ThriftCart Reference Guide

A GUIDE TO OPERATE AND TROUBLESHOOT THRIFTCART
THE WACHUSETT EARTHDAY IQP TEAM
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Logging In and Out</td>
<td>4</td>
</tr>
<tr>
<td>Logging In</td>
<td>4</td>
</tr>
<tr>
<td>Logging Out</td>
<td>4</td>
</tr>
<tr>
<td>Managing User Accounts</td>
<td>5</td>
</tr>
<tr>
<td>Create a User Account</td>
<td>5</td>
</tr>
<tr>
<td>Manage User Permissions</td>
<td>7</td>
</tr>
<tr>
<td>Change Your Password</td>
<td>11</td>
</tr>
<tr>
<td>Managing Customers</td>
<td>12</td>
</tr>
<tr>
<td>Add a Customer</td>
<td>12</td>
</tr>
<tr>
<td>Edit Customer Information</td>
<td>14</td>
</tr>
<tr>
<td>Add a Customer from Register</td>
<td>17</td>
</tr>
<tr>
<td>Selecting an Existing Customer from Register</td>
<td>20</td>
</tr>
<tr>
<td>Performing Transactions</td>
<td>22</td>
</tr>
<tr>
<td>Add Item to Cart</td>
<td>22</td>
</tr>
<tr>
<td>Remove Item from Cart</td>
<td>22</td>
</tr>
<tr>
<td>Discard All Items in Cart</td>
<td>23</td>
</tr>
<tr>
<td>Cashing Out with Cash</td>
<td>24</td>
</tr>
<tr>
<td>Cashing Out with Card</td>
<td>26</td>
</tr>
<tr>
<td>Suspending and Recalling Purchase Transactions</td>
<td>30</td>
</tr>
<tr>
<td>Reprinting Receipts and Return Transactions</td>
<td>33</td>
</tr>
<tr>
<td>Inventory</td>
<td>37</td>
</tr>
<tr>
<td>Adding an Item to Inventory</td>
<td>37</td>
</tr>
<tr>
<td>Editing an Item in Inventory</td>
<td>42</td>
</tr>
<tr>
<td>Register Interface</td>
<td>46</td>
</tr>
<tr>
<td>Add Item Button to the Interface</td>
<td>46</td>
</tr>
<tr>
<td>Edit/Delete a Button in the Interface</td>
<td>49</td>
</tr>
<tr>
<td>Make Changes to the Cash Register Live</td>
<td>53</td>
</tr>
<tr>
<td>Generating reports</td>
<td>56</td>
</tr>
<tr>
<td>Daily Summary Report</td>
<td>58</td>
</tr>
<tr>
<td>Receipt tape report</td>
<td>60</td>
</tr>
<tr>
<td>Category sales report</td>
<td>62</td>
</tr>
<tr>
<td>Customer Sales Report</td>
<td>64</td>
</tr>
<tr>
<td>“Sales by zip code” report</td>
<td>66</td>
</tr>
<tr>
<td>Troubleshooting</td>
<td>68</td>
</tr>
<tr>
<td>“You do not have the permission required to do this”</td>
<td>68</td>
</tr>
<tr>
<td>Recently added inventory item not found in cash register page</td>
<td>68</td>
</tr>
<tr>
<td>Warning page regarding MySQL</td>
<td>68</td>
</tr>
</tbody>
</table>
INTRODUCTION

ThriftCart is a cloud point-of-sale system developed by Nabadab LLC. The system allows its user to conduct sales transactions, manage their inventory, and gather sales data anywhere there is a computer with internet access. ThriftCart is able to operate on multiple devices that can open a web browser (e.g. computer, iPad, Windows tablet, etc). The content of this manual explains, in detail, how to use specific features of ThriftCart and how to tackle and problems that may occur while using the system.
LOGGING IN AND OUT

LOGGING IN

To log in to ThriftCart, type the appropriate URL into the address bar. Once you are at your personal ThriftCart page, enter the appropriate username and password and press "Log In".

URL:

![Login screen with username and password fields]

LOGGING OUT

When the user is logged in to ThriftCart, they can log out by pressing the "Log Out" button on the upper section of any page.

