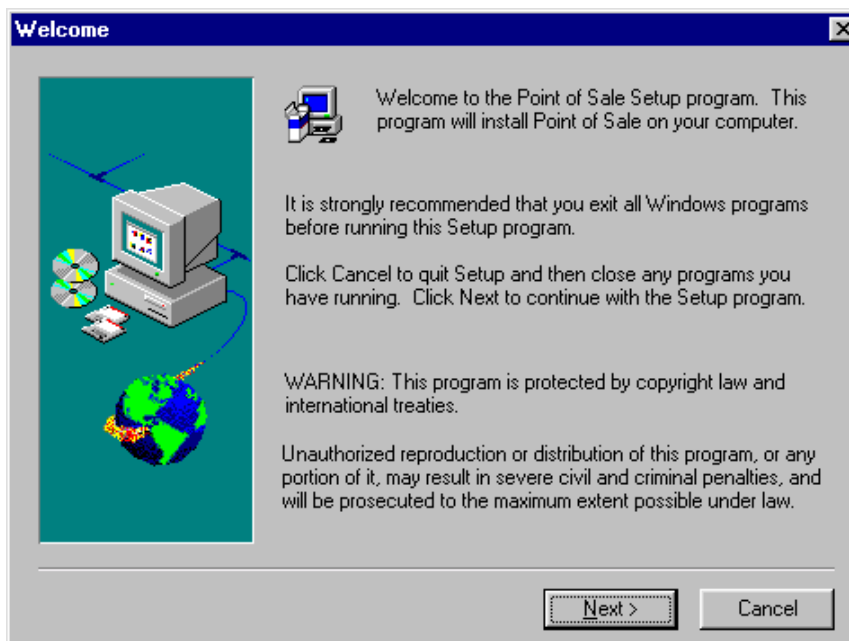
Blackbaud's *Point of Sale 7* works only with *Store Operations* (formerly called *QuickSell Commerce*). If you use a previous version of *QuickSell*, you must upgrade before you can use *Point of Sale*.

## ► Install Point of Sale

1. Insert the *Point of Sale* CD into your CD-ROM drive. The *Point of Sale* installation setup begins.

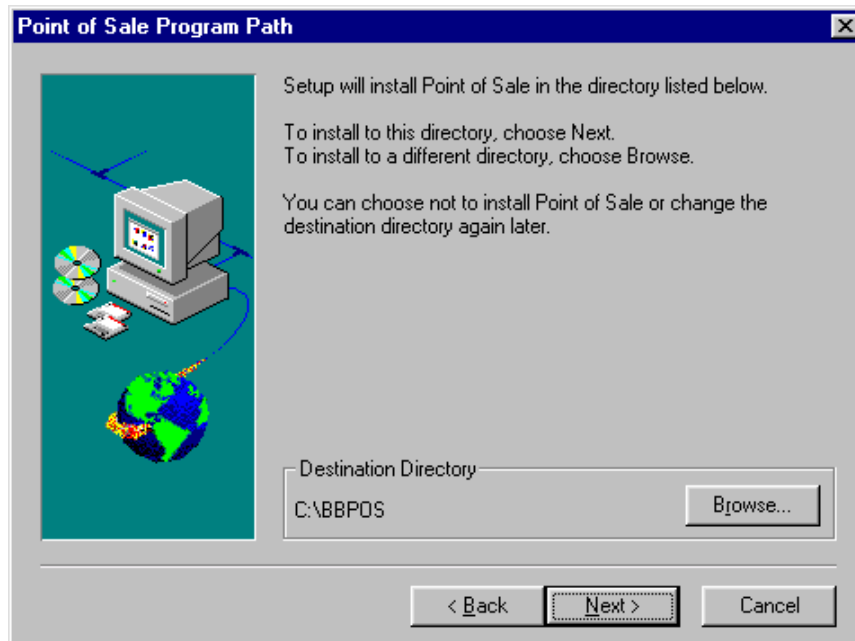


2. When initial setup is complete, the Welcome screen appears.



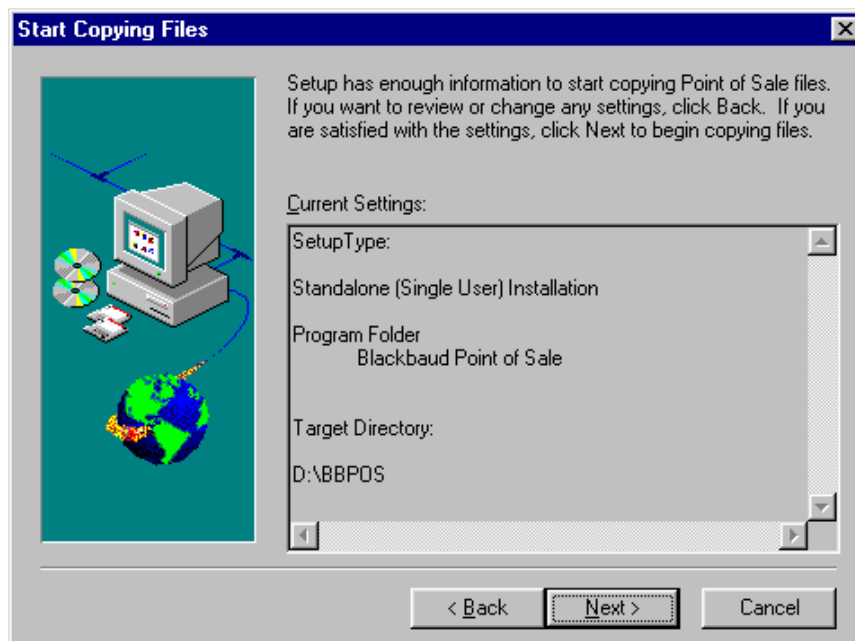


- To continue, click **Next**. The Program Path screen appears.

