

Pocket Change™

Palm Edition
(Release version 1.20)

User Information Guide

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Pocket Change User Information Guide

(Palm OS Edition)

Welcome

Welcome to Pocket Change for the Palm OS. Pocket Change is a tool used for printing cash-based receipts. With its intuitive interface, all you need to do is enter an amount, click Sale, then enter the amount of cash your customer gives you. Pocket Change will display the change owed to the customer and allow you to print a cash receipt.

This document outlines the major features and uses of Pocket Change. In order to use Pocket Change, you must have an existing version of our Credit Card Verification Software, as Pocket Change uses the Merchant Account information and customer receipt and printing options that you set up in this program.

Pocket Change Requirements

Pocket Change will work with any Palm OS Operating System. However, in order to use Pocket Change, you must meet the following criteria:

- Our Credit Card Verification Software must be installed.
- You must have Pocket Merchant or Pocket Spectrum setup in our Credit Card Verification Software
- You must have already activated and logged on to your Merchant Account using the Verification Software.

If you launch Pocket Change and receive the following error: "AppForge Booster Required..." it means that you have not properly installed our Credit Card Verification Software.

Installing and Launching Pocket Change

Please follow the instructions below to install Pocket Change onto your device. This is a two step process. The first process is to load the installation file onto your Palm. The second step is to locate the program file and launch it.

Note:

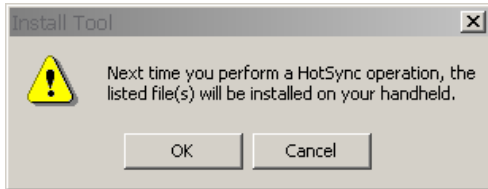
It is assumed that you have already installed the Palm software that came with your PDA and that you have successfully performed at least one Hotsync between your PDA device and the computer you are using to install this software. If not, please consult the documentation that came with your PDA device and set up your system before continuing with this installation.

Installation

In order to install Pocket Change onto your device...

1. Locate the [PocketChange.prc](#) file.
This is the file that was given on some type of media, downloaded from the Internet, or as an attachment through an e-mail.
2. Copy the file to your Windows desktop.
Please see your windows OS documentation on how to do this

3. Double-click on the [PocketChange.prc](#) file.
If your system is setup correctly, the Palm Install Tool dialog will appear.
If you have more than one PDA device being used with your computer, you will first need to select the [Username](#), and then click on the [OK](#) button.
4. Click the [Done](#) button on the [Install Tool](#) dialog box.
5. Click [OK](#) for the message box.

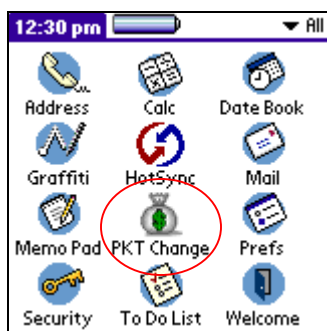


6. Place your PDA device into the Hotsync cradle.
7. Press the [Hotsync](#) button to load the [PocketChange.prc](#) file onto your PDA device and start the installation.

Launching the Program

Once the [PocketChange.prc](#) file is successfully transferred to your PDA device, you will need to locate the Pocket Change program file. To do this, follow the steps below.

1. After a successful Hotsync, remove your Palm Device from its cradle.
2. Click on the [Applications/Home](#) button.
3. Select [All](#) in the [Categories](#) dropdown list.
4. Click on the [PKT Change](#) icon.
The application will launch and require you to activate at least one Merchant account.
Information on how to do this is in the next section.



The Pocket Change Interface

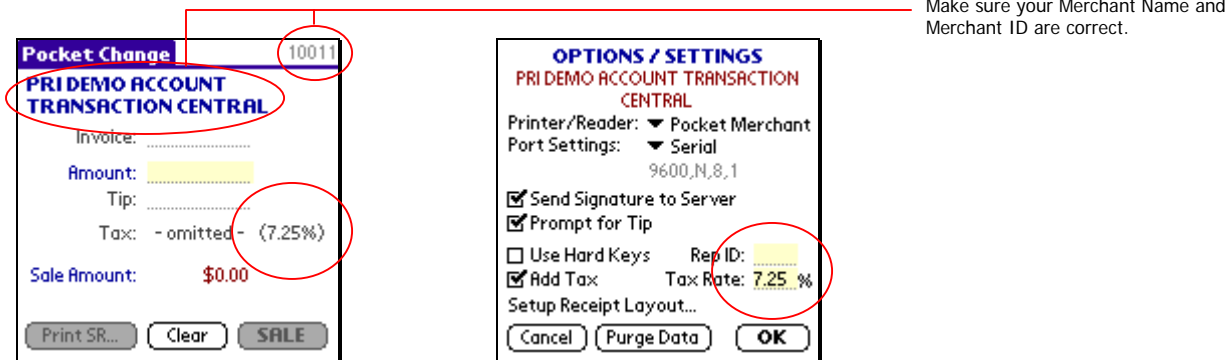
Introduction

The features of Pocket Change can be accessed by menu items, hotspots and buttons. There are two basic screens: (1) a sales screen and a (2) summary screen. In addition, there is also the numeric Keypad interface that you are familiar with in our Credit Card Verification software. These are shown below.

