



myepos

## Table of contents

---

Operation .....	4
Starting your System .....	4
Sticky Notes .....	5
Special Log On Codes .....	6
Log On For Sales .....	7
Selling Items .....	7
Tendering From Payment Screen .....	9
Other Functions Main Sales Screen .....	10
Selling Scanned Items .....	11
PLU Or Barcode Number Manual Entry .....	12
Check Stock For Items .....	12
Item Seach .....	12
Refunds .....	13
Credit Note .....	14
Reciepts .....	14
Customers .....	15
Gift Vouchers .....	17
Manager Functions .....	18
Cash Drop .....	18
Pay Out Money .....	19
Gift Vouchers Database .....	19
Credit Notes Database .....	19
Training Mode .....	19
No Sale .....	20
Reports Mode .....	20
Current Clerk Sale .....	21
Current Hourly Sales .....	21
Current Financial Report .....	22
Current Sales .....	23
End of Shift Report .....	23
End Of Day .....	23
Clerk Sales by Period .....	24
Hourly Sales by Period .....	25
Financial By Period .....	26
Time & Attendance .....	27
Current Table Activity .....	27
Till Journals .....	27
Till Viewer .....	28
Manager Dashboard .....	29
POS Program Mode .....	30
Item Set Up .....	30
Create a New Group .....	30
Edit an Existing Group .....	32
Create a New Department .....	33
Edit an Existing Department .....	35
Create a New Supplier .....	36
Edit an Existing Supplier .....	38

Create a New Product .....	39
With Barcode .....	39
With PLU number .....	47
Labels .....	54
POS Menu .....	55
Staff Set Up .....	55
Staff Group Set Up .....	57
Access Set Up .....	58
Promotions .....	60
Table Layout .....	60
Tab Set Up .....	61
Stock Control .....	64
Purchase Order .....	64
Deliveries .....	65
Returns .....	66
Stock Taking .....	66

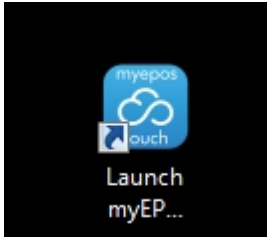
## Operation

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### Starting your System

## Starting your System

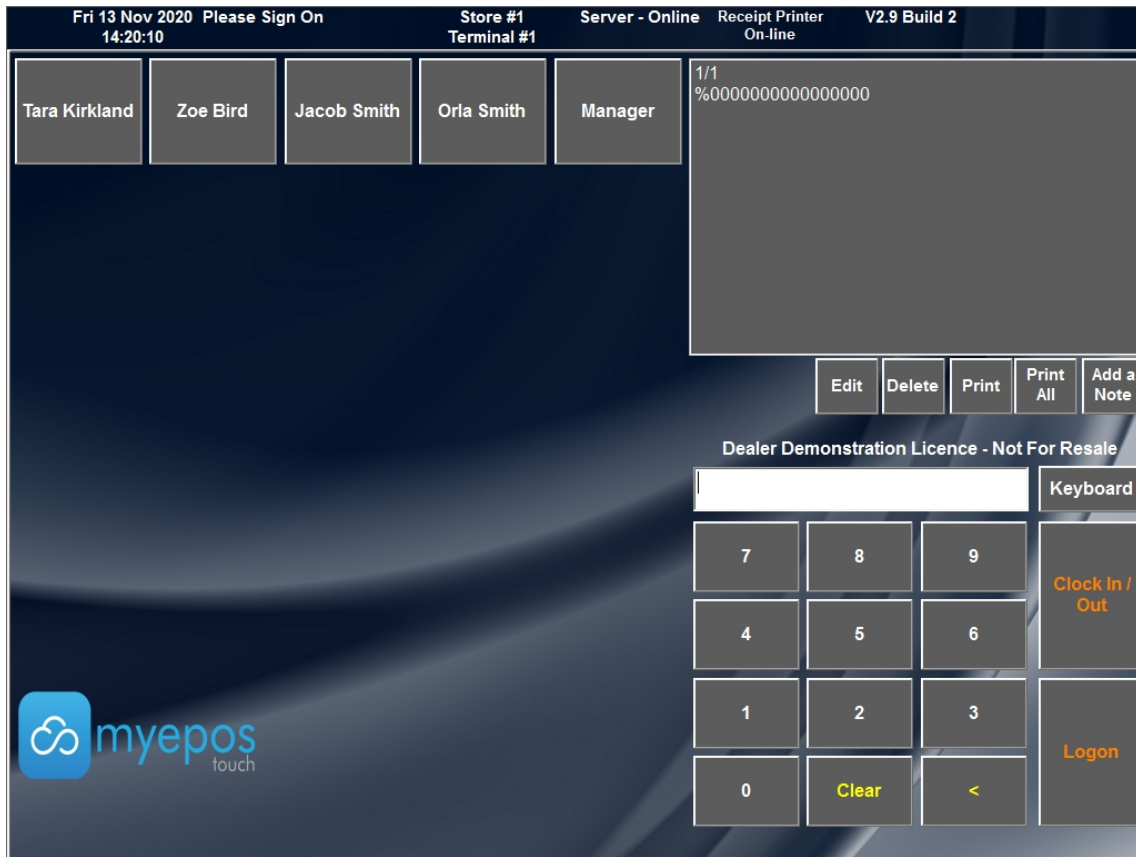
From the desktop of the PC use the myEPOS icon to start your software.



When the system starts up you will be presented with the below screen click on start POS Mode

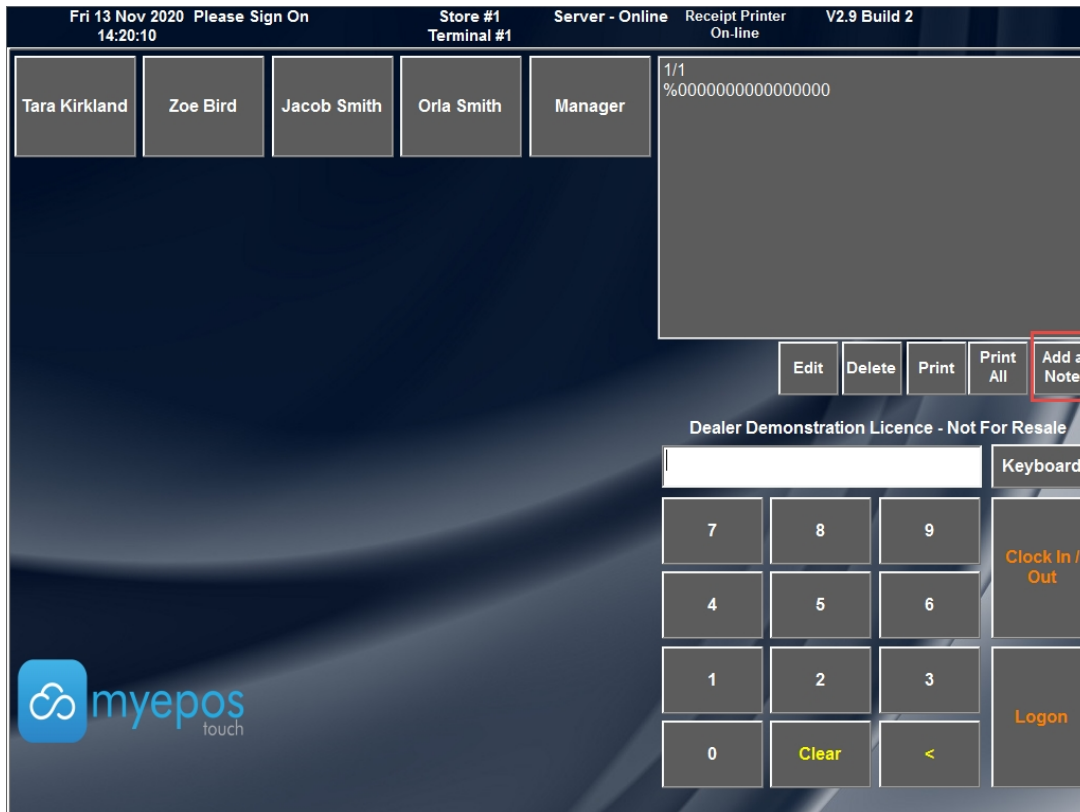


You will then be shown the user log in screen.

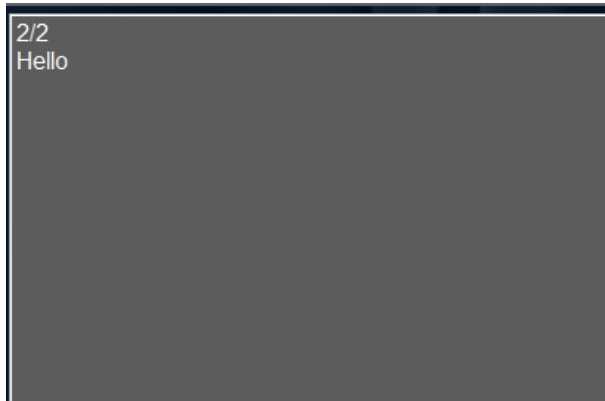


## Sticky Notes

## Sticky Notes



This area can be used for making notes, use the Add a Note button and select who it is for, plus time/date of note.