![Logout button in the header of the ThriftCart interface]
MANAGING USER ACCOUNTS

CREATE A USER ACCOUNT

Navigate to the login page in your web browser and fill out the “User name” and “Password” fields below “Don't have a log in? Sign up for an account!”
After filling out the field, click on the “Sign Up!” button, and you will be directed to this page:

![Image of the page confirming account creation]

This page confirms that you have made an account. However, an administrator will have to give your account permission to log in. Changing account permissions is explained in the next section.
MANAGE USER PERMISSIONS

With an account that can manage user permissions, from the home page click on the “Settings and Admin” option.

Then click on the “Manage Permissions” option.
On the next page, select the user account that you want to change permissions for from the dropdown menu and click the “Edit permissions for this user” option.

You’ll be directed to a page that list each permission that you can alter.
The full list of permissions is as follows:

- **Admin**
  - Manage Settings
  - Note To Self
  - Manage Permissions
  - Manage Store Credit
  - Make Survey
  - Reorder
  - Tag Admin
  - Discounts
  - Reports
  - Cash Donation

- **Cash Register**
  - Price Override
  - Refund
  - Return
  - Cash Drawer
  - Sold Ticket Print
  - Open Store Credit Issue
  - Cash Register
  - Sold Items
  - Ordered Product

- **Contacts**
  - Letters
  - Add Donor
  - Manage Contacts

- **Drop Off**
  - Add Drop Off Self Service
  - Manage Drop Off
  - Add Drop Off
  - Manage Drop Off Passwords

- **General**
  - Email
  - Employee

- **Inventory**
  - Move Category
  - Delete Category
  - Add Donation
  - Purchase Order
  - Add Item
  - Manage Categories
  - Ordered Product Admin
  - Add Pictures
  - New Category
  - Manage Items
  - Barcode Map
  - Print Barcode
  - Inventory
  - Delete Items

- **Pickup**
  - Delete Trucks
  - Call Logger
  - Manage Pickups
  - Edit Zones
  - Manage Trucks
  - GPS Tracking

- **Timesheet**
  - Timesheet
  - View Timesheets
  - Worker Enrollment
  - Timesheet Admin
  - Timesheet Name Search
Toggle permissions using the corresponding checkboxes. Then click on the “Edit permissions for this user” option at the bottom of the page to confirm your changes.
CHANGE YOUR PASSWORD

To change your own password, from the home page click on the “Change password” option.

On the next page, fill out the fields as they are specified and click the “Change password” option.
MANAGING CUSTOMERS

ADD A CUSTOMER

From the home screen, press the "Point-of-sale and Inventory" button.

From the menu that appears on the right, press the "Manage Contacts" button.

Press the "Add a new contact" button.
In the fields provided, enter the information relevant to the contact that is being added. Note that not every field has to be filled. When finished, press the "Add contact" button.
EDIT CUSTOMER INFORMATION

From the home screen, press the "Point-of-sale and Inventory" button.

From the menu that appears on the right, press the "Manage Contacts" button.

Choose which customer whose information you wish to edit by clicking the "Edit/view" option to the left of their name.
Change the customer's information within the fields as desired. Note that not every field has to be filled. A custom field can also be created through the text boxes marked in red below. For example, a new attribute name could be labeled "Ethnicity" and the corresponding value field could be labeled as "Asian-American".
Press the save changes button to update the customer's information. Custom fields will be saved and viewable upon clicking this button. Custom fields can be removed by clicking the "X" that appears to their right.
ADD A CUSTOMER FROM REGISTER

From the register screen, press the "Add customer" button.
Type in the customer's information where appropriate in the fields provided.

Press the "Enter new customer" button that appears on the right after filling in some of these fields.
Filling in remaining fields as desired. Note that not every field has to be filled. When finished entering customer information, press the "Add contact" button.

If a dialog box appears, press "Cancel" to create the customer and "Okay" to continue to edit the customer's information.
SELECTING AN EXISTING CUSTOMER FROM REGISTER

From the register screen, press the "Add customer" button.
Type in the existing customer’s information where appropriate in the fields provided.

Select one of the existing customers that appear on the right. If no customer appears on the right, the customer either does not exist or the information entered in the fields to the left was entered incorrectly. In this example, we selected “Zachary” as the existing customer.
PERFORMING TRANSACTIONS

ADD ITEM TO CART

On the register screen, press any item in the Item Zone (marked in the red box below) and the item will appear in the cart.

