Ability Total Customer for QuickBooks Point of Sale

Summary

Verify age for restricted items, set purchasing limits, validate memberships and use driver licenses to instantly create customers.

Features

- ✓ Age Verification
- ✓ Instant Customer
- ✓ Membership
- ✓ Purchasing Limits
- ✓ Auto-Zip

Benefits

- ✓ Protect your Business
- ✓ Easy to Setup, Accurate
- ✓ Flexible Settings
- ✓ Age Verification Reports
- ✓ Collect Customer Data
- ✓ Update Customer Info
- ✓ Prompt to Enroll in Memberships
- ✓ Track & Validate Memberships

Industries

- ✓ Liquor Stores
- ✓ Wineries/Tasting Rooms
- ✓ Distilleries
- ✓ Grocery Stores
- ✓ Convenient Stores
- ✓ Vape Shops
- ✓ Medical Dispensaries
- ✓ Gun Stores
- ✓ Memberships
- ✓ + Many More

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intuit Reseller Program
intuit QuickBooks Point of Sale

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Ability BUSINESS

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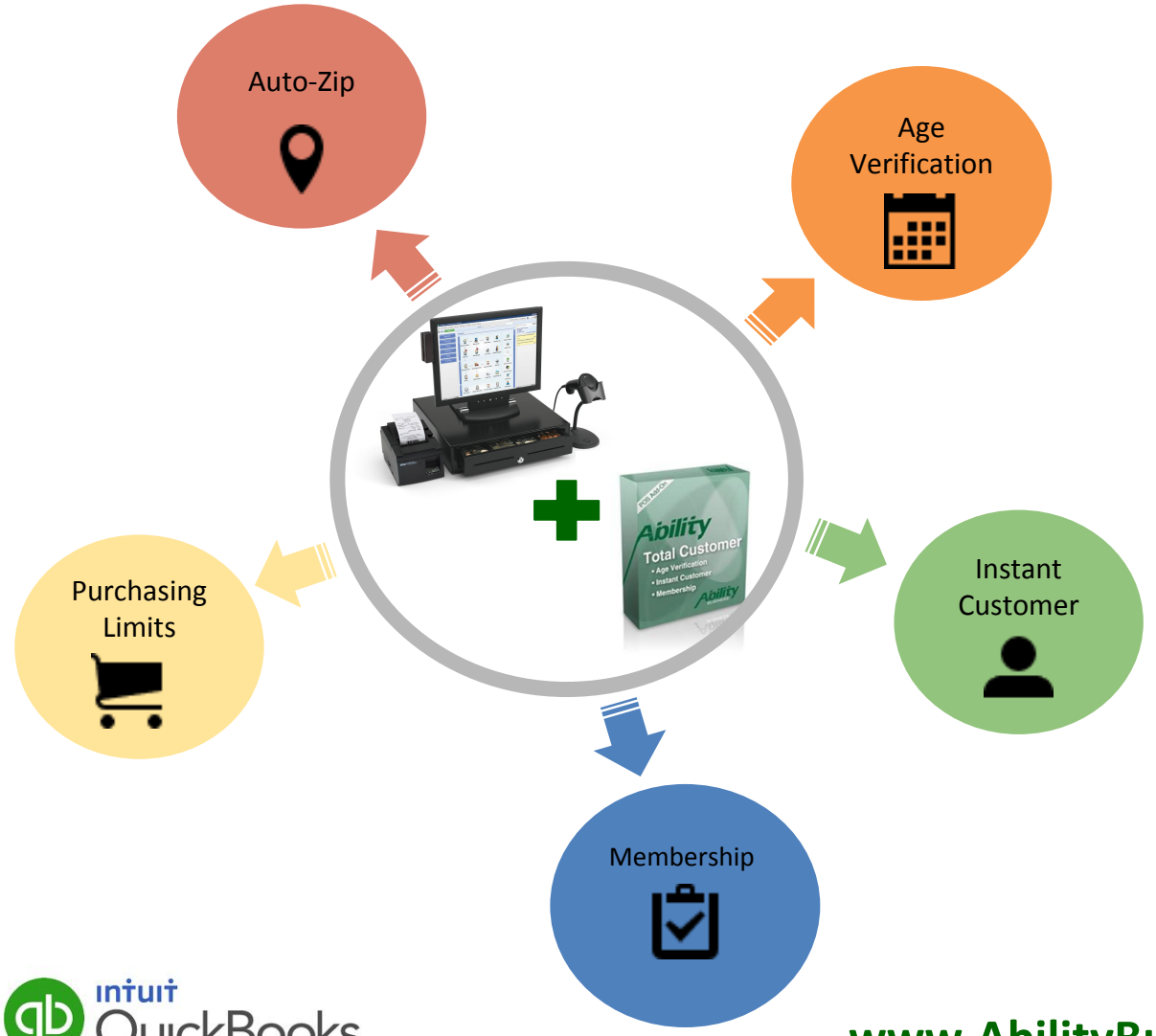
Ability Total Customer

Designed to work with QuickBooks Point of Sale Desktop.



Premier Reseller

Reseller Program

QuickBooks Point of Sale

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Ability Total Customer Settings & Overview

Setting	Description
General Options	Enable the features you would like to use.
Age Verification	Identify age restricted items.
Instant Customer	Quickly create, update and retrieve customer records.
Membership	Validate and track memberships.
Purchasing Limits	Set purchasing limits on specific items that customers purchase.
Auto-Zip	Enter the Zip code and automatically populate the City, State, and Area Code for Customer and Vendor Records.
Share Error Info with Ability Business	Check the box to share Auto-Zip errors with us.
Datafile Location	
Browse	Select where to store your Total Customer Datafile on your computer.
Data Backup Settings	Coming Soon!
ID Card Expiration	Select how to treat expired ID cards for your business. ○ Always Reject ○ Accept with Warning ○ Accept without Warning

Ability Total Customer Settings & Overview

Setting	Description
Age Verification Options	
Automatic Age Verification	Select how to identify age restricted items in QuickBooks Point of Sale. Choose one (1).
By item	Identify specific items in QBPOS. See Appendix A-1.
By Department	Identify specific Departments in QBPOS. See Appendix A-2.
As ALL Items and Departments	Global Setting. See Appendix A-3.
Manual Age Verification	Enable the required features for manually verifying age.
Require DOB (Date of Birth)	Required.
Require Expiration Date	Additional security to check for expired ID's.
Require ID Number	Additional safeguard to collect ID number.
Require Password for Manual Entry	Allows you to require a Manager Override.
Change Password	Ability to update the manager override password.
Reporting	Select your date range for the reports.
Rejected Sales	Portrait Report. Includes Report Date Span, Date/Time of Sale, Sales Receipt #, ID Card #, Birthdate, Age at Time of Scan. See Appendix A-4.
Recorded Scans	Portrait Report. Includes Date/Time of Sale, Sales Receipt #, ID Card #, Birthdate. See Appendix A-5.

Ability Total Customer Settings & Overview

Setting	Description
Instant Customer Options	
Customer Searching	Select how to search customers.
Match First and Last Names	Exact Match.
Match on Last Name	Match based on the number of characters entered.
Select number of characters	Input the number of characters to search in the last name.
Personal Data* *Requires QuickBooks Point of Sale Pro or Multi Store.	Select how you want to handle personal data. Choose one (1). ○ Always Save ○ Prompt to Save ○ Never Save
Data that can be collected and stored in QuickBooks Point of Sale Customer Custom Fields. **QBPOS only has 7 custom fields for customers.**	○ ExpirationDate ○ CardNumber ○ CalculatedAge ○ BirthDate ○ Gender ○ Eye ○ Hair ○ Height ○ Weight
Restore Instant Customer Messages	Restores all previously hidden instant customer message screens.

Ability Total Customer Settings & Overview

Setting	Description
Membership Options* *Requires QuickBooks Point of Sale Desktop Pro or Multi Store.	Validate & Track Membership during Make a Sale Transaction.
Name your Custom Field	Enable a QuickBooks Point of Sale Custom field for Customers. Go to: File->Preferences->Company->General->My Field Labels. MembershipExp is the default name.
Select prompt for Sales Receipt	When a customer is selected on the Make a Sale screen, a prompt will popup. Choose one (1): ○ Warn if membership has expired ○ Warn and block items from being added to the receipt until date is corrected ○ Warn and remove the customer from the receipt
Prompt to Replace Invalid Customer ID	Enable to prompt when ID is invalid. Set the length of the ID.
Only Allow Members Rewards	
Prompt for Renewal	Enable to prompt for Renewal. Enter the name of your POS membership items for New Member and Renewal.
Enable Members Price Level	Set the default Members Price Level.
Customer Facing Display Options	Note: Requires Ability Customer Display Addon
New & Renewal membership customer facing prompt	Enter your message that will be displayed on the CDS.
Customer Prompt Timeout	Enter the number of seconds for prompt timeout on CDS.

Ability Total Customer Settings & Overview

Setting	Description
Purchasing Limits Options	
Designate Items	Select one (1),
Global	All age restricted items.
Individual Items	Select specific items to restric.
Limit Sale	Enter the number that the item can be sold per a time period.
Enter X (Number)	Enter numerical value
Per Y (Time Period)	Select one: Day, Week, Month, 6 Months, Year, or Calendar Year,
Allow Override	Enable to allow users to override Purchasing Limits.

How Age Verification Works

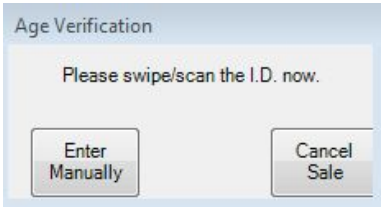
The AAMVA standard requires a 2D barcode and has deprecated the magnetic swipe.

Depending on your customer base, you may require a **3-track magnetic stripe reader, a 2D barcode scanner, or both**.

