NCH Software
Copper Point of Sale Software

This user guide has been created for use with

Copper Point of Sale Software Version 3.xx

Technical Support

If you have difficulties using Copper Point of Sale Software please read the applicable topic before requesting support. If your problem is not covered in this user guide please view the up-to-date Copper Point of Sale Software Online Technical Support at www.nchsoftware.com/point-of-sale/support.html.
If that does not solve your problem, you can contact us using the technical support contacts listed on that page.

Software Suggestions

If you have any suggestions for improvements to Copper Point of Sale Software, or suggestions for other related software that you might need, please post it on our Suggestions page at www.nch.com.au/suggestions/index.html.
Many of our software projects have been undertaken after suggestions from users like you. You get a free upgrade if we follow your suggestion.

Copper Point of Sale Software

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Options ~ Web Routing http://www.nch.com.au/kb/10233.html

NCH Software Suite

This is a useful way to browse all the software available from NCH Software

You can see a set of products by type like Audio, Video and so on and view the product. From there you can try out the product and it will download and install it for you to trial. If you already have the product installed then you can click "Run It Now" and the program will be launched for you.

There is also a list of features for products in the category. Click on a feature, such as "Edit a Video File", to install a product with that ability.

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Introduction

Thank you for installing Copper.

Copper makes it easy to create sales receipts for customers and keep track of transactions. Copper is designed to integrate easily into Point Of Sales environments, and is intended for use with touch screen terminals and barcode scanners.

Copper generates and prints professional looking receipts. It records all transactions and then uses that information to produce helpful reports.

Copper is entirely free and can be installed and running within minutes.

Features

- Records sales transactions quickly and easily
- Generates and prints professional looking receipts
- Supports receipt printers that use roll paper
- Works well with touch screen terminals and barcode scanners - no need for mouse or keyboard input
- Manages item pricing and offered discounts
- Generates reports for analyzing sales by salesperson or item
- Can run multiple (unlimited) businesses from one install
- Can store unlimited receipts and items
- Data backup/restore feature keeps your data safe
- Installs and ready for printing in less than a minute
- Designed to be very easy to use for day-to-day operation

System Requirements

- Windows 2000/XP/2003/Vista/7/8/10
- Printer (for printing receipts)

Getting Started

After you first install Copper, the startup wizard will run. This will prompt you for the most basic information about your business including your company name, address and contact details.

After the startup wizard has run, you will need to create at least one Salesperson. Ideally, you should also create Item entries for each of the items you will be selling, so that they can be easily added to a transaction via the item code. All default settings should work "out of the box". See the Common Tasks topic of this manual for help on creating Salespeople and Items.

Once you have created at least one Salesperson, and at least one item, you can experiment with creating transactions using the main screen. Don't worry about creating false data - you can easily remove the test transactions using the Delete action in the Transactions List.

When you feel confident creating transactions, you can fine tune Copper using the configuration Options (from the Tools menu). This lets you specify more details about your business, tax rates or the layout of receipts.

Common Tasks

Adding New Salespeople Click the View button on the main window toolbar, and select Salesp
eople   to open the Salesperson List. Then click the Add button on the Salesperson List
toolbar.

Enter the appropriate information for the new Salesperson. You must provide a First Name and
Last Name, but all other information is optional.

Click the OK button to save the new Salesperson.

Creating Items
Click the View button on the main window toolbar, and select Items to open the Items List.
Then click the Add button on the Items List toolbar.

Enter the code, description, unit value and tax rate for the new item. If applicable, enter a
discount as a percentage reduction of the original price.

Click the OK button to save the new item.

Creating Transactions
Transactions are created from the main window. Starting a Transaction is a two step process:
adding items, and recording the payment.

Adding Items to a Transaction
If necessary, use the New Transaction button located in the lower right corner to clear all
items and information from the previous transaction. There are several ways to add a new
item to a transaction:

- Scan the item's code using a barcode scanner.
- Enter the item's code into the Enter Item Code text box, then press Enter or the Add
  Item button.
- Use the Select Item button to select an item from the Items List.
- Use the Manual Item Entry button to add an item that does not have a barcode, or
  cannot be found in the Items List (requires a keyboard).

If you add an Item which is already listed in the current transaction's items list, the quantity
of that item will increase by one, rather than adding a new item line entry. To change an
item's quantity more quickly, select an item then click or press the Adjust Quantity button
and enter a new quantity for the selected item.

Recording Payment for a Transaction
When at least one item has been added to a new transaction, and you are ready to receive
payment, click or press the Pay button.

Select the payment method to be used, and enter the amount tendered by the customer. Copper will calculate the amount of change due as you enter the tendered amount, and will display this in the field below.

When you have entered the correct payment details, and returned the correct change to the customer, click the 'Record' button to save the transaction.

Viewing Recorded Transactions

Every time you received payment for a transaction, Copper records the transaction in its database. At any time, you can view past transactions regardless of the date on which they occurred. To view a previously recorded transaction:

- Click on the View button on the main window toolbar.
- Select the Transactions item from the popup menu to open the Transactions List.
- Click within the Transactions List to select the transaction you wish to view.
- Click on the View button on the toolbar of the Transactions List window.

Only the salesperson with administrative privilege can edit or delete a transaction from the transaction list.

- Click on the View button on the main window toolbar.
- Select the Transactions item from the popup menu to open the Transactions List.
- Click within the Transactions List to select the transaction you wish to view.
- Click on the Delete or Edit buttons on the toolbar of the Transactions List window.

This window also gives you the option to Preview or Print the transactions list, or Delete a transaction.

Viewing Refunded Transactions

Every time you process a refund for a transaction, Copper records the refunded transaction in its database. At any time, you can view past refunded transactions regardless of the date on which they occurred. To view a previously refunded transaction:

- Click on the View button on the main window toolbar.
- Select the Refunds item from the popup menu to open the Refunded Transactions List.
- Click within the Refunded Transactions List to select a refunded transaction you wish to view.
- Click on the View button on the toolbar of the Refunded Transactions List window.

Only the salesperson with administrative privilege can delete a transaction from the refunded transaction list.

This window also gives you the option to preview or print the refunded transactions list, or dele te a transaction.

Using Draft Transactions

Copper allows you to save new transactions as drafts. This means that if you are in the middle of drafting up a new transaction and you find yourself being interrupted, you can save it as a draft, and then resume completion of the transaction at a later time.

To save the current transaction as a draft, click on the Save button at the bottom of the main window. This will save the transaction into to the list of drafts. To resume work on a previously saved draft, click on the Open button at the bottom of the main window. To view the list of saved draft transactions, Use the menu item View -> Drafts on the main window.

The list of draft transactions allows you to choose a draft transaction.   To open the selected draft in the main window, click Select. To delete the selected draft, click Delete. To view the contents of a selected draft, click View. To edit the contents of a selected draft, click Edit.

Reporting and Analysis

Copper's reporting ability can be used as a valuable performance analysis tool. To access Copper's reports, click on the Reports button on the main window toolbar. Then, select the menu item for the report you wish to view. You will then be asked to select a report category and to provide a date range for the reporting period.