REMOVE ITEM FROM CART

To remove an item from the cart, press the "X" to the right of an item.
DISCARD ALL ITEMS IN CART

From the register, press the "Empty Cart" button.
Confirm whether or not you wish to empty the cart. If you wish to empty the cart, press the "OK" button. Otherwise, press the "Cancel" button.

CASHING OUT WITH CASH

Once the appropriate quantity of items have been selected, press the "cash" button on the register screen.
If necessary, collect money from the customer and enter the amount of money received on the number pad. Then press the green "GO" button.

You should be brought to a page displaying the receipt for the transaction. If not, press the "Payments match amounts due. Complete purchase" button.
CASHING OUT WITH CARD

Once the appropriate quantity of items have been selected, press the "Card" button on the register screen.
From the list of options presented multiple actions can be taken:

To return to the register screen, select the "Return to register" option.

To proceed with a sale using a card, select the "sale" option and proceed with the directions displayed on the screen and card reader.
To split the sale between multiple payment options, select the "Split payment (change payment amount)" option.
Indicate the amount the customer wishes to charge on the card in the field provided. Then press the "Use this amount instead" button.

**Split payment amount**

Override amount: $0.50

Use this amount instead

Proceed with the sale with the options provided.
SUSPENDING AND RECALLING PURCHASE TRANSACTIONS

You would suspend a purchase transaction if the person who is making the purchase cannot complete their transaction at the moment (e.g. they need to return to the showroom to get another item), but you do not wish to forget what was already added to the cart.

To suspend a purchase transaction from the “Cash Register” page, click on the “Suspend Transaction” option (which is indicated below with the red box).

Note that depending on your computer’s screen size, the position of the “Suspend Transaction” option will be not at this exact location.
After clicking on the “Suspend Transaction” option, a dialog window will appear.

ThriftCart suggests that you should enter a brief description of the person who is making the purchase as the name of the transaction.
After clicking the “OK” button, you will have successfully suspended a purchase transaction (in this example, we have named our suspended transaction “Man with blue hat”).

To resume a purchase transaction at any time from the “Cash Register” page, select the suspended transaction you intend to resume from the drop-down menu and click the “Resume transaction” button.
REPRINTING RECEIPTS AND RETURN TRANSACTIONS

ThriftCart lets you browse through previous transactions, allowing you to reprint their corresponding receipts and perform return transactions.

To browse through previous transactions, from the “Cash Register” page click on the “Recent transactions” link.

By clicking on the “Recent transactions” link, you will be directed to this page:
Each “Return/refund/void” link leads to a page that gives more information about a transaction, such as what items were sold, and more importantly in this situation, options to “View/Print” the transaction’s receipt and “Void” the transaction.

To reprint the transaction’s receipt, click on the “View/Print Receipt” link.
To void a purchase transaction, thereby performing a return transaction, first click on the “Void Entire Transaction” link. Then click the “OK” button for each of the two dialog windows that appear.
You will be brought back to the “Cash Register” page, where you can complete the return transaction by clicking on the “Payments match amount due. Complete purchase” button.
The following instructions detail the process of adding an item that currently does not exist in inventory to inventory.

From the home page, press the "Point-of-Sale and Inventory" button.

A menu will appear on the right side of the screen. Click the "Add Inventory Items" button.
Choose the "Select an Anonymous Donor" button.

If prompted, select "Wachusett Earthday" as a location.
You will be presented with a panel of different categories of items. Press the panel labeled "Custom".

You will be brought to a page where you can enter the specific detail regarding the new item you wish to add to inventory. Enter the desired information for this item in the appropriate fields.
Note that not every field has to be filled. Once the appropriate fields have been filled out, there are two options:

1. Create the new item and continue to add items by pressing the button labeled "Add this item and return to adding items". Items can continue to be added by following the instructions detailed earlier in this section.
2. If you are done adding items, press the button labeled "Add this item and close out donation".

When the "Add this item and close out donation" button has been pressed, you will be brought to the page listing the different categories of items. Towards the bottom of the screen will be a list of the new items you have added and the detail pertaining to them.
EDITING AN ITEM IN INVENTORY

From the home page, press the "Point-of-Sale and Inventory" button.