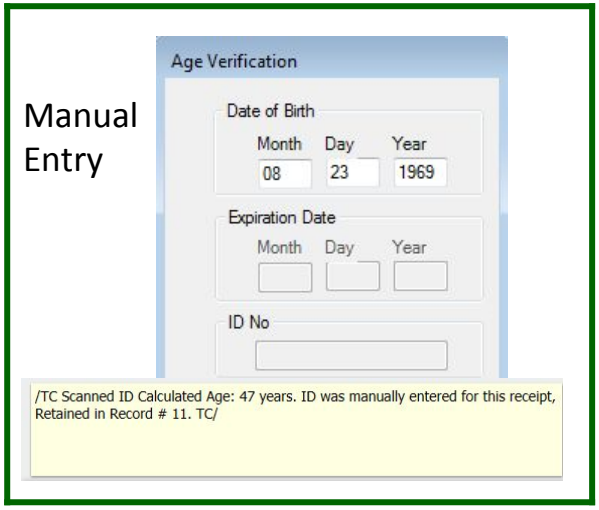
Hardware sold separately. Visit www.AbilityBusiness.com.

1 Scan Age Restricted Item

2 Scan/Swipe or Manual Entry

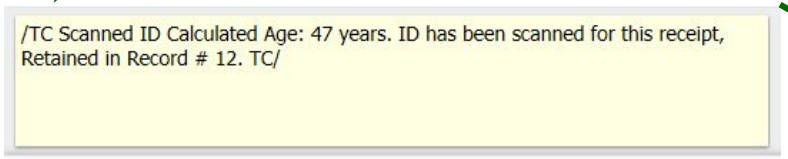


Manual Entry

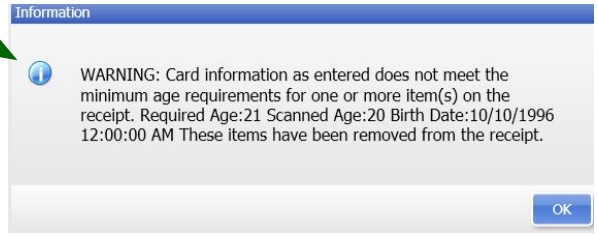


3 Age is Verified

If of age, the calculated age is stored in the comments box.



If not of age, a warning prompt is displayed.

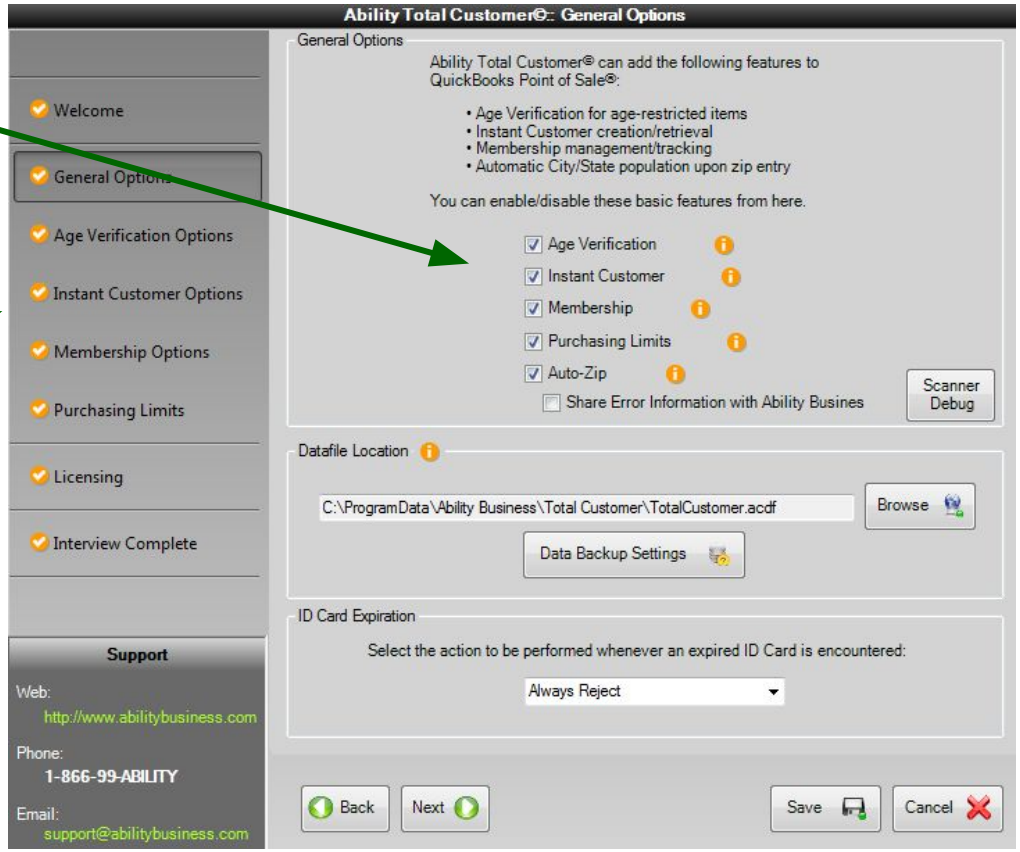


4 View Reports

General Options

1 Enable features you will use.

2 Configure each feature by selecting the page on the left panel.



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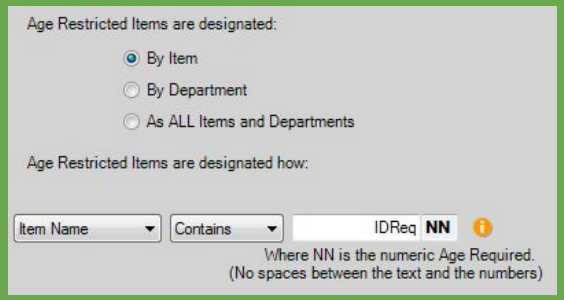
Age Verification - Settings

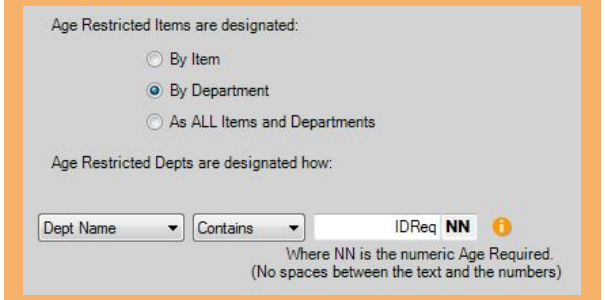
We understand that all businesses have different rules and needs, so we have developed Ability Total customer to be flexible! You will select one (1) of the following:

Choice 1
By Item



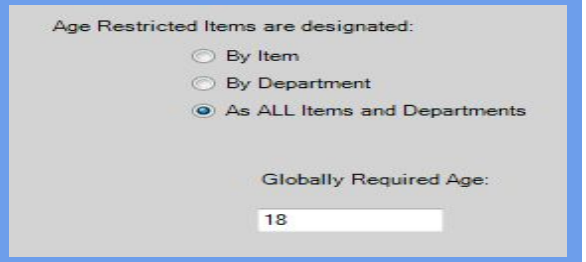
More

Choice 2
By Department



More

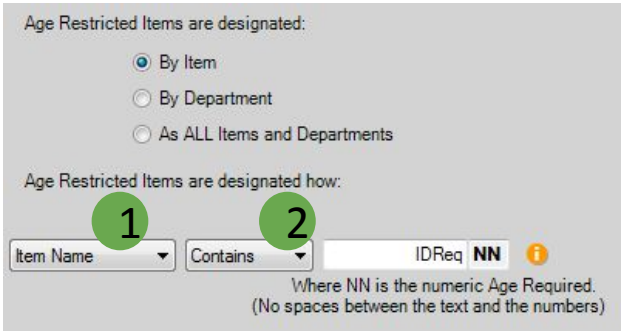
Choice 3
ALL



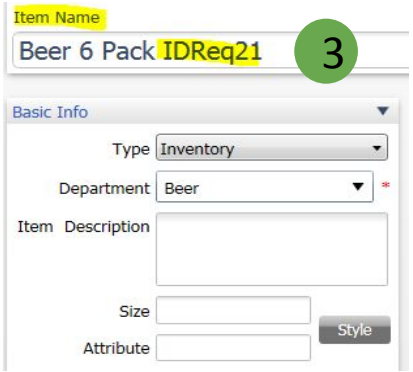
More

Age Verification - By Item

1. Select where you want to add the identifier in QuickBooks Point of Sale Desktop (Choose 1):
   - Item Name
   - Item Description
   - Size
   - Attribute



2. Select from the dropdown placement of the IDReq in the field:
   - Starts with
   - Contains
   - Ends with

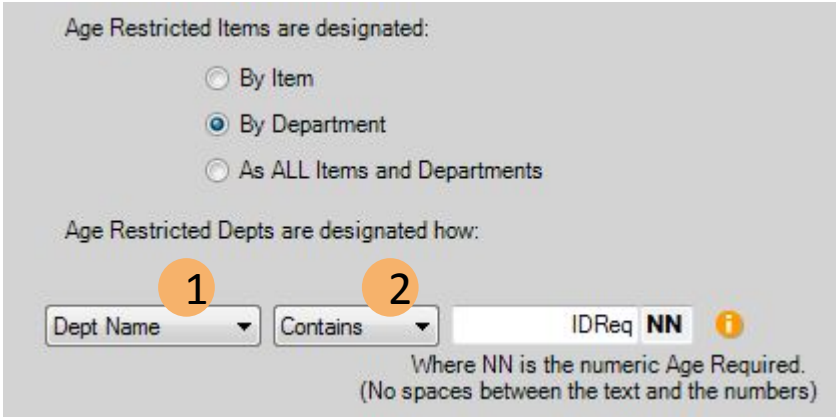


3. In QuickBooks Point of Sale, go to your item list and update the items.

4. Other Examples

Age Verification - By Department

1. Default Setting - Dept Name



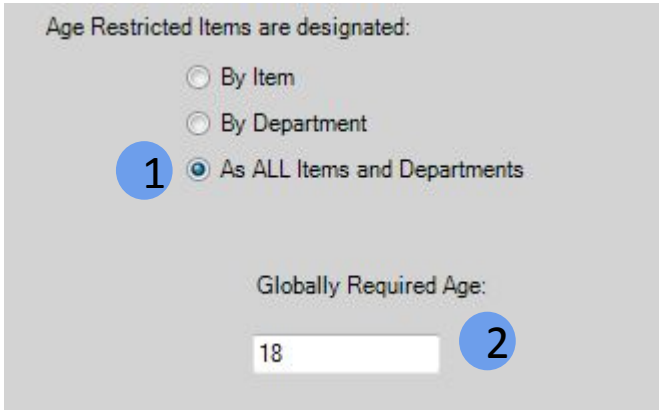
2. Select from the dropdown placement of the IDReq in the field:
   - Starts with
   - Contains
   - Ends with