Copper provides the following reports for both sales and refunds categories:

- Transactions - View all transactions within the selected reporting period, including salesperson and amount.
- Salespeople - View total sales made or refunds processed by each salesperson within the selected reporting period, including percentage by totals for each salesperson.
- Items - View the total quantity of each item sold or refunded within the selected reporting period, including total values for each item. The item values do not take into account coupon discounts or taxes.
- Taxes - View the total taxes of different types applied on transactions within the selected reporting period.
- Payment Methods - View the report of payment methods of different types (such as cash, check, credit, etc.) applied on transactions within the selected reporting period.

Each reporting screen provides the following actions:

- Preview - Preview the report to see how it will be printed.
- Print - Send the report to a printer.
- Save as PDF - Save the report as a PDF file.
- Save as CSV - Save the report as a CSV file, which can be opened in a spreadsheet application.
- Email - Send the report as a PDF file to a recipient via email. You must set up email settings from the General tab in Options before you can send email from Copper.
- Fax - Send the report to a recipient via Fax. You must set up fax settings from the General tab in Options before you can send faxes from Copper.

Multiple Currencies

Copper handles a business dealing with multiple currencies as a different business for each currency. For example you could create one "business" called YourCompany - USD and another YourCompany - Euro. Each could handle sales tax, VAT separately and you can print reports entirely separately for the US dollar account or the EURO account. Each account must be set up separately with its own salesperson, items etc.

To add a new currency to the business: from the menu, select Copper -> Multiple Businesses. Then click Add. After you click Add the Startup Wizard will run. Then you can choose different currency from the Options -> Regional under the Regional Format Settings section. It is recommended you name the new business currency something logical like YourCompany - AussieD. Remember to treat it as an entirely new business.

Credit Card Readers

Copper provides limited support for USB credit card readers.

Setup Instructions

1. Purchase a magnetic stripe reader that is configured from the factory to work in keyboard emulation mode + SureSwipe mode. To see whether it is working correctly, open a program such as Notepad or TextEdit. Plug in the card reader and swipe a card. If you see text all on one line, and the cursor moves to the next line, it should be working correctly. Now delete the text.
2. If you are using a MagTek device, the mode can be changed at this page: http://www.magtek.com/support/mode/ , or within Copper, you can go to Options -> Credit Card Gateways and click Configure to set up the device.
3. Set up a "Card Present" account with a credit card gateway provider. For instance, Authorize.net provides a free test account. Later on, after you are done testing, make sure you have a live account and that it is properly activated before you start selling to customers. Otherwise, you won't get paid for the items you sell. We recommend starting with a test account and testing it thoroughly, and then switching to a live account, and then running a few small "purchases" on your own credit card before opening it up to customers. You can check the purchase status online through the web page that your gateway service provides.
4. Get the latest credit card interfaces by opening Copper and going to Options -> Credit Card Gateways -> Check for Updates.
5. Enter your credentials after going to Options -> Credit Card Gateways and selecting a provider and clicking Options.
6. Run test transactions by entering items and clicking "Pay". Check the box indicating that you wish to "Charge Customer via Online Credit Card Gateway". Then click "Add Payment". With the cursor in the "Card Number" field, slide your card through the reader. It should process automatically.

Security Considerations

1. Whether you are using a card reader or entering card numbers manually, it is important to keep your machine clean and free of malware.
2. Please consider using a reputable antivirus program. At the same time, it's healthy not to go overboard because there are some phony security programs out there. We recommend choosing one of the well-known antivirus programs.
3. Please consider using Copper on a dedicated machine. Other activities such as unsupervised web browsing or opening email attachments could compromise the security of the machine. If this is not practical, consider making a list of activities, programs, or web sites that are needed for running the business, and then using the machine only for these purposes.
4. One way to tighten security is to set up a firewall to block all Internet traffic except a few selected sites such as the operating system update site and the credit card gateway. Usually, the credit card gateway URL can be found in the credit card setup page.
5. Please update the credit card components regularly within Copper. Even if a new version of Copper has been installed, it is a good idea to check for credit card updates.

6. If you see an unclear error message when making a credit card sale, please contact NCH support and/or check your merchant interface to see whether the transaction succeeded.
7. Please check bank statements regularly.

Password Management

How to change your password

1. First, log in to your account and click the Open Salespeople List link on the main page.
2. Select your name from the list and click edit.
3. Enter the new password you wish to use.
4. Re-enter the new password to confirm it.
5. Click OK to finish.

Retrieve Your Password

Click on Reset Password button on the login page. An email containing your reissued password will be sent to your email box. For security reasons, your password will be reset every time that you retrieve your password.

Network Setup

This tab allows you to configure your network so that you can synchronize data between applications. The following options are available.

- Allow access to Copper Point of Sale Software on the local network - This option allows you to synchronize data with another computer that is on the local network. This is the preferred option.
- Allow access to Copper Point of Sale Software from the internet (Cloud Access) - This option allows you to synchronize data between computers that are not on the same local network.
- Run Web Routing and Test Wizard - Use this to check the firewall if you need cloud access.
- Advanced Routing - This provides more options for configuring your computer on the network. If you are using Copper as a client of Inventoria on the local network, then the advanced options can typically be left alone.

Keyboard Shortcuts

The following list shows shortcuts for the most common tasks used in Copper main window:

- View Items Ctrl+T
- View Salespeople Ctrl+F
- View Customers Ctrl+C
- Handle Refunds and Returns Ctrl+R
- View Program Options Ctrl+O
- View Help Documentation F1
- Initiate New Transaction or Void Current Transaction F3
- Make Payment for Current Transaction F4
- Delete Selected Item(s) DELETE
- Exit Copper (Close to Tray) Alt+F4

The following list shows shortcuts for the common tasks used in Copper Items List window:

- Add New Item Ctrl+N
- Add New Coupon Ctrl+U
- View Help Documentation F1
- Edit Selected Item or Select Item if in edit transaction mode ENTER
- Delete Selected Item(s) DELETE
- Exit 'Items List' window ESC

The following list shows shortcuts for the common tasks used in Copper Transaction List window:

- View Transaction Alt+V
- Edit Selected Transaction ENTER
- Print Selected Transaction Ctrl+P
- View Help Documentation F1
- Delete Selected Transaction(s) DELETE
- Exit 'Transaction List' window ESC

The following list shows shortcuts for the common tasks used in Copper Customers window:

- Add New Customer Ctrl+N
- View Help Documentation F1
- Edit Selected Customer Details or Select Customer ENTER
- Delete Selected Customer(s) DELETE
- Exit Customers window ESC

The following list shows shortcuts for the common tasks used in Copper Salespeople window:

- Add New Salesperson Ctrl+N
- Email Selected Salesperson Ctrl+E
- Telephone Selected Salesperson Ctrl+T
- View Help Documentation F1

- Edit Selected Salesperson Details ENTER
- Delete Selected Salesperson(s) DELETE
- Exit Salespeople window ESC

The following list shows shortcuts for the common tasks used in Copper Report windows:

- Print Selected Report   Ctrl+P
- Email Selected Report   Ctrl+E
- Save Selected Report as PDF file   Ctrl+S
- View Help Documentation   F1
- Exit Report window   ESC

The following list shows shortcuts for the common tasks used in Copper Restaurant Menus windows:

- Add Menu   Ctrl+N
- Edit Selected Menu/Category/Item   ENTER
- Delete Selected Menu/Category/Item   DELETE
- View Help Documentation   F1
- Exit Restaurant Menus window   ESC

The following list shows shortcuts for the common tasks used in Copper Restaurant Table List windows:

- Add New Table   Ctrl+N
- Delete Selected Table(s)   DELETE
- Edit Selected Table(s)   ENTER
- View Help Documentation   F1
- Exit Table window   ESC

Application Synchronization

Use this help page to troubleshoot the most common problems when attempting to synchronize items or quantities with Inventoria or another instance of Copper.