Once notes are saved, they will scroll through automatically every few seconds. They can be printed to the receipt printer. Contact your dealer about using the Email function

### Special Log On Codes

## Special Log on Codes from logon screen

Using the numeric keypad entering the below special codes will allow you access to different areas of the tills programming.

### **10101 > Logon**

This will take you back to the system log on screen.

### **20202 > Logon**

This will close the software back to windows desktop

### **30303 > Logon**

This will close the software and shutdown the terminal.

### **40404 > Logon**

Will take you to the systems operation settings. Please DO NOT amend settings here, unless you have technical advise from your dealer.

### **50505 > Logon**

Will close the software and log off the windows user. This will show the windows log in screen. Press OK to log back on to your desktop.

### **60606 > Logon**

Will go to the software licensing screen. Please DO NOT amend anything here unless you are instructed by your Dealer.

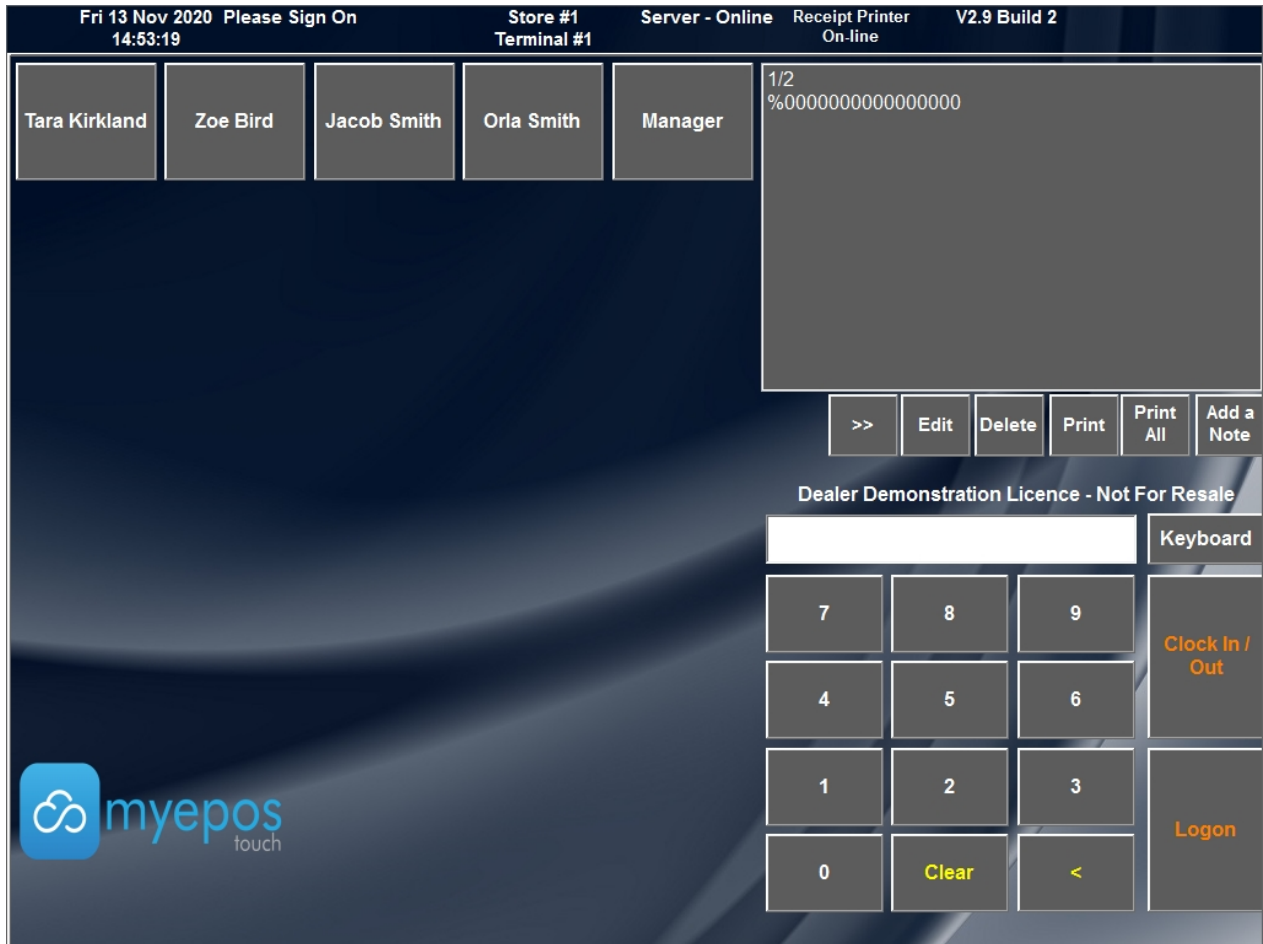
## 70707 > Logon

Will perform a backup. An automatic backup with the End of Day report is performed should have already been setup by your dealer.

### Log On For Sales

## Log on For Sales.

From the user logon screen shown below. Logon by pressing your name, you may be asked for code enter your security code then your name.



### Selling Items

## Selling Items



1. From your home selling screen you can either scan items (Note items need to be set up first. Refer to the programming of items section)
2. Manual Price Entry. For non scanning items, or items not set up you can manually enter a price using the keypad NOTE £5.95 would be 595 and not 5.95 (Do not use the decimal point) After entering the decimal point click the open Misc Sale keys.

As items are sold they build up in the journal window on the right of the screen.



Description	Price
Fish Cake	1.50
Misc Food	3.21
Mixed Kebab	4.40
Cheesy Chips	3.00

Review	4 Lines: £12.11
--------	-----------------

If you select the products in the journal window new buttons appear.



VOID: Use your finger or mouse to highlight a product in the journal window then press VOID. You will be prompted VOID LINE? YES/NO. Yes will remove that single line from the transaction.

NOTE: Use your finger or the mouse to highlight the product in the journal window, then press NOTE. You can then add up to three lines of notes which will print on the receipt.

QTY: Use your finger or mouse to highlight the product in the journal window, then press QTY. Enter a quantity value on the keypad that pops up and it will change the quantity of items for that line.

+ & - Buttons: Use your finger or mouse to highlight a product in the journal window. + will increase the number of items on that line and - will reduce the quantity.

REVIEW: This button will bring up all the transactions in the sale along with some additional function keys.



CHANGE PRICE: With the item highlighted in the review window; you can change the price of that item for that transaction. (e.g. damaged item, agreed customer price) After highlighting press change price. Enter the new price and press update price. Press the next item to be adjusted, or Close to go back to the main sales screen.

DISCOUNT LINE BY %: With the item highlighted in the review window, press discount line by %. Enter discount value e.e. for 10% 10 then enter a reason for the discount. Press the next item to be adjusted, or Close to go back to the main sales screen.

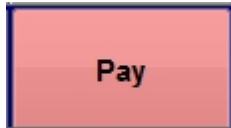
DISCOUNT LINE BY AMOUNT: With the item highlighted in the review window, press discount line by amount. Enter discount value e.g. for 50p 50 then enter a reason for the discount. Press the next item to be adjusted, or Close to go back to the main sales screen

ENTER NOTE FOR LINE: With the item highlighted in the review window, press enter note for line this works the same as the note function in the normal journal.

