

jCatalog

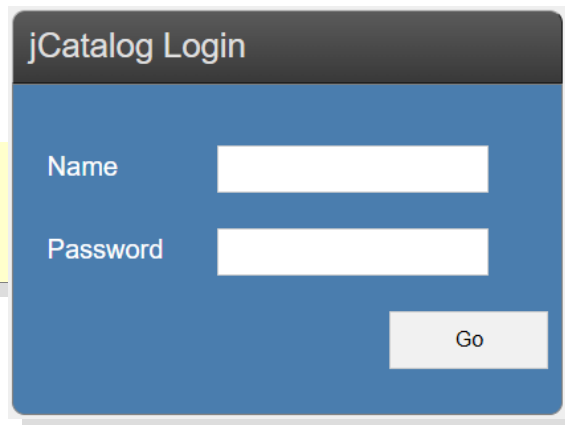
Procedural Guide

jCatalog lets your wholesale customers order online from your QLists made in jWebPOS.

1 - Log in

You can log in to jCatalog with your jWebPOS user credentials.

You will have to make Customer credentials for each of your customers to let them access the jCatalog.



The image shows a login form titled "jCatalog Login". It has a blue background. There are two input fields: "Name" and "Password". Below the "Password" field is a "Go" button.

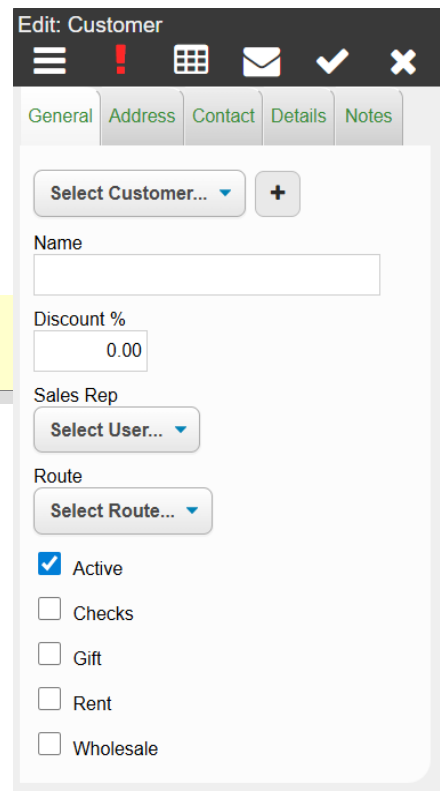
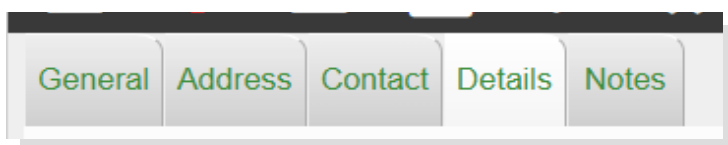
To add login credentials to Customers, navigate to Edit/New in jWebPOS. Select the Customer button.



- Select an existing customer or create a new one.

Check 'Wholesale' if this is a wholesale customer. This will let them be eligible for discount levels.

- Navigate to the Details tab:



The image shows a form titled "Edit: Customer". It has a dark header with a menu icon, a red exclamation mark, a calendar icon, an envelope icon, a checkmark icon, and a close icon. Below the header are five tabs: "General", "Address", "Contact", "Details", and "Notes". The "Details" tab is selected. The form contains several fields: "Name" (text input), "Discount %" (text input with "0.00" value), "Sales Rep" (dropdown menu with "Select User..." text), "Route" (dropdown menu with "Select Route..." text), and a list of checkboxes: "Active" (checked), "Checks", "Gift", "Rent", and "Wholesale".

You should see a page like this:

Charge allows your customers to run a tab. You can set the **Limit** on their account tab, 0.00 being no limit.

Tax Exempt enables the option for the customer to make tax-exempt purchases. Enter their state-issued **ID #** in the box to the right.

Default Acct sets an account for the customer's purchases to be charged to.

Loyalty allows the customer to run their purchases through one of your loyalty programs, letting them be eligible for your loyalty-program-specific discounts and offers.