Unable to connect to [host name] through port [port number].

Copper was unsuccessful in its attempt to connect to the server program. Confirm that the server program is running and has Web Access enabled. Verify that the host name entered into Copper is the correct host name or IP address of the computer which is running the server and that the port number entered into Copper matches the port number through which the server accepts web connections.

Connection rejected -- Application integration not enabled by [program name].

The application synchronization behavior is not enabled by any business in the server program. Complete the setup process for application synchronization in the Options dialog of the server program.

Connection rejected -- invalid authorization key.

The authorization key entered into this instance of Copper does not match that of the server. The authorization key is case sensitive and must exactly match the authorization key entered into the server program.

Quantity change failed -- invalid location name: [location name].

Copper is attempting to update quantities for an item at a location that does not exist in the server Inventoria program. The location name entered into Copper is not case sensitive but must otherwise match the name of one location in the server Inventoria.

Quantity change failed -- invalid item name: [item name].

Copper is attempting to update quantities for an item that does not exist in the server Inventoria program. The most likely cause of this error is that the item was created locally or deleted from the server Inventoria after the most recent item synchronization.

Import Items

The following fields can be imported into item records:

- Item Code - A unique identifier for the item. This could be a barcode number or an identifier number or a short descriptive string. It cannot be longer than 25 characters.

  Examples: 381370092346, ITEM0001, WHEAT BREAD
- Description - A description of the item. It is typically limited to 259 characters.

  Examples: Dental Floss, Granola Bars w/Raisins, Golden Wheat Bread
- Price - The sale price of the item, using the format defined in the regional settings. If you are using a currency other than dollars, please configure the currency before importing. It is not necessary to include the currency symbol.

  Examples: $1.99, 2.54, 0.89
- Tax - (Optional) The name of the tax to apply to this item. If blank, the default tax applies. It can also be "Default" or "None". Please set up taxes in Copper before importing items that use taxes.

  Examples: Sales Tax, Default, None, Riverton Sales Tax

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A party who intends to seek arbitration must first send to the other, by certified mail, a written Notice of Dispute ("Notice"). The Notice to NCH should be addressed to:

Legal Department

NCH Software, Inc.

6120 Greenwood Plaza Blvd, Ste 120

Greenwood Village CO, 80111

USA

("Notice Address"). The Notice must (a) describe the nature and basis of the claim or dispute; and (b) set forth the specific relief sought ("Demand"). If NCH and you do not reach an agreement to resolve the claim within 30 days after the Notice is received, you or NCH may commence an arbitration proceeding. The amount of any settlement offer made by NCH or you shall not be disclosed to the arbitrator.

A. The arbitration will be governed by the Commercial Arbitration Rules and the Supplementary Procedures for Consumer Related Disputes (collectively, "AAA Rules") of the American Arbitration Association ("AAA"), as modified by this Agreement, and will be administered by the AAA. The AAA Rules are available online at adr.org, by calling the AAA at 1-800-778-7879, or by writing to the Notice Address. The arbitrator is bound by the terms of this Agreement. All issues are for the arbitrator to decide, including issues relating to the scope and enforceability of the arbitration provision. Unless NCH and you agree otherwise, any arbitration hearings will take place in Greenwood Village Colorado. If your claim is for $10,000 or less, we agree that you may choose whether the arbitration will be conducted solely on the basis of documents submitted to the arbitrator, through a telephonic hearing, or by an in-person hearing as established by the AAA Rules. If your claim exceeds $10,000, the right to a hearing will be determined by the AAA Rules. Regardless of the manner in which the arbitration is conducted, the arbitrator shall issue a reasoned written decision. NCH will pay all AAA filing, administration, and arbitrator fees for any arbitration initiated in accordance with the notice requirements above. If, however, the arbitrator finds that either the substance of your claim or the relief sought in the Demand is frivolous or brought for an improper purpose then the payment of all such fees will be governed by the AAA Rules. In such case, you agree to reimburse NCH for all monies previously disbursed by it that are otherwise your obligation to pay under the AAA Rules. In addition, if you initiate an arbitration in which you seek more than $75,000 in damages, the payment of these fees will be governed by the AAA rules.

B. The arbitrator may award declaratory or injunctive relief only in favor of the individual party seeking relief and only to the extent necessary to provide relief warranted by that party's individual claim. YOU AND NCH AGREE THAT EACH MAY BRING CLAIMS AGAINST THE OTHER ONLY IN YOUR OR ITS INDIVIDUAL CAPACITY, AND NOT AS A PLAINTIFF OR CLASS MEMBER IN ANY PURPORTED CLASS OR REPRESENTATIVE PROCEEDING. Further, unless both you and NCH agree otherwise, the arbitrator may not consolidate more than one person's claims, and may not otherwise preside over any form of a representative or class proceeding. If this specific provision is found to be unenforceable, then the entirety of this arbitration provision shall be null and void.

C. Notwithstanding any provision in this Agreement to the contrary, we agree that if NCH makes any future change to this arbitration provision (other than a change to the Notice Address) you may reject any such change by sending us written notice within 30 days of the change to the Arbitration Notice Address provided above. By rejecting any future change, you are agreeing that you will arbitrate any dispute between us in accordance with the language of this provision.

D. To opt out of this Arbitration Agreement and class action waiver send an Opt Out notice to the Notice Address stating "I am electing to opt out of the Arbitration Agreement and class action waiver contained in the Legal Terms applicable to my purchase of an NCH product." Your Opt Out Notice must include the date and proof of purchase. The Opt Out Notice must be postmarked no later than thirty (30) days after the date of purchase. A separate Opt Out Notice must be sent for each product purchased.

General - CSV Import Wizard: Select CSV for Import

Select CSV for Import

CSV Import File

Enter the name of the CSV file containing the import or click the adjacent button to open a file browsing dialog.

A CSV (Comma-Separated Value) file contains data entries separated by a comma. Many spreadsheet applications allow the user to save entered data in the CSV format.

General - CSV Import Wizard: Match Data Fields

Match Data Fields

This page of the wizard provides a means of associating the headers in your CSV file with the fields supported by Copper Point of Sale Software.

To assign a header to a specific field, click on the cell adjacent to the field. A list of unassigned headers will display, from which you may select the header you wish to assign.

General - CSV Import Wizard: CSV Import Results

CSV Import Results

The results page shows how many items were successfully imported, how many rows failed to produce an import, as well as all relevant errors generated during the import.

Options - Options ~ Credit Card Gateways

The Credit Card Gateways tab of the Options dialog is where credit card payments are configured, so that you can accept credit card payments from customers using Copper Point of Sale Software. Credit card gateways can virtually take the place of physical credit card swipe machines and process your customer's payments securely.

A list of the available credit card gateways appears on this tab. If you do not see any gateways, click the Update List button to refresh the list. By updating the list, you will see credit card gateways that have been tested with Copper Point of Sale Software.