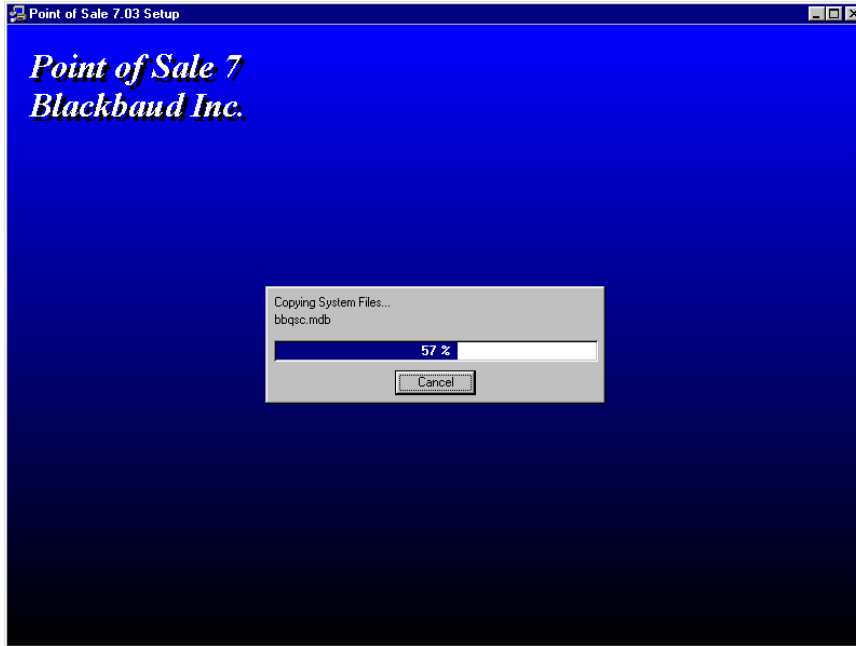


**Warning:** If you install to a directory other than the default, we strongly recommend you use a path that contains no files with names longer than eight characters.

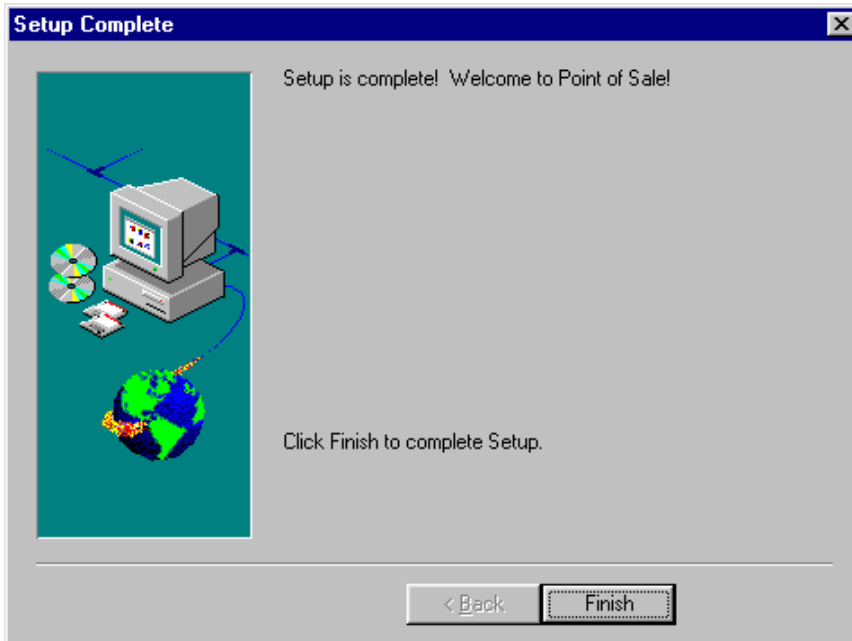
- Select the **Destination Directory** in which you want to install *Point of Sale*. If you do not want to use the default directory, click **Browse** to locate another directory. We strongly recommend you use a directory path that contains no files with names longer than eight characters.
- Click **Next**. The Start Copying Files screen appears.



6. Verify that the settings are correct and click **Next**. The installation begins and a progress bar appears.



When the installation program completes copying files, the Setup Complete screen appears.



7. To complete the installation, click **Finish**. The first time you log into *Point of Sale*, you must specify the path to the *Point of Sale* database. For more information, see “Log Into Point of Sale” on page 6.

## Log Into Point of Sale

The first time you log into *Point of Sale* after you install the program, you must provide the path to the *Point of Sale* database.

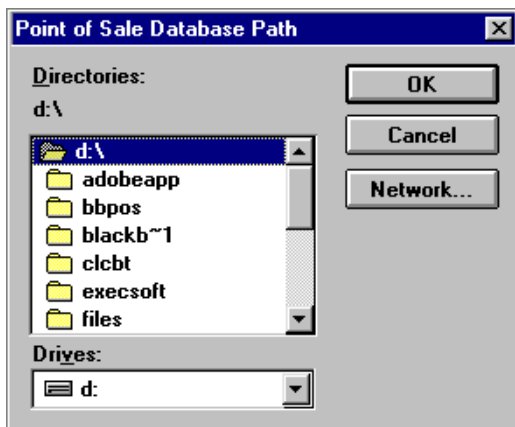
### ► Log into Point of Sale

1. From your *Windows* taskbar, click **Start, Programs**. Click **Blackbaud Point of Sale, Point of Sale**. The Login screen appears.



**Note:** *Point of Sale* accesses the same user name and password as *The Raiser's Edge*.

2. Enter your **User name** and **Password** and press **ENTER** on your keyboard. Your **User name** and **Password** are the same as those used to log into *The Raiser's Edge*.
3. When you log into *Point of Sale* for the first time after it is installed, the Point of Sale Database Path screen appears.



4. Locate the directory in which you installed *Point of Sale* and select the Database folder. The default location during installation is C:\bbpos\Database. To map to the drive on which the database resides, click **Network**.

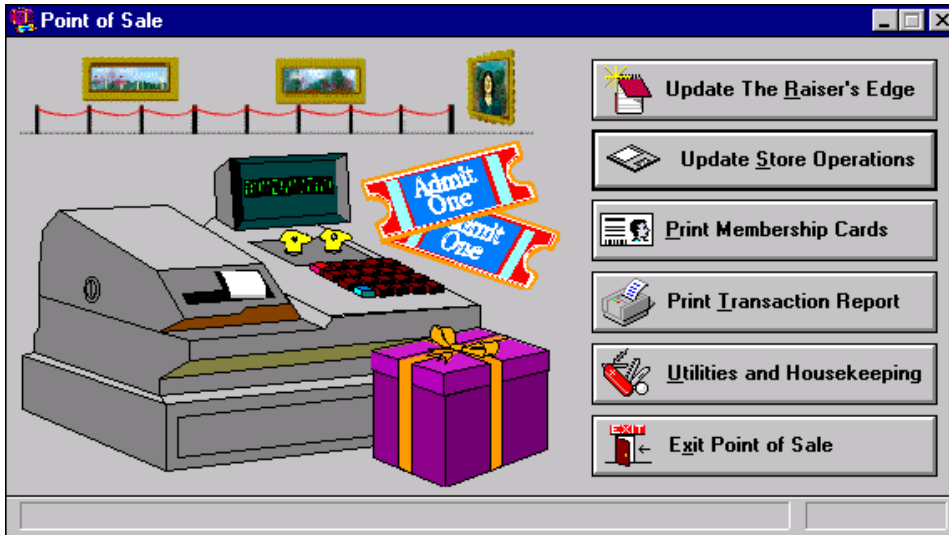
The Point of Sale main screen appears. For information about this screen, see “Navigate in Point of Sale” on page 7.

