

Ability Signature Capture & Customer Display

Streamline your business while reducing paperwork and administrative tasks with our Ability Customer Display & Signature Capture app designed for QuickBooks Point of Sale.



www.AbilityBusiness.com | sales@abilitybusiness.com | 866.992.2454



Benefits

- Engage customers
- Display item information
- Gather customer information
- Collect digital signatures
- Verify or reject signatures
- Print receipt with signature
- Email Customer Receipts with Signature
- Retrieve signatures & receipt details
- Market with scrolling images

Who

Businesses that use QuickBooks Point of Sale and -

- have customer accounts
- want to capture signatures
- display sale information

- ✓ Retail
- ✓ Wholesale
- ✓ Distributors
- ✓ Contractors
- ✓ House Accounts

Features & Settings

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Features & Settings

Feature/Setting	Description
Business Logo	Add your business logo. The logo will be displayed in the upper right hand corner of the display.
Require Signature	Select which payment tender types that you want to require a signature for. Available: Account, Credit Card, Check, Cash, Debit Card, Gift Certificate, Gift Card
Require Typed Name	Enable this feature if you want your customer to also type their name in addition to the signature.
Verify Signature	Enable this feature if you want a prompt shown for the cashier to verify the signature. The cashier can accept or reject.
Include Item Pictures	Enable this feature if you have Item Pictures enabled in QUickBooks Point of Sale and want the picture shown with the item on the display .
Receipt Identifier	Enable this feature if you would like the Receipt Identifier to held in the comments,
Receipt Delivery Prompts	Enable this feature to prompt customers to select delivery of email: Email, Print, Email & Print, No Receipt. For emailed receipts. *If the customer record doesn't have an email, a prompt will be shown for the customer to add their email at the display.
Idle Images	Add images for branding and marketing.
New Customer	Prompt unknown customers for information.
Retrieve Last Receipt Signature	Quickly retrieve the last receipt signature from the custom blue button on the Make A Sale Screen.
Email Last Receipt	Quickly email the last receipt from the custom blue button on the Make A Sale Screen.
Print and/or Email Receipt with Signature	Print from the Signature Retrieval screen to an office printer.
Advanced Setting	
Ability Total Customer Integration	Ability Total Customer Subscription Required.
Rewards & membership Linked	Enable to to link rewards and membership program.