At the bottom of the menu, fill out a **User Name** and **Password** for your customer to use.

The screenshot shows a software interface with several tabs: General, Address, Contact, Details, and Notes. The 'Details' tab is active. It contains the following fields and options:

- Charge: Limit 0.00
- Tax Exempt: ID # [empty box]
- Default Acct: Select Account... [dropdown]
- Loyalty: Select Loyalty Card... [dropdown]
- User Name: [empty text box]
- Password: [empty text box]

Make sure to let the customer know what their credentials are to sign in with!

2 - Main Menu

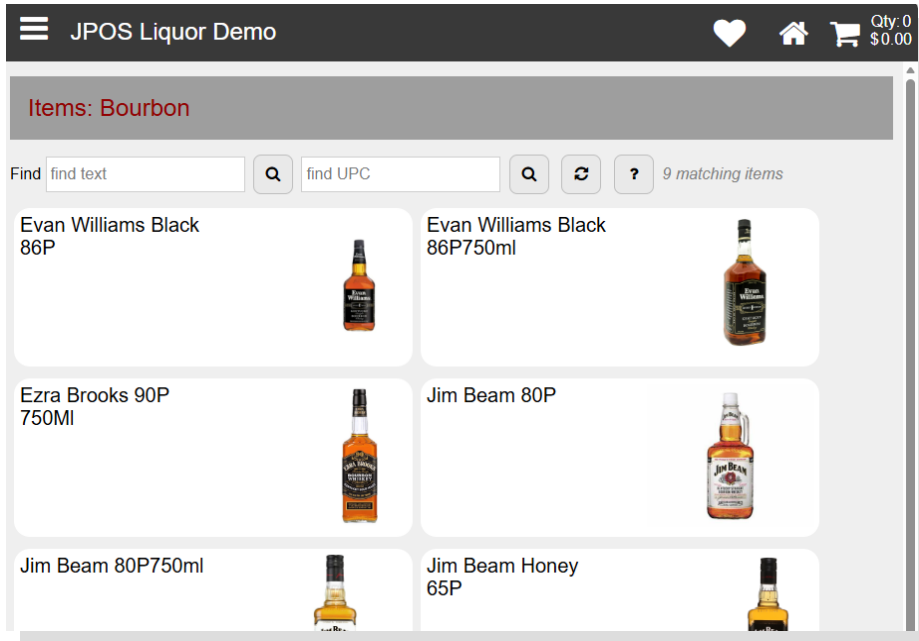
If you have QLists already made and checked **Catalog**, you should see a page like this:

The screenshot shows the 'Main Menu' of the JPOS Liquor Demo application. At the top, there is a navigation bar with a hamburger menu icon, the text 'JPOS Liquor Demo', and icons for a heart, a home button, a shopping cart, and a price tag showing 'Qty: 0 \$0.00'. Below the navigation bar is a search bar with two input fields: 'find text' and 'find UPC', each with a magnifying glass icon. To the right of the search bar are three icons: a refresh icon, a home icon, and a question mark icon. The main content area displays a grid of liquor categories, each in a rounded rectangular button:

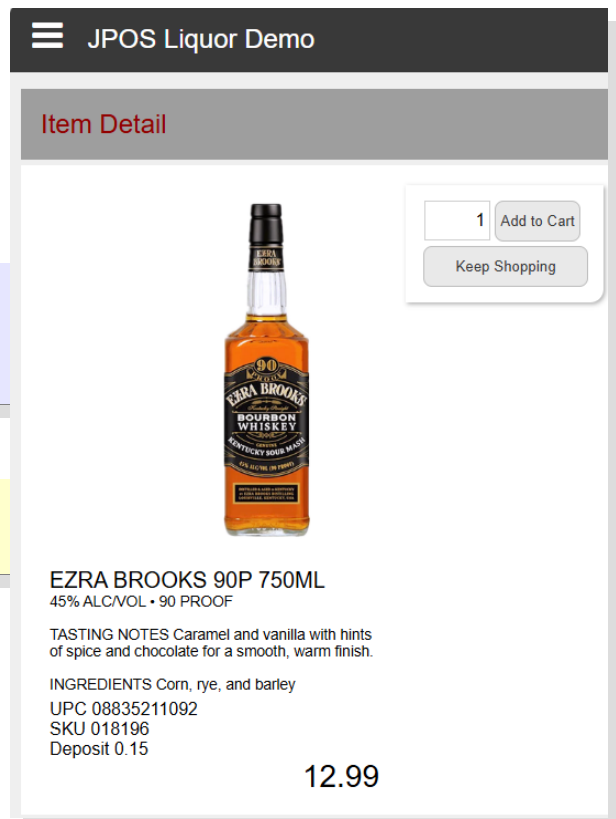
- Bourbon
- Brandy
- Cocktails
- Cordials
- Gin
- Rum
- Scotch
- Tequila
- Vodka
- Whiskey
- Whiskey Canadian
- Whiskey Irish