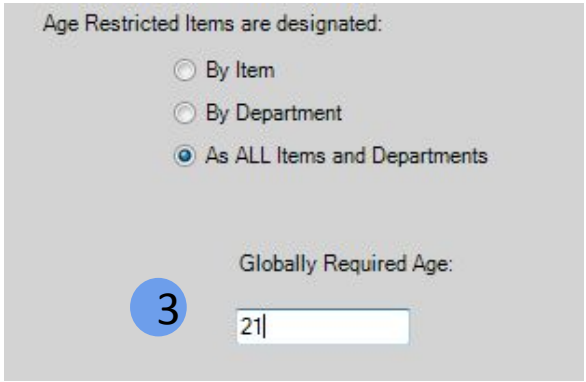
3. In QuickBooks Point of Sale, go to your Department List and update the name to include your IDReq and age.

4. Other Example

Age Verification - All Items and Departments

1. Select All
2. Enter the Global Age
3. Other Example





Rejected Sales

Portrait Report. Includes Report Date Span, Date/Time of Sale, Sales Receipt #, ID Card #, Birthdate, Age at Time of Scan.

Recorded Scans

Portrait Report. Includes Report Date Span, Date/Time of Sale, Sales Receipt #, ID Card #, Birthdate.

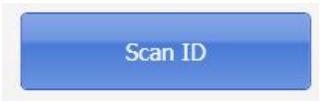
ID Verification History

Report Span from: 8/9/2017 to: 8/23/2017

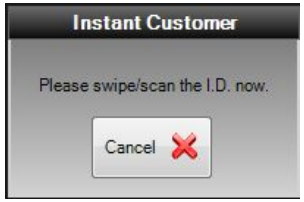
Date/Time of Sale	*Sales Receipt #*	*ID Card #*	*Birthdate*
8/22/2017 12:03:33 PM	54		8/23/1969
8/22/2017 12:49:39 PM	55	RF801637	8/23/1969
8/22/2017 12:57:25 PM	56		10/10/1996
8/23/2017 9:18:55 AM	56		8/1/1972
8/23/2017 9:19:18 AM	57		10/10/1994
8/23/2017 9:20:00 AM	58		5/20/1971
8/23/2017 9:20:25 AM	59		12/19/1985

How Instant Customer Works

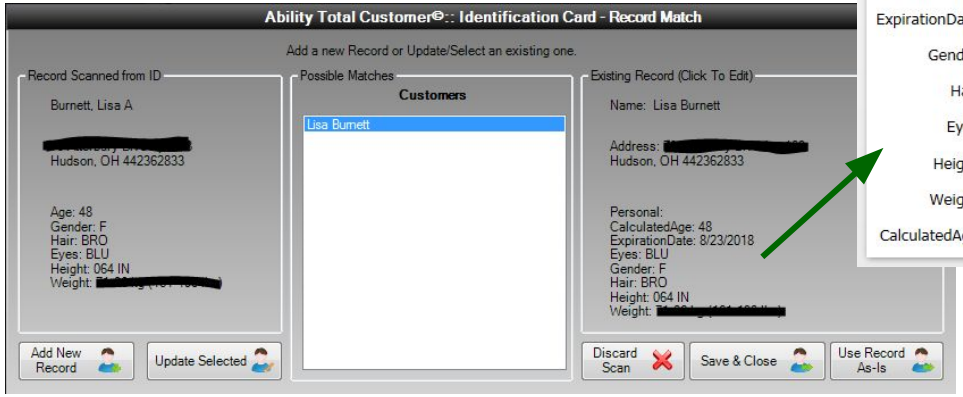
1. Select Scan ID button on the Make a Sale screen

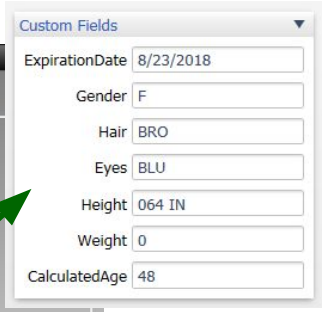


2. Scan or Swipe ID

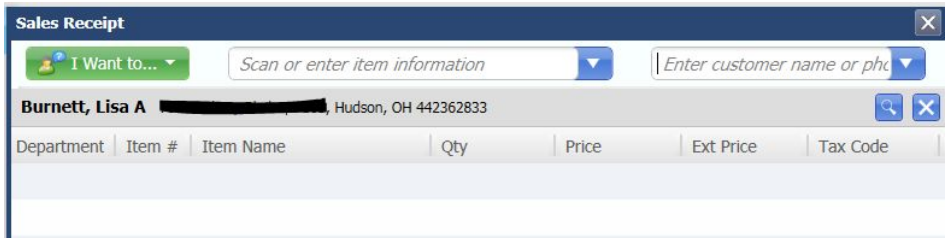


3. Select option:
   - Add New Record
   - Update Selected
   - Discard Scan
   - Save & Close
   - Use Record As Is





4. Customer's name is added to the Sales Receipt



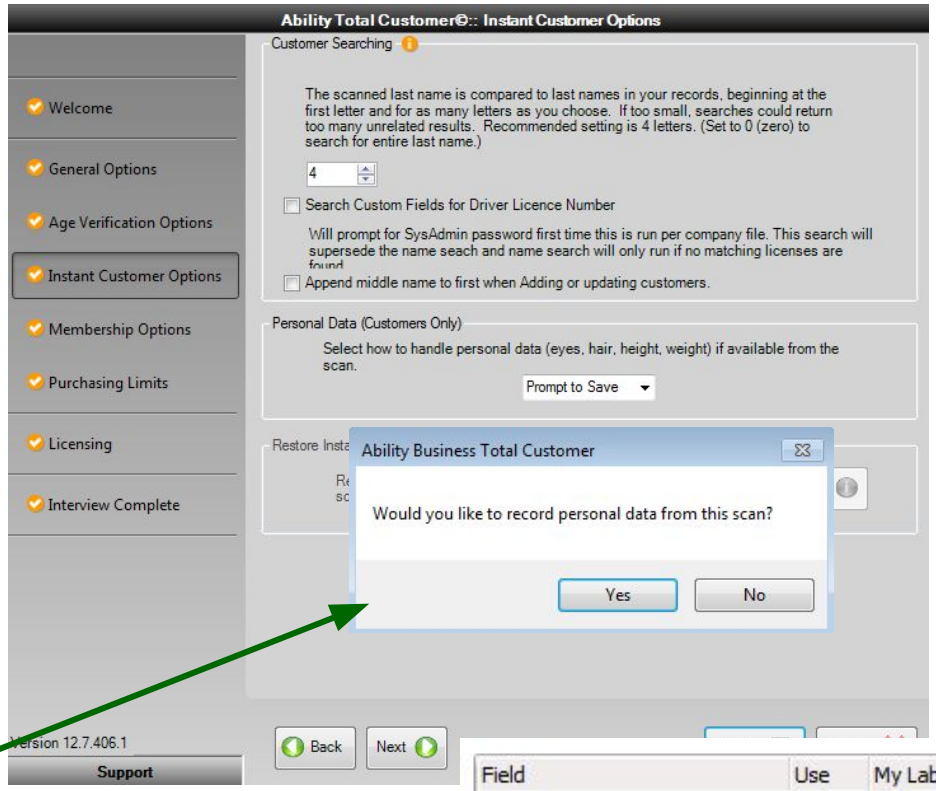
The AAMVA standard requires a 2D barcode and has deprecated the magnetic swipe.

Depending on your customer base, you may require a **3-track magnetic stripe reader, a 2D barcode scanner, or both**.

Hardware sold separately. Visit www.AbilityBusiness.com.

Instant Customer - Settings

1. Enter the desired number for searching and retrieving possible matches.
2. Enable to search by DL first, then Name.
3. Enable to append Middle Name to First Name.
4. Select how you want to handle Personal Data.
   - Always Save
   - Prompt to Save
   - Never Save



Note: If you decide to collect Personal Data, in QuickBooks Point of Sale go to:

File->Preferences->Company->General->My Field Labels and enable & name the custom fields.