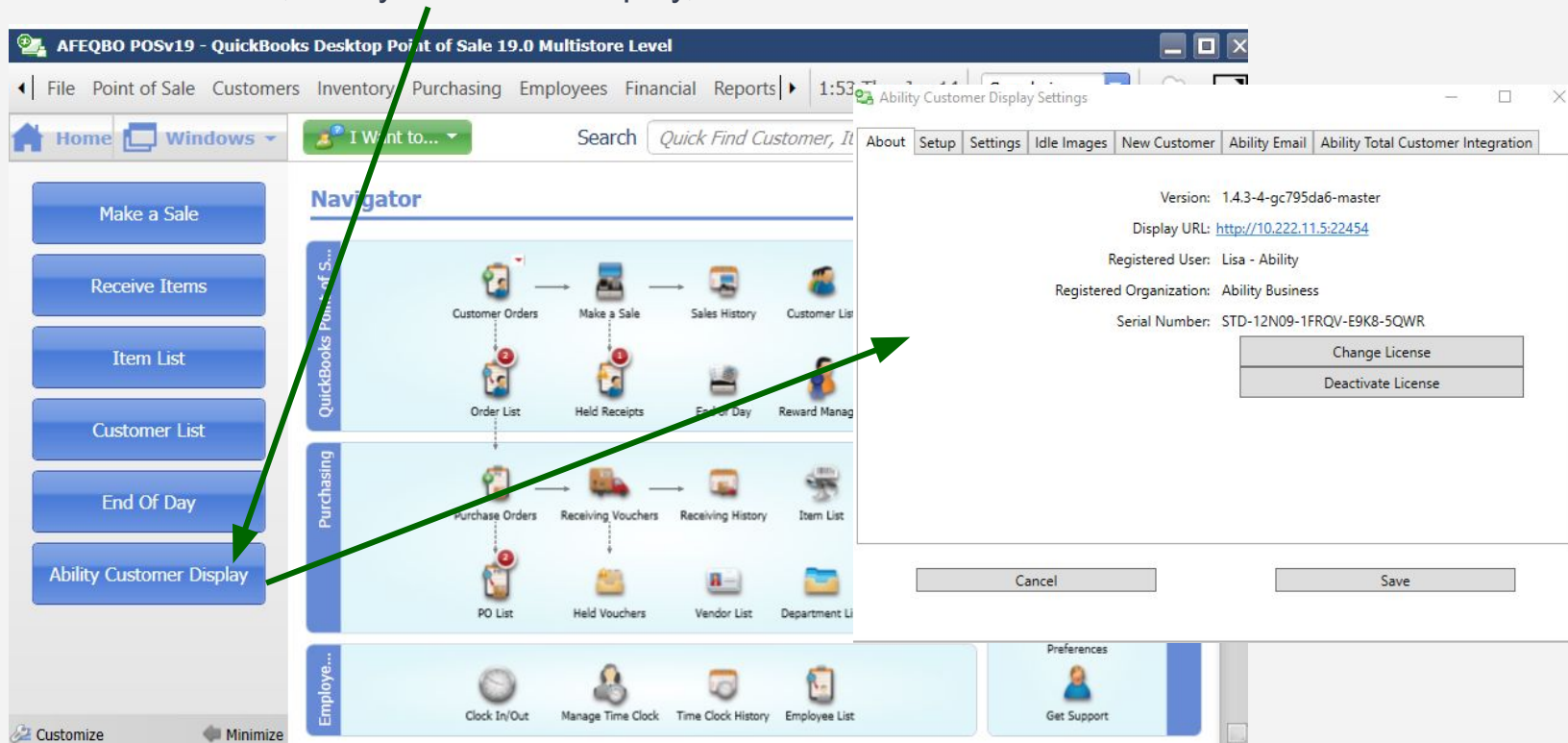
Configurations

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Access the settings

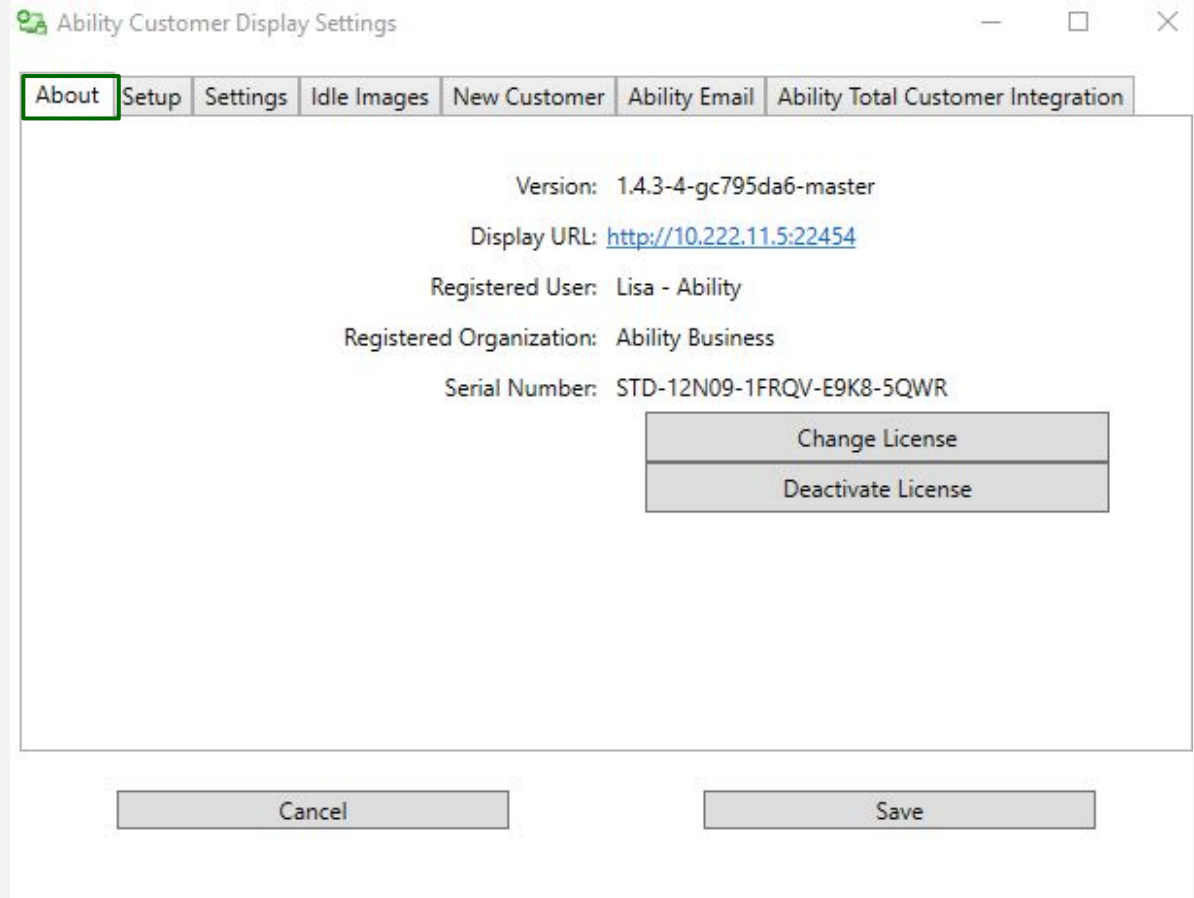
After the app has been installed, you can access the settings on the QuickBooks Point of Sale Home screen. Select Blue Button, Ability Customer Display, on the left side.