If you do not have any QLists already made, refer to the QList guide.

When you select a list from the Main Menu, you should see a page like this if it is populated:



When a customer selects an item, they will see a page like the one on the right:



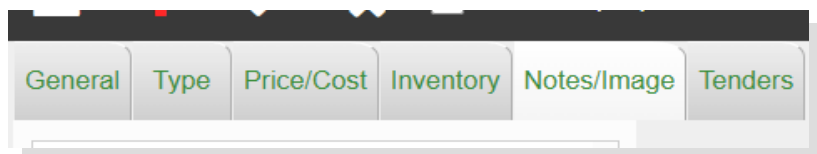
Beneath the item name, a description may appear if you have added it to the item.

You can add a description through Edit Item in jWebPOS:

- Go to Edit/New, then select:



- Go to the Notes/Image tab:



You should see a page like the one on the right:

Item Description will give info that the customer can see. (320 character limit)

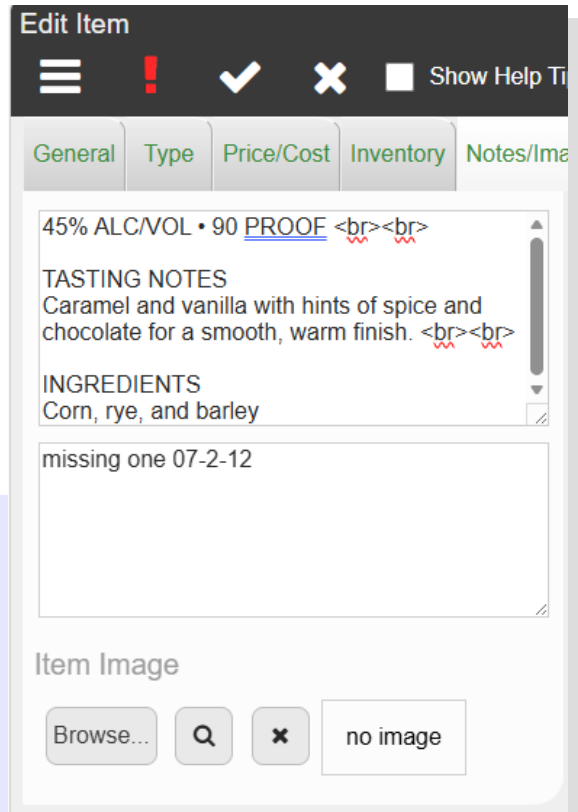
Item Notes are only for the store to view, and will not be visible to customers in jCatalog.

Each of these text fields supports HTML markdown for text formatting. Some quick examples are:

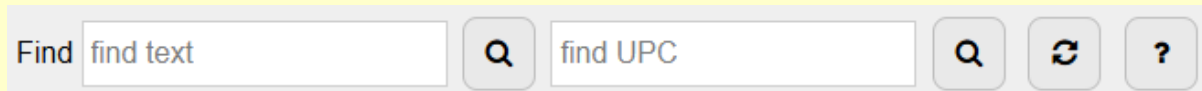
`
` or `</br>` at the end or beginning of a paragraph will create a line break. More `
`s means more space!