To configure settings for a gateway, select it from the list so that its name is highlighted, and click the Options button. To enable a credit card gateway for charging customers, check the box to the left of its name. Only one credit card gateway can be selected at a time. Note that if you do not enable a gateway by checking its box, credit card charging with Copper Point of Sale Software will not be possible.

For more information about each of the supported gateways, click the links below:

- Authorize

    - Authorize website: www.authorize.net
    - Authorize getting started guide www.authorize.net/files/gettingstarted.pdf
    - Also see the Authorize account settings topic in this manual.
    - Free sandbox account: https://developer.authorize.net/sandbox/. Choose a "Card Not Present" account if you always enter card data manually, or a "Card Present" account if you are using a supported card reader.

- Eway

    - Eway Australia website: http://www.eway.com.au/. More countries are available by selecting the location on the website.
    - Also see the Eway account settings topic in this manual.

- PayPal

    - PayPal website: www.paypal.com. You will want to set up a Paypal account, and then set up a Payflow Pro account.
    - Payflow Pro website: https://www.paypal.com/us/webapps/mpp/referral/paypal-payflow-pro.
    - Also see the Paypal Payflow Pro Account Settings topic in this manual.

Supported Currencies

Currently, only currencies with two decimal places (such as US dollars) are supported. Currencies with zero or three decimal places are not yet supported. To use a currency other than US dollars, please set the default currency in your credit card gateway interface. Then run a few small test transactions and then review the merchant interface to make sure the results are as expected.

Charge Customers via online Credit Card Gateway - Select this option to enable credit card charging functionality. If you are using a self-contained external credit card machine instead, do not select this.

Configure... - Configure or adjust the settings for the selected account.

Update List - Connect to the internet and check for updates, or for support for additional gateways.

HARDWARE DEVICES

Use this section to configure a USB credit card reader. Currently, only some MagTek readers and generic keyboard-mode readers are supported.

Show all devices - Check this box to show USB devices connected to your computer, even if they aren't recognized as card readers.

Refresh - Updates the list of attached USB devices.

Configure - Select an item in the list and click "Configure" to set up a card reader to work with Copper.

Screen References - Transaction

Previous transactions can be viewed using this dialog window, but once transactions have been recorded, they cannot be altered unless you have administrative privelege. When viewing a previous transaction, you will see the Date and Time at which the transaction was recorded. You will also see a list of all items sold, and a summary of payment details below. At the bottom of the window is a Receipt button which you may click on to reproduce a receipt for the transaction.

Screen References - Draft Transaction

Draft transactions can be viewed using this dialog window. When viewing a draft transaction, you will see a list of all items to be sold, and a summary of payment details below. To use a draft transaction, close the dialogs and use the "Open Draft" button on the main screen.

Screen References - Salespeople List

This screen lists all the salespeople who are allowed to use Copper. Before salespeople can use Copper, they must first Log On. It is not mandatory, but it is strongly suggested that you assign a password for each salesperson.

You can use this screen to manage the list of salespeople who are allowed to use Copper. The following actions are available:

- Add - Add a new salesperson to the list so that they may use Copper.
- Delete - Remove an existing salesperson from the list. Once this is done, the salesperson will no longer be able to use Copper.
- Edit - Edit the details of an existing salesperson.
- Email - Send email to the selected salesperson using your email client software. Note that this action is not affected by the Report Send Settings which are configured via the 'General' tab of the Options Dialog.
- Telephone - Make a phone call to the selected salesperson using NCH Expresstalk VoIP software. Additional resources are required to activate this feature.
- Import - Import a list from a CSV file. The following fields are supported: First Name, Last Name, Phone, Phone 2, Email, and Additional Information.

The salespeople list can easily be filtered by entering the filter text in 'Find SalesPerson' input box. The filter string matches in first and last name as well as the phone number, and it is case-insensitive. 'Clear' button clears the filter and displays full salespeople list.

Screen References - Salesperson Search

Use this dialog to search for a salesperson by first name, last name, or phone number. The first matching entry will be selected. To find subsequent matching entries, press F3 or click on Salesperson -> Find Next.

Screen References - Customer List

Use this screen to manage your customer records. Here you will see a list of all the customers which Copper is aware of.

You can use this screen to manage the list of customers managed by Copper. The following actions are available:

- Add - Add a new customer to the list.
- Delete - Remove an existing customer from the list.
- Edit - Edit the details of an existing customer.

Also, 'Select' option is available for unpaid or new transaction on clicking 'Select Customer...' button on main transaction dialog.

- Select - This button is enabled when a customer is selected from the customers list, and can be used to add the selected customer to the active transaction.

Screen References - Items List

This screen lists all recorded items.

You can use this screen to manage the list of all recorded items including coupons. The following actions are available:

- Item - Add a new item to the list.
- Coupon - Add a new coupon to the list.
- Delete - Remove an existing item from the list. Once this is done, the item can't be used any more.
- Edit - Edit the details of an existing item.
- Import - Import the items from a CSV file.

The items list can easily be filtered by entering the filter text in 'Find Item' input box. The filter string matches in item code and item description, and it is case-insensitive. 'Clear' button clears the filter and displays full items list.

Also, 'Select' option is available for unpaid or new transaction on clicking 'Select item...' button on main transaction dialog.

- Select - This button is enabled when an item is selected from the items list, and can be used to add the selected item to the active transaction.

Screen References - Restaurant Menus

This is the general menus screen. This screen lists all menus, and the associated categories and items.

You can use this screen to add new Menus/Categories/Items. You can also delete/edit existing Menus/Categories/Items. Assigning (new/existing) category to selected menu and assigning (new/existing) item to selected category is also available. You can also use this screen to view the list of Categories and list of Items. The following actions are available:

- Add Menu - Add a new menu.
- Add Category - Add a new category.
- Add Item - Add a new item.
- Edit Menu/Category/Item - Edit selected Menu/Category/Item.
- Delete Menu/Category/Item - Delete selected Menu/Category/Item.
- Assign Category - Assign (new/existing) category to selected Menu.
- Assign Item - Assign (new/existing) item to selected Category.
- View Category List - View Category list.
- View Item List - View Item list.

Screen References - Restaurant Menu Categories

This screen lists all menu categories.

You can use this screen to manage the list of all menu categories. The following actions are available:

- Add - Add a new menu category.
- Delete - Remove an existing menu category.
- Edit - Edit the details of an existing menu category.

Screen References - Restaurant Menu Items

This screen lists all menu items.

You can use this screen to manage the list of all menu items. The following actions are available:

- Add - Add a new menu item.
- Delete - Remove an existing menu item.
- Edit - Edit the details of an existing menu item.

Screen References - Restaurant Tables

This screen lists all tables.

You can use this screen to manage the list of all tables. The following actions are available:

- Add - Add a new table.
- Delete - Remove an existing table.
- Edit - Edit the details of an existing table.

Screen References - Restaurant Terminal

Selecting Terminal from the Restaurant menu opens the payment terminal screen.

If you have not created restaurant menus, categories or items yet, you will have the following options:

- Add Menu - Click this button to add a menu.
- Assign Item - Click this button to add an item to the menu and assign the category.

Existing menus are displayed on the left side in the menu panel. The menu items will display in the items panel in the center or the screen. Each item is color coded according to its category.

Click on an item in the item panel to add it to the order. A table must be added and selected when making an order. The order docket is located on the right side of the terminal.