About Tab

Locate the following information about the app:

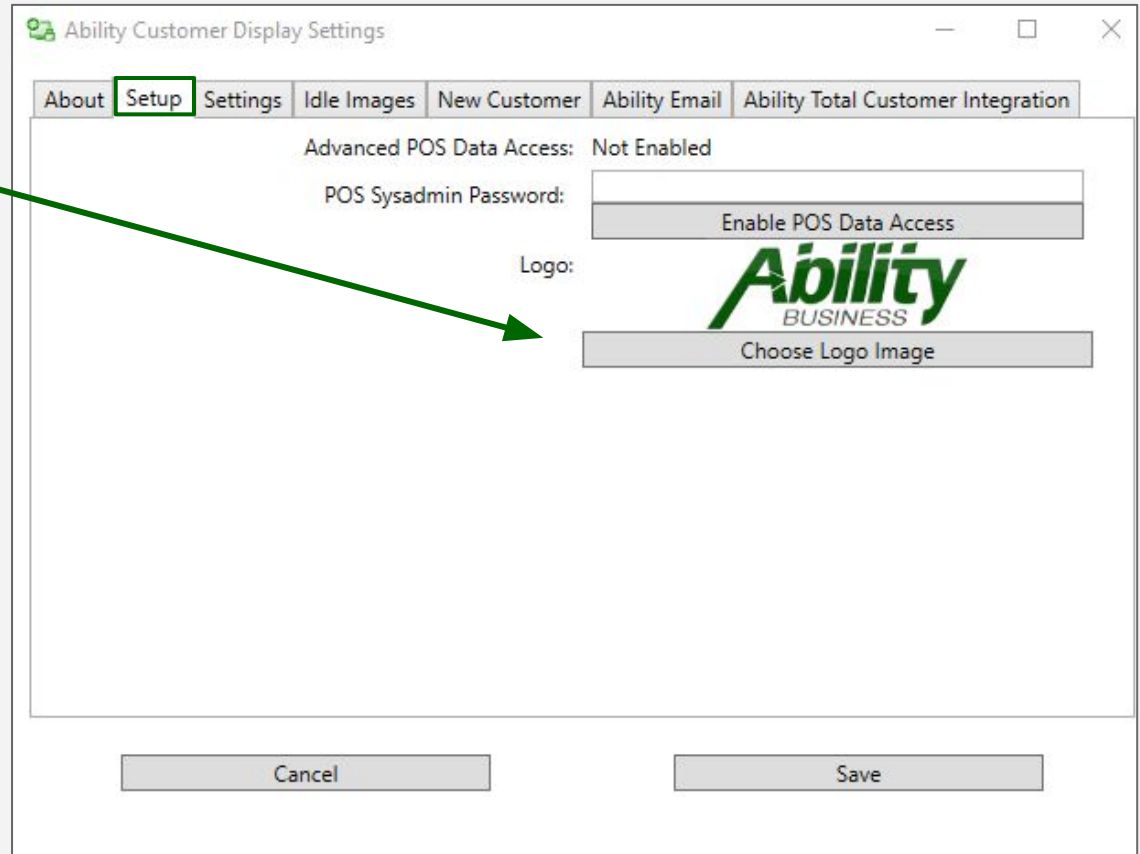
- Version
- Display url
- Registration information
 - User
 - Organization
- Serial/License Number



Setup Tab

Choose your Logo Image

- jpg or png
- Our example size is 231x80



The screenshot shows the 'Ability Customer Display Settings' window with the 'Setup' tab selected. The 'About' tab is also visible. The 'Advanced POS Data Access' section shows 'Not Enabled' and a button to 'Enable POS Data Access'. The 'POS Sysadmin Password' field is empty. The 'Logo' section shows the 'Ability BUSINESS' logo and a button to 'Choose Logo Image'. A green arrow points from the text 'Our example size is 231x80' to the 'Choose Logo Image' button. At the bottom are 'Cancel' and 'Save' buttons.

Settings Tab

Select the payment tender types you will require a signature.

Enable other features
See Page 5.

The screenshot shows the 'Ability Customer Display Settings' window with the 'Settings' tab selected. The 'Settings' tab is highlighted with a green box. A green arrow points from the text 'Select the payment tender types you will require a signature.' to the 'Choose which tenders will require a signature:' section. Another green arrow points from the text 'Enable other features See Page 5.' to the 'Require typed name in addition to signature' section.

Ability Customer Display Settings

About Setup **Settings** Idle Images New Customer Ability Email Ability Total Customer Integration

Choose which tenders will require a signature:

- ☒ Account
- ☒ CreditCard
- ☐ Check
- ☐ Cash
- ☐ DebitCard
- ☐ GiftCertificate
- ☐ GiftCard

Require typed name in addition to signature ☐ Yes

Prompt cashier to verify signature ☐ Yes

Item Pictures are enabled in QBPOS: ☐ Yes

Include Receipt Identifier in Comments: ☒ Yes

Receipt Delivery Prompts ☒ Email ☒ Print ☒ Email & Print ☒ No Receipt

Cancel Save

Idle Images Tab

Promote your brand, sales, upcoming events, and much more with this feature.

Write your caption and select the image file.

Select this button to Add a New Row to enter another Caption/File line above.

Recommended files & Size:

- JPG, PNG, or Gifs
- iPad pro or Mini image Sizes
 - without Retina 1024x768
 - with Retina 2018x1536
- iPad Pro
 - 2732x2048

Caption	File
Welcome!	ability-fullscreen@1x.png
Customize idle images in settings	ability-fullscreen@1x.png
Ability Customer Display is great for Marketing!	Ability-fullscreen@2x.png

Images should be saved as JPG or PNG with highest quality. GIFs are also supported.
Images should be the following sizes, depending on your device model:
iPad or iPad Mini without Retina Display: 1024x768
iPad or iPad Mini with Retina Display: 2048x1536
iPad Pro: 2732x2048

Select this button to clear all images.