``Wrapping text`` like this will make its contents **bold**.

`<i>` These `</i>` wraps will apply *italics*.

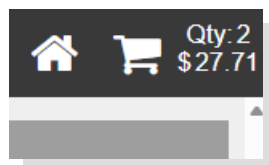



Customers can also find items by using the search bar:

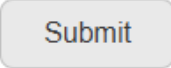


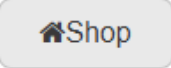
3 - Ordering

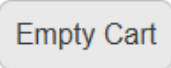
When your customer adds items to their cart, it will be updated in the top right corner of their page:



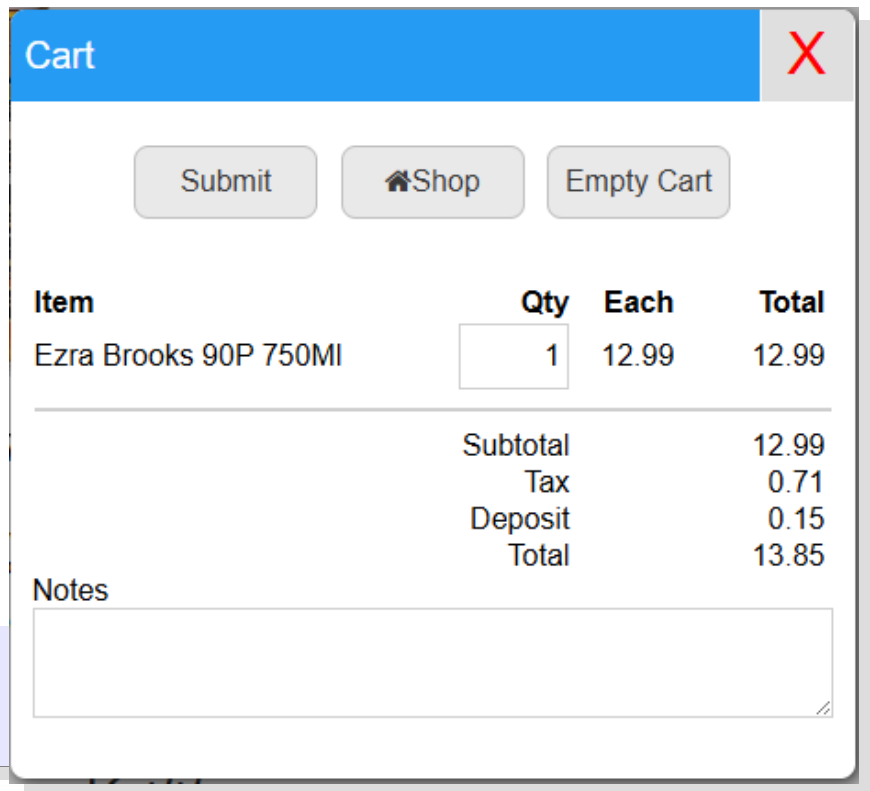
Selecting the  cart button will bring up the checkout review window:

 will send the order to your Active Orders list.

 will return the customer to the main menu without clearing the cart.


 will clear the cart and return to the main menu.

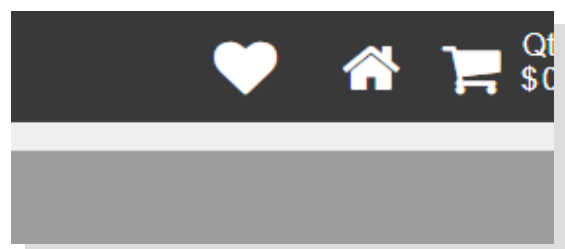
Your customers can add notes to their order with this text box:



Item	Qty	Each	Total
Ezra Brooks 90P 750MI	1	12.99	12.99
Subtotal			12.99
Tax			0.71
Deposit			0.15
Total			13.85

Customers can recall items they have ordered recently from the Favorites Page.