## Navigate in Point of Sale

After you log into *Point of Sale*, you can access tasks from the main screen. From many *Point of Sale* tasks, you can access the Search screen. The Search screen enables you to locate a *Store Operations* customer record when you want to perform a procedure for only one customer.

## Point of Sale Main Screen

The Point of Sale main screen provides a central location from which you perform all *Point of Sale* functions.



The Point of Sale screen contains the following options.

**Update The Raiser's Edge.** This option enables you to create actions, notes, and attributes for all constituents who make purchases in *Store Operations* (including purchases made by their relationships, such as non-constituent spouses, contacts, and membership cardholders). Additionally, you can add new customers in *Store Operations* to *The Raiser's Edge* as constituents.

You can also bring phone and email information from *Store Operations* into *The Raiser's Edge*.

In notes, you can import the total amount of purchases made in *Store Operations* since the last update. For more information, see "Update The Raiser's Edge" on page 13.

**Note:** *QuickSell Commerce.is* is now called *Store Operations*.

**Update Store Operations.** You can load constituent information such as ID, address, phone, and discount information directly into *Store Operations* as customer information. You can also update an attribute on each constituent record loaded into *Store Operations*.

Individuals who are not constituents in *The Raiser's Edge*, such as spouses, contacts, and people receiving membership cards, may also receive separate customer accounts in *Store Operations*.

If you have the optional module *Membership Management*, information such as membership level, membership start date, and membership expiration date load as additional fields in *Store Operations*. If you have the optional module *Alumni Tracking*, the **Class of** field can also be stored as an additional field. For more information, see "Update Store Operations" on page 19.

**Print Membership Cards.** For customers in *Store Operations*, you can generate membership cards that include name, institution name, constituent ID, a signature line, and any optional field. For more information, see "Print Membership Cards" on page 25.

**Print Transaction Report.** This option prints a statement that contains items, prices, quantities, and dates for all transactions made in *Store Operations*. You can print a statement for one constituent or for a group of constituents. For more information, see "Transaction Reports" on page 26.

**Utilities and Housekeeping.** Utilities and Housekeeping has two options. The first is **Configuration**, where you establish the settings such as **Organization name**, **Store Operations Path**, and **Additional Field Mapping**. For more information, see "Configuration" on page 10.

The second option is **Compact Database**. This option compresses the *Point of Sale* database, freeing up room on the hard disk and increasing overall performance. For more information, see “Compact Database” on page 13.

**Exit Point of Sale.** Use this option to exit *Point of Sale* and close the program.

## Search Screen

**Search for Customer**

**Criteria**

Last name: s [dropdown] [input]

First name: [input]

Customer #: [input]

**Search Results**

Name	City/State	Address	ZIP
Smith, John T.	Louisville, KY	621 Winder Road	40213
Smith, Stephanie G.	Tempe, AZ	515 Morning Dove La	85283
Snyder, Daniel R.	Portland, ME	74 Carter Avenue	04108
Sharp, Monica L.	Chicago, IL	325 Kentwood Lane	60612
Sadler, Harris F.	Richmond, VA	84 St. James Place	23223
Sinclair, Anne C.	Charleston, SC	115 Ashley River Road	29412
Sinclair, Joseph	Charleston, SC	115 Ashley River Road	29412
Smyth, Terli	Oakland, CA	2510 College Avenue	94618
Suarez, Emilio	Cabo Rojo, PR	57 Farly Street	00623
Simpson, Michael J.	Kiawah Island, S	443 Lake Forest Drive	29455

Buttons: Search, Cancel, Previous, Select, Help

From several areas in *Point of Sale*, you can access the Search screen. The Search screen helps you locate a specific customer record in *Store Operations* when you want to perform a process for one customer. You can search for a customer based on **Last name**, **First name**, or **Customer #**. Additionally, in the gray criteria field, you can select a *Store Operations* additional field. You can then specify the entry in that field on which you want to base a search.

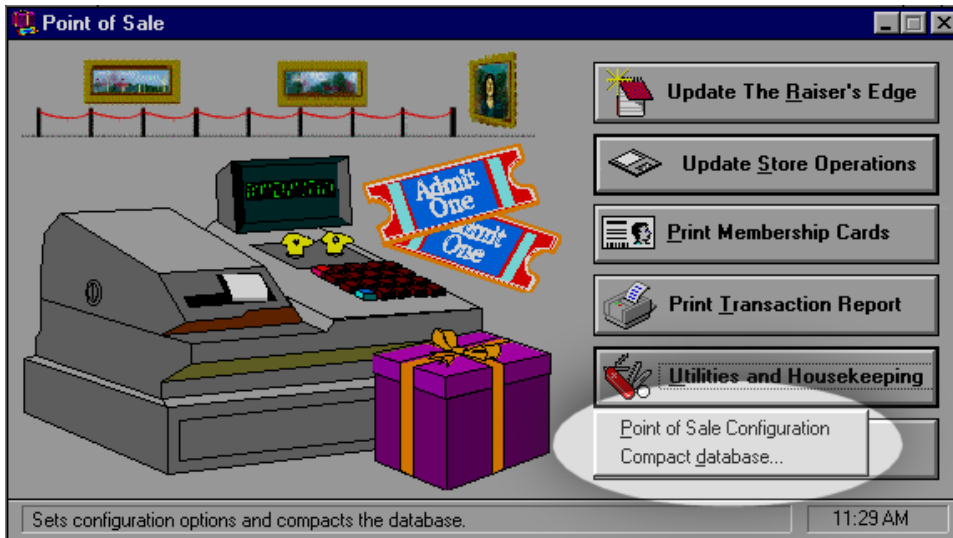
You do not have to enter criteria in all fields. For example, you can base a search on **Customer #** only, on **First name** and **Last name**, or on any other combination of criteria fields.

When you enter search criteria, you can enter partial or complete information in any or all of the available fields. For example, when you search for John Doe, enter “Doe” in the **Last name** field to locate all records with the last name Doe or Doe as the first three letters; or enter “D” to bring up all records with the last name beginning with the letter D. To restore criteria entered prior to your latest search, click **Previous**.

After you enter criteria, click **Search**. Records that match your specified criteria appear in the **Search Results** grid. To open a record, highlight it and click **Select**.

# Utilities and Housekeeping

When you click the **Utilities and Housekeeping** button on the Point of Sale main screen, two options appear. Use these options to access **Point of Sale Configuration** and **Compact database**.



To find out more about *Point of Sale* Configuration, see the following section. To learn how to compact the *Point of Sale* database, see “Compact Database” on page 13.

## Configuration

The *Point of Sale* Configuration screen is where you enter your organization name and set additional information field mappings. Before you can load constituents into *Store Operations* as customers, you must map the **Raiser’s Edge record number** and **Date membership card printed** fields into *Store Operations* additional fields. You can optionally map other fields in *The Raiser’s Edge* to *Store Operations* additional fields. For more information about additional information fields, see the *Store Operations* documentation.