To edit an item quantity in the current order:

- Click on the item in the item panel to increase the quantity by one.
- Click on the item in the order row, then click on the new quantity using the keypad buttons on the bottom right.

To remove an item in the current order, click on the item in the order row, then click X button.

To apply a payment to the order, click on the Cash, Credit or Check button. Enter the payment information in the dialog that opens.

To cancel a transaction and start a new transaction, click on the Void button.

Click Change button to switch staff account.

Click Exit Console button to exit payment terminal screen.

Screen References - Restore

This feature restores the previously backed up data in Copper data repository.

Warning: When you do restore, all the current data will be over-written or deleted permanently from the Copper data storage folder, and it will be replaced by the restored data. Thus, it is highly recommended to back up the current data before performing restore operation.

How to restore

1. Login to your account using root user credentials. Root user is the first user created when installing the Copper for the very first time.
2. Select the 'Restore data...' submenu item under 'Tools' menu.
3. Confirm by clicking 'Yes' on the popup query message if you want to continue restore operation. (See 'Warning' above)
4. Select the parent folder where Copper backed up data is pren. Generally, the parent folder name has format 'Copper-Backup-YYYY-MM-DD'.
5. Click OK to start restoring.

Screen References - Dual Screen

This feature enables the dual screen mode, i.e., a second dialog will open up which will display the transaction details from the main window. This is intended for systems with two monitors, where one monitor is turned towards customer and other towards salesperson; hence, allowing both customer and salesperson to view and review transaction details during the check-out process.

Screen References - Refunds

"The refund feature in Copper allows a salesperson to process and record items returned by customers.

Processing a Refund
Refunds are processed from Refunds window and it can be accessed from toolbar button on main window. Refund processing is a two step process: adding returned items, and recording the refund.

Adding Items to a Refund Transaction
If necessary, use the New Refund button located in the lower right corner to clear all items and information from the previous transaction. There are several ways to add a new item to a transaction:

- Enter a transaction number from the past receipt into the Enter Transaction Code text box, then press Enter or the Add Transaction button. This would add all items from the entered transaction.
- Use the Browse Transaction to select items from recorded transaction list.
- Use the Select Item button to select an item from the Items List. Note that adding new items is not allowed when refunding a past transaction.
- Use the Manual Item Entry button to add an item that does not have a barcode, or cannot be found in the Items List (requires a keyboard). Note that adding new items is not allowed if processing from a past transaction.

You may be able to Adjust Quantity and Adjust Unit Value of the added items in the list depending on item types and past transaction types.

Recording the Refund
When at least one item has been added to a new refund transaction, and you are ready to process and record the refund, click or press the Process Refund button.

Select the refund method to be used, and enter the amount refunded to the customer. Copper will calculate the amount of change to receive if any as you enter the refund amount, and will display this in the field below.

When you have entered the correct refund details, and returned the correct change to the customer, click the 'Record' button to save the refunded transaction.

Coupons in a Refund
When creating a refund, coupons must be selected for each refund. If a coupon is not included, the refund price will be greater.

Screen References - View Previous Refunds

Previously refunded transactions can be viewed using this dialog window. When viewing a previous transaction, you will see the Date and Time at which the transaction was recorded. If available, it also displays the original transaction reference number from which the items were refunded. You will also see a list of all items refunded, and a summary of payment details below. At the bottom of the window is a Receipt preview and print buttons which you may click on to reproduce a receipt for the refunded transaction.

Screen References - Browse Transactions

Past recorded transactions can be viewed and items from a selected transaction can be added to process refunds using this dialog window. The dialog consists of two list views:

- Top listview contains the list of past transactions. The list can be filtered by selecting the time period by using the pool-down-list control, or by selecting custom start and end dates. Click on a transaction to select it and populate the bottom listview.
- Bottom listview contains the list of items from the selected transaction. Select items to be refunded by checking the checkboxes next to each item row, and click Refund Selected to continue processing the selected items for refunds. Coupon item from a selected transaction is always added even if it is left unselected.

Note that Copper can only process items from one transaction at a time for refunds.

Screen References - Process Refund

After you click the 'Process Refund' button on the 'Refunds' screen, the Process Refund dialog will appear. This is where you enter how you paid back the customer. Note that to maintain consistency, this dialog is designed to closely resemble 'Receive Payment' dialog, which processes the sales payment details.

Total Refund Due

This field displays the total amount owed to the customer for the transaction.

Method

Refund by cash, check, or gift card. (Credit cards are not supported for refunds at this time.)

Balance Remaining

This field displays the remaining balance amount owed to the customer for the refunded transaction.

Refund Amount

Enter the amount to refund. Any change owed is displayed in the Change field below. You may enter the amount, less than the total amount due. In such occasion, you are required to complete the refund processing by splitting into multiple refund payments.

Refund Reference

Enter the credit transaction reference number here, or the check number. This is an optional field.

Change

If the refund amount is more than the Total Refund Due, the change due will be displayed here.

Add Refund

If the salesperson or business wants to split the total refund amount into multiple payment methods, then use 'Add Refund' button to add each partial tendered amount to the pay list. Once the transaction is fully paid, click 'Record' to save and store the payment information.

Remove Payment

Use this option to remove the selected refund payment.

Show/Hide Keypad

This button shows or hides a numeric keypad, and could be useful for touch screen interfaces.

Screen References - Gift Card

You can use this screen to manage the gift cards registered with Copper. The following actions are available:

- Issue Gift Card - Register a new Gift Card with Copper.
- Check Balance - Check the remaining balance on a registered Gift Card.

Issue Gift Card

Register a new gift card.

- Enter the gift card code: - Enter the code number for the new gift card.
- Enter the gift card amount: - Enter the inital value for the new gift card.

Check Balance

This will show the remaining value left on the gift card.

- Enter the gift card code: - Enter the code number for the gift card to be checked.

Screen References - Apply Gift Card

Enter the Gift Card Code you want to apply to this payment.

Screen References - Add Menu Item

Name:

Enter the name of the menu item.

Description:

Enter the description of the menu item.

Unit Value (price or rate):

Shows the price per serving.

Screen References - Recipe

Name:

Enter the name of the recipe.

Description:

Enter the description of the recipe.

Number of portions:

Enter the number of portions this recipe makes.

Preperation time:

Enter the time require to make this recipe.

Price per portion:

Enter the normal price per portion.

Cost per portion:

Enter the cost per portion.

Screen References - Table

Number:

Enter the table number.

Number of seats:

Enter the number of seats that are normally at this table.

Location:

Enter the description of the location.

Notes:

Enter any addition notes about the table.

Screen References - Add Menu

Name:

Enter the name of the menu.

Description:

Enter the description of the menu.

Add Category

Add a category associated to the current menu.

Screen References - Add Menu Category

Name:

Enter the name of the category.

Description:

Enter the description of the Category.

Color:

Enter the color of the category.

Add Item

Add an item associated to the current category.

Screen References - Server

Name:

Enter the name of the menu.

Description:

Enter the description of the menu.

Screen References - Select Item

Select item to be assigned to the category.

You can assign a new item by selecting "Add New".

Screen References - Select Category

Select category to be assigned to the menu.

You can assign a new category by selecting "Add New".