Go to the  favorites button on the right side of the Navigation Bar:



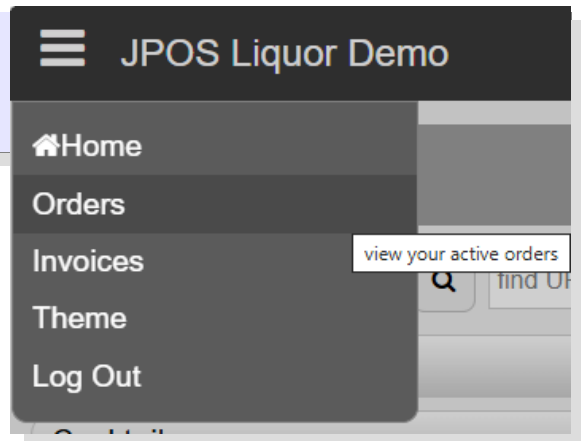
Items purchased on the logged in account recently will populate the Favorites Page:



Jameson Irish Whiskey 80P375ml

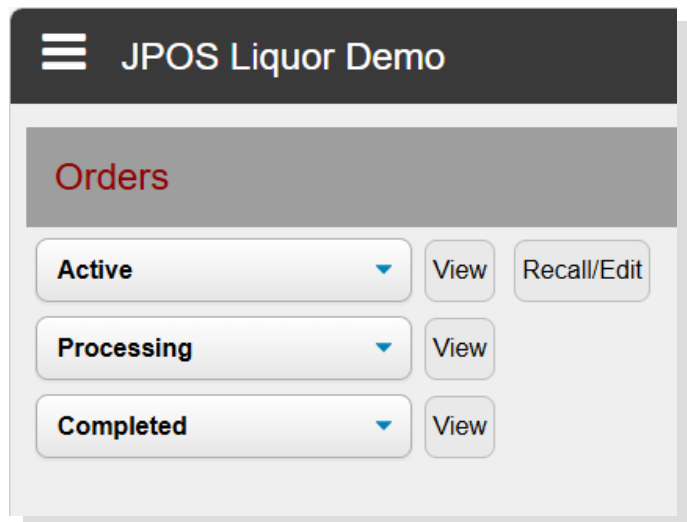
4 - Reviewing Orders as a jCatalog Customer

In jCatalog, you can view your orders as a customer and edit your active orders before they go to processing.



Go to the Navigation Bar and select Orders:

Active orders are orders waiting to be reviewed and processed. You can use [Recall/Edit](#) to bring up the order in the Cart window.



Processing orders are orders that have been reviewed by a jWebPOS user and are currently underway.

Completed orders are finished orders marked as such by a jWebPOS user.

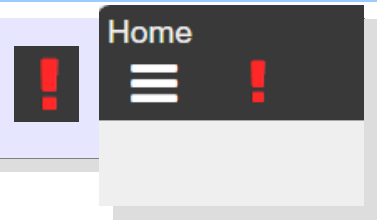
Viewing an order will bring up a window like this:

A screenshot of an order review window. The window has a blue header with the text 'Order: 03-25-2026 11:04:13' and a red 'X' icon in the top right corner. The main content is a table with columns for Item, Qty, Each, and Total.

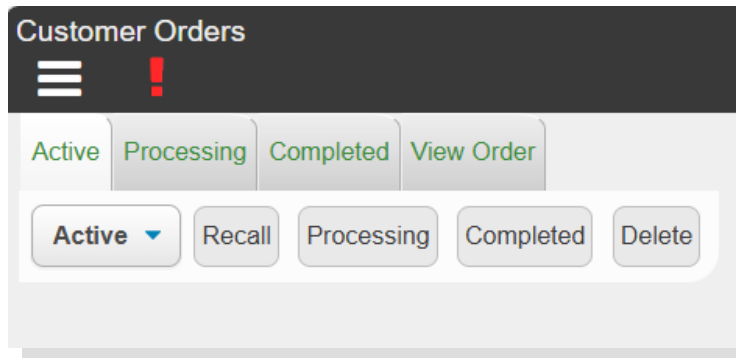
Item	Qty	Each	Total
Ezra Brooks 90P 750MI	2	12.99	25.98
Subtotal			25.98
Tax			1.43
Deposit			0.30
Total			27.71