Select this button to delete a selected row.

Select this button to add another folder of images.

New Customer Tab

Build your customer marketing list by gathering customer information.

Enable and enter your button text verbiage.

Select the information you wish to collect.

Enter program terms and conditions.
Be sure to consult with your accountant, lawyer, or other professional about what you may need to state.

The screenshot shows the 'Ability Customer Display Settings' window with the 'New Customer' tab selected. The window has a title bar with standard OS controls. Below the title bar is a tabbed interface with tabs for 'About', 'Setup', 'Settings', 'Idle Images', 'New Customer' (which is highlighted with a green box), 'Ability Email', and 'Ability Total Customer Integration'. The 'New Customer' tab contains the following settings:

- ☒ Prompt unknown customers for information
- 'Join' Button Text: Sign Up
- 'Join' Button Subtitle: Sign up for email offers!
- Choose what information to prompt for a new customer:
 - ☒ First Name
 - ☐ Address
 - ☐ City
 - ☐ Zip
 - ☐ Prompt new customers to join Rewards program
 - ☒ Last Name
 - ☐ Address Line 2
 - ☐ State
 - ☒ Email
 - ☐ Require Signature to join rewards
- Rewards Program Terms & Conditions: (A large text area for input)

At the bottom of the window are 'Cancel' and 'Save' buttons.

Ability Email Tab

Email receipts with signatures captured at the Ability Customer Display.

Enable Ability Email.

Enter the following information:

- From Name
- Reply-To Address
- Subject Line
- Body Content

Ability Customer Display Settings

About Setup Settings Idle Images New Customer **Ability Email** Ability Total Customer Integration

Ability Email

The Ability Email service can automatically email your customers a copy of their receipt, without configuring any email service on this computer.

Enable Ability Email ☒ Enable Ability Email

"From" Name Lisa - Ability POS

Reply-To Address lisa@abilitybusiness.com

Subject Thank you for your purchase!

Body Test test!
Visit us again!

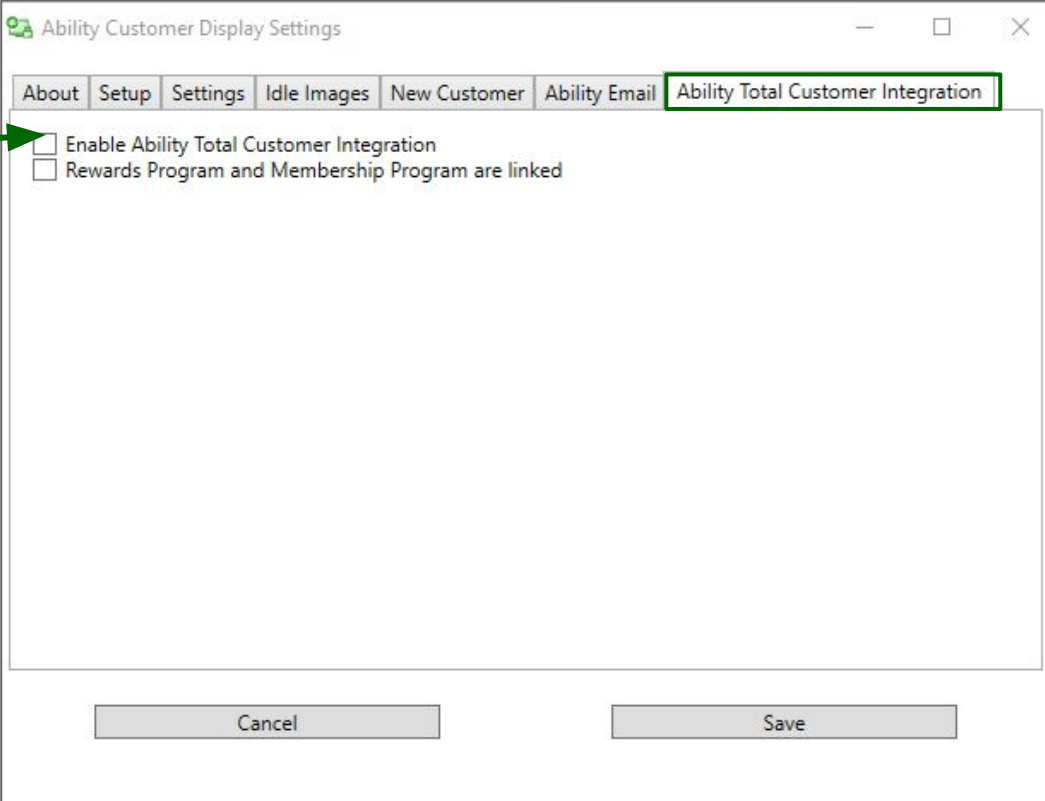
Cancel Save

Ability Total Customer Integration Tab

Streamline your rewards and membership program with Ability Total Customer: Membership App.

Enable check boxes to turn on integration and linking.

Note:
Ability Total Customer: Membership App is sold as a separate subscription.