Screen References - Authorize Account Settings

Authorize Account Settings

Login:

Enter a login ID you've obtained from Authorize.Net

Transaction Key:

Enter a transaction key you've obtained from Authorize.Net

Gateway URL:

Enter the Authorize.Net gateway. It should be https://secure.authorize.net/gateway/transact.dll
for a normal account, or https://test.authorize.net/gateway/transact.dll for a test account.

Screen References - Eway Account Settings

Eway Account Settings

CustomerID:

Enter a customer ID you've obtained from Eway.

Gateway URL:

Enter the Eway gateway. Typical URLs are
https://www.eway.com.au/gateway_cvn/xmltest/testpage.asp for a test account, and
https://www.eway.com.au/gateway_cvn/xmlpayment.asp for a live account.

Screen References - Paypal Payflow Pro Account Settings

Paypal Account Settings (Payflow Pro / PayPal Payments Pro)

Partner:

Enter the PayPal partner (usually PayPal). Use the same credentials you would use to log in to https://manager.paypal.com.

Merchant Login:

Enter your merchant login

User:

Usually this is the same as the merchant login

Password:

Enter the password to your PayPal merchant account

This is a test account (see help)

Check this to use test mode instead of running live transactions. To use test mode, you may need to create a sandbox account at https://sandbox.paypal.com and then enter your sandbox email address at http://manager.paypal.com under Service Settings -> Hosted Checkout Pages -> Setup. (Source: https://www.paypalobjects.com/webstatic/en_US/developer/docs/pdf/payflowgateway_guide.pdf 19 July 2013 p.50)

Screen References - Paypal Account Settings

Paypal Account

API Username:

Enter an API user name you've obtained from PayPal

API Password:

Enter an API password you've obtained from PayPal

Gateway URL:

Enter the PayPal gateway. Usually, https://api-3t.paypal.com/nvp

API Credentials

Client Side SSL

Select this option if you are using a certificate.

3-token Authentication

Select this option if you are using a signature.

Signature:

Signature for 3-token Authentication

Certificate Password:

Password of the Certificate file for Client Side SSL

Full file path of Certificate file for Client Side SSL.

Test Connection

Click this to check the connection to the gateway using the credentials provided.

Screen References - Account Settings

If you are using a third-party credit card gateway DLL, enter the full URL-encoded login string here.

Screen References - Fax Settings

To send faxes you need an electronic gateway to send direct from your PC using email protocols. Click on the recommended gateways link for more information.

Gateway domain (after @):

To send faxes you must enter the gateway domain (that is the part after @). For example to send a fax to [FaxNumber]@yourfaxco.com enter yourfaxco.com as the domain.

Screen References - Fax Number

Please enter the telephone number for the fax to send to.

Remember this fax number

Tick 'Remember this fax number' to save the number for use in the future.

Screen References - Email Address

Please enter the email address you want to send to. This needs to be the full email address, e.g. tom.jones@example.net . To send to multiple email addresses, separate each address with a comma.For problems with sending an email, please refer to this page.

Remember this email address

If this option is available, tick 'Save this as email ...' to save the email address for use in the future.

Screen References - Print Preview

The Preview window displays each page of the document as it will be printed by the printer.

Print (if available)

You can print the document by clicking the Print button.

This will open the printer selection and settings dialog where you can select which pages of the document to print.

Previous and Next

Use the Previous and Next buttons to view each page of the document when there is more than one page to print.

Close

The Close button closes the window.

Screen References - Back Up Data

It is essential that you backup your data regularly just in case something goes wrong. Please select one of the options below.

Backup Options

Back up to a Network Folder

This is a good option if you are working in an office. Ask your Network Administrator to create a safe folder on the shared server. Select this folder and click Backup. The entire application folder will be copied to that folder. If something goes wrong (like a hard drive crash) you just copy back the folder and everything will be restored.

Back up to a CD or DVD with Express Burn

Select this option to burn all the data to disc using Express Burn. See www.nch.com.au/burn to learn more about Express Burn.

Back up to a Removable Drive

As an alternative use this option to backup to an external USB hard drive or USB key flash drive. Please consider using MEO to encrypt the files if using removable media.

Screen References - Manual Item Entry

Use the Manual Item Entry button, located on the main screen above the transaction list, to add an item that does not have a barcode, or cannot be found in the Items List (requires a keyboard).

Item Quantity:

Enter the quantity of the item being sold.

Item Code:

Enter the code of the item being sold, if applicable.

Item Description:

Enter the full description you want to be displayed on the receipt.

Unit Value (price or rate):

Enter the price of a single item.

Discount:

Enter any discount as a percentage reduction of the Unit Value.

Tax:

Select the tax rate that applies. If you only see 'None' you may first need to configure the Tax Options (Options from the main window then click the Tax tab).

Add this item permanently to Items List

Check this box to create this item permanently, i.e., the item will be added to the items list repository, as well as, to this transaction.

Screen References - Adjust Item Discount

Use the Adjust Discount button to change the purchase discount of the currently selected item. Note that the discount is applied to the selected item one time only and valid for just this transaction, i.e. this won't change the discount for the item in the item inventory list. Thus, it is highly recommended to add some comments to the item description with the reasons for applying the discount.

Item Description:

Enter the full description and append the reason for applying this discount.

Discount Percentage:

Adjust any discount as a percentage reduction of the Unit Value.

Discount Amount:

Adjust any discount as an amount reduction of the Unit Value.

Screen References - Adjust Item Unit Value

Use the Adjust Unit Value button to change the unit value of the currently selected item while completing a refund transaction. Note that the unit value is applied to the selected item one time only and valid for just this transaction, i.e. this won't change the value for the item in the item inventory list. Thus, it is highly recommended to add some comments to the item description with the reasons for changing the unit value.

Item Description:

Enter the full description and append the reason for changing the unit value.

Unit Value:

Adjust any unit value for the selected item. The values can not be adjusted for coupons in percentage.

Screen References - Adjust Item Quantity

Use the Adjust Quantity button to change the purchase quantity of the currently selected item.

New Quantity:

Enter the new quantity to be purchased.

Show/Hide Keypad

This button shows or hides a numeric keypad, and could be useful for touch screen interfaces.

Screen References - Add Shipping Amount

Use the Shipping button to add shipping charges to a transaction.

Shipping Amount:

Enter the shipping cost.

Screen References - Add/Edit Customer

The Add/Edit Customer window is where you fill in the details for customers. To access the Add/Edit Customer window, click Add New Customer from the Customers List or click edit on one of the existing customers. Users with viewer-only privileges will be unable to edit customer details.

You can use this screen to manage the list of customers managed by Copper. The following actions are available:

First Name:

Enter the customer's first name.

Last Name:

Enter the customer's last name.

Address:

Enter the customer's contact address.

Phone:

Enter the customer's contact telephone number.

Email:

Enter the customer's contact email address.

Screen References - Salesperson

Add salespeople to Copper to keep track of each salesperson's transactions, and their contact information. To add salespeople, click the Add New Salesperson link from the sidebar, or open the Salesperson List and click Add, then use the descriptions below to fill in the information about the salesperson.

First Name:

Enter the first name of the salesperson.

Last Name:

Enter the last name of the salesperson.

Phone (primary):

Enter the primary phone number of the salesperson. The phone number can contain letters, digits, and other text.

Phone (alternative):

Enter the alternative phone number of the salesperson, if any.