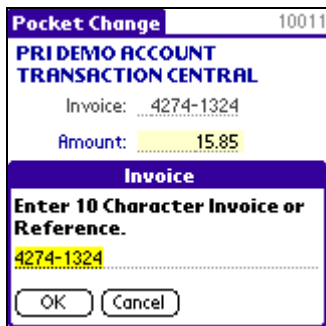
Sales Screen

The sales screen is where you enter a reference number (**Invoice**) and the amount of the ticket item (**Amount**). You can also enter a Tip and Sales Tax. In order enter sales tax; you must have already set up a sales tax value inside the options/settings screen of your Credit Card Verification software. In this example a sales tax of 7.25% was entered.

Also, if you are using more than one merchant account in your software, it is important to verify that your Merchant Name and Merchant ID are correct, since the receipt layout is dependent on what account you are using. Pocket Change uses the Merchant Account you last logged into with your Credit Card Verification software.



When you enter an invoice, and default reference number is displayed. You can click **OK** to keep this reference number, or input your own 10 character code.



When you click on the Amount box, the Keypad is display. Enter the amount of ticket item or service being sold or charged. You can do the same with entering a tip. If you want to add tax to the item, click on the tax area. This hotspot will toggle the tax-added-value on and off.

Enter Ticket Item			
Amount:		15.85	
1	2	3	CE
4	5	6	BKSP
7	8	9	Cancel
0	00	ACCEPT	

Enter Tip:				Sale: \$15.85	
Enter Tip:		2.50			
15%=\$2.38 20%=\$3.17					
1	2	3	CE		
4	5	6	BKSP		
7	8	9	Cancel		
0	00	ACCEPT			

Pocket Change		10011
PRI DEMO ACCOUNT TRANSACTION CENTRAL		
Invoice:	4274-1324	
Amount:	15.85	
Tip:	2.50	
Tax:	1.15 (7.25%)	
Sale Amount:	\$19.50	
Print SR...	Clear	SALE

Click here to turn sales tax calculations on and off.

Click here to toggle tip suggestion on and off.

After entering the amount and invoice, you can click on the **SALE** button to display the Tendered Keypad. Here you enter the amount of money the customer gives you. If you enter an amount less than what the total sales is; a warning message will appear.

Enter Amount				Total: \$19.50	
Tendered:		20.00			
Change: 0.50					
1	2	3	CE		
4	5	6	BKSP		
7	8	9	Cancel		
0	00	ACCEPT			

Enter Amount				Total: \$19.50	
Tendered:		15.00			
Change: N/A					
Information					
Enter an amount greater or equal to the total sale (\$19.50).					
OK					

After entering a valid amount, the summary screen will appear (see below for information on this screen).

The sales screen also allows you to print a service receipt. A service receipt does not display the tip or total, but rather an area where the customer can enter the amount. If you enter a Tip amount and click on **Print SR...**, you will be notified that the Tip amount will not print. Once the customer fills out a service receipt, you can enter the tip amount, click on sale, determine the change (if any) and provide a final cash receipt to the customer. You can also make a copy for your records or keep the handwritten service receipt. A sample of a service receipt is shown later in this user information guide.

Pocket Change		10011
PRI DEMO ACCOUNT TRANSACTION CENTRAL		
Invoice:	4274-1324	
Amount:	15.85	
Tip:	2.50	
Information		
Note: Tip amount will not be displayed for a service receipt.		
OK		

The sales screen as has a number of other features that are accessible only from the menu. To open the menu, click on the Pocket Change title at the top of the screen. When doing so, the following menu will be displayed:



[Enter Cash Given](#) is the same as clicking on the [SALE](#) button.

[Clear Fields](#) is the same as clicking on the [Clear](#) button.

[Suggest Tip – On/Off](#) toggles the Tip Suggestion on a Service Receipt. This is shown later in receipt examples.

[Print Service Receipt](#) is the same as clicking on the [Print SR...](#) button.

[About](#) displays the version number of the software. Always make sure you have the most recent version.

[Exit](#) will exit the Pocket Change software.

Summary Screen

The summary screen is displayed after entering a valid cash (or tendered) amount. This screen displays the amount of change required to give back to the customer and allows you to print a cash receipt by clicking on the [PRINT](#) button.

From this screen, you can return to the previous sales screen by clicking on the [Back](#) button and change amounts or click on the [New Sale](#) button to start entering information for a new cash sale. These features are also available from the menu bar.



Receipt Samples

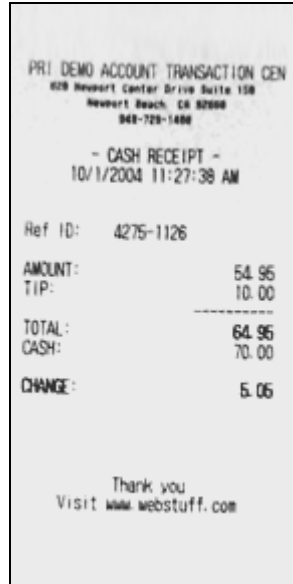
Introduction

There are two types of receipts: (1) General Cash Receipts and (2) Service Receipts. Service receipts allow the customer to enter the TIP and TOTAL. General Cash Receipts display TOTAL, CASH, and CHANGE. Each of these are shown below.

General Cash Receipts



Tip and Tax



Tip Only



No Tip or Tax

Service Receipts



The following Service Receipt shows Tax and Tip Suggestion.

To remove the Tip Suggestion, toggle the Tip Suggestion menu item from ON to OFF in the sales screen.

Tip Suggestion