jWebPOS – Getting Started

Procedural Guide

This guide will demonstrate how to log in to your jWebPOS site and how to navigate through the basic pages.

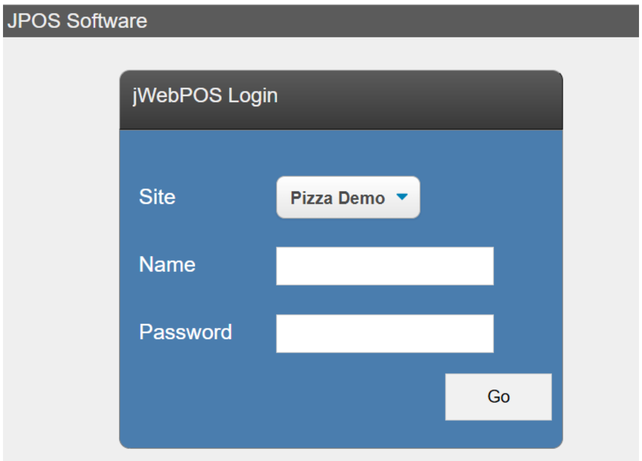
1 - Login

Begin by opening your web browser, and navigate to one of the following address types:

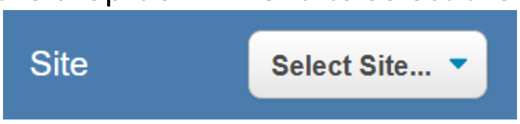
- https://jwebpos.com/ if your site is hosted on the JPOS server

- https://"YOURDOMAIN".com/jwebpos/jweblogin.aspx if your site is installed at your location, with your domain replacing "YOURDOMAIN"

You should see a page like this:



Use the drop-down menu to select the name of your site:

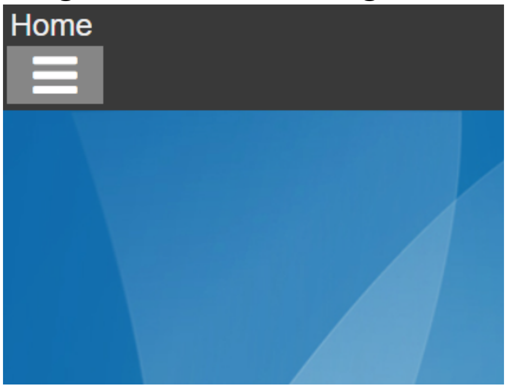


If your site is not listed, please let an on-site technician know, or contact our support team (options available at https://jpossoftware.com/JPOS/Supportpage)

Enter your user credentials in the Name and Password fields:

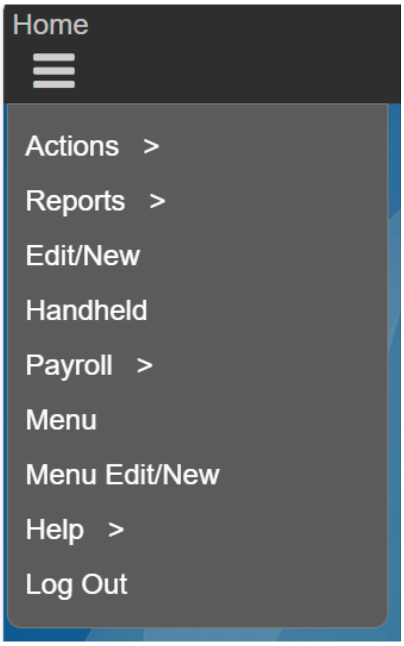
If you receive an error for an invalid username or password, or you do not remember your credentials, please let an on-site technician know, or contact our support team (options available at https://jpossoftware.com/JPOS/Supportpage)

After you successfully log in, you should see the Home Page, which should only have the background and the navigation bar at the top:



2 – Navigation

Open the nagivation menu by selecting the  button:

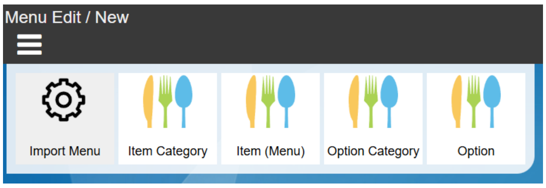


Items with a > open up to more options when selected:

•Actions perform various managerial tasks, such as viewing customer orders.
•Reports run numbers, like handling account balances and inventory count.
•Payroll records paychecks and runs payroll-specific reports.
•Help offers a link to the JPOS Help Site, as well as the option to receive remote support from a technician.