After you map field information in *The Raiser’s Edge* to *Store Operations* and load constituent records into *Store Operations*, you should not alter the names of the additional fields. If you do, your information may not update properly in future exchanges between the two programs.

## Fields to Load to Store Operations

This section contains information about the fields to load from *The Raiser’s Edge* into *Store Operations* additional fields.

### Mandatory Fields (Loaded from The Raiser’s Edge to Store Operations)

- Account number (see Raiser’s Edge record number later in this list)
- Last name
- First name
- Address: The first and second address lines in *The Raiser’s Edge* map to the first and second address lines in *Store Operations*. All other address lines in *The Raiser’s Edge* are concatenated (combined) and added to the end of the second address line in *Store Operations*. All address lines are truncated to 50 characters.
- City
- State

- Zip
- Country
- Telephone
- Date membership card printed (as an additional date field)
- Raiser's Edge record number (as an additional text field)
  - For regular constituents, this number will be **The Raiser's Edge** internal record number
  - If you choose to create separate customer accounts for non-constituent spouses in the Load Constituents Wizard, this number will be the relationship internal record number + s

**Note:** When you choose to create separate accounts for non-constituent spouses and membership cardholders, if a relationship in **The Raiser's Edge** is both, two separate accounts are created for that person in *Store Operations*. One account number has "s" after it, and the other has "m" after it.

- If you choose to create separate customer accounts for non-constituent membership cardholders (available only if you have the optional module *Membership Management*), this number will be the cardholder internal record number + m
- If you choose to create separate customer accounts for non-constituent contacts in the Load Constituents Wizard, this number will be the contact internal record number + c1 (for first contact, c2 for second, etc.)

For more information about the Load Constituents Wizard, see "Update Store Operations" on page 19.

### Optional Fields in Store Operations

Several fields from **The Raiser's Edge** can optionally appear as additional fields in *Store Operations*.

#### As Additional Text Fields

**Note:** You may want to add **Constituent ID** as an additional field so you can based searches on this information in *Store Operations*.

- Constituent ID
- Membership level (available if you have the optional module *Membership Management*)
- First Table attribute from RE (If one or more attributes of the type "Table" exists on a **Raiser's Edge** constituent record, the first is placed on the *Store Operations* customer record.)

#### As Additional Numeric Fields

- Class of (available if you have the optional module *Alumni Tracking*)

#### As Additional Date Fields

- Membership start date (available if you have the optional module *Membership Management*)
- Membership expiration date (available if you have the optional module *Membership Management*)
- First Date attribute from RE (If one or more attributes of the type "Date" exists on a **Raiser's Edge** constituent record, the first is placed on the *Store Operations* customer record.)

► **Configure Point of Sale**

1. From the Point of Sale main screen, click **Utilities and Housekeeping** and select **Point of Sale Configuration**. The Point of Sale Configuration screen appears.

Organization name:

**Additional Field Mapping**

Select the Store Operations additional customer field in which each Raiser's Edge Field will be stored. The 'Raiser's Edge record number' and 'Date membership card printed' fields must be mapped before individuals can be loaded into Store Operations.

Raiser's Edge Field	Map To
Raiser's Edge record number	RE record number
Date membership card printed	Mem Card Date
Constituent ID	<None>
Membership level	<None>
Membership start date	<None>
Membership expiration date	<None>
Class of	<None>

2. The **Organization name** field defaults automatically with your organization name as established in *The Raiser's Edge*. If necessary, edit the name to appear as you want it to print on membership cards and transaction reports.

**Warning:** To maintain consistency in your data, once you map your additional fields in the **Additional Field Mapping** grid, we strongly recommend you not change them after loading constituents.

3. Enter the **Additional Field Mapping** grid information. **Raiser's Edge Field** names appear in the left column. In the **Map To** column, choose the *Store Operations* customer field in which you want the corresponding **Raiser's Edge Field** information to appear. You must map the **Raiser's Edge record number** and **Date membership card printed** fields to additional fields in *Store Operations*. Mapping all other fields is optional.

The fields in the **Map To** column are established in the Configuration area of *Store Operations* and appear on the customer properties record on the Additional tab.

The **Raiser's Edge record number** also defaults into the **Account Number** field on the Billing Information tab of the customer record. You must not change the **Account Number** once the customer record has been created or the connection between that record in *Store Operations* and *The Raiser's Edge* will be broken.

In addition to the required **Raiser's Edge record number** and **Date membership card printed** fields, we recommend you establish an additional customer field to track *The Raiser's Edge* Constituent ID for each customer because you may want to use this information to search for records from within *Store Operations*. However, after you load constituents, you should not change this information in *Store Operations*. To guard against accidental changes by your users, after you map *The Raiser's Edge* to the additional field, you can delete the field label (name) in *Store Operations* so that the information in the field appears in a read-only, non-editable form.

4. To exit the Configuration screen, click **OK**. You return to the Point of Sale screen.



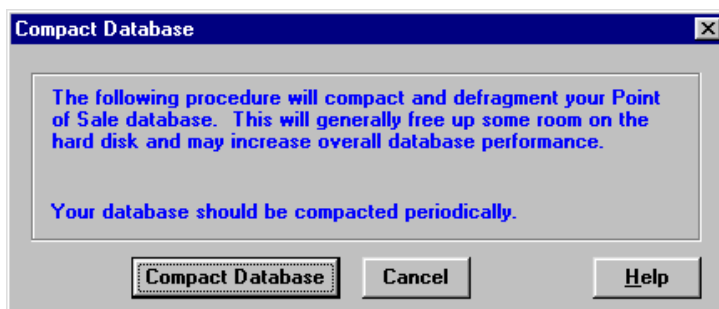
## Compact Database

When you compact the database, you condense and defragment the *Point of Sale* database. This frees up room on your hard drive and helps increase overall performance. We recommend you run this procedure on a regular basis.

### ► Compact the database

**Warning:** When you enter *Point of Sale*, if you receive a message asking whether to repair the database, your database may be corrupt. If you receive this message, please contact Blackbaud Customer Support.

1. From the Point of Sale screen, click **Utilities and Housekeeping** and select **Compact Database**. The Compact Database screen appears.



2. Click **Compact Database**. When *Point of Sale* finishes the task, you return to the Point of Sale screen. If you click **Cancel**, you return to the Point of Sale screen without compressing the database.

## Update The Raiser's Edge

The Update The Raiser's Edge Wizard updates actions, notes, and attributes within *The Raiser's Edge* for all customers in *Store Operations* who made purchases since the last update. You can also specify that phone and email information from *Store Operations* be updated in *The Raiser's Edge*.