Email:

Enter the email address of the salesperson.

Additional Info:

Enter any additional information, such as date of birth.

Password:

Enter the login password for the salesperson.

Verify Password:

Repeat the login password that was entered in the above 'Password' field to verify its accuracy.

Privileges

Administrator

Check this option to allow this user to modify others user's preferences, view reports and logs, sell/refund items, and to add/remove transactions.

Salesperson

Check this option to allow this user to sell/refund items.

Screen References - Select Report Category and Period

Before Copper generates the report you have selected, you will be asked to select report category (Sales or Refunds) and to enter dates you would like the report to span. Select from fixed reporting dates, or customize a start and end date for the report.

Report Category

Sales

Check this option to generate report from sales transactions.

Refunds

Check this option to generate report from refunded transactions.

Report Period

Select Period:

Select the period for the report. Choose from a fixed period including the current month, the previous month, or the current calendar year. Or you can choose Select from the list and then enter any Start Date and End Date you like in the boxes to customize the period of the report.

Start Date:

Enter the date (inclusive) the report period will start from. Clicking the down arrow will display a calendar from which the start date for the report can be selected.

End Date:

Enter the date (inclusive) the report period will end on. Clicking the down arrow will display a calendar from which the end date for the report can be selected.

Screen References - Multiple Businesses

A single installation of Copper can manage many businesses. They run as if they were entirely different installs. Every single setting can be changed for each business. Each business has its own salespeople, items, payments and reports.

To add a business, from the menu select Copper -> Multiple Businesses. Then click Add New Business. After you click Add the Startup Wizard will run.

To delete a business, select a business by clicking once on the list of businesses. Then click D elete Business .

To select the active business, choose a business in the list and click Select.

Screen References - Credit Card Information

Enter the credit card details for this transaction.

Card Number (or slide card):

Enter the customer's credit card number, or swipe a card through a card reader.

Card Expiration Date (mm/yyyy):

Enter the customer's credit card expiration date (mm/yy or mm/yyyy).

Card Verification Number:

Enter the customer's credit card Verification Number.

Customer Name:

Enter the name of the customer.

Billing Address:

Enter the customer billing address.

Screen References - Receive Payment

After you click the Pay button on the main screen, the Receive Payment dialog will appear. This is where you enter how the customer paid, and if you need to give change back.

Total Amount Due:

This field displays the total amount owed by the customer for the transaction.

Payment Method:

Select a payment method to pay for the transaction.

Balance Remaining:

This field displays the remaining balance amount owed by the customer for the transaction.

Amount Tendered:

When the customer pays in cash, enter the amount received. Any change owed is displayed in the Change field below. If the customer pays by another method, this field will be automatically filled out with the remaining amount due.

Payment Ref:

Enter the credit transaction reference number here, or the customer's check number.

Change:

If the customer paid in cash and money is owed back to them, the change due will be displayed here.

Add Payment

If the customer wants to split the total owed amount into multiple payment methods, then use 'Add Payment' button to add each partial tendered amount to the pay list. Once the transaction is fully paid, click 'Record' to save and store the payment information.

Remove Payment

If a payment was entered incorrectly, remove it and re-enter it.

Hide Keypad

This button shows or hides a numeric keypad, and could be useful for touch screen interfaces.

Screen References - Log On

Select a staff and enter your password to Log On.

User Name:

Select User. This is used to uniquely identify the user.

Password:

Enter the password for this user.

Reset Password

Retrieve a forgotten password.

Screen References - Options ~ Web Access

Browser Access

For more information on setting up Browser Access, see this Knowledge Base article:
www.nch.com.au/kb/10233.html .

Screen References - Options ~ General

This tab is used to enter details about your business or company. Most of the information is printed on each receipt or report. If you don't want the information printed, you can leave the fields blank.

Company Details

Business Name:

Enter the official name of the business (e.g., Acme Corporation, Inc).

Registered Number:

In many countries, each business has an official number which must be displayed on the receipt. Please enter it here.

Address:

Enter the address of your business as you want it to be printed on the receipt.

Contact Details:

Enter the contact details you want on the receipt. For example, phone, fax, email address and website.

Logo Image File:

To add your logo to receipts and other reports you can select the file path to a bmp/gif/jpg/png image.

Report Send Settings

These settings only apply to the sending of reports via fax or email. Please note that they do not affect the sending of email directly to salespeople. The 'Email' button on the salesperson list uses your email client software.

Email Settings...

Please refer to the link http://www.nch.com.au/kb/10018.html for more details.

Fax Settings...

To send faxes you need an electronic gateway to send directly from your PC.

Run on Startup

Copper can be configured to run automatically whenever a user logs on to the computer.

Run Copper automatically when you log in

Tick this option if you want Copper to run automatically when a user logs on to the computer. Specify for whom Copper will automatically startup by selecting one of the following options from the pull down list:

- Start when any user logs on : to start Copper whenever any person logs on to the computer.
- Start when this user logs on only : to start Copper only when the current user logs on to the computer.
- Start before logon. Show all users' tray : to start Copper when the computer starts up and to make the system tray icon visible to all users.
- Start before logon. Show this user only : to start Copper when the computer starts up and to make the system tray icon visible only to the current user.
- Start before logon. Do not show icon : to start Copper when the computer starts up, without showing the system tray icon.

Service Settings

Use this option if you need advanced control over how Copper runs in the background.

Enable touchscreen buttons

This makes some dialog buttons larger, for use on a touchscreen

Enable system touchscreen keyboard

This brings up a touchscreen keyboard when Copper starts. This option only applies to Windows 7 or later.

Screen References - Options ~ Sync Apps

Copper Synchronization Settings

Do not synchronize items. Items are local to this computer only.

Check this option to disable client and server synchronization behavior.

Synchronize this installation of Copper as a client of Inventoria or Copper

Check this option to permit Copper to connect remotely with either Inventoria or Copper for downloading current item data and uploading quantity changes.

Access Authentication Code (must match the server program):

Enter the code that Copper will use to connect to a server Inventoria or Copper.

Address or IP number of server program (not including 'http://'):

Enter the address or IP of the server program to which Copper should connect.

Port number used by server program:

Enter the port number used by the server program to accept web connections. Inventoria has a default port number of 1097 and Copper has a default of 1096.

Location name for this business profile:

Select or enter the name of the location in the server Inventoria which corresponds to the current business profile in Copper.

Retrieve Locations

Use this button to request a list of locations existing in the server Inventoria.

Update Now

Use this button to immediately perform an item synchronization using the current settings.

Allow Copper to act as a server for other installations of Copper

Check this option to permit other instances of Copper to connect remotely for downloading current item data.

Access Authentication Code (must be entered in client program):

Enter a code that other instances of Copper will use to connect to this business in Copper.

Screen References - Options ~ Transaction

This tab is used to control the way transactions are recorded.

Transaction Details

Next Transaction Number:

This is the current transaction number. It is increased every time a new transaction is recorded.

Number Prefix (optional):

The transaction number prefix is optional. You can enter digits or characters to be used in front of any transaction number.

Payment Methods

When you apply a payment you select the payment method. This can then be used to create reports of payments and to aid in reconciling statements. You can change the default list of payments by entering a comma separated list of the methods your company accepts here. An example is Check,Bank Deposit,Credit Card, etc. Note: The first item in this list will be the default selection in the payment dialog.