Ability Customer Display Settings

About Setup Settings Idle Images New Customer Ability Email **Ability Total Customer Integration**

☐ Enable Ability Total Customer Integration

☐ Rewards Program and Membership Program are linked

Cancel Save

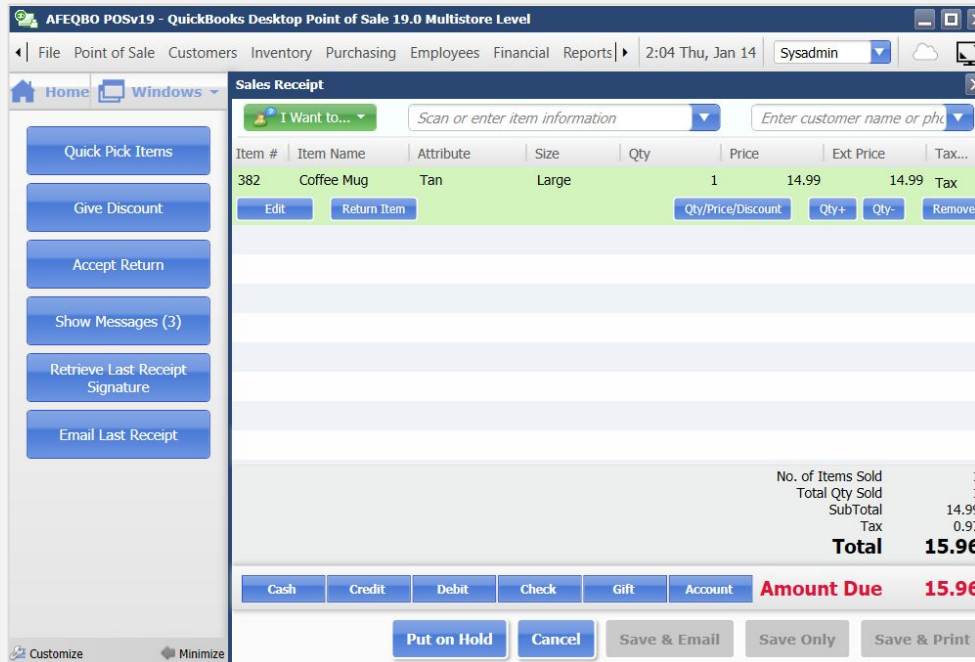
Workflow

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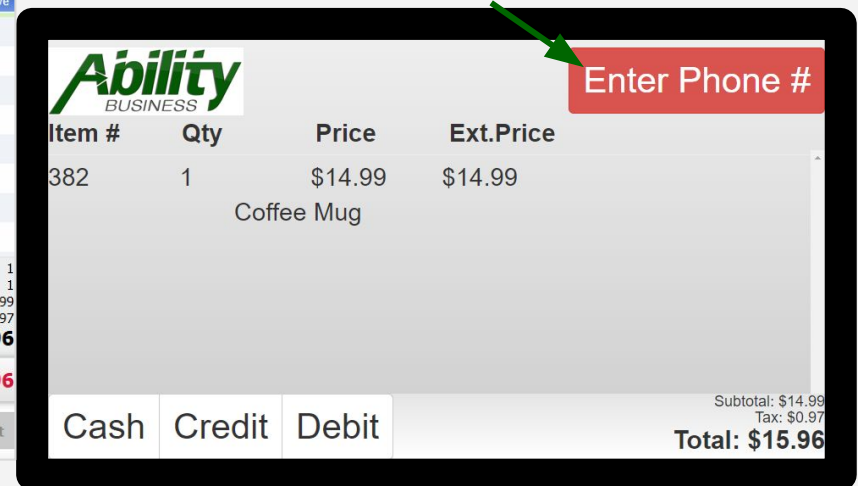
Workflow Overview

As you start scanning and entering items on the Make A Sale screen, the display will populate the sale information from QuickBooks Point of Sale.



In the upper right hand corner of the display, the customer can quickly type their phone number.

- If they are in the customer list, their name will be attached to the receipt.
- If they are not in the customer list, you can prompt them to be added.



Workflow

Customer enters their phone number at the display and selects submit. If they are in the system, their name will show on the display and attach to the QuickBooks Point of Sale Make a Sale screen.

The diagram illustrates the workflow for a customer's purchase. It starts with a screen for entering a phone number, which then leads to a POS screen showing a welcome message and a list of items. A green arrow indicates the flow from the 'Submit' button to the POS screen. Another green arrow points from the customer's name in the POS screen to the 'Burnett, Lisa Ann' entry in the bottom section.

Enter your phone number:

(330) 644-4123

1 2 3
4 5 6
7 8 9
0

Cancel Submit

Ability BUSINESS

Welcome back, Lisa Ann!

Item #	Qty	Price	Ext. Price
382	1	\$14.99	\$14.99
Coffee Mug			

Cash Credit Debit

Subtotal: \$14.99
Tax: \$0.00
Total: \$14.99

Burnett, Lisa Ann

Contact: 3306444123
Email: lisa@abilitybusiness.com

Account Balance: (\$485.01)
Available Credit: \$985.01

History: 01/14/21 Sales Receipt

Item #	Item Name	Attribute	Size	Qty	Price	Ext Price	Tax...
382	Coffee Mug	Tan	Large	1	14.99	14.99	Tax

Edit Return Item Qty/Price/Discount Qty+ Qty- Remove

Workflow Credit Card

On the display, the customer selects Credit payment type.