From the menu that appears on the right, press the "Manage Items" button.
If you know the ID of an item you can search by ID. Otherwise, you can search for the item by name. To see a listing of all items just press the "Search" button at the bottom of the page.
To select from the listing of items, press their corresponding ID number to the left of their name.

Edit the appropriate fields. Note that not every field has to be filled. When finished, press the "Edit this item and return to search page" button. Or press the "Do not edit. Go back to search" button if you no longer wish to make changes to the item.
Edit Item ID 23

Category: Kitchenware (2)
Title: Plate
Description:
Price: 0.00
Quantity: 5
Tax rate: Non-taxed (0%)
Donation source: Donated
Location of item: Wachusett Earthday
Weight:
Units:
Picture: No file chosen

☐ Do not show this item on the website!
Allow item to appear multiple times separately on receipt (important for custom items)

Edit this item and return to search page
Do not edit. Go back to search.
The following instructions detail how to edit the register interface.

Press the "Setting and Admin" button from the home screen.

From the menu that appears on the right, press the "Manage Setting" button.

You will be brought to a new page containing a panel of different buttons. Press the "Design a Cash Register" button.
Indicate which register interface you wish to make edits to.

Once you have chosen the appropriate register, press the "Edit/Create" button.

Out of the list of categories presented, press the "Item Zone" option.
Scroll to the bottom of the page. Press the "Add New Button" option.

After the "Add new button" button is pressed, a list of fields will appear below that can be filled in to change the appearance of the button you are adding to the register interface. Fill in the appropriate fields pertaining to the new button being added and its aesthetic qualities. Note that not every field has to be filled. Below is a description of how some specific fields change the appearance of a button.

**Button caption:** The text displayed within a button.
**Image**: An optional image inside of the button.

![Image Example](image-url)

**Style**: The size and color of the button.

![Style Options](style-options-url)

**Button action**: What the button does when you press it.

**Item ID**: ID of the item associated with the button.

Once finished, press the "Add button" button at the bottom of the page. Continue to add buttons as desired.

To ensure that the added buttons can be viewed in the current register interface, please follow the instructions in the "Make Changes Live" section of this manual.

**EDIT/DELETE A BUTTON IN THE INTERFACE**

The following instructions detail how to edit the register interface.
Press the "Setting and Admin" button from the home screen.

From the menu that appears on the right, press the "Manage Setting" button.

You will be brought to a new page containing a panel of different buttons. Press the "Design a Cash Register" button.
Indicate which register interface you wish to make edits to.

Once you have chosen the appropriate register, press the "Edit/Create" button.

Out of the list of categories presented, press the "Item Zone" option.
Press the "Edit this button" option for the button whose appearance you wish to make changes to.

Scroll to the bottom of the page and change the contents of the item's field where desired. Note that not every field has to be filled. When finished, click the "Edit button" button.
Continue to edit buttons as necessary.

To delete a button, scroll down to the bottom of the page and press the "Delete this button" button.

MAKE CHANGES TO THE CASH REGISTER LIVE

Press the "Setting and Admin" button from the home screen.
From the menu that appears on the right, press the "Manage Setting" button.

You will be brought to a new page containing a panel of different buttons. Press the "Design a Cash Register" button.
Indicate which register interface you wish to make edits to.

Once you have chosen the appropriate register, press the "Edit/Create" button.

Press the "Rebuild cart (make changes live)" button.

The current register interface should now reflect the changes you have made.
ThriftCart can generate reports based on your sales and customer base. The reports that are relevant to your sales and customer base are as follows:

- Daily Summary Report
- Receipt tape report
- Category sales report
- Customer Sales Report
- “Sales by zip code” report

This section will instruct you on how to navigate to the pages where you can generate these reports and will show you example reports.

After logging onto ThriftCart, click on the “Settings and Admin” option from the home page.
Then click on the “Make Reports” option.