Additionally, you can specify that new customers in *Store Operations* be loaded into *The Raiser's Edge* as constituents. You can load customers based their purchases. For example, you can select to load only those new customers who purchased items in specific item departments or categories.

For customers who are not constituents in *The Raiser's Edge*, the updated item appears on the individual or organization constituent record with which the customer is linked as a relationship.

If both the constituent and the spouse are included in the update, only the constituent information is created.

## ► Update The Raiser's Edge

1. From the main Point of Sale screen, click **Update The Raiser's Edge**. The Step 1 of 6 screen appears.

2. To add an action to the constituent records you update, mark **Add Action**. For example, you might want to add a phone call to thank them for their purchases. If you leave the checkbox unmarked, the fields on this screen are disabled.

You can enter action information in two ways. Enter the **Action Date**, **Start Time**, **End Time**, **Action Type**, **Status**, and **Letter** directly on this screen. Or, click **Edit Action**. The New Action screen appears.

If you enter the action information on this screen, when you click **Save and Close** on the toolbar, you return to the Update The Raiser's Edge Wizard - Step 1 of 6 screen. The information you entered on the New Action screen defaults into the fields on the wizard screen.

No matter which way you add the information, it is used to associate the action with each updated constituent record in *The Raiser's Edge*.

On the wizard screen, when you mark **Include Online Transaction Flag**, the message "This was an online transaction." appears in the action notes to indicate the purchase was made via the Web.

3. Click **Next**. The Step 2 of 6 screen appears.

4. To add a note to each updated constituent record, mark **Add Note**. For example, you may want to include the amount of total purchases made by the customer. If you leave the checkbox unmarked, the fields on this screen are disabled.

Select the **Notepad type**. You must have already created the **Notepad type** in *The Raiser's Edge* for it to appear as a selection in the dropdown for this field. Enter the **Description** and **Date**.

Define the transaction information you want to appear in the note in the **Contents** field. If you select "User defined", the **Note** field appears for you to enter the content you want to appear in the note. If you select "Total amount by purchases" or "Totals by Department", the **Sample** box displays how the note will look.

When you mark **Include Online Transaction Flag**, the message "This was an online transaction." appears after the last line of the note to indicate the purchase was made via the website.

When you mark **Include total number of visits**, the message "Total number of visits: ##" appears after the last line of the note. This places the total number of visits made by the customer to the store in the note record.

5. Click **Next**. The Step 3 of 6 screen appears.

6. To add an attribute to each updated constituent record, mark **Add Attribute**. You must have already created the attribute in *The Raiser's Edge* for it to appear as a selection on this screen. For example, you may want to create an attribute with a **Description** of "Record updated from Store Operations" and a **Comment** of "This constituent record was updated with information from Store Operations." If you leave the **Add Attribute** checkbox unmarked, the fields on this screen are disabled.

When you mark **Include Online Transaction Flag**, the message “This was an online transaction.” appears in the **Comments** column of the attribute to indicate the purchase was made via the Web.

- Click **Next**. The Step 4 of 6 screen appears.



- To add phone and email information from the *Store Operations* customer record to the updated **Raiser's Edge** constituent records, mark **Add Phone and Email**.

In the **Copy Phone Number to** field, select the **Raiser's Edge** phone type to be included with the phone information from *Store Operations*. In the **Copy Email Address to** field, select the **Raiser's Edge** phone type you want included with the email address from *Store Operations*. In **The Raiser's Edge**, phone types and email information are stored in the **Phone Types** grid on the constituent record.

If you mark **Overwrite existing information**, the information from *Store Operations* replaces existing phone and email information in **The Raiser's Edge**.

For example, when a *Store Operations* customer makes a purchase and gives you a new or different phone number, if you want to replace the old number in **The Raiser's Edge**, mark **Overwrite existing information**. If you want both the old and new number to appear in **The Raiser's Edge**, you must give the new phone number a different type than already exists in **The Raiser's Edge**. If you do not mark **Overwrite existing information** and try to update a phone type that already exists, the new number is not added to the constituent record in **The Raiser's Edge**.

- Click **Next**. The Step 5 of 6 screen appears.



To add new customers in *Store Operations* as constituents in **The Raiser's Edge**, mark **Load New Store Operations Customers into The Raiser's Edge**. When you mark this checkbox, the rest of the items on the screen are enabled. If you leave the other items empty, all new customers in *Store Operations* are loaded into **The Raiser's Edge**.

When you enter a date in the **Only load customers added after** field, only new customers added after that date are loaded into *The Raiser's Edge*.

You can use the **Item Category** and **Item Department** fields to load only customers who purchased specific items. For example, you may want to add only those customers who purchased items from your "Gift" department. The default entry in these fields is "None". Leaving this entry means you do not want to filter by any category or department and customers who purchased any item will be added to *The Raiser's Edge*.

To create a query in *The Raiser's Edge* for the customers you load as constituents, mark **Create Query for Customers loaded**.

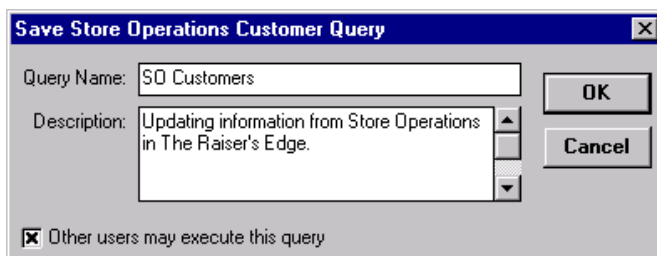
The options you specify on the other wizard screens affect the records you create on this screen. For example, if you specify to add a note and attribute to updated records, the newly created constituent records also contain the note and attribute.

10. Click **Next**. The Step 6 of 6 screen appears.



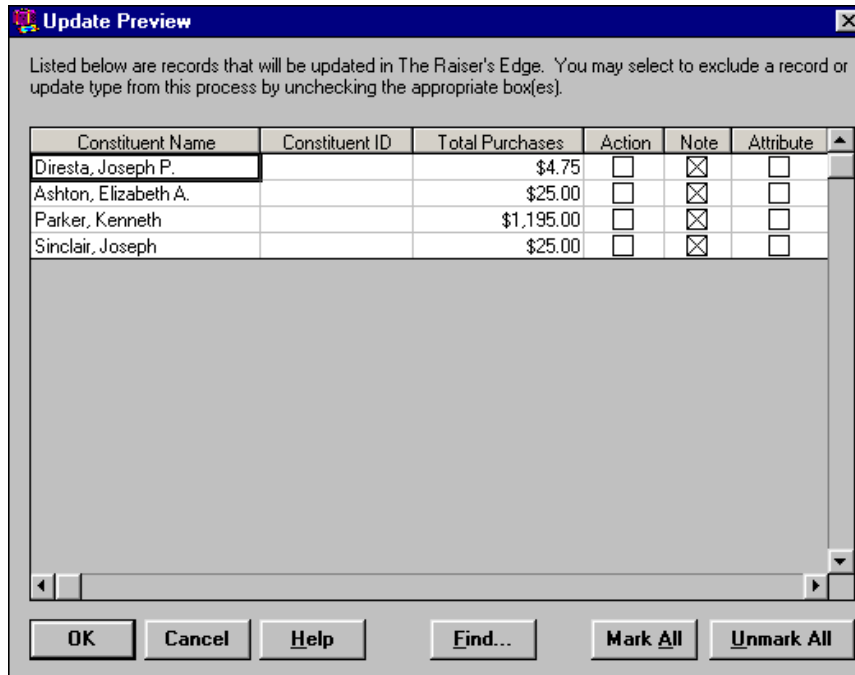
To preview action, note, attribute, and information before updating it in *The Raiser's Edge*, mark **Preview before updating The Raiser's Edge**.