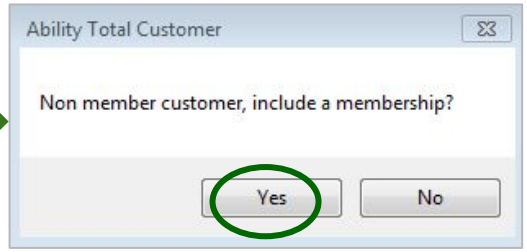
Field	Use	My Label
Customer Custom Field 1	☑	ExpirationDate
Customer Custom Field 2	☑	Gender
Customer Custom Field 3	☑	Hair
Customer Custom Field 4	☑	Eyes
Customer Custom Field 5	☑	Height
Customer Custom Field 6	☑	Weight
Customer Custom Field 7	☑	CalculatedAge

How Membership Works

1 → 2 → 3 → 4

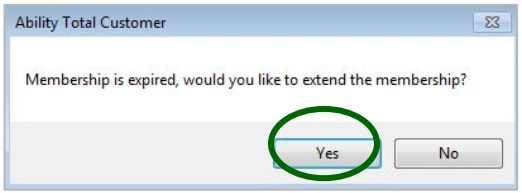
Add the customer to the Sale Receipt

New

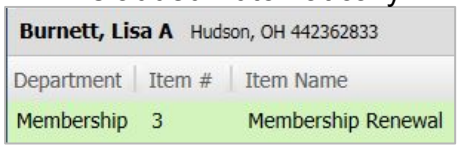


Membership Item is added Automatically

Expired

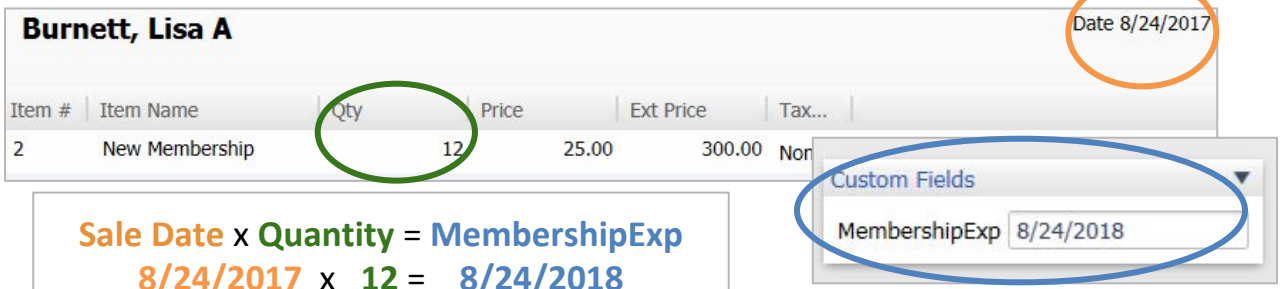


Membership Renewal Item is added Automatically



Use our Instant Scan feature to capture addresses!

Membership Expiration Date is Automatically Set after finalizing the sale.



Sale Date x Quantity = MembershipExp
8/24/2017 x 12 = 8/24/2018

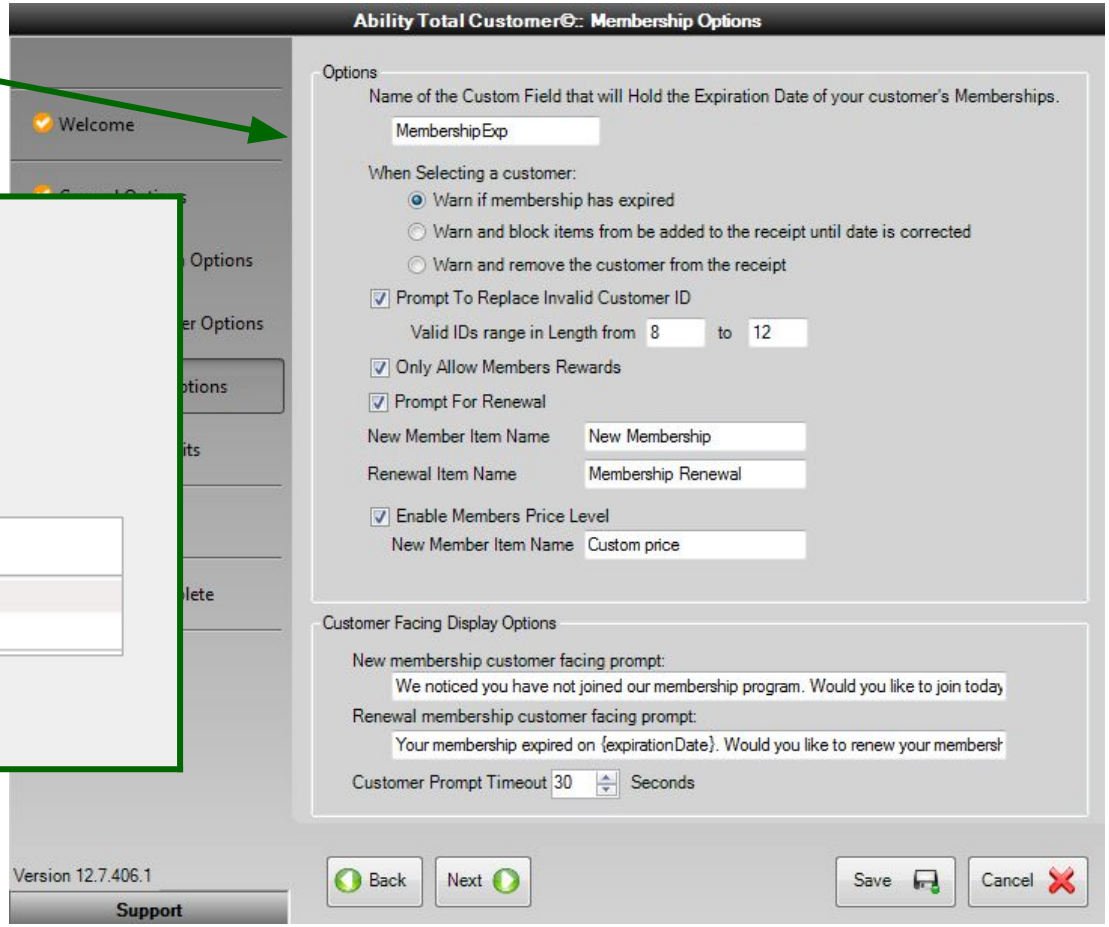
Membership - Settings

1 Enable & Name a Customer Custom Field in QuickBooks Point of Sale

In QuickBooks Point of Sale go to:

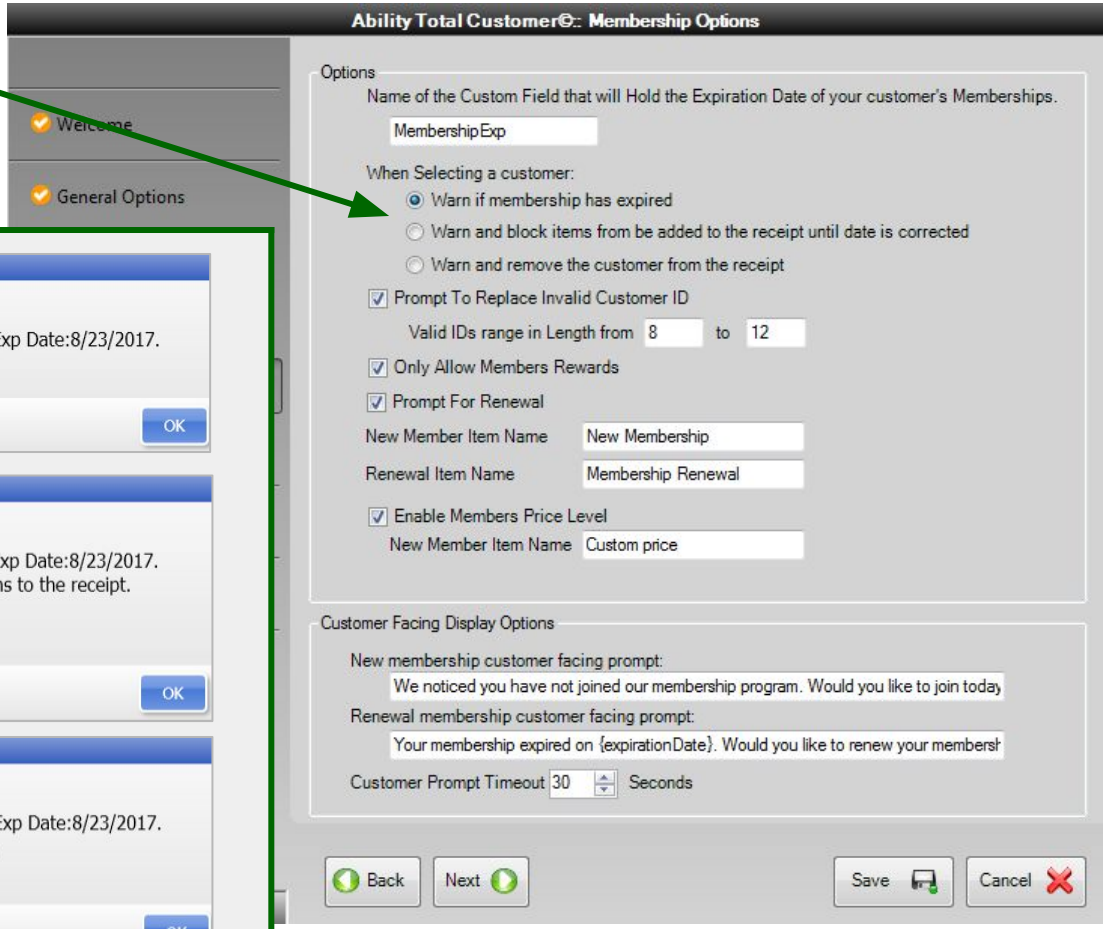
File->Preferences->Company->General->My Field Labels and enable & name the custom fields.

Field	Use	My Label
Customer Custom Field 1	☑	MembershipExp

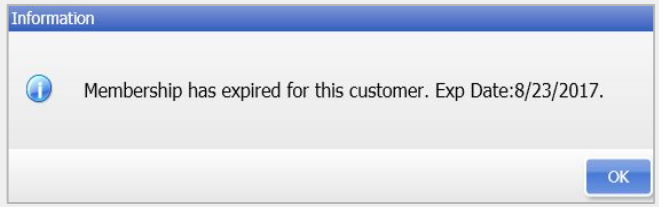


Membership - Settings

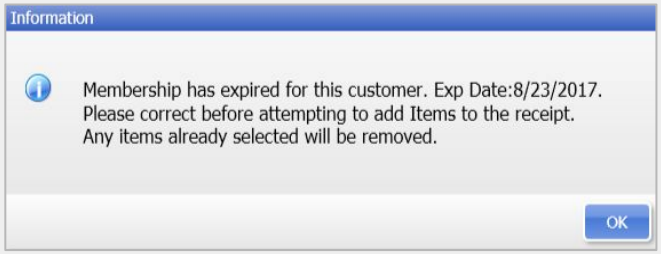
2 Select how to handle expired membership.