On the “Make Reports” page, you will see a list of options that refer to the reports that ThriftCart can generate.
ThriftCart describes a “Daily Summary Report” as “A quick report that gives daily sales by top-level categories as well as sales amount by payment type”. Clicking on the “Daily Summary Report” option from the “Make Reports” page will lead you to this page:
To generate a “Daily Summary Report”, you must select the store(s) the report will gather information from (in this case, “Wachusett Earthday”) and provide a range of dates that the report will limit itself to (despite its name, the report is not limited to a single day). Doing so will create the “Daily Summary Report” in tabular form. Below is a portion of a sample “Daily Summary Report”:
ThriftCart describes a “Receipt tape report” as a report that “Shows all receipts for a given day”. Clicking on the “Receipt tape report” option from the “Make Reports” page will lead you to this page:
To generate a “Receipt tape report”, you must select the store(s) the report will gather information from (in this case, “Wachusett Earthday”) and provide a range of dates that the report will limit itself to. Doing so will create the “Receipt tape report” in tabular form. Below is a portion of a sample “Receipt tape report”:

<table>
<thead>
<tr>
<th>Donated</th>
<th>1</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>DVD</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Furniture</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Fabric</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Home Decor</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>PreOwned</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Book</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>PreOwned</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Lighting</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Home Decor</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Tools</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>1</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

You can export a “Receipt tape report” to Microsoft Excel by selecting “Generate a CSV file (can be used in Excel)” and (re)generating the report.
ThriftCart describes a “Category sales report” as a report that “Break[s] down sales by category or by lists of individual items. Gives statistics such as average price, standard deviation, etc.”. Clicking on the “Category sales report” option from the “Make Reports” page will lead you to this page:
To generate a “Category sales report”, you must select the store(s) the report will gather information from (in this case, “Wachusett Earthday”) and provide a range of dates that the report will limit itself to. We suggest that you leave the “Category” option as “(Parent category)” to get sales from all categories. This will create the “Category sales report” in tabular form. Below is a portion of a sample “Category sales report”:
ThriftCart describes a “Customer Sales Report” as a report that shows “sales totals grouped by customer for given date ranges”. Clicking on the “Customer Sales Report” option from the “Make Reports” page will lead you to this page:
To generate a “Customer Sales Report”, you must select the store(s) the report will gather information from (in this case, “Wachusett Earthday”) and provide a range of dates that the report will limit itself to. Doing so will create the “Customer Sales Report” in tabular form. Below is a portion of a sample “Customer Sales Report”:

![Customer Sales Report](https://example.com/customer_sales_report.png)

You cannot export a “Customer Sales Report” to Microsoft Excel.
A “Sales by zip code” report generated by ThriftCart groups sales by customers’ zip code. Clicking on the “Sales by zip code” option from the “Make Reports” page will lead you to this page:
To generate a “Sales by zip code” report, you must select the store(s) the report will gather information from (in this case, “Wachusett Earthday”) and provide a range of dates that the report will limit itself to. Doing so will create the “Sales by zip code” report in tabular form. Below is a portion of a sample “Sales by zip code” report:
This section will identify some problems that you may encounter while operating ThriftCart and how to address them. If you encounter a problem that is not covered in this section, we suggest that you contact Nabadab LLC. for additional support by filling out the form located at http://thriftcart.com/contact.php.

**“YOU DO NOT HAVE THE PERMISSION REQUIRED TO DO THIS”**

If ThriftCart displays a page that has this warning:

> Sorry, you do not have the permission required to do this. Contact the site administrator.

It means that your ThriftCart administrator has not set the necessary user permissions for you to perform your operation. You should ask your ThriftCart administrator to set the necessary user permissions before attempting to perform your operation again.

**RECENTLY ADDED INVENTORY ITEM NOT FOUND IN CASH REGISTER PAGE**

If you cannot find an inventory item button in the “Cash Register” page after adding the related item to your inventory, it most likely means that you have not rebuilt the “Cash Register” page yet. You should follow our instructions to modify the register interface “Cash Register” page. Visit the section titled “Make Changes to the Cash Register Live.”

**WARNING PAGE REGARDING MYSQL**

If ThriftCart displays a page that begins with the following:

> Warning: mysql_connect() [function.mysql-connect]: Access denied for user 'DB_WEAKUSER'

It most likely means that you were performing an operation that ThriftCart will always prevent as a security precaution. You cannot perform your operation, and should navigate to the previous page using your browser’s “back” button.