11. Click **Finished**. If, on the Step 5 of 6 screen, you mark **Create Query for Customers loaded**, the Save Customer Query screen appears.



12. Enter the **Query Name** and **Description** and mark the checkbox if **Other Users May Execute this query**. The query includes only new constituent records created from customer records. Updated records and non-constituent records such as relationships or contacts are not included.

13. Click **OK**. The Update Preview screen appears.



14. Constituents to be updated list on the left. Action, note, or attribute items with the checkbox marked will be included on these constituent records. You can unmark individual checkboxes so those items do not appear on a selected constituent record. To include the action, note, and attribute information you established in the wizard on all listed constituent records, click **Mark All**. To clear all checkboxes, click **Unmark All**.
15. To begin the update, click **OK**. After the records are updated in *The Raiser's Edge*, the Finish screen appears.



This screen displays the number of new customers added as constituents in *The Raiser's Edge*, the number of existing *Raiser's Edge* records that were updated, and the number of records considered exceptions.

Exceptions are records that should have been updated, but for some reason were not. For example, after you load a constituent into *Store Operations*, you may delete the constituent in *The Raiser's Edge*. If that customer makes a purchase, when you run the Update Raiser's Edge Wizard, an exception is created because the record no longer exists in *The Raiser's Edge*.

If any exceptions were created, you can view details about them by clicking **Print Exception Report**.

16. To return to the main Point of Sale screen, click **OK**.

## Update Store Operations

**Note:** *QuickSell Commerce.is* now called *Store Operations*.

**Update Store Operations** pulls constituent information from **The Raiser's Edge** database and uses that information to create customer records in *Store Operations*. The Load Constituents Wizard walks you through a sequence of screens where you specify the constituents and information you want to pull from **The Raiser's Edge** and load into *Store Operations*.

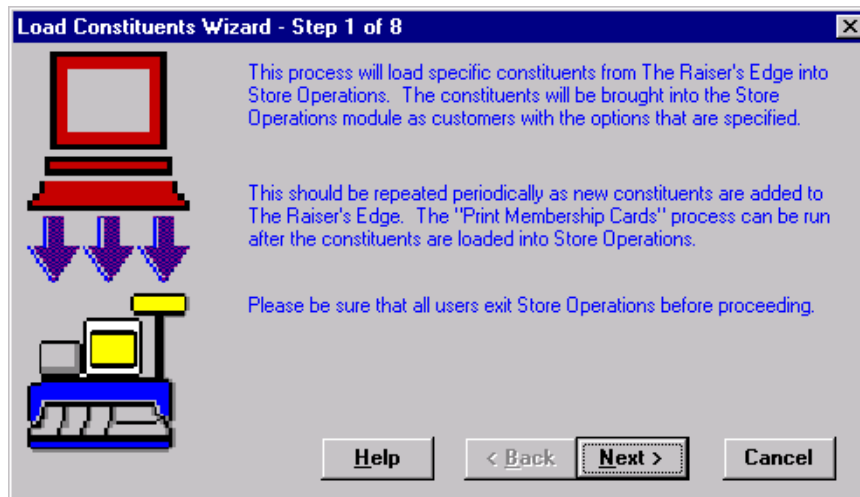
You should run the Load Constituents Wizard whenever changes you make to your records in **The Raiser's Edge** need to be reflected in *Store Operations*. For example, if you change address information for constituents in **The Raiser's Edge** who are also customers in *Store Operations*, you will want to run the Load Constituents Wizard to update their address information in *Store Operations*. You may want to update the information at a set interval. For example, you can run the wizard on a weekly basis.

### ► Update Store Operations

If you have the optional module *Membership Management*, the Load Constituents Wizard has eight steps. If you do not have *Membership Management*, the wizard has only seven steps. The following procedure is performed with the optional module *Membership Management* present.

**Warning:** Once you load constituents into *Store Operations*, you should not, under any circumstances, change **The Raiser's Edge** record number in *Store Operations*. If you do, the link between **The Raiser's Edge** and *Store Operations* is lost for that customer.

1. From the Point of Sale screen, click **Update Store Operations**. The Step 1 screen of the Load Constituents Wizard appears.



2. Read the text and click **Next**. The Step 2 screen appears.

Select which constituents to load into *Store Operations* as customers and whether to keep a record of the constituent's middle initial in *Store Operations*.

- Select to load **All constituents** or **Selected Constituents**. If you select **Selected Constituents**, click the arrow to access **The Raiser's Edge** Open screen and select a constituent query to include a group of constituents.
  - To load only constituent records added after the specified date into *Store Operations*, mark **Only load those constituents added after** and include the date. When you mark this checkbox, only constituents added after the specific date load, no matter whether you select **All constituents** or **Selected Constituents**.
  - To update new or changed biographical information for existing customers, mark **Update customers already loaded into Store Operations**. The biographical information that can be updated in *Store Operations* includes Last name, First name, Address, City, State, Zip, Country, and Telephone.
  - To include the middle name initial on the customer record in *Store Operations*, mark **Append middle initial to First Name**.
3. Click **Next**. If you have the optional module *Membership Management*, the Step 3 of 8 screen appears. If you do not have *Membership Management*, please skip to step 5.