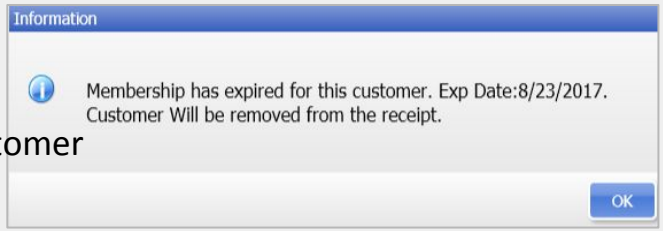
Warn



Warn & Block Items



Warn & Remove Customer



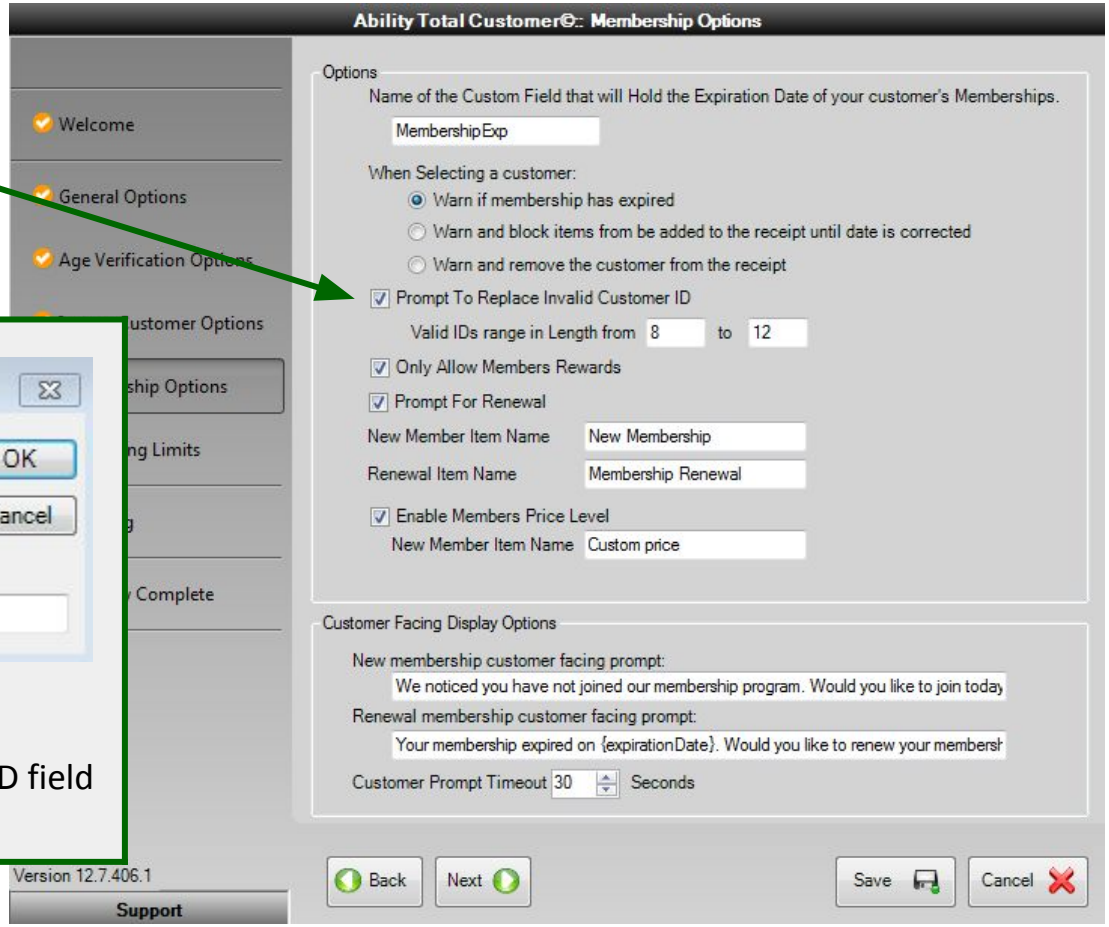
Membership - Settings

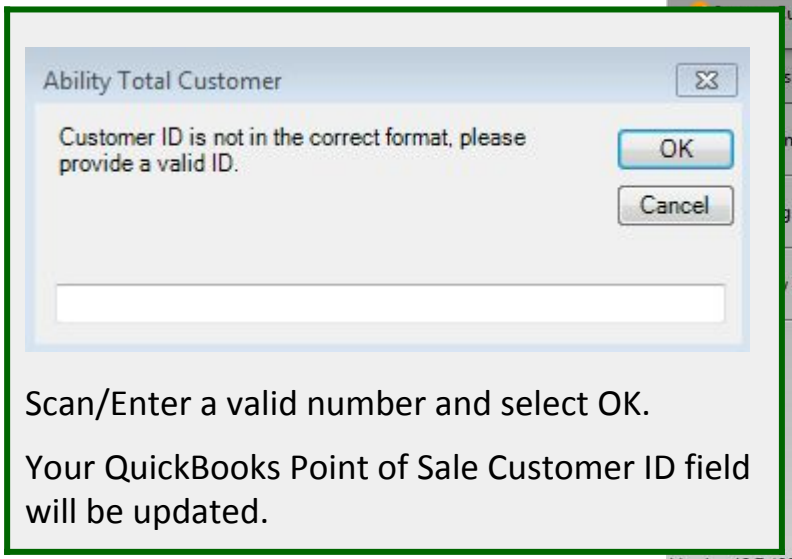
3

Optional Setting.

Enable if you want to receive a prompt when there is an Invalid Customer ID.

Set the range.





Scan/Enter a valid number and select OK.

Your QuickBooks Point of Sale Customer ID field will be updated.

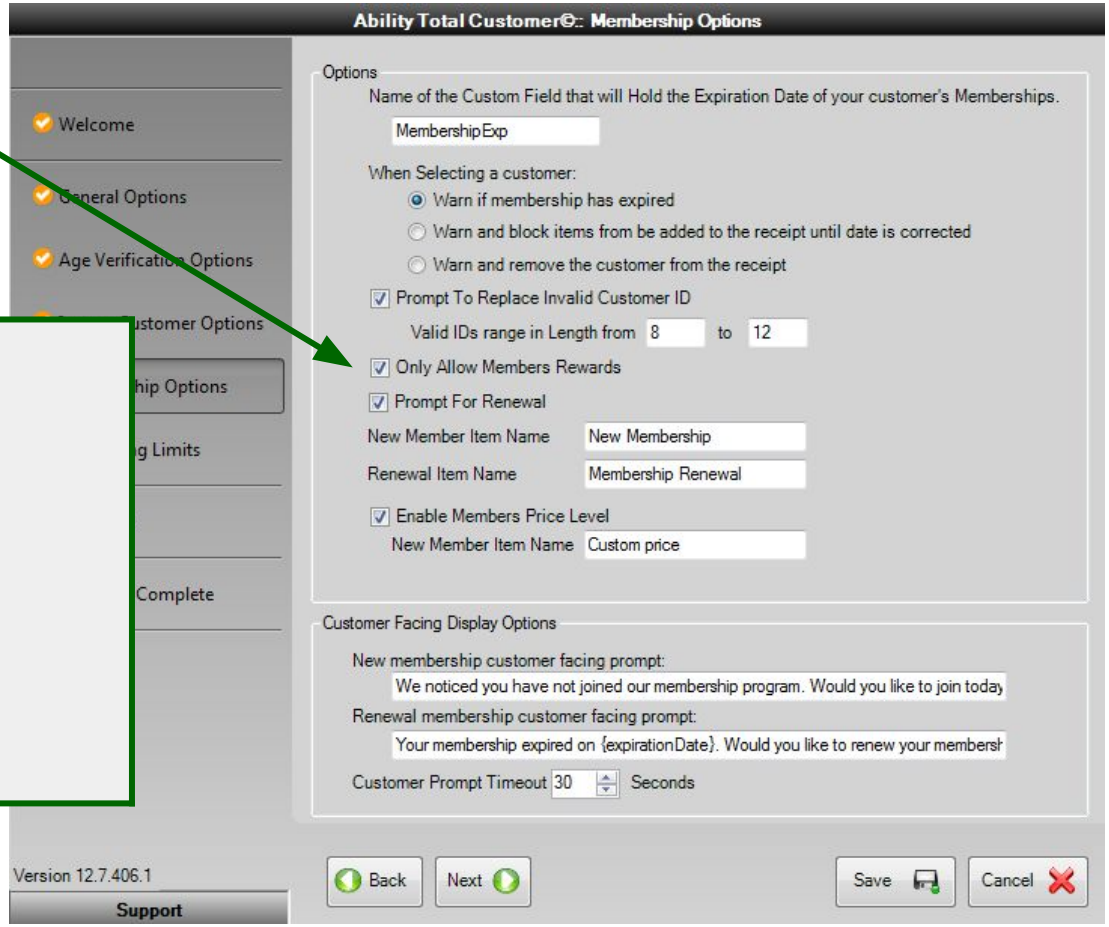
Membership - Settings

4

Optional Setting.

Enable to allow Member Rewards Only.