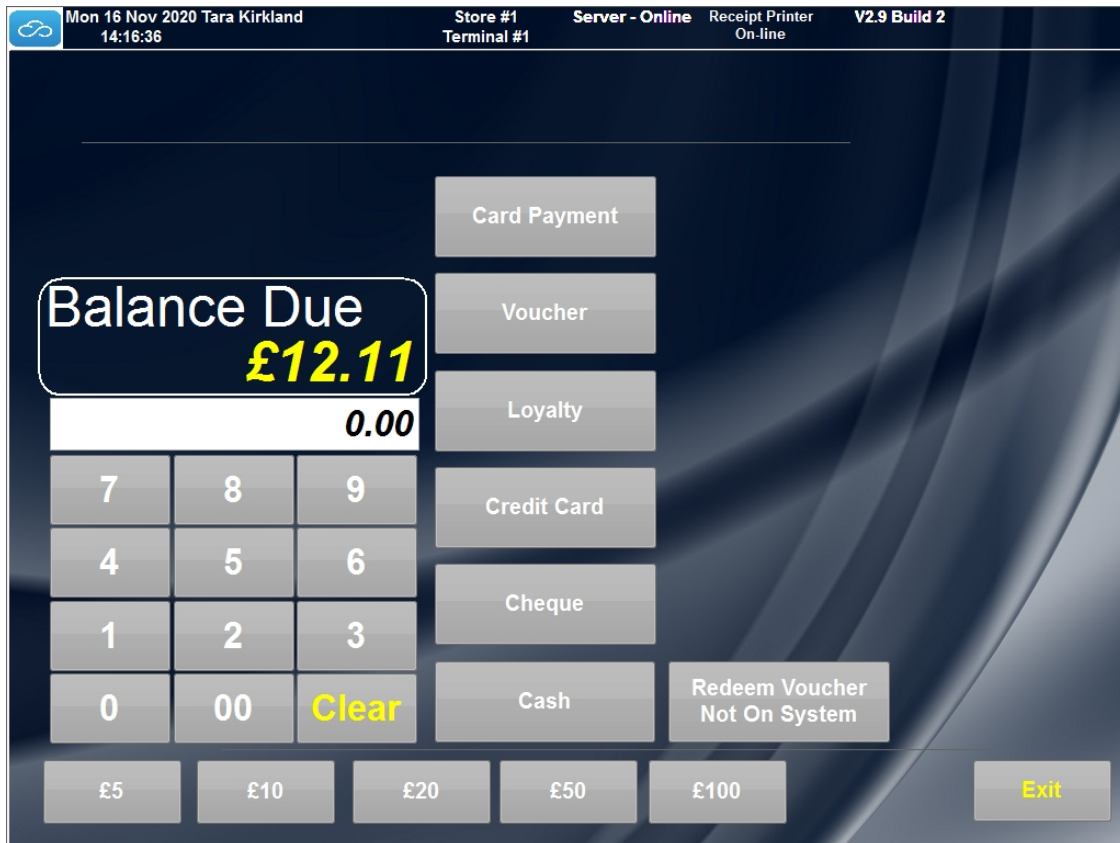
VOID LINE: With the item highlighted in the review window, press void line for line this works the same as the void function in the normal journal.

### Tendering From Payment Screen

To complete the transaction, from the main sales screen choose pay.



This will take you to the payment screen. Note if you have gone to this screen by mistake, but not yet entered any payments, you can press EXT to get back to sales mode, else start to enter payments.



The balance due of the sale is shown on the screen.

Pressing Cash, Cheque, Card, Paypal will assume the correct amount is being tendered and will complete the sale and print the receipt.

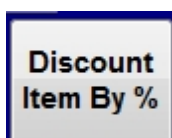
If you wish to calculate the change, or split tender; enter the amount E.g. Balance is £12.11 and the customer gives £20 CASH you can enter the amount 2000 then cash (Or use a quick tender £5, £10, £20, £50, £100 buttons). This would then show the change of £7.89.

Split tender e.g. Balance is £25.99 Customer wants to pay £10.00 Cash and then £15.99 on card. Enter 1000 then cash this will leave the balance due at £15.99 press Card to complete the transaction.

### Other Functions Main Sales Screen

In this section we will cover other functions in the main sales screen.

#### ***Discount Item by %***



To take a % discount off the item in the transaction:

Either sell the item then enter the amount of discount e.g. 10 for -10% then press discount item by % and it will take 10% of the last item sold.

Or

Sell several items. Highlight the item in the journal window by pressing on it. Then enter the amount of discount e.g. 10 for -10% then press discount item by % and it will take 10% of that item.

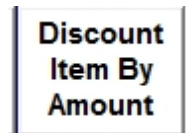
### ***Discount sale by %***



Alternatively at the end of a transaction you can choose to discount all items by a %.

Enter the amount of discount e.g. 20 for 20% and then press discount sale by %. Then complete sale.

### ***Discount item by amount.***



If you wish to take a set amount off an item instead of a % you can use Discount By Amount to take an amount off the item in the transaction.

Either sell the item then enter the amount off e.g. 50p enter 50 and press Discount Item by amount and it will take 50p of the last item sold.

Or

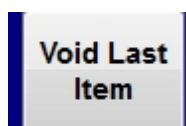
Sell several items. Highlight the item in the journal window by pressing on it. Then enter the amount of discount e.g. 50p enter 50 press discount item by amount and it will take 50p off that item.

### ***Cancel Sale***



If you do not want to complete a transaction, or wish to start it again you can cancel sale and it will void all items. During the transaction (Before tendering) press Cancel Sale, Void All Items and Cancel Transaction. Press Yes.

### ***Void Last Item***



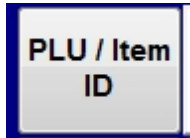
If you want to void the last item only after selling it press Void Last Item

### **Selling Scanned Items**

## Selling Scanned Items

[PLU Or Barcode Number Manual Entry](#)

### PLU or Barcode Number Manual Entry



If a barcode label is damaged and will not scan you can manually enter all the digits in the barcode and press PLU/Item ID and this will sell the product

[Check Stock For Items](#)

### Check Stock For an Item



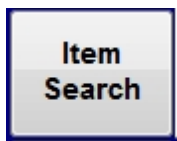
Press the button Check Stock for Item and then scan the item. It will return the current stock level for that item.

Either press Close or Sell Item.

This is handy if you want to check stock holding of a product

[Item Search](#)

### Item Search at Point of Sale Screen



Press the item search button to search for products on your database.

Product Search

Show Disabled Products  
 Show Kit Items Only?

Description:

Style Code:

Colour:

Size:

Supplier Code:

Department:  List X

Supplier:  List X

Exact Match  Contains All Words

Only Shows Items in Stock

Tags:  List X

Q	W	E	R	T	Y	U	I	O	P	<--	7	8	9
A	S	D	F	G	H	J	K	L	Enter		4	5	6
\	Z	X	C	V	B	N	M	/	'	*	1	2	3
"	&	@	%	SPACE	:	+	,	-	_		0	00	.

Close

Clear Field

Search

Type in some details for the product to be searched on. Other fields can be amended as well. Note the tick box for ITEMS IN STOCK ONLY then press search.

This will return that product, or all products with the description you have entered, with price and stock level.

Highlight the item required and you can either sell it, or view its sales history.

## Refunds

### Refunds

#### *Single Item Refund*

To refund an item press Item refund then scan the item or enter the price to one of the open department keys.

Select a pre-defined refund Reason. Add additional notes for the return. (If you want the item to go back into stock leave the box ticked, if the product is not resalable leave the box un-ticked - press on the box to toggle the tick on/off)

#### *Whole transaction Refund*

If you need to refund a whole transaction: use the scanner to scan the barcode at the bottom of the customer receipt. This will bring the transaction back and allow you to refund selected items or refund all.

At this point the sale value goes negative.

Either sell items in exchange or complete the sale, or if the total is negative for a full refund you have two options. Either press Card, Cheque, Cash to give the payment back or issue a credit note.

## Credit Note

### Credit Note

#### *Issuing a credit note.*

For a refund you can capture the customer's details at the point of sale.

Go to the payment screen to issue a credit note you can either enter some basic customer details here if you did not wish to put the customer on your database. You can also put some notes to print on the credit note. Or press customer Look up. For a new customer press Auto create to generate a new customer number, or search for an existing customer.

Fill in any relevant details  
Then Accept.

This will produce a refund receipt for the customer.  
This will also produce a credit note (Barcode on credit not for tracking)  
(The expiry date for credit notes is set as 180 days, but can be changed by contacting your dealer)

#### *Credit Note Redemption*

Sell all the items to the customer, go to the payment screen and select credit note.

Scan the barcode from the credit note, or enter the number.

The system will ask you if you want to redeem this credit note. Press OK

If the sale is the value of the credit note it will finalise the transaction.  
If the credit note is worth more than the value of the transaction, it will finalise then issue a new credit note for the balance to issue to the customer.  
If the credit note is less than the transaction, it will take it as a part payment leaving the balance to be paid.

## Receipts

### Receipts

The system is set to issue a receipt with every transaction.



For the last transaction you can issue another receipt by pressing receipt.  
You can also choose gift receipt this prints a copy of the receipt with no values present.  
You can also if you have an A4 printer set-up to the hardware, it can be configured to give an A4 style

invoice. (Please refer to your dealer for configuration)  
You can also email invoices.