5 - Processing Orders as a jWebPOS User

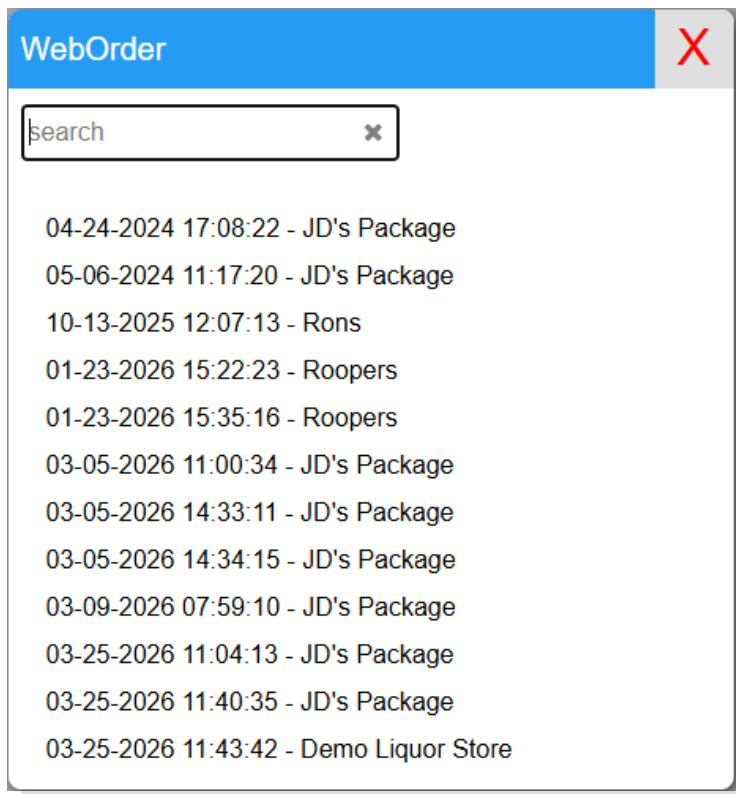
When you have active orders pending as a jWebPOS user, you will see the active orders button in jWebPOS on the Navigation Bar:



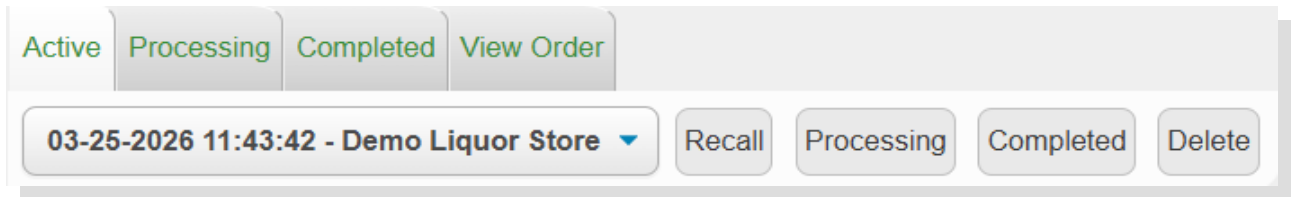
This button will bring you to the Customer Orders page:



From here, you can view all active orders by using the drop-down menu. A search window will open up, similar to this one if you have active orders pending:



When you select an order, it will be held in the drop-down button:

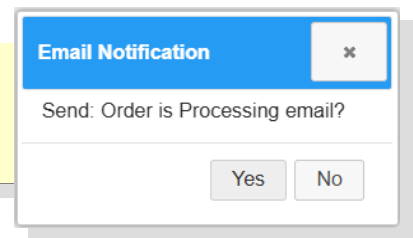


Recall will send the order to the Invoice Page, where it can be edited or have notes attached.

The order will remain even if the cart is emptied on the Invoice Page.

Processing will advance the order to the Processing stage, indicating that the order is being reviewed by a jWebPOS user and is currently underway.

Moving an order to Processing can send a notification email to the customer, if an email is provided in that customer's contact information.



Completed will mark an order as fulfilled. At this stage, it can only be viewed or deleted.

Delete will permanently delete an order.