Add info here

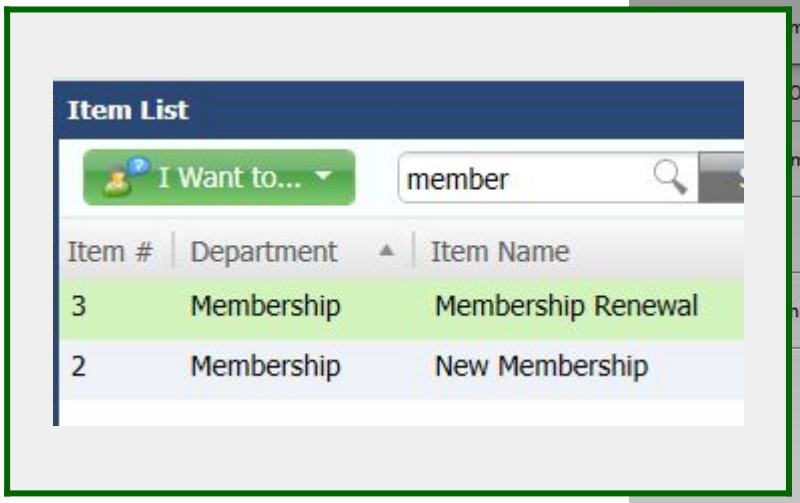


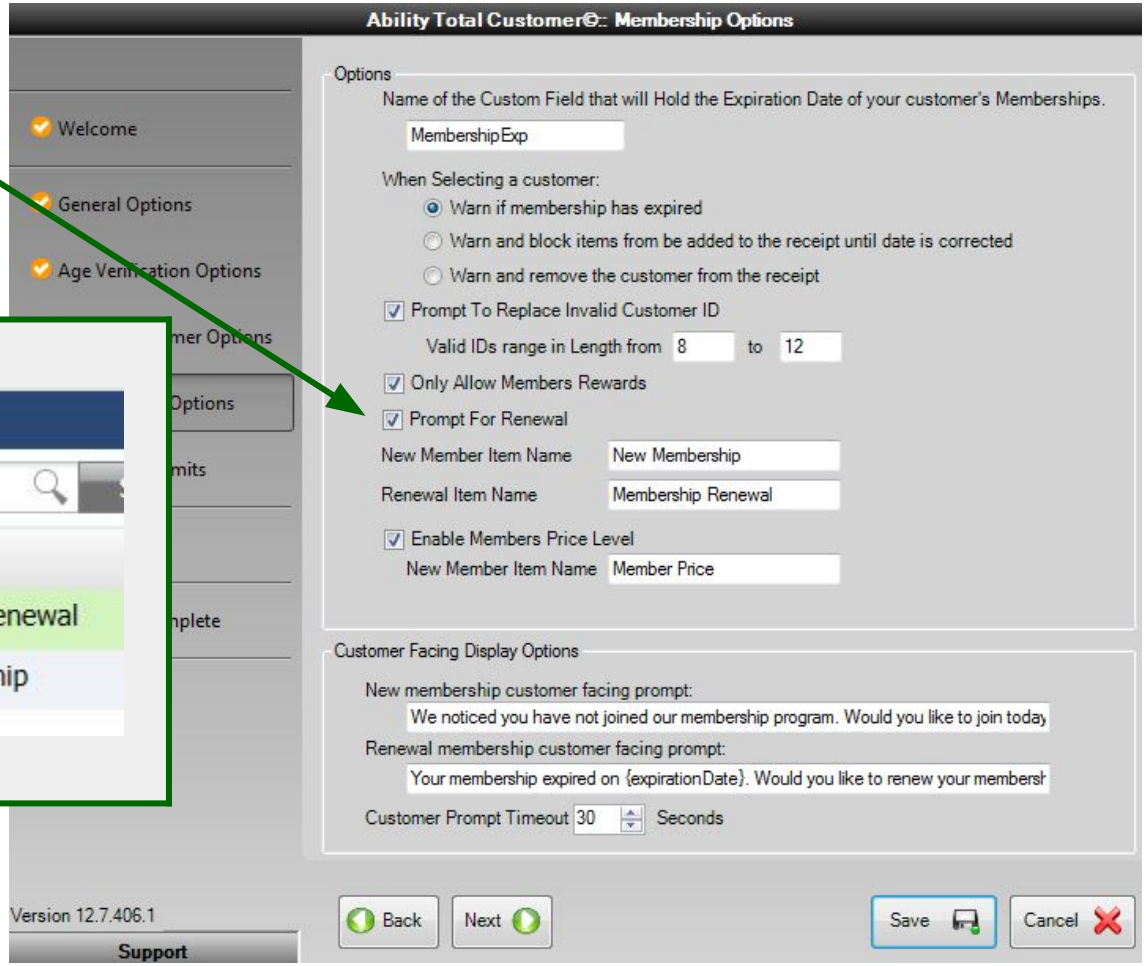
Membership - Settings

5

Enable Prompt for Membership.

Enter your Item Name for New Membership and Renewal.





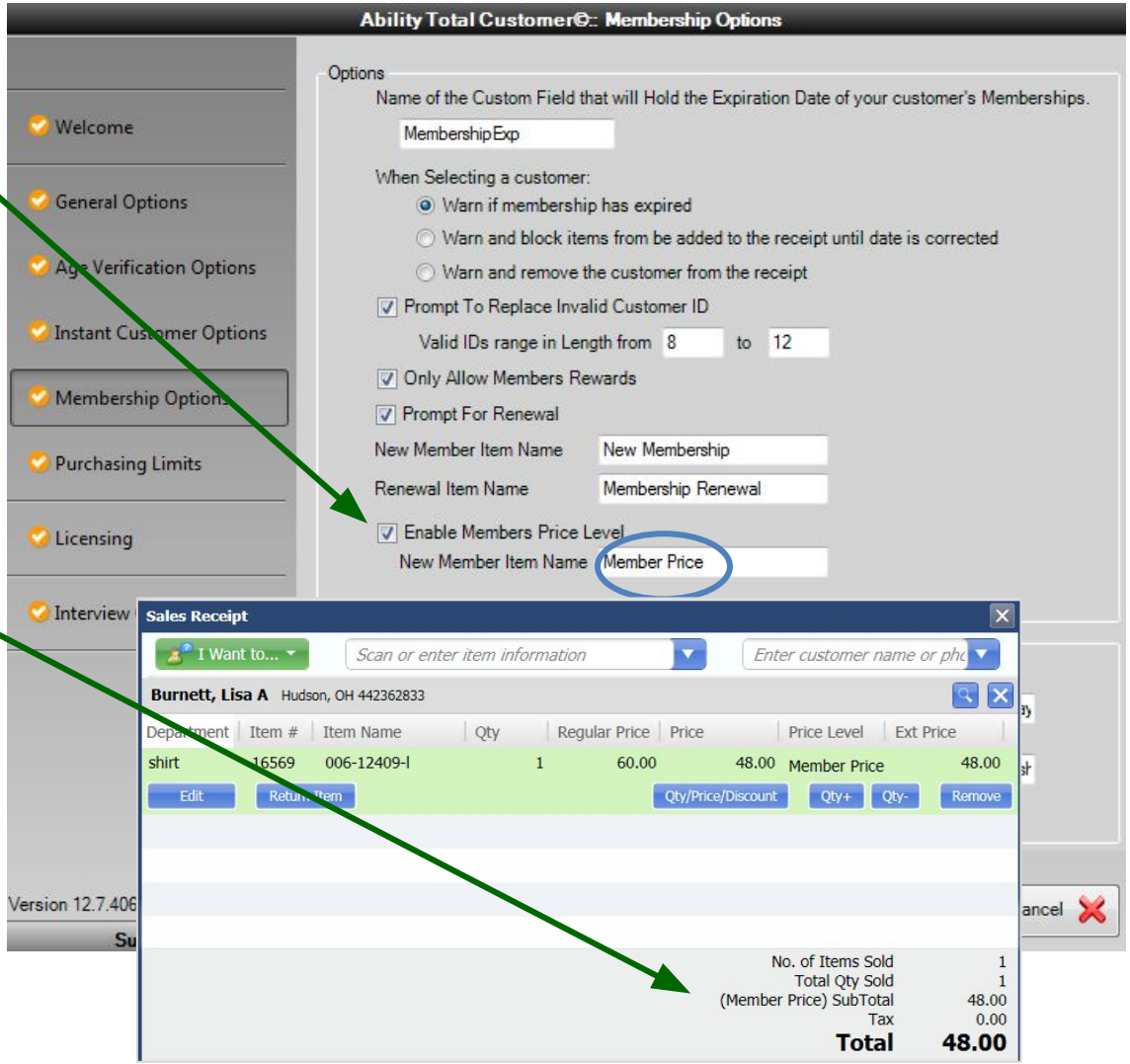
Membership - Settings

6

Enable to automatically use a specific Custom Price Level.

Enter the Price Level Name to use.

Global Setting.



QuickBooks Point of Sale Custom Price Level

Price Level Name	Markdown % (for new items)
Member Price	20
Friend's & Family Price	25
Employee Price	40
Other	10

Membership - Settings

7

Advanced Setting.

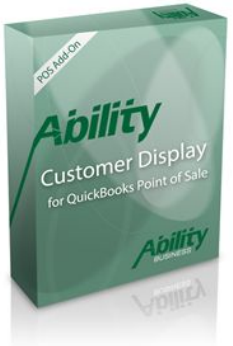
Used in conjunction with Ability Customer Display.

