

Getting Started

The essential first steps for setting up and learning RepairNest POS.

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1. Confirm Business Essentials

Verify tax, business identity, time zone, policies, and payment methods before taking live transactions.

1. Confirm Business Essentials

First-Day Setup Checklist

- Verify the location name, address, logo, time zone, and currency.
- Confirm every required sales-tax rate and product tax assignment.
- Review customer-facing policies and receipt wording.
- Confirm accepted payment methods.
- Select and test the card processor, if integrated.
- Create employee roles and employees in Back Office.
- Configure the register, shifts, and cash drawer.
- Set the daily target.
- Test printers, payment devices, and displays.

Complete configuration before processing live customer transactions.

How to Verify Sales Tax Before Your First Sale

Sales tax is one of the first settings to review because it affects transaction totals and reporting.

1. Open **Settings**.
2. Review the configured tax rates and tax templates.
3. Confirm taxable products are connected to the correct tax behavior.
4. Review any payment-method rule that forces tax for supported card methods.
5. Run a safe test sale and verify subtotal, tax, and total.

See [Payments, Taxes & Pricing](#).

How to Verify Business Information, Time Zone, and Policies

1. Open Settings → General.
2. Confirm business name, address, contact information, logo, currency, calendar, and time zone.
3. Review the general policy that may appear even when no specific item policy applies.
4. Review receipt and workflow-specific policies.
5. Save and test a receipt.

The correct time zone is essential for shifts, day end, reports, and scheduled alerts. See [General Business Settings](#).

How to Review Payment Methods Before Launch

1. Confirm the methods your store accepts are visible.
2. Hide methods employees should not use.
3. Set signature, address, last-four, and forced-tax requirements.
4. Enable and select the integrated processor.
5. Protect integration bypass with a PIN.
6. Test each accepted payment workflow safely.

See [Payment Methods & Checkout Controls](#).

2. Prepare Your Team

Create employees and roles in Back Office, then choose employee language and appearance preferences.

2. Prepare Your Team

How to Create Employees and Roles Before Launch

Core employee access is managed from the Back Office, not the store terminal.

1. Go to admin.autopaydesk.com.
2. Sign in with authorized Back Office access.
3. Open Employees and review Manage Roles.
4. Create or refine roles.
5. Add employees with individual PINs.
6. Assign the correct location and role to each employee.
7. Test employee sign-in and permissions.

See [Back Office Employee Management](#).

How to Set Employee Language and Appearance

Each employee can use a preferred interface language and light or dark mode.

1. Select the upper-right employee menu.
2. Select the pencil icon.
3. Choose English, Arabic, Spanish, or French.
4. Choose Light or Dark appearance.
5. Save and verify the interface.

See [Language & Localization](#) and [Appearance & Navigation](#).

How to Test Employee Access

1. Sign in as a test employee.
2. Confirm the employee reaches the correct location.
3. Verify normal tasks are available.
4. Verify restricted settings, reports, deletion, refunds, or management tools are unavailable when the role should not permit them.
5. Confirm the employee's language and appearance.
6. Correct the Back Office role or location assignment before launch.

3. Configure Store Workflows

Prepare wireless options, register behavior, products, favorites, shifts, and daily targets.

How to Prepare the Wireless Module

If your business uses wireless sales or bill payment, confirm the module's core records before launch.

- Add the carriers your store sells.
- Add the providers used for service or bill payment.
- Review carrier and provider availability.
- Attach the correct surcharge behavior where applicable.
- Test a safe wireless workflow.

Until the dedicated Wireless book is completed, use the [Wireless carrier, provider, and surcharge help search](#).

How to Review Register Settings

Open Settings → Register and review how checkout should behave.

- Product search and cart layout
- Customer selection and required customer information
- Inventory, repair, and layaway aging indicators
- Receipt and invoice behavior
- Product-entry options, Quick Sale, and keypad controls

See [Register Settings](#).

How to Prepare Products, Inventory, and Favorites

1. Create or import the products you sell.
2. Confirm itemized and serialized inventory behavior.
3. Verify UPC, SKU, price, cost, tax, and stock.
4. Test exact barcode, SKU, and serial-number search.
5. Create favorite tiles for best sellers and common services.

See [Products & Inventory](#) and [Favorite Products](#).

How to Configure Shifts and Cash Drawers

1. Create and name each cash drawer.
2. Choose whether registers use separate or shared drawers.
3. Review opening denominations.
4. Configure automatic day end if required.
5. Review shift receipt printing and layout.
6. Test opening, counting, and closing a shift.

See [Shift & Day End](#) and [Cash Management](#).

How to Set Up Your Daily Target

Daily Target turns operating costs and profit goals into a visible daily objective.

1. Open Daily Target or Light Settings.
2. Enter recurring monthly operating expenses.
3. Set the desired profit amount.
4. Set the number of operating days.
5. Choose the small or large dashboard presentation.
6. Save and confirm the target appears on the home screen.

See [Daily Target](#).

4. Connect & Test Hardware

Configure receipt printers, cash drawers, payment terminals, displays, and complete a safe opening test.

How to Configure Receipt and Document Printers

1. Open Settings → Devices & Hardware.
2. Select or configure the receipt printer.
3. Confirm connection type and paper size.
4. Review automatic printing choices.
5. Print a test receipt.
6. Test any invoice, statement, label, or repair-document printer used by the store.

See [Devices, Hardware & Displays](#).

How to Test the Cash Drawer and Card Terminal

1. Select the correct cash drawer and open a test shift.
2. Confirm the drawer opens only through authorized actions.
3. Verify the selected payment processor and terminal.
4. Run a safe approved card test.
5. Confirm the payment returns to the POS and the receipt is correct.
6. Test that integration bypass requires its PIN.

Do not use live customer payment data for an unapproved test.

How to Configure Customer-Facing Displays and Other Devices

Review every device used in the customer and employee workflow:

- Customer-facing display
- Barcode or QR scanner
- Receipt and label printers
- Cash drawer
- Card terminal
- Scale or other supported accessory

Confirm each device is connected to the intended workstation and works in both normal and recovery scenarios. See [Devices, Hardware & Displays](#).

Final Go-Live Test

1. Sign in as a normal employee.
2. Confirm the correct language, appearance, toolbar, and priority page.
3. Open the correct cash drawer and shift.
4. Find an item by name and identifier.
5. Add a favorite product.
6. Select a customer and complete a safe test sale with tax.
7. Verify required payment prompts and integrated-card behavior.
8. Print and review the receipt.
9. Perform a cash count and close the shift.
10. Review reports and confirm the test records are understood.

Resolve every unexpected result before taking live transactions.

Getting Started with RepairNest POS

RepairNest POS is designed to be easy to learn, but a few setup decisions should be verified before your first live sale.

Recommended launch order

1. Confirm sales tax, business information, time zone, and policies.
2. Create employees and roles in Back Office.
3. Review payment methods and card-processing security.
4. Configure the workflows your store uses, including wireless, products, favorites, shifts, and daily target.
5. Connect printers, cash drawers, card terminals, and displays.
6. Run a safe test from sign-in through receipt printing and shift close.

You can return to this checklist whenever a new location or workstation is added.