Credit Card Label:

If you change the payment methods, select which method, if any, is used for online credit card processing.

Activate and Redeem Gift Cards

This option allows gift cards to be issued and redeemed.

Screen References - Options ~ Receipt

This tab is used to set the receipt layout.

Receipt Details

Print small size receipts

This option forces receipts to be printed with narrow widths. It is intended for use with continuous receipt paper rolls.

Paper Width:

Select an appropriate paper width for small size receipts.

Side Margin (inches):

Enter the measurement, in inches, that printed content will appear from the paper edges along the left and right sides for small size receipts.

Top and Bottom Margin (inches):

Enter the measurement, in inches, that printed content will appear from the paper edges along the top and bottom for small size receipts.

Always print receipts to default printer without prompting for print dialog.

When checked, the print data is sent to default printer. That means, no print dialog is displayed to select a printer, or to change its settings, after the 'Print Receipt' command is initiated.

Print duplicate copies of receipt.

When checked, two copies of receipt is printed, a customer copy and a store copy.

Show salesperson's name on receipts.

Select whether to show the salesperson's full name on all receipts.

Logo Height (inches):

The logo height field determines the size of your logo when it is printed. The logo will be stretched or shrunken so it matches that height while still maintaining the correct aspect ratio.

Preview Receipt

Clicking the Preview Receipt button will open a preview of what the printed receipt will look like. Before this window opens, the Copper program may ask you to save the receipt settings.

Screen References - Options ~ Receipt Text

This tab is used to set the text that appears on receipts.

Customize Receipt Text

Receipt Text Titles:

This is the text that will be printed on receipts. Select a title or heading from the drop-down menu, then alter the text for that item in the field to the right.

Comments

Text entered here will appear at the bottom of the printed receipt. Choose an alignment and font size for the text.Note Comment:

Enter any text which will appear near the bottom of the receipt.

Foot Comment:

Enter any text which will appear at the very bottom of the receipt.

Preview Receipt

Clicking the Preview Receipt button will open a preview of what the printed receipt will look like. Before this window opens, the Copper program may ask you to save the receipt settings.

Screen References - Options ~ Tax

This page is used to configure any sales tax, GST or VAT rates which are applied.

Sales Tax System:

This is where you select if sales tax applies in your state or country and whether there are 1, 2 or 3 rates.

Tax Rates

Tax Name:

Enter the name that the tax is called in your state or country (e.g., Sales Tax, GST, VAT etc).

Tax Rate (percent):

Enter the default tax rate.

Tax Name 2:

This is where you have a second rate of tax. Note that the rates are not cumulative. So if the rates should both apply Rate 2 should be the dual rate.

Tax Name 3:

This is where you have a third rate of tax. Note that the rates are not cumulative. So if the rates should all apply, Rate 3 should be the combined triple rate.

Tax Options

By default items have this tax rate:

Any new item will have this rate selected by default.

Item prices are tax inclusive (presumed to already include tax)

If this is ticked, all items subject to tax will be priced and displayed as being tax inclusive.

Screen References - Options ~ Regional

Regional Format Settings

Currency Symbol:

This is the symbol used for money in your country - usually $.

Currency Order:

Use this option to select if the currency symbol is before the number (e.g., $10.00), or after the number (e.g., 10.00$).

Currency Digits:

Use this option to set the number of digits after the decimal point.

Decimal Symbol:

This is the symbol used for the decimal point - usually a dot everywhere but in Europe, where a comma is used.

Thousands Symbol:

This is the symbol used to separate thousands - usually a comma.

Number of Decimal Places For Quantity:

This is the number of digits that will appear to the right of the decimal place when displaying quantities. Note that this does not apply to currency amounts.

Rounding Settings

The rounding feature allows Copper to round (up/down) the total amount for transactions to the selected interval when processing the payments. Rounding becomes necessary when lower denomination of coins are unavailable to tender for cash payment type transactions. Note that if you apply the exact total due amount to payment, rounding won't be applied even if the feature is active, because it eliminates the necessity to provide any change back to the customer.

Rounding Type:

Use this option to enable and disable rounding totals, and select rounding types.

Rounding Interval:

Use this option to set the rounding interval. E.g.: if setting to nearest 5 cents, select $0.05 from the pull-down list.

Rounding Rule:

Use this option to specify rounding rules.

Round each item individually

Use this option to round each item in an order separately. Otherwise, rounding is applied only after the order total is calculated.

Print Settings

Printed Date Format:

This is the date format used for printing and PDF generation

Paper Size:

This is the paper size used for PDF generation and when the default printer is used.

Side Margin (inches):

Enter the measurement, in inches, that printed content will appear from the paper edges along the left and right sides.

Top and Bottom Margin (inches):

Enter the measurement, in inches, that printed content will appear from the paper edges along the top and bottom.

Screen References - Options ~ Sync Apps - Network

Application Synchronization Access

For more information on setting up Web Access used for Application Synchronization, see this Knowledge Base article: www.nch.com.au/kb/10233.html .

Screen References - Item ~ Item

Enter items into the Copper system to complete transactions quickly and easily. To enter a new item, click the Enter New Item link from the left sidebar on the main page, or click Add from the Items List to pull up the Item dialog. Then, use the descriptions below to fill out the information about your new item.

Item Code:

Enter a short, unique (but memorable) code for this item. This code will be used to quickly add items to a transaction.

Item Description:

Enter the full description you want to be displayed on the transaction.

Unit Value (price or rate):

This is the price of a single item.

Discount:

Enter the discount as a percentage of the normal unit value.

Tax:

Select the tax rate which applies. If you only see 'None' you may first need to configure the Tax Options (Options from the main window then click the Tax tab).

Screen References - Item ~ Coupon

Enter coupons into the Copper system. Coupons in Copper are discounts that are applied to entire purchase (i.e, transaction). You can create as many coupons as you want. Copper now supports multiple coupons per transaction. To enter a new coupon, click the Add New Coupon link from the left sidebar on the main page, or click Add New Coupon from the Items List to pull up the Coupon dialog. Then, use the descriptions below to fill out the information about your new coupon.

Note: A coupon can be entered in local currency format or percentage format. However, the tax calculations may defer based on your format selection. See the respective format below for details on tax calculations. It is recommended to try out few experimental transactions with different types of coupons.

Coupon Code:

Enter the code of the Coupon or gift card, if applicable.

Coupon Description:

Enter the full description you want to be displayed on the receipt.

Coupon expires on:

Enter the date when the coupon expires.

Discount Price

Discount Value:

Enter the discount amount in your local currency to be applied on total bill. The amount is simply deducted off the after-tax total, i.e., the discount is applied on after tax amount.

Tax Group:

Select the tax group of the item(s) to which this coupon will apply. For manufacturer coupons, usually you would enter None. For store coupons that apply to a specific item, enter the tax group of that item. For store coupons that apply to the entire purchase, enter All. The coupon will be applied prior to calculating the selected tax.

Discount coupon is in percentage

Check this option if you want to allow discount in percentage instead of the discount value in currency. The amount is deducted off the before-tax subtotal, i.e., the discount is applied on before tax amount.

Discount in Percentage

Discount Percent:

Enter any discount as a percentage. The percentage amount is deducted off the before-tax subtotal, i.e., the discount is applied on before tax amount.