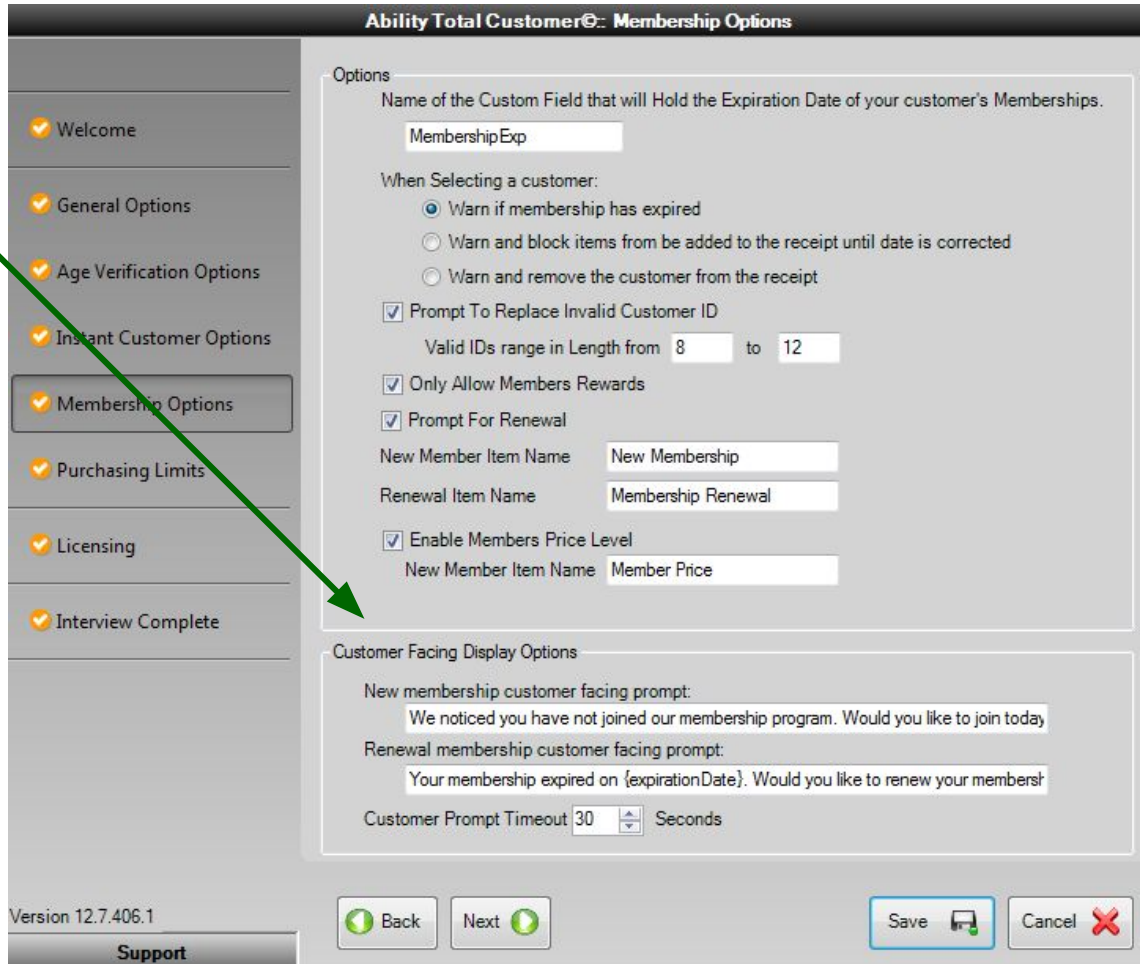
$299 First Per Station
$99 Renewal Per Year/Per Station

Read more here.

Features:

- Display Item/Receipt Information
- Advertising Messages
- Capture Signatures
- Customer Lookup



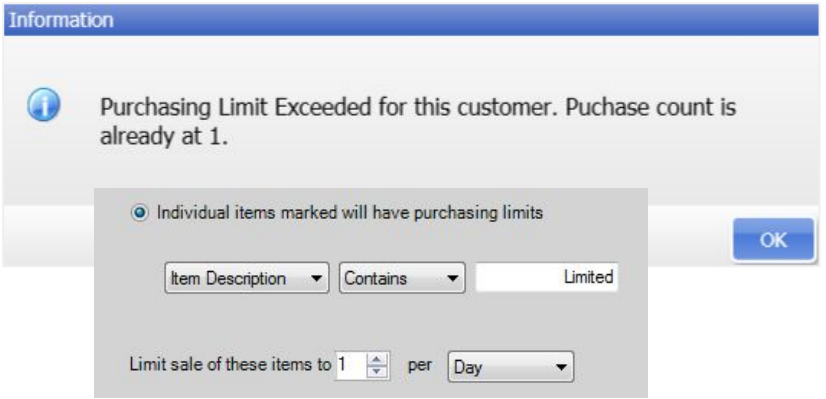


Purchasing Limits - How It Works

Purchase Limit Reached?

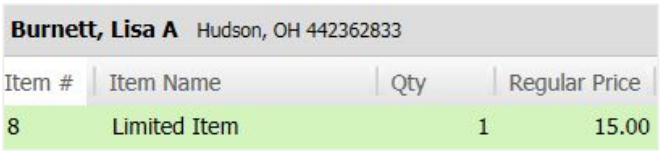
Yes

Prompt is displayed based on your settings.

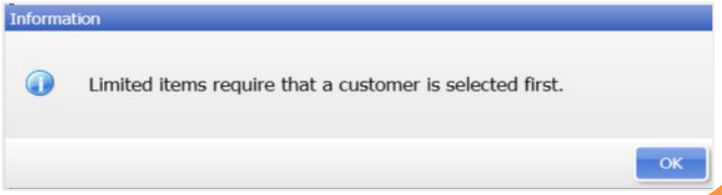


No

Happy Selling!



Employee is prompted if a customer is not selected.



Purchasing Limits - Global Setting

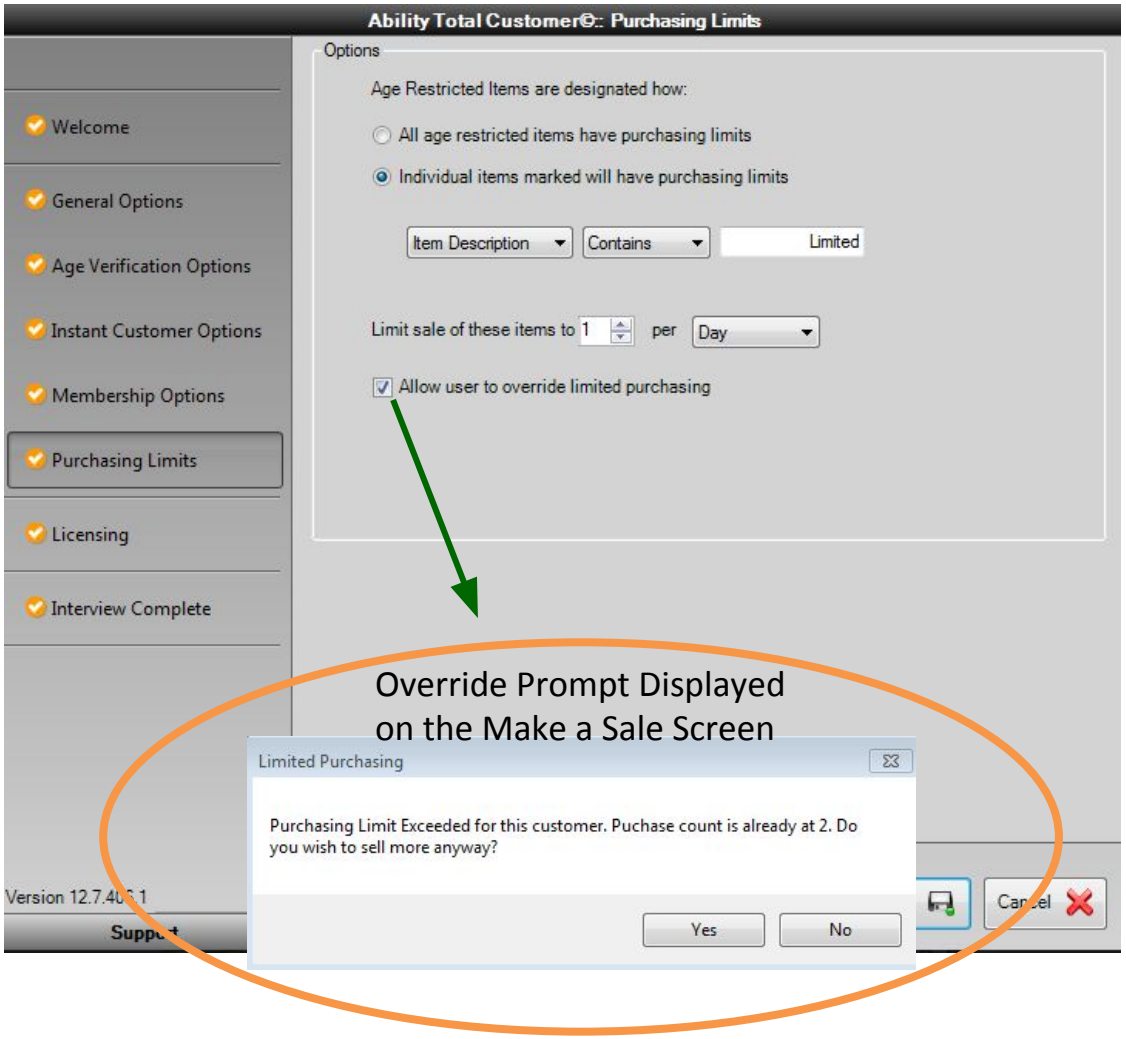
1. Select how to designate items:
   - All Age Restricted Items
   - Individual Items

2. If Individual Items, select which QuickBooks Point of Sale Item field to use:
   - Item Name
   - Item Description
   - Size
   - Attribute