3 – Menu Setup

Open the navigation menu and select Menu Edit/New. You should see this page:



The Menu Edit / New page is where you can edit the menu that your customers will see when they travel to your site. From here, you can create item and topping/option categories, as well as the items and options in those categories.

For more information on setting up a menu, please refer to the Menu Setup Procedural Guide.

4 – Routines & Mobile Routines

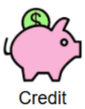
Open the navigation menu and select Edit/New. You should see this page:

This page gives you access to managerial routines to make changes to your site and its data:

The contents are summarized as follows:

•General Settings lets you change your site's display theme, set alcohol and tobacco restrictions, define tax values, and perform advanced functions.

•Account helps you manage accounts you create, such as for checking or payroll.



•Credit lets you record deposits with notes into your accounts.

•Debit is for recording payments from your accounts to vendors, businesses or people.

•Expense allows you to record business expenses in categories that you define.

•Customer lets you enter information about customers, discount their purchases, exempt them from taxes, and enroll them in loyalty card programs.

Customer Notes •Customer Notes runs a quick report on all existing customer notes.

Customer FTP •Customer FTP is for setting up a File Transfer Protocol. This allows wholesalers to send invoices to their customers.

Department •Department lets you create and edit departments for your inventory and services. This is where you can add department-wide tags for alcohol, tobacco, EBT eligibility, and applicable taxes.

Employee •Employee is for keeping information about your employees, such as wages, contact information, and misc notes.

Gift Card •Gift Card can register new gift cards, edit their balance, and see when a card was last used.

Group •Group lets you create groups to apply to items that you may wish to share properties between, such as price, that you can separate based on pack quantity or weight. Changing a single item in the Group updates all items within that same Group.

Item •Item can create or edit your items. You can specify group, department, vendor source, taxes, pricing, and other item properties from here.

Inventory •Inventory runs a search by name or department to find and edit the reported quantity (qty) of specific items in your inventory.

Label Setup •Label Setup lets you create and edit your printed labels. You can specify the size and contents.

Labor Type •Labor Type creates labor types to be listed in reports. These will be listed in TimeClock reports.

Printer •Printer is for printer-specific settings.

QB Links •QB Links sets up QuickBooks to link with your JPOS account. Instructions are provided on page.

QList

•Qlist can manage sets of items you specify with the Advanced button. Items in Qlists are displayed as buttons on the invoice page, making it easy to add to a cart. This is useful for items that do not have a barcode (slice of pizza, fountain soda, apples, etc.) or are difficult to scan (propane tank stored in a cage outside, ice bags, heavy beer cases, etc.)

Qty Group

•Qty Group is for specifying maximum quantities that may be purchased in a single transaction for certain items in your database. Some manufacturers may specify these limits for their products.

Route

•Route lets you create routes to be used in Sales Reports

User

•User is for user-specific settings for employees that use your site.

Vendor

•Vendor manages information on the vendors your business uses. These can then be selected on your relevant items or in reports.

Vendor FTP

•Vendor FTP is for setting up a File Transfer Protocol to send and receive orders from vendors.

Vendor Notes

•Vendor Notes reports all vendor notes on record.

Site Database

•Site Database is used for defining where your site gets its file information.

Altria Setup

•Altria Setup is for defining departments and values to be used in Altria Group relevant reports.

Brand/Mfr

•Brand/Mfr records brand and manufacturer names that you will have the option to select on your items and display in reports.

Mfr Loyalty

•Mfr Loyalty can manage manufacturer loyalty promotions.

Chain Sites Setup

•Chain Sites Setup keeps track of chained sites and their properties.