## Customers

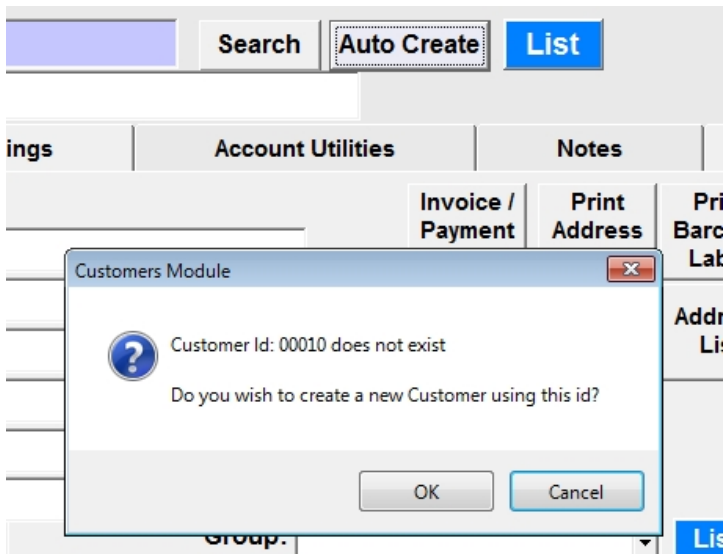
# Customers

### *Add a new customer.*

Press select customer from your till screen



For a new customer press Auto Create to generate a new customer number.



Fill in the relevant details.

**Customers Module**

Id: 00010 Clear

Name:

Address	Settings	Account Utilities	Notes	Profile	Sign In log
Address: <input type="text"/> Town: <input type="text"/> County: <input type="text"/> Area: <input type="text"/> <span>List</span> <span>X</span> Country: <input type="text"/> Post Code: <input type="text"/> <span style="margin-left: 50px;">Group: <input type="text"/> <span>List</span></span> Mobile: <input type="text"/> <span style="margin-left: 50px;">Land Line: <input type="text"/></span> Email: <input type="text"/>			Invoice / Payment History Print Address Label Print Barcode Label Top Selling Products Add a New Address Address List		<div style="border: 1px solid gray; border-radius: 50%; width: 100px; height: 100px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">                         No Image Set                     </div> <div style="margin-top: 10px; text-align: right;">                         Last Activity: //                          No. of Sales: 0                          Sales Value: £0.00                     </div>

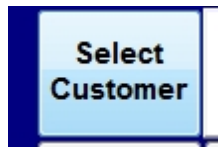
Q	W	E	R	T	Y	U	I	O	P	<--	7	8	9
A	S	D	F	G	H	J	K	L	Enter	4	5	6	
\	Z	X	C	V	B	N	M	/	'	*	1	2	3
"	&	@	%	SPACE	:	+	,	-	_	0	00	.	

Edit Details On CAPS On Cancel Save Select Customer

Then select customer.

### Select existing Customer

Press select customer from your till screen



Search by name.



Customer Id	Name: Address:
00009	Lexi
00010	
521051	johnson
525952	Adrian Cresswell
528146	rudge
577125	Dorinda Davies
588563	Abbas
597323	Egan
624560	Willetts

11 Customers Found.

Name:  Phone:

Address:

Post Code:

Q	W	E	R	T	Y	U	I	O	P	<--	7	8	9
A	S	D	F	G	H	J	K	L			4	5	6
\	Z	X	C	V	B	N	M	/	'	*	1	2	3
"	&	@	%	SPACE	:	+	,	-	_		0	00	.

Select the appropriate customer.

This function will allow tracking of item sales to customer, and can have settings changed to utilise loyalty and customer accounts, with credit limits and statements.

Please speak to your dealer for further configuration.

## Gift Vouchers

### Gift Vouchers

#### ***Selling a gift voucher.***

Enter the amount you want the gift voucher to be e.g. £25.00 as 2500 then press Sell Gift Voucher.

You can either enter some basic customer details here if you did not wish to put the customer on your database. You can also put some notes to print on the gift receipt.

Pay off the transaction and the printer will issue a Gift Voucher with Traceable barcode.

#### ***Redeeming a Gift Voucher***

Sell all the items to the customer, go to the payment screen and select Gift Voucher.

Scan the barcode from the Gift Voucher, or enter the number.

The system will ask you if you want to redeem this Gift Voucher. Press OK

If the sale is the value of the Gift Voucher it will finalise the transaction.

If the Gift Voucher is worth more than the value of the transaction, it will finalise then issue a new Gift Voucher for the balance to issue to the customer.

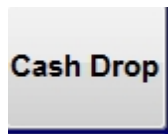
If the Gift Voucher is less than the transaction, it will take it as a part payment leaving the balance to be paid

## Manager Functions

---

### Cash Drop

### Cash Drop



If you decide to take money out of the till to put in the safe during the day, this can be accounted for by pressing the cash drop button.

**Money Uplift**

**Cash**  | **0.00**

---

**Uplift Total:**
**0.00**

<b>7</b>	<b>8</b>	<b>9</b>	<b>&lt;</b>
<b>4</b>	<b>5</b>	<b>6</b>	
<b>1</b>	<b>2</b>	<b>3</b>	
<b>0</b>	<b>00</b>		<b>Next</b>

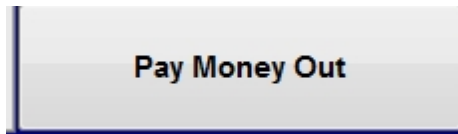
**Cancel**

**Finished**

Enter the cash amount and press finished.  
Cash Drop receipt will also print

## Pay Out Money

### Pay out Money



If you need to pay money out of the till for petty cash e.g. delivery, window cleaner.

Press Pay Money Out. Enter the amount being paid out and choose a reason.

## Gift Vouchers Database

### Gift Vouchers Database

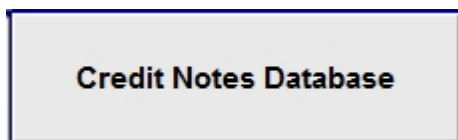


If you need to know which Gift Vouchers have been issued go to Manager Mode and Press Gift Vouchers Database.

From this screen you can search for Vouchers, Delete or re-print vouchers.

## Credit Notes Database

### Credit Notes Database

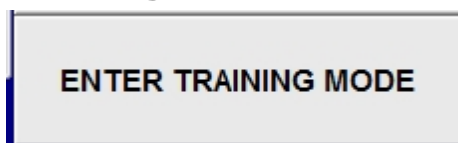


If you need to know the status of credit notes issued. Go to Manager Mode and press Credit Notes Database.

From this screen you can search for Credit Notes, delete or re-print notes.

## Training Mode

### Training Mode



**Note: Anything started in training must be completed in Training must be**

## completed in training.

Training makes a backup of the system to C:\Training for testing.

All receipt will print training.

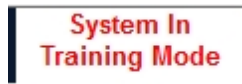
To enter training to go Manager Mode, press Enter Training Mode, when prompted to enter training say yes. Would you like to update your training data say yes.

Wait for system to back everything up to a training mode. The screen will turn red as a warning you are in training.

In training mode you can test transactions and this will not deduct from stock or add to sales.

## To Exit training mode.

From the log on screen press on the flashing System in Training



Exit training mode? Yes

System will return to normal.

## No Sale

## No Sale



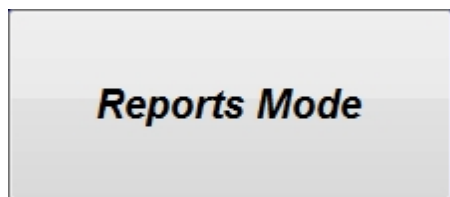
To Open this cash draw, not as part of a transaction. Go to Manager mode

Press No Sale  
Select a reason  
Drawer Opens  
No Sale Receipt Prints

## Reports Mode

---

## Reports Mode



This button allows access to current and end of day financial reports plus cashing up functions. All these reports can be printed on your receipt printer.

## Current Clerk Sale

### Current Clerk Sale Report

Current clerk sale report shows all sales by clerk since last Z read.

MyEpos Touch Take Away System		
-----		
Current Clerk Report		
Tara Kirkland		
Date: 18/11/2020 Time: 11:55		
-----		
Tara Kirkland		
-----		
Transactions:	11	
Gross Sales:	24	75.20
Refunds:	-4	-12.11
		-----
Total Net Sales:	20	63.09
		-----
Vouchers Sold:	1	5.00
		-----
Total Balance:		68.09
		-----
MONEY Uplifts:	1	5.00
		-----
-----		
Avg Value Per Sale:		5.74
Avg No. Of Items Per Sale:		2
-----		
No of Covers:	1	
Trans with Covers:		1
Total Cover Spend:		6.10
Avg Cover Spend:		6.10
-----		
Tender Totals		
-----		
Cash:	9	78.10
Credit Note:	1	-12.11
Card Payment:	1	2.10

## Current Hourly Sales

### Current Hourly Sales Report

Current hourly sale report shows the number of sales per hour from the last Z read. It breaks it out by number of sales, number of items and the total value of sale by hour.

MyEpos Touch Take Away System			
-----			
Current Hourly Sales Summary			
Tara Kirkland			
Date: 18/11/2020 Time: 11:56			
-----			
Hour	Sales	Items	Value
-----			
09:00	7	13	101.43
10:00	2	1	2.50
11:00	4	11	48.09
13:00	1	1	2.10
14:00	1	3	4.30
15:00	1	4	12.11
-----			
Totals:	16	33	170.53
-----			

## Current Financial Report

### Current Financial Report

Current Financial Report is an X read of your till it shows an overall picture of your business from your last Z read.