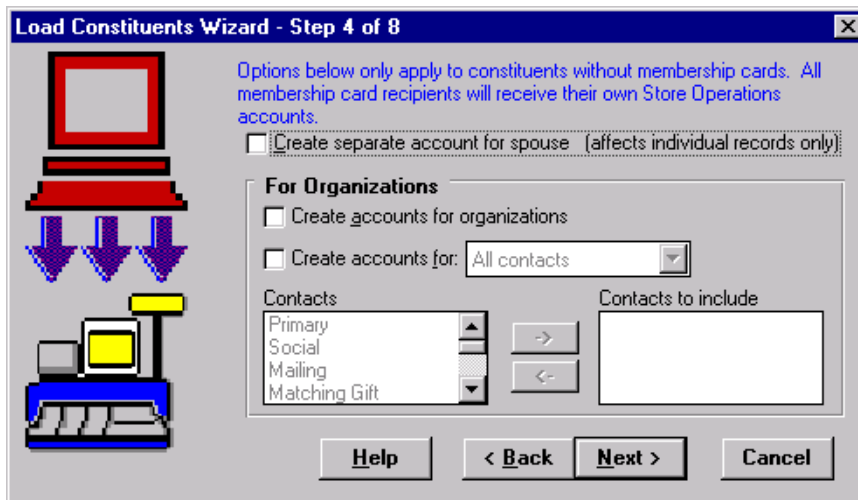


**Note:** If you create separate accounts for non-constituent spouses and membership cardholders, when a **The Raiser's Edge** relationship is both, two separate accounts are created for that person in *Store Operations*. One account number has "s" after it, and the other has "m" after it.

To create a separate account in *Store Operations* for each person on the membership card list in **The Raiser's Edge**, mark **Create separate accounts for each membership card recipient**. The account number is **The Raiser's Edge** cardholder internal record number plus "m."

You can **Include active memberships as of** a specific date. For example, you can enter today's date to ensure no currently inactive memberships are included when you load constituents.

4. Click **Next**. The Step 4 of 8 screen appears. (Step 3 of 7 without *Membership Management*)



- a. To create a separate account for spouses of the constituents you are loading, mark **Create separate account for spouse**. The spouse account number will be **The Raiser's Edge** relationship internal record number plus "s."
- b. In the **For Organizations** frame, to create accounts for organizations, mark **Create accounts for organizations**.
- c. To create accounts for organization contacts, mark **Create accounts for** and select "All contacts" or "Selected contacts". If you choose Selected contacts, use the single right arrow to move your contacts from the **Contacts** box to the **Contacts to include** box. The contact account number will be **The Raiser's Edge** relationship internal record number plus "c1" (for the first contact, "c2" for the second, etc.).

5. Click **Next**. The Step 5 of 8 screen appears. (Step 4 of 7 without *Membership Management*)

In the **Attribute to add** field, select an attribute to add to each constituent record you load into *Store Operations*. You must have already created the attribute in *The Raiser's Edge* for it to appear as a selection on this screen. For example, you may want to create an attribute with a **Description** of "Store Operations Customer" and a **Comment** of "This constituent is a customer in Store Operations."

This attribute appears in *The Raiser's Edge* on the Attributes tab of each constituent record loaded. If you do not want to include an attribute, select "None".

6. Click **Next**. The Step 6 of 8 screen appears. (Step 5 of 7 without *Membership Management*)

Select *The Raiser's Edge* address type and information you want to use in *Store Operations*.

- In the **Address to load** field, select the type of address to load. If you select "None", the other fields on this screen are disabled.
- In the **If address is not found** field, select what you want to do if the address you specified in the **Address to load** field cannot be found.
- In the **Phone type** field, select the type of phone number from *The Raiser's Edge* you want to load into *Store Operations*.

7. Click **Next**. The Step 7 of 8 screen appears. (Step 6 of 7 without *Membership Management*)

Mark the checkbox for the additional fields you want to load into *Store Operations*. Only fields you mapped in *Point of Sale* Configuration appear in the box. To access Configuration, from the Point of Sale screen, click **Utilities and Housekeeping** and select **Point of Sale Configuration**.

8. Click **Next**. The Step 8 of 8 screen appears. (Step 7 of 7 without *Membership Management*)

**Note:** *QuickSell Commerce.is* is now called *Store Operations*.

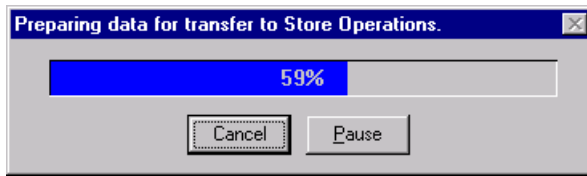
In the **Store Operations Options** frame, you can specify several settings for the constituents who will be loaded into *Store Operations* as customers. These settings can be changed in *Store Operations* on individual customer records from the Properties screen, Customer Options tab.

- To control how much the customers are allowed to buy over a specified time period, mark **Enforce purchase limits**.
- If you do not want the customers to be charged taxes on any sales, mark **Tax exempt**.
- If you use item price levels to give discounts to your best customers, in the **Price level** field, select the level you want to give these customers.
- Enter the **Credit limit** and **Percent discount** you want to give these customers.

In the **Queries to Create** frame, if you want to view records loaded into *Store Operations*, mark **Create output query**. To view records that met your criteria, but were not loaded for some reason, mark **Create output query for exceptions**. These queries are viewed in *The Raiser's Edge*. These queries do not include non-constituents and records that already exist in *Store Operations*.

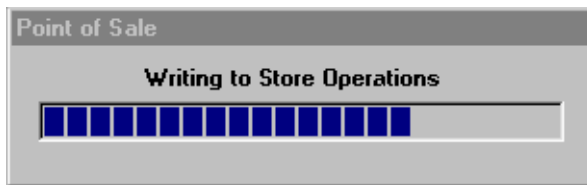
**Warning:** All users must log out of *Store Operations* before you click the **Finished** button on the Load Constituents Wizard.

9. Before you begin to process constituents, ensure all users log out of *Store Operations*. If users are logged into the *Store Operations* database, *Point of Sale* cannot load constituents. To begin the process, click **Finished**. If you select to create output or exception queries, you are asked to name and save them.
10. A progress screen appears as *Point of Sale* begins to prepare constituent data for transfer.

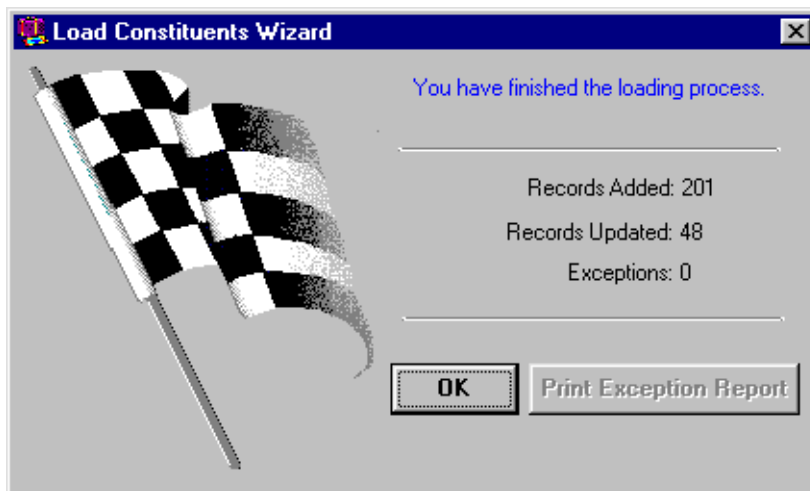


11. At this point, you can click **Pause** to temporarily stop the loading process or click **Cancel** to stop it entirely before any constituent records load into *Store Operations*.