Ability BUSINESS

Welcome back, Lisa Ann! [Edit My Info](#)

Item #	Qty	Price	Ext.Price
382	1	\$14.99	\$14.99
Coffee Mug			

Cash **Credit** Debit

Subtotal: \$14.99
Tax: \$0.00
Total: \$14.99

The request is stored in the POS Comment Field. Proceed to authorize credit card payment.

Customer Requests: credit

Upon approval, the customer signs and selects done.

Receipt Signature

Lisa

Clear By signing above, I agree to pay in accordance with my cardmember agreement. Done

Customer selects email receipt.

Total: \$14.99
Paid: \$14.99
Change: \$0.00

Select receipt option:

Email Receipt Print Receipt Email & Print No Receipt

Customer can confirm their email and select done.

Email Receipt

Cancel Done

Select receipt option:

Email Receipt Print Receipt Email & Print No Receipt

Email is sent. Sales is finalized.

Total: \$14.99
Paid: \$14.99
Change: \$0.00

Thank you!

☒ Email Receipt ☐ Print Receipt ☐ Email & Print ☐ No Receipt

Workflow On Account

Once all the items are scanned/entered on the Make a Sale screen, the cashier will select the On Account payment type and will be prompted to ask the customer to sign on the customer display.

Sales Receipt

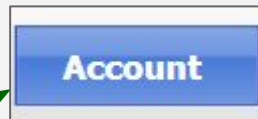
Scan or enter item information

Enter customer name or phone

Contact: 330644123
Email: lisa@abilitybusiness.com
Account Balance: (\$440.04)
Available Credit: \$440.04
History: 01/20/2015 Sales Receipt

Item #	Item Name	Attribute	Size	Qty	Price	Est Price	Tax
352	Coffee Mug	Tan	Large	1	14.99	14.99	Tax

Amount Due: 14.99



Ability Customer Display

Ask customer to sign on Customer Display.
Tender: Account Amount: \$14.99

OK (20)

Customer will sign & select done.

Then select receipt delivery.

Receipt Signature

Clear Done

Total: \$14.99
Paid: \$14.99
Change: \$0.00
Select receipt option:

Email Receipt Print Receipt Email & Print No Receipt

Email Receipt

lisa@abilitybusiness.com

Cancel Done

Select receipt option:

Email Receipt Print Receipt Email & Print No Receipt

Cashier selects
Save Only at POS,



Example of Email Receipt.

Sample Email & PDF

Email Settings from Ability Customer Display

"From" Name	Lisa - Ability POS
Reply-To Address	lisa@abilitybusiness.com
Subject	Thank you for your purchase!
Body	Test test! Visit us again!

Email Example



Store: 1
Workstation: 1

Sales Receipt #16
1/14/2021 2:59:30 PM -05:00
Cashier: Sysadmin

COPY
AFEQBO POSv19

Bill To: Lisa Ann Burnett
Ship To:

Item #	Item Name	Attribute	Size	Orig Price	Disc %	Type	Qty	Price	Ext Price	Tax
382	Coffee Mug	Tan	Large	\$14.99			1.00	\$14.99	\$14.99	Tax
Subtotal:									\$14.99	
Exempt 0.00% Tax:									+ \$0.00	
RECEIPT TOTAL:									\$14.99	

Credit Card: \$14.99 Visa
Typed Name:
Timestamp: 1/14/2021 2:48:00 PM -05:00

I agree to pay above amount according to card issuer agreement (merchant agreement if credit voucher).

Signature: On File

PLEASE RETAIN FOR YOUR RECORDS

Page 1 / 1

PDF
Example

Access & Retrieve Receipts

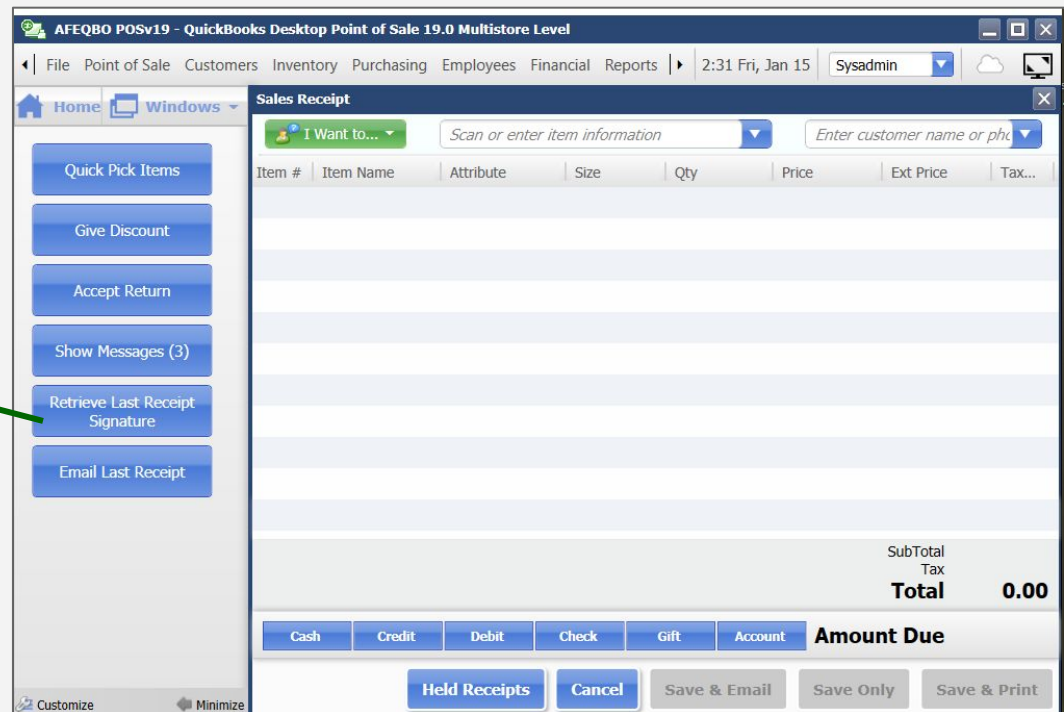
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On the Make a Sale Screen: Custom Blue Button