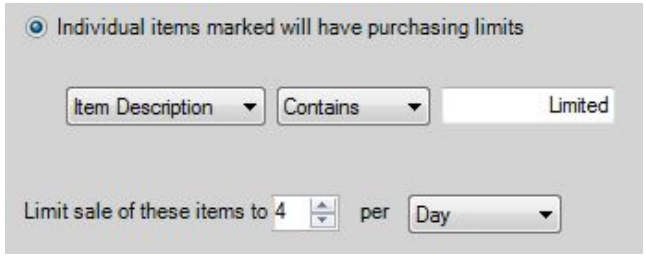
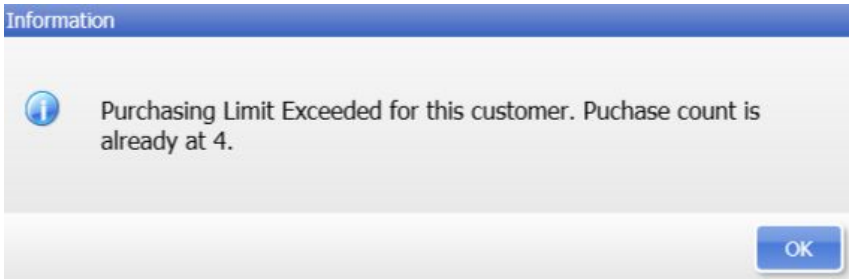
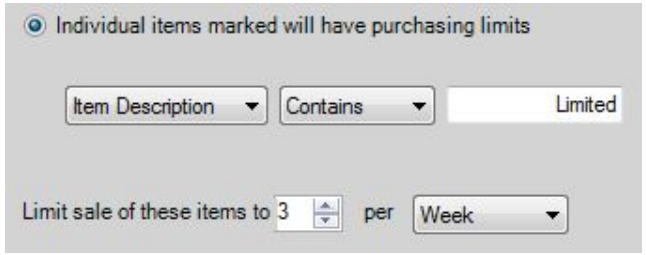
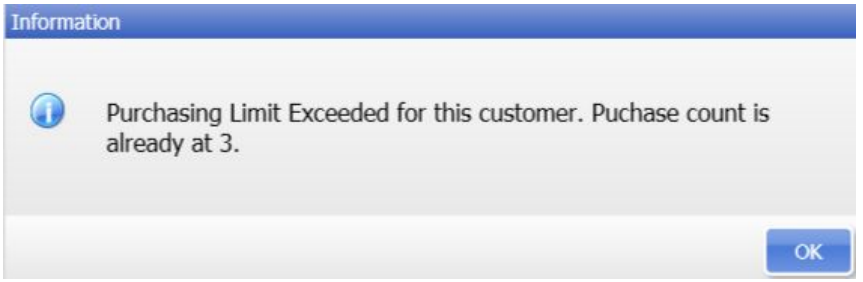
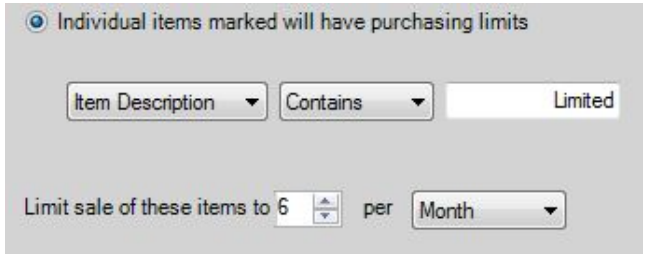
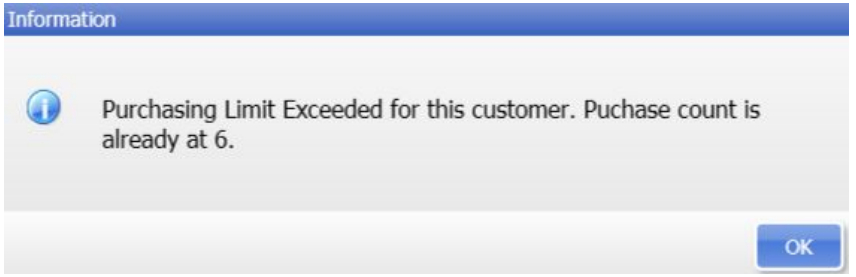
   Add "Limited" to your Item Field In QBPOS.

3. Input the limit to sell & select how you want to limit:
   - Day
   - Week
   - Month
   - 6 Months
   - Year
   - Calendar year

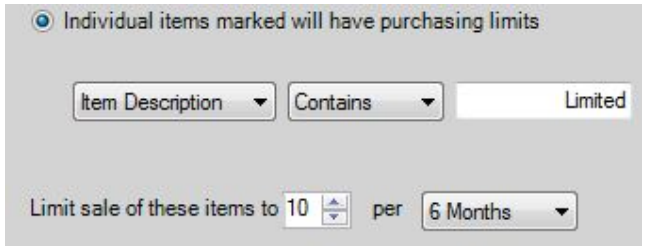
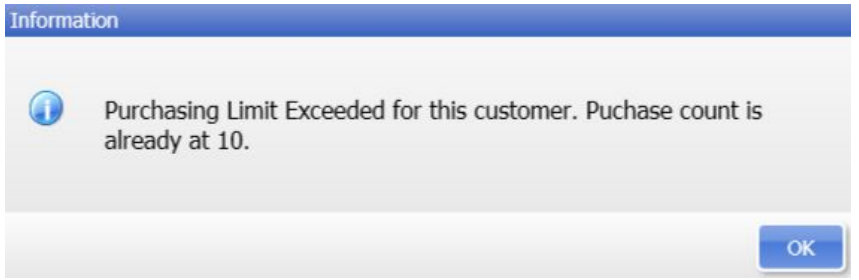
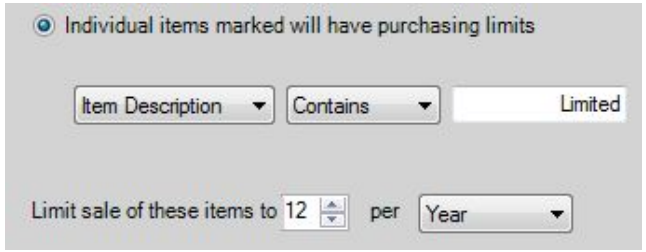
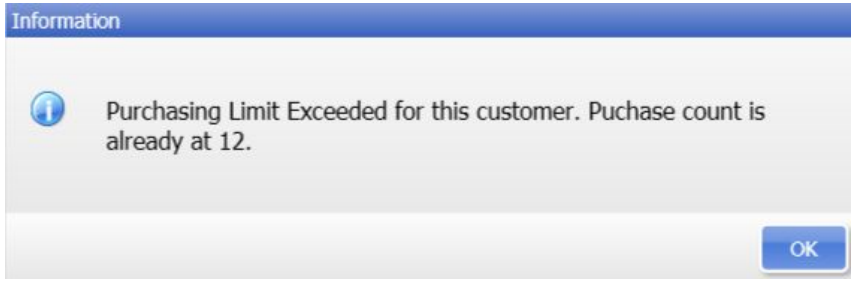
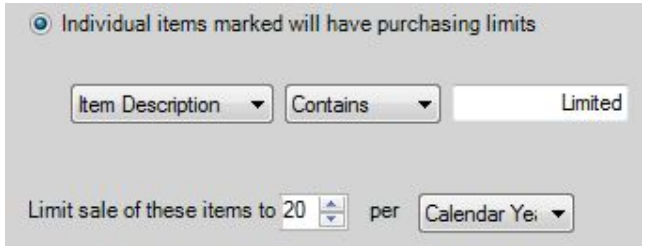
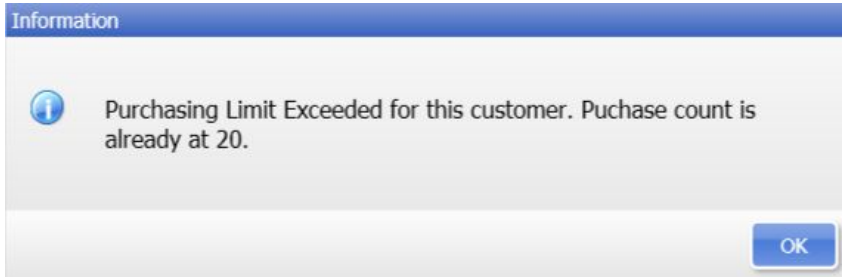
4. Optional. Enable to allow override.



Purchasing Limits - Examples

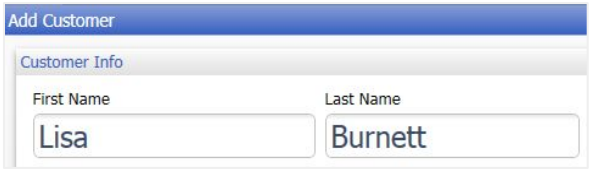
Setting	Prompt Displayed
	
	
	

Purchasing Limits - Examples

Setting	Prompt Displayed
	
	
	

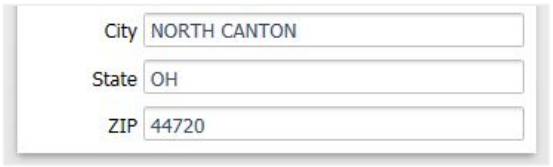
How Auto Zip Works

1. Add a New Customer/Vendor

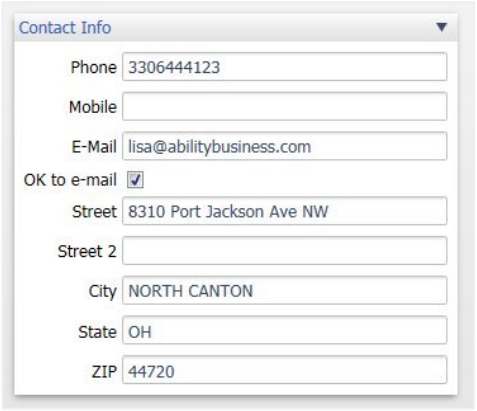


2. Enter the Zip Code

3. Auto Zip fills in the City and State



4. Collect the rest of the info



Ability Total Customer for QuickBooks Point of Sale Price & Requirements

Subscription – Licensed Add-On
$299.00 First Year/Per Station

Yearly Renewal
$99 Annual Renewal/Per Station

Requirements
QuickBooks Point of Sale v11 (2013), v12, v18
Active internet connection

Support
Technical Support and updates are included in your yearly subscription for the add-on.

Need Additional Features?
Ability Business offers development services . Call **888-582-2454** to discuss your needs.