If you do not click **Cancel**, another progress screen appears as *Point of Sale* begins writing information to *Store Operations*.



12. Once the loading process is complete, the Finished screen appears.



This screen displays the number of new customer records added to *Store Operations*, the number of existing customer records that were updated, and the number of constituent records considered exceptions.

Exceptions are records that should have been added or updated, but for some reason were not. For example, when you have already updated *Store Operations* and you run the Load Constituents Wizard again, if you do not mark **Update information for customers already loaded into Store Operations** on the Step 2 screen, the records already loaded into *Store Operations* generate exceptions.

If any exceptions were created, you can click **Print Exception Report** to view details for them.

- To return to the Point of Sale screen, click **OK**.

## Print Membership Cards

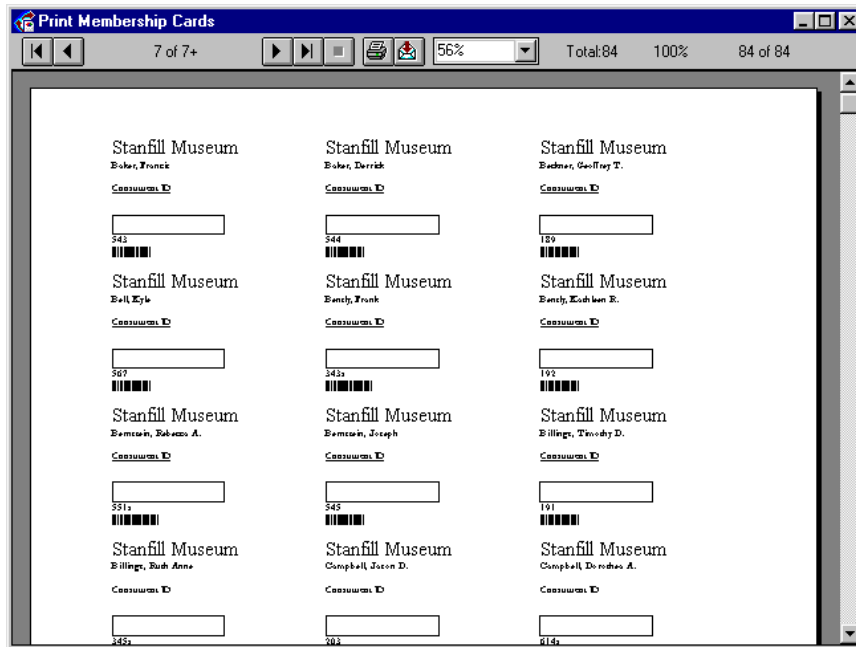
The **Print Membership Cards** option enables you to process membership cards for individuals in *Store Operations*. You can specify that the cards include a number of items, such as institution name, constituent ID, and a signature line.

**Note:** Membership cards with barcodes can be printed only on laser printers that support bar codes.

### ► Preview and print membership cards

- From the Point of Sale screen, click **Print Membership Cards**. The Print Membership Cards screen appears.

- In the **Customers to Include** frame, select whether to print a card for **All customers** or **One customer**. If you select **One customer**, the **Customer** field appears with an arrow. Click the arrow to access the Search screen so you can locate the customer record.
- To avoid printing duplicate cards, mark **Exclude customers who already have Point of Sale cards printed**.
- In the **Membership Card Options** frame, select the information you want to appear on the membership cards.
  - To have the institution name appear on the card, mark **Institution name** and click **Font**. A screen appears so you can specify the font in which to print your institution name.
  - To include the **Constituent ID**, a **Signature line** (area where the member can sign his name), and information from a *Store Operations* **Optional field**, mark the appropriate checkboxes. If you have the optional module *Alumni Tracking*, the **Class of** field is available to include on the membership cards.
  - In the **If name is too long** field, specify what *Point of Sale* should do when a name does not fit on a single line of a membership card. You can select to “Abbreviate first name”, “Drop to next line” (name continues on next line), or “Truncate” (name ends when maximum number of characters per line is reached).
- In the **Sort by** field, select the order in which to print the cards. For example, if you sort by “Last name”, the cards print in alphabetical order based on the last name.
- To view the cards on screen before printing, click **Preview**.



7. To send the cards to the printer, click **Print**.  
After you print the cards, a message appears.



**Note:** Only membership card printed dates in *Store Operations* are updated. Membership card dates in *The Raiser's Edge* are not updated through *Point of Sale*.

8. If the print run was successful, click **Yes**. The Date membership card printed additional field is updated in *Store Operations*. You return to the main Point of Sale screen.

## Transaction Reports

This option produces a transaction report for all or selected *Store Operations* customers who are constituents in *The Raiser's Edge*. The report includes all items, prices, quantities, and dates for transactions.

► **Preview and print the transaction report**

1. From the Point of Sale main screen, click **Print Transaction Report**. The Print Transaction Report screen appears.

2. In the **Customers to Include** frame, select whether to print **All Constituents** or **One Constituent**. If you select **One Constituent**, the **Constituent name** field appears. Use the Search screen to locate a particular customer you want to include in the report.
3. To print only transactions that fall within a particular date range, enter the selected dates in the **Include transactions from** and **to** fields. If you leave these fields blank, the report includes all transactions.
4. In the **Report order** field, specify whether to sort the results by date or alphabetically.
5. If you want each record to appear on a separate page, mark **Print one constituent per page**.
6. To view the report on screen, click **Preview**.

Trans Date	Item Code	Description	Price	Quantity	Total
<b>Ashton, Elizabeth A.</b>					
01/24/2004	49	Quick Sell Phone Package A	\$200.00	1	\$200.00
					<b>Total Amount: \$200.00</b>
01/24/2000	10	Candle - Crisp Breeze	\$4.75	3	\$14.25
01/24/2000	48	Candle - Aromatherapy	\$5.50	1	\$5.50
01/24/2000	11	Candle - Gardenia	\$4.75	1	\$4.75
					<b>Total Amount: \$24.50</b>
					<b>Customer Total: \$224.50</b>
					<b>Total Transactions: 2</b>
<b>Diresta, Joseph P.</b>					
01/24/2000	2	InstaFC Camera Pro Pack	\$84.75	1	\$84.75
01/24/2000	5	Refrim II Neon Processor	\$350.00	1	\$350.00

7. To send the report to the printer, click **Print**. You return to the main Point of Sale screen.





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