On the Make a Sale Screen, you can easily complete two tasks using the two, custom Blue Buttons on the left side:

1. Retrieve Last Receipt Signature
2. Email Last Receipt



Retrieve of Last Receipt Signature

Select the Blue Button on the left side, Retrieve Last Receipt Signature.

Retrieve Last Receipt
Signature

The signature receipt will open in a browser for you to review, email, or print.

Review email history and status

Ability Customer Display Home Help

Signature Retrieval

Receipt ID 6069-2992-0334-1713-665-10

Store: 1
Location: 1

Sales Receipt #16
Jan 14, 2021 2:59:30 PM
Cashier: Sysadmin

RETRIEVAL
AFEQBO POSv19

Bill To: Lisa Ann Burnett

Item #	Item Name	Attribute	Size	Orig Price	Disc %	Type	Qty	Price	Ext Price	Tax
382	Coffee Mug	Tan	Large	\$14.99			1	\$14.99	\$14.99	
Subtotal:									\$14.99	
Exempt 0% Tax:									+ \$0.00	
RECEIPT TOTAL:									\$14.99	

Credit Card: \$14.99 Visa
Typed Name:
Timestamp: Jan 14, 2021 2:48:00 PM

I agree to pay above amount according to card issuer agreement (merchant agreement if credit voucher).

Signature: On File

PLEASE RETAIN FOR YOUR RECORDS

Email History

Timestamp	Recipient	Subject	Status
Jan 14, 2021 3:02:15 PM	lisa@abilitybusiness.com	Thank you for your purchase!	Opened

Email Print

Quickly email
or print the
receipt.

Snapshot of Signature

The app also captures a snapshot of the receipt at the time the signature was captured before it is finalized by selecting save.

Receipt ID 6035-9253-0188-6615-809-13

Print

Not final - this is a snapshot of the receipt at the time the signature shown was captured

Store: 1
Workstation: 1


Sales Receipt #
Jan 5, 2021 2:48:17 PM
Cashier: Sysadmin

RETRIEVAL
AFEQBO POSv19

Bill To: Lisa Ann Lyons

Item #	Item Name	Attribute	Size	Orig Price	Disc %	Type	Qty	Price	Ext Price	Tax
380	Mirror			\$50.00			1	\$50.00	\$50.00	Tax
Subtotal:									\$50.00	
Exempt 0% Tax:									+ \$0.00	
RECEIPT TOTAL:									\$50.00	

Credit Card: \$50.00 Visa
Typed Name: lisa
Timestamp: Jan 5, 2021 2:48:26 PM



I agree to pay above amount according to card issuer agreement (merchant agreement if credit voucher).

Receipt ID: 6035-9253-0188-6615-809

PLEASE RETAIN FOR YOUR RECORDS

Retrieve of Last Receipt Signature + Email

Once you select the email button, a prompt will display with the email select ok, and the email will be sent.

The screenshot displays the 'Ability Customer Display' interface. A modal window titled 'Signature Retrieval' is open, showing a receipt ID '6069-2992-0334-1713-665-1' and a prompt to 'Enter recipient email address' with the email 'lisa@abilitybusiness.com' entered. The modal has 'OK' and 'Cancel' buttons. A green arrow points from the 'Email' button in the top right corner of the interface to the 'OK' button in the modal. The background shows a receipt for 'Sales Receipt #16' dated Jan 14, 2021, 2:59:30 PM, with a cashier 'Sysadmin'. The receipt lists a 'Coffee Mug' for \$14.99. Below the receipt, there is a section for 'Credit Card: \$14.99 Visa' and a 'Typed Name' field. A large, stylized signature is visible in the center. At the bottom, there is an 'Email History' table with one entry for the email sent to 'lisa@abilitybusiness.com' with the subject 'Thank you for your purchase!' and status 'Opened'.

Timestamp	Recipient	Subject	Status
Jan 14, 2021 3:02:15 PM	lisa@abilitybusiness.com	Thank you for your purchase!	Opened

Note:
You can also enter a different email before selecting "OK".

Retrieve of Last Receipt Signature + Print

Select the print button, the print screen will display then select print.