It includes:

Transactions:	Number of Transactions
Gross Sales:	Number and Value of Gross Sales
Refunds:	Number and Value of Refunds
Total Net Sales:	Number and Value of Net Sales
Vouchers Sold:	Number and Value of Voucher Sales
Total Balance:	Total of Net Sales & Voucher Sales
Avg Value per Sale:	Value of Transactions Divided by Value of Total Net Sales
Avg No. Of Items Per Sale:	Number of Transactions Divided by Number Net Sales
No of Covers:	Number of Covers
Transactions with covers:	Number of transactions that have used covers
Total Cover Spend:	Total of sales using covers
Avg Cover Spend:	Total Cover Spend Divided by Number of Covers
<b>Tender Totals:</b>	
Cash:	Number of Cash Transactions and Value of Cash
Credit Note:	Number and value of Credit Notes Issued
Card Payment:	Number and value of card transactions
<b>VAT</b>	
VAT on Cash Sales	Total VAT and Total Excluding VAT

VAT on Card Sales  
 VAT on Mixed Sales  
 Summary

Total VAT and Total Excluding VAT  
 Total VAT and Total Excluding VAT  
 Total VAT and Total Excluding VAT

**Loyalty**

Transaction Points Issued:

Number of loyalty points issued

**Price Band Sales**

Price Band 1:

Number and value of sales made at price band 1

Group Totals

Breakdown of sales by group

Daily Tab Activity:

Breakdown of Tabs including Tab Number, Covers and Total spend

**Current Sales**

**Current Sales**

Current sales opens a screen where you can search all sales from the last Z Read

The screenshot displays the 'Current Sales' interface. At the top, there are filter options for 'Clerk' (set to 'ALL CLERKS'), 'Transactions', 'Refunds', 'Paid In / Deposits', 'Paid Out', 'Voids', 'Voids after Send', 'No Sale', 'Waste', 'Only Transactions With Discounts?', and 'Only Transactions With Promotions?'. Below these are fields for 'Tender' (set to 'All Payment Types'), 'Sale No.' (set to '(0=All)') with a 'Numpad' button, and search fields for 'Description' and 'Customer'. A 'Tab' dropdown is set to 'Not Specified'. A table lists sales with columns for Date, Time, Clerk, Sale No., Value, and Customer. A detailed receipt for sale #19 is shown on the right, listing items like Large Chips, Chip Cone, Small Curry, Small Peas, Mixed Kebab, and Meat with Chips, with a total of 11.80. At the bottom, there are summary statistics: '3 Sales @ £47.09', '0 Refunds / Trade In @ £0.00', and '0 Money Paid In @ £0.00'. A 'Print A4 Report' button is visible. A control panel at the bottom right contains buttons for 'Void Sale', 'Repeat / Refund', 'Gift Receipt', 'Edit Tender', 'Invoice', 'Receipt', 'Delivery Note', 'Print Summary', 'Print Journal Breakdown', and 'Exit'.

**End of Shift Report**

**End Of Shift Report**

The End of Shift report prints out a Financial report for the period either from the time the last End of Shift report or Z read whichever is soonest.

It also marks all transactions with the shift number.

**End Of Day**

**End of Day Report**

Current Financial Report is an Z read of your till it shows an overall picture of your business from your last Z read.

It includes:

Transactions:	Number of Transactions
Gross Sales:	Number and Value of Gross Sales
Refunds:	Number and Value of Refunds
Total Net Sales:	Number and Value of Net Sales
Vouchers Sold:	Number and Value of Voucher Sales
Total Balance:	Total of Net Sales & Voucher Sales
Avg Value per Sale:	Value of Transactions Divided by Value of Total Net Sales
Avg No. Of Items Per Sale:	Number of Transactions Divided by Number Net Sales
No of Covers:	Number of Covers
Transactions with covers:	Number of transactions that have used covers
Total Cover Spend:	Total of sales using covers
Avg Cover Spend:	Total Cover Spend Divided by Number of Covers
<b>Tender Totals:</b>	
Cash:	Number of Cash Transactions and Value of Cash
Credit Note:	Number and value of Credit Notes Issued
Card Payment:	Number and value of card transactions
<b>VAT</b>	
VAT on Cash Sales	Total VAT and Total Excluding VAT
VAT on Card Sales	Total VAT and Total Excluding VAT
VAT on Mixed Sales	Total VAT and Total Excluding VAT
Summary	Total VAT and Total Excluding VAT
<b>Loyalty</b>	
Transaction Points Issued:	Number of loyalty points issued
<b>Price Band Sales</b>	
Price Band 1:	Number and value of sales made at price band 1
Group Totals	Breakdown of sales by group
Daily Tab Activity:	Breakdown of Tabs including Tab Number, Covers and Total spend

**ENSURE THE REPORT HAS PRINTED IN FULL BEFORE EXITING THE PRINT SCREEN THIS WILL THEN RESET YOUR DATA AND CAN NOT BE UNDONE**

## Clerk Sales by Period

### Clerk Sales By Period

Clerk sales by period allows you to see the clerk sales for a specified date range.



Report Filters
Keyboard Off

Date Range  
 Single Date

**Quick Dates**

Today

Yesterday

This Week

Last Week

Last 2 Weeks

Last 7 Days

Last 14 Days

This Month

Last Month

Last 2 Months

Last 30 Days

This Year

Last Year

All Time

Store 1

Deselect All    Select All

November 2020

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 18/11/2020

to

November 2020

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

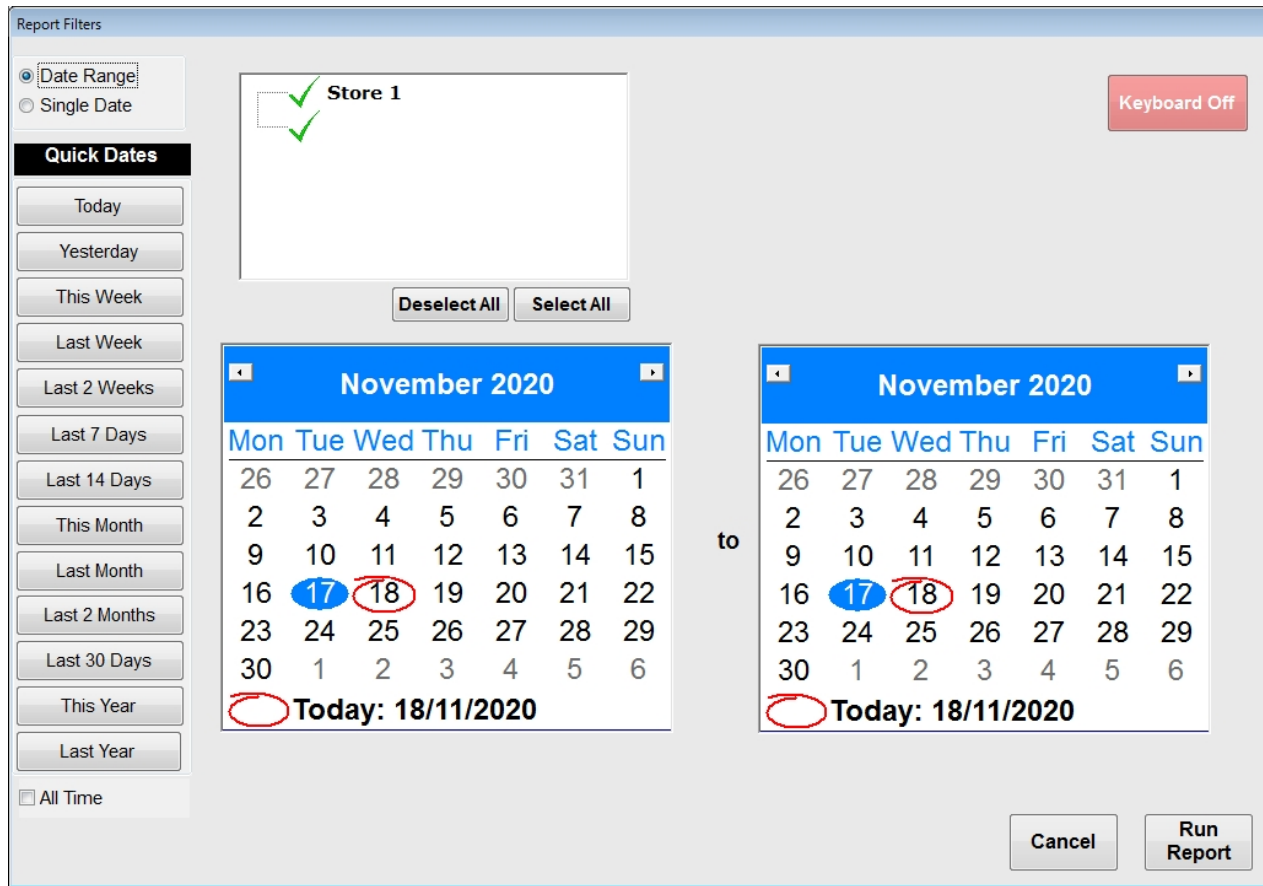
Today: 18/11/2020

Cancel
Run Report

## Hourly Sales by Period

### Hourly Sales By Period

Hourly sales by period shows the number of sales per hour for the specified date/s. It breaks it out by number of sales, number of items and the total value of sale by hour.