Ability Customer Display Home Help

Signature Retrieval

Receipt ID 6069-2992-0334-1713-665-10 Email Print


Store: 1
Workstation: 1

Sales Receipt #16
Jan 14, 2021 2:59:30 PM
Cashier: Sysadmin

RETRIEVAL
AFEQBO POSv19

Bill To:	Lisa Ann Burnett									
Item #	Item Name	Attribute	Size	Orig Price	Disc %	Type	Qty	Price	Ext Price	Tax
382	Coffee Mug	Tan	Large	\$14.99			1	\$14.99	\$14.99	
Subtotal:									\$14.99	
Exempt 0% Tax:									+ \$0.00	
RECEIPT TOTAL:									\$14.99	

Credit Card: \$14.99 Visa
Typed Name:
Timestamp: Jan 14, 2021 2:48:00 PM



I agree to pay above amount according to card issuer agreement (merchant agreement if credit voucher).

Signature: On File

PLEASE RETAIN FOR YOUR RECORDS

Email History

Timestamp	Recipient	Subject	Status
Jan 14, 2021 3:02:15 PM	lisa@abilitybusiness.com	Thank you for your purchase!	Opened
Jan 28, 2021 2:37:08 PM	sales@abilitybusiness.com	Thank you for your purchase!	Queued

Receipt ID 6069-2992-0334-1713-665-10 Print


Printed: Jan 28, 2021 2:41:00 PM
Store: 1
Workstation: 1

Sales Receipt #16
Jan 14, 2021 2:59:30 PM
Cashier: Sysadmin

RETRIEVAL
AFEQBO POSv19

Bill To:	Lisa Ann Burnett									
Item #	Item Name	Attribute	Size	Orig Price	Disc %	Type	Qty	Price	Ext Price	Tax
382	Coffee Mug	Tan	Large	\$14.99			1	\$14.99	\$14.99	
Subtotal:									\$14.99	
Exempt 0% Tax:									+ \$0.00	
RECEIPT TOTAL:									\$14.99	

Credit Card: \$14.99 Visa
Typed Name:
Timestamp: Jan 14, 2021 2:48:00 PM



I agree to pay above amount according to card issuer agreement (merchant agreement if credit voucher).

Signature: On File

PLEASE RETAIN FOR YOUR RECORDS

Print 1 sheet of paper

Destination: Canon T88000 series

Pages: All

Copies: 1

Layout: Portrait

Color: Color

More settings

Print Cancel

On the Sales History Screen: I Want to... green button

On the Sales History Screen, select the receipt to view then select the “I Want to..” green button.

A screenshot of the "Sales History" screen. At the top, there is a header bar with the title "Sales History" and a search bar. Below the header, there is a row of filters: "I Want to..." (with a dropdown arrow), "In-Store", "Mobile", "Ecommerce", and "All" (selected). Below the filters is a table with columns: Date, Receipt #, Receipt Type, Total, Total Qty Sold, Payment, Full Name, Online Store, and Status. The table contains 17 rows of sales data. A green arrow points from the "I Want to..." button in the header to the "I Want to..." button in the main screenshot.

Date	Receipt #	Receipt Type	Total	Total Qty Sold	Payment	Full Name	Online Store	Status
1/28/2021	17	Sales	14.99	1	Account	Lisa Ann Burnett		Regular
1/14/2021	16	Sales	14.99	1	Credit Card	Lisa Ann Burnett		Regular
1/14/2021	15	Sales	14.99	1	Credit Card	Lisa Ann Burnett		Regular
1/14/2021	14	Sales	14.99	1	Credit Card	Lisa Ann Burnett		Regular
1/14/2021	13	Sales	14.99	1	Account	Lisa Ann Lyons		Regular
1/13/2021	12	Sales	15.96	1	Credit Card	joanne burnett		Regular
1/13/2021	11	Sales	15.96	1	Cash			Regular
1/5/2021	10	Sales	63.25	2	Credit Card	lisa Burnett		Regular
1/5/2021	9	Sales	50.00	1	Credit Card	Lisa Ann Lyons		Regular
1/5/2021	8	Sales	500.00	1	Cash	Ashley Lyons		Regular
1/5/2021	7	Sales	40.00	2	Account	Ashley Lyons		Regular
1/5/2021	6	Sales	-20.00	-1	Cash	Ashley Lyons		Regular
1/5/2021	5	Sales	78.25	2	Split	Dale Webb		Regular
1/5/2021	4	Deposit	25.00	0	Credit Card	Dale Webb		Regular
1/5/2021	3	Sales	50.00	1	Check	Wes Baehr		Regular
1/5/2021	2	Sales	50.00	1	Credit Card	Dale Webb		Regular
1/5/2021	1	Sales	20.00	1	Cash	Ashley Lyons		Regular

Two options will be available to select from the dropdown:

1. Email Receipt
2. Retrieve Signature

Select the either Email Receipt or Retrieve Signature.

Requirements

Requirements

- ✓ QuickBooks Point of Sale
 - v11
 - v12
 - v18
 - v19
- ✓ Internet Connection
- ✓ Display Device
 - iPad Mini*
 - iPad*

Suggested

- ✓ Kiosk Stand
- ✓ Stylus

*Ability Business does not sell iPad's. You can utilize an iPad that has a current iOS, purchase locally, or online.

An iPad mini is recommended for Ability Signature Capture/Customer Display app. We typically support the last 3 iOS versions of an Apple iPad.

For example: As of January 13, 2022, your iPad Mini needs to be running iOS 13, 14, or 15.

Check [here](#) for current iOS info for Generation (model), release date, latest iOS version.