## Financial By Period

### Financial By Period

Financial by Period Report is an X read of your till it shows an overall picture of your business for the date/s specified.

It includes:

Transactions:	Number of Transactions
Gross Sales:	Number and Value of Gross Sales
Refunds:	Number and Value of Refunds
Total Net Sales:	Number and Value of Net Sales
Vouchers Sold:	Number and Value of Voucher Sales
Total Balance:	Total of Net Sales & Voucher Sales
Avg Value per Sale:	Value of Transactions Divided by Value of Total Net Sales
Avg No. Of Items Per Sale:	Number of Transactions Divided by Number Net Sales
No of Covers:	Number of Covers
Transactions with covers:	Number of transactions that have used covers
Total Cover Spend:	Total of sales using covers
Avg Cover Spend:	Total Cover Spend Divided by Number of Covers
<b>Tender Totals:</b>	
Cash:	Number of Cash Transactions and Value of Cash
Credit Note:	Number and value of Credit Notes Issued
Card Payment:	Number and value of card transactions
<b>VAT</b>	
VAT on Cash Sales	Total VAT and Total Excluding VAT
VAT on Card Sales	Total VAT and Total Excluding VAT
VAT on Mixed Sales	Total VAT and Total Excluding VAT
Summary	Total VAT and Total Excluding VAT

**Loyalty**

Transaction Points Issued: Number of loyalty points issued

**Price Band Sales**

Price Band 1: Number and value of sales made at price band 1

Group Totals Breakdown of sales by group

Daily Tab Activity: Breakdown of Tabs including Tab Number, Covers and Total spend

**Time & Attendance**

**Time & Attendance**

Time and attendance report shows the hours worked by clerk.

Note this only works if you have Time & Attendance active. Contact your dealer to enable this feature if required.

**Current Table Activity**

**Current Tab Activity**

Current Tab Activity shows all open Tabs

```

MyEpos Touch
Take Away System
-----
Current Tab Activity
Tara Kirkland
Date: 18/11/2020 Time: 12:52
-----
No#           Covers           Total
-----
Tab: Collections
-----
  1           0           1.60
-----
Tab: Table
-----
  1           1          12.10
  2           1           4.10
-----
Tab: JOBS
-----
  1           0           9.90
-----
  4           2          27.70
-----
    
```

**Till Journals**

## Till Journals

Till journals is similar to Current sales in that it allows you to search and view sales. However in till journals you can review sales from previous days, and also all terminals.

17/11/2020
<< >>
Set Dates

Store: **Store 1**
Terminal: **All Tills**

Clerk: \*\*\*\*
**ALL CLERKS**

Transactions

Refunds

Paid In / Deposits

Paid Out

Voids

Voids after Send

No Sale

Waste

Only Transactions With Discounts?

Only Transactions With Promotions?

Tender: **All Payment Types**
Sale No: (0=All):  Numpad

Description: Search Clear
Tab: **Not Specified**

Customer: Search Clear

Drag a header here to group items

Date	Time	Clerk	Sale No:	Value	Customer
17/11/2020	09:18	Tara Kirkland	001-001-000011	-12.11	
17/11/2020	10:58	Tara Kirkland	001-001-000012	5.00	
17/11/2020	11:42	Tara Kirkland	001-001-000013	6.30	
17/11/2020	11:46	Tara Kirkland	001-001-000014	12.90	
17/11/2020	11:49	Tara Kirkland	001-001-000015	15.99	
17/11/2020	11:49	Tara Kirkland	001-001-000016	12.90	

Fish Cake	1.50
Cod	5.10
Mini Cod	3.30
Cod Bites	3.00
<b>Total:</b>	<b>12.90</b>
Cash	20.00
<b>Change Due:</b>	<b>7.10</b>

5 Sales @ £53.09    1 Refunds / Trade In @ £-12.11    0 Money Paid In @ £0.00

0 Paid In / Deposits @ £0.00

Print A4 Report

△

Void Sale

Repeat / Refund

Gift Receipt

Edit Tender

Invoice

Receipt

Delivery Note

Print Summary

Print Journal Breakdown

Exit

### Till Viewer

## Till Viewer

Allows you to view other tills Current Sales

Next Poll In 10 Seconds
Z Report

Terminal:  

Clerk: \*\*\*\* ALL CLERKS

Transactions

Refunds

Paid In / Deposits

Paid Out

Voids

Voids after Send

No Sale

Waste

Only Transactions With Discounts?

Only Transactions With Promotions?

Tender: All Payment Types Sale No: (0=All): 0 Numpad

Description:   Search Clear Tab: Not Specified

Customer:   Search Clear

Drag a header here to group items

Date	Time	Clerk	Sale No:	Value	Customer
23/10/2020	13:13	Tara Kirkland	001-001-000001	2.10	

1 Sales @ £2.10

0 Refunds / Trade In @ £0.00

0 Money Paid In @ £0.00

0 Paid In / Deposits @ £0.00

Print A4 Report

Void Sale	Repeat / Refund	Gift Receipt
Edit Tender	Invoice	Receipt
Delivery Note		
Print Summary	Print Journal Breakdown	Exit

Online Orders - 02/11/2020 09:58	#1
Medium Chips	2.10
<b>Total:</b>	<b>2.10</b>
Card Payment	2.10

## Manager Dashboard

# Manager Dashboard

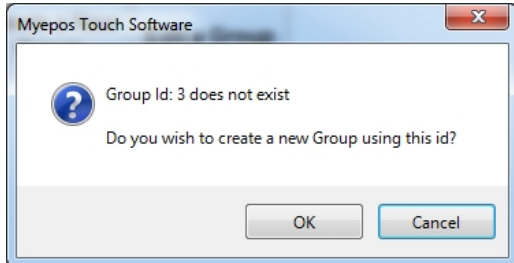
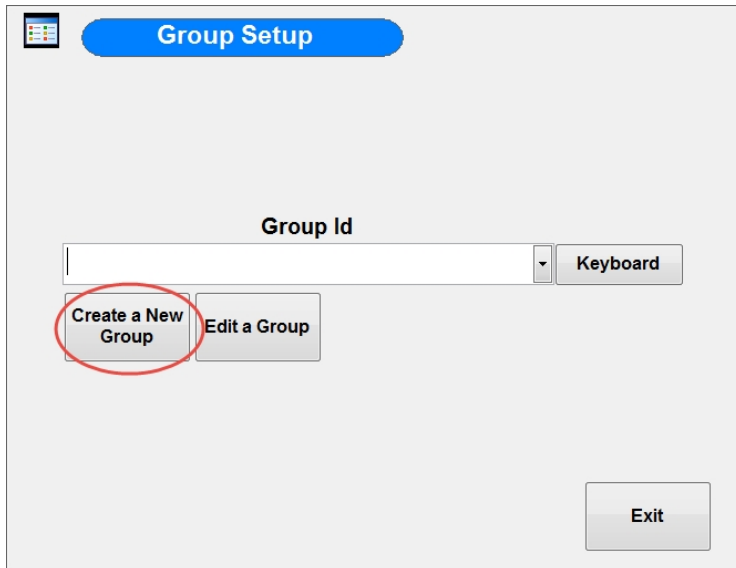
Manager Dashboard shows live hourly performance, department sales and Cash Values



## Create a New Group



From the item set up screen choose Group Setup and Create a New Group and OK



This then loads the below screen:

- Name: Give the group a name
- Export Code: Code that can be used in an external system
- Operator Alert: Text that pops up for operator when item is sold from group
- Compulsory Tab Required: Items in this group Must go on a Tab when this box is ticked
- Prompt For Operator: Prompt for operator who served the customer
- Show on Order Pad: Show group on orderpad

Save and Exit Set up when Completed

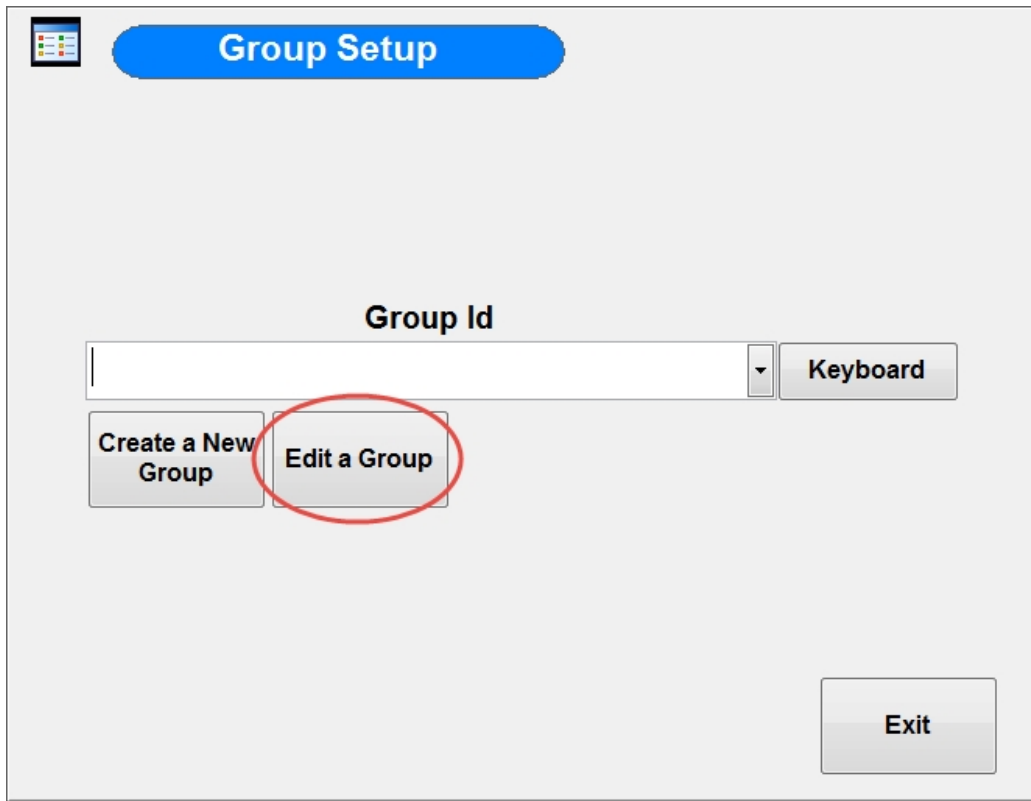
### Edit an Existing Group

## Edit an Existing Group



Select Edit a group





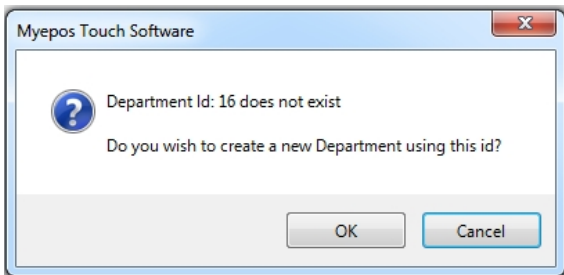
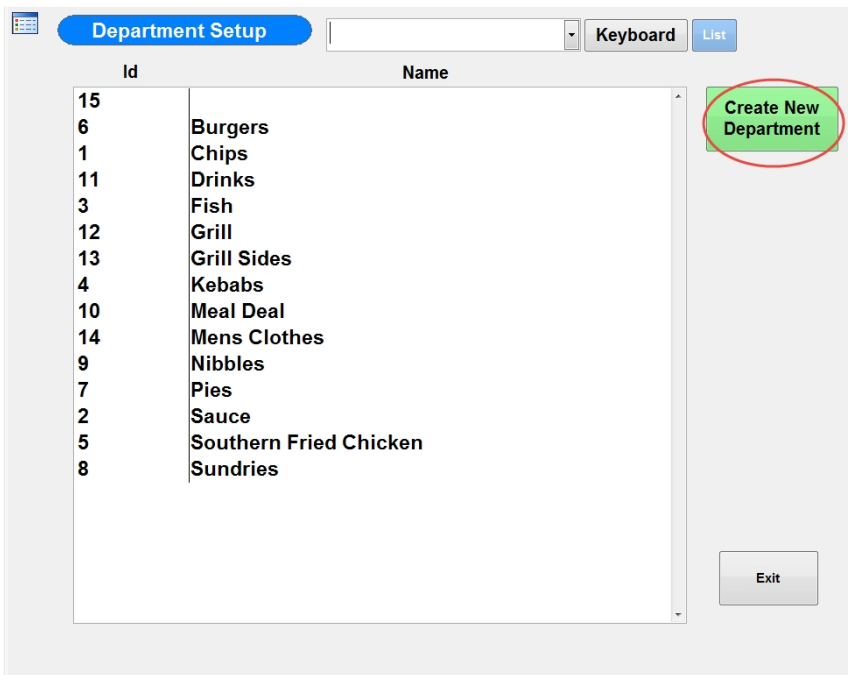
This opens all current groups. Select the one you wish to edit and you are now presented with the same screen as create a new group.

### Create a New Department

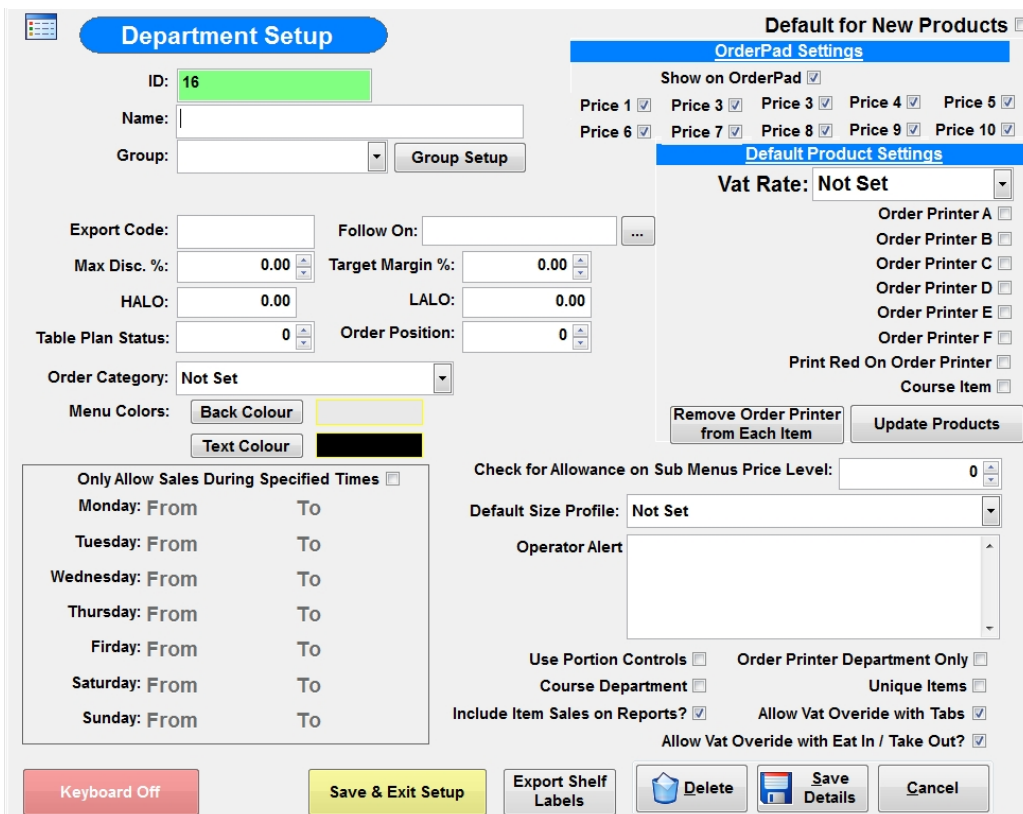
## Create a New Department



Select Create a New Department and OK



This loads the below screen:



Name:	Name of Department
Group: previously.	Group Department is to be reported in as set up
Export Code:	Code that can be used in an external system
Follow On: from this department	Function to be preformed after an item is sold
Max Disc %: from this department	Maximum % Discount to be granted on items
Target Margin %: based on this %	Suggests sell price for items in this department
HALO:	High Amount Lockout for department
LALO:	Low Amount Lockout for department
Table Plan Status: table plan status should be assigned	When items from this department are sold what
Order Position: on orders	Position items from this department are shown in
Order Category:	Category Items are shown in from this department
Menu Colours:	Colour of button on sales screen
Allow Sales During Specified Times: days or times (Perfect for Sunday Lunch Or Set Menus)	Only allow sales from this department on certain
<b>Order Pad Settings</b>	
Show on Order Pad:	Show Department on Order Pad.
Price Levels:	Define price levels available on Order Pad.
<b>Default Product Settings</b>	
VAT Rate:	VAT Rate for items in this department
Printers: should print to.	Select which printer/s items in this department
Remove Order Printer from Each Item: department	Remove all current set printers for items in this
Update Products: department	Update printer settings in for each item in this
Check for Allowance on Sub Menus Price Level: allowance using price level. (See Set Menu guide for More Information)	If Items are part of a set menu check for
Default Size Profile:	Default Size Profile for items in this department
Operator Alert: from department	Text that pops up for operator when item is sold
Use Portion Controls: department	Use portion controls for items sold in this
Order Printer Department Only:	Department is a course department
Course Department:	If ticked items when sold from this category are
Unique Items: listed as individual items rather than grouped into identical products e.g. 5 x Pizza	
Include Items on Sales Reports: sales reports	Items from this department should be included on
Allow VAT Override with Tabs:	Allow VAT Override on Tabs
Allow VAT Override with Eat In/Take Out?:	Allow VAT override based on Eat In/ Take Out

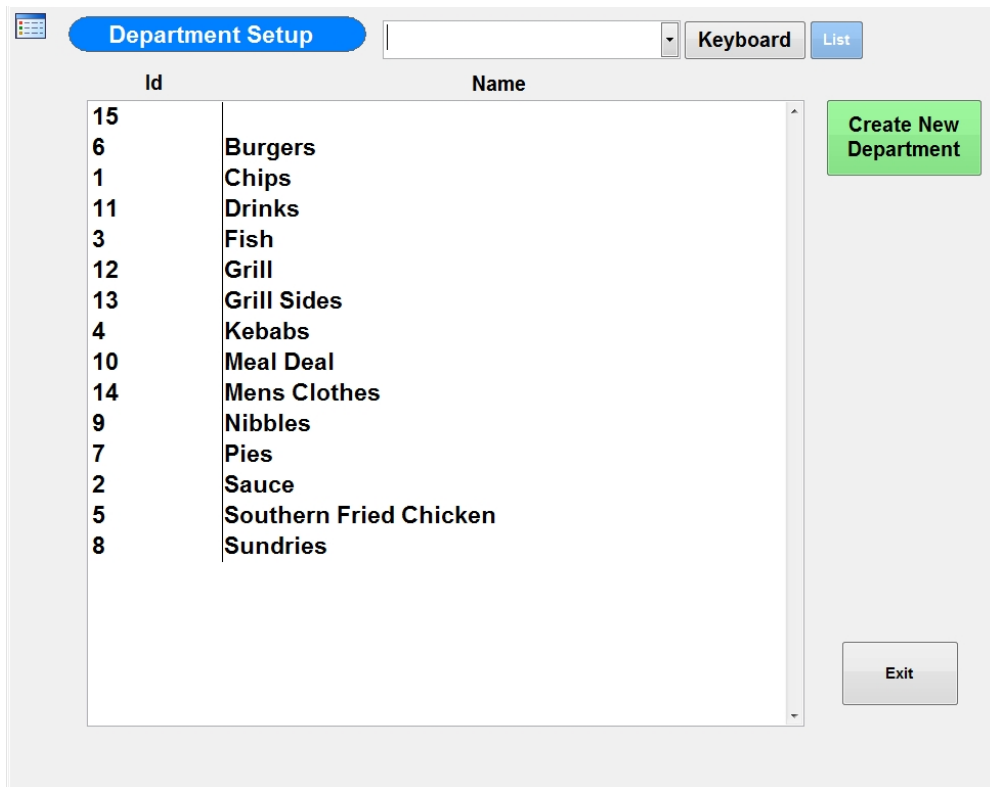
You can now save and exit set up. Repeat these steps for every department you need to create.

### Edit an Existing Department

## Edit an Existing Department



Select the department you wish to edit, you are now presented with the same screen as create a new department.

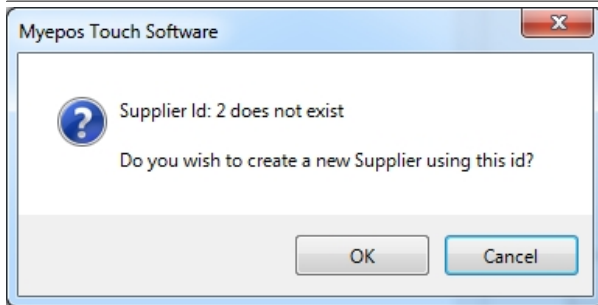
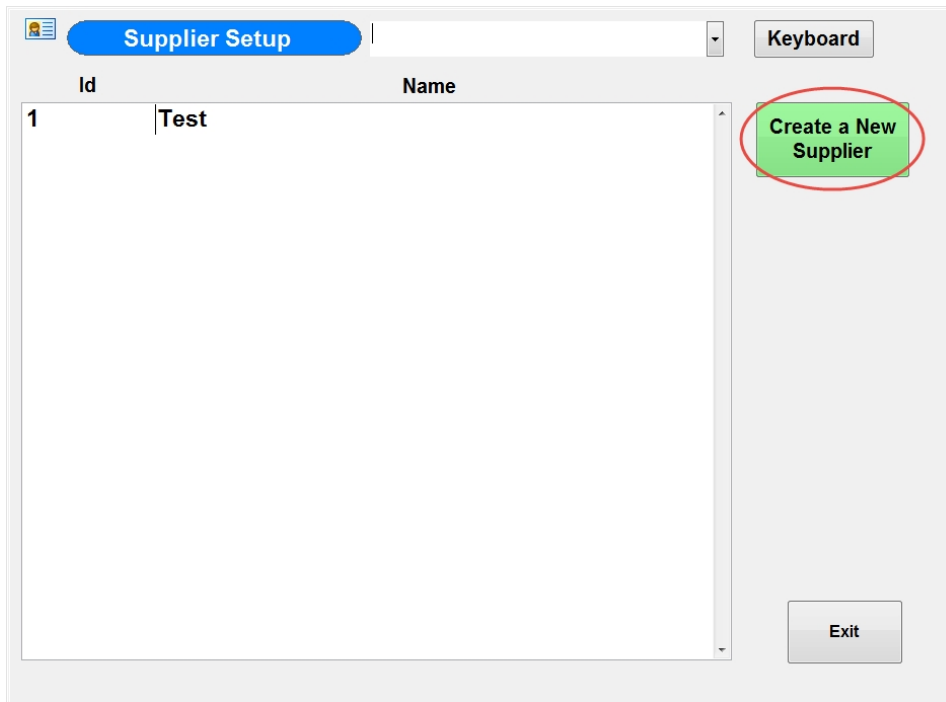


### Create a New Supplier

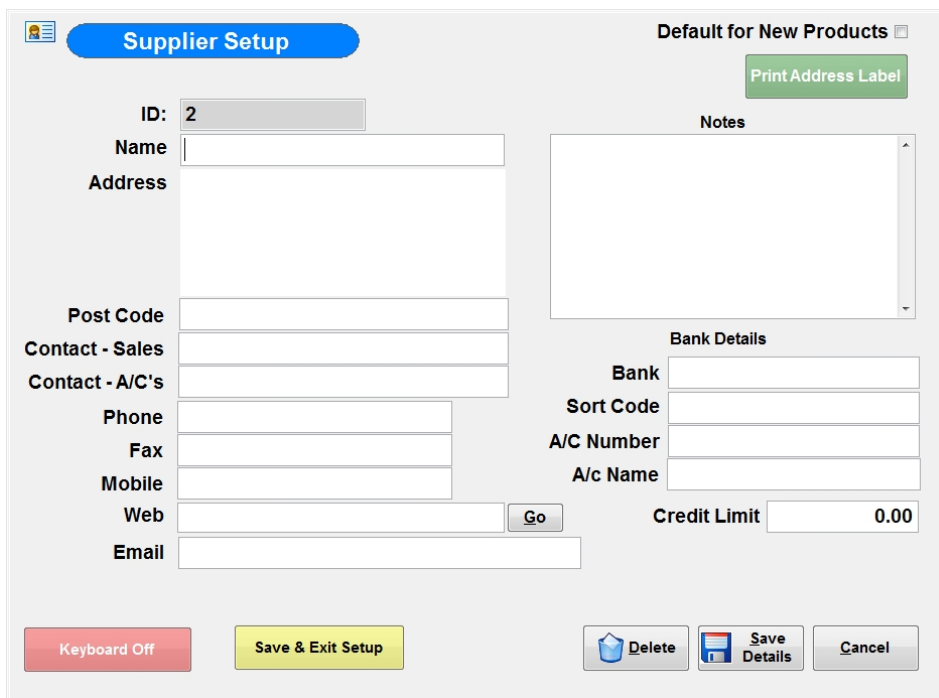
## Create a New Supplier.



Select Create a New supplier and click OK



This Loads the below screen which needs to be completed.



Default for New Products:  
Name:

If Ticked this supplier will appear by Default for any new items  
Supplier Name

Address:	Supplier Address
Post Code:	Supplier Post Code
Contact- Sales:	Contact For Sales
Contact- A/Cs:	Contact For Accounts
Phone:	Phone Number
Fax:	Fax Number
Mobile:	Mobile Number
Web:	Website
Email:	Email Address
Notes:	Notes about supplier

**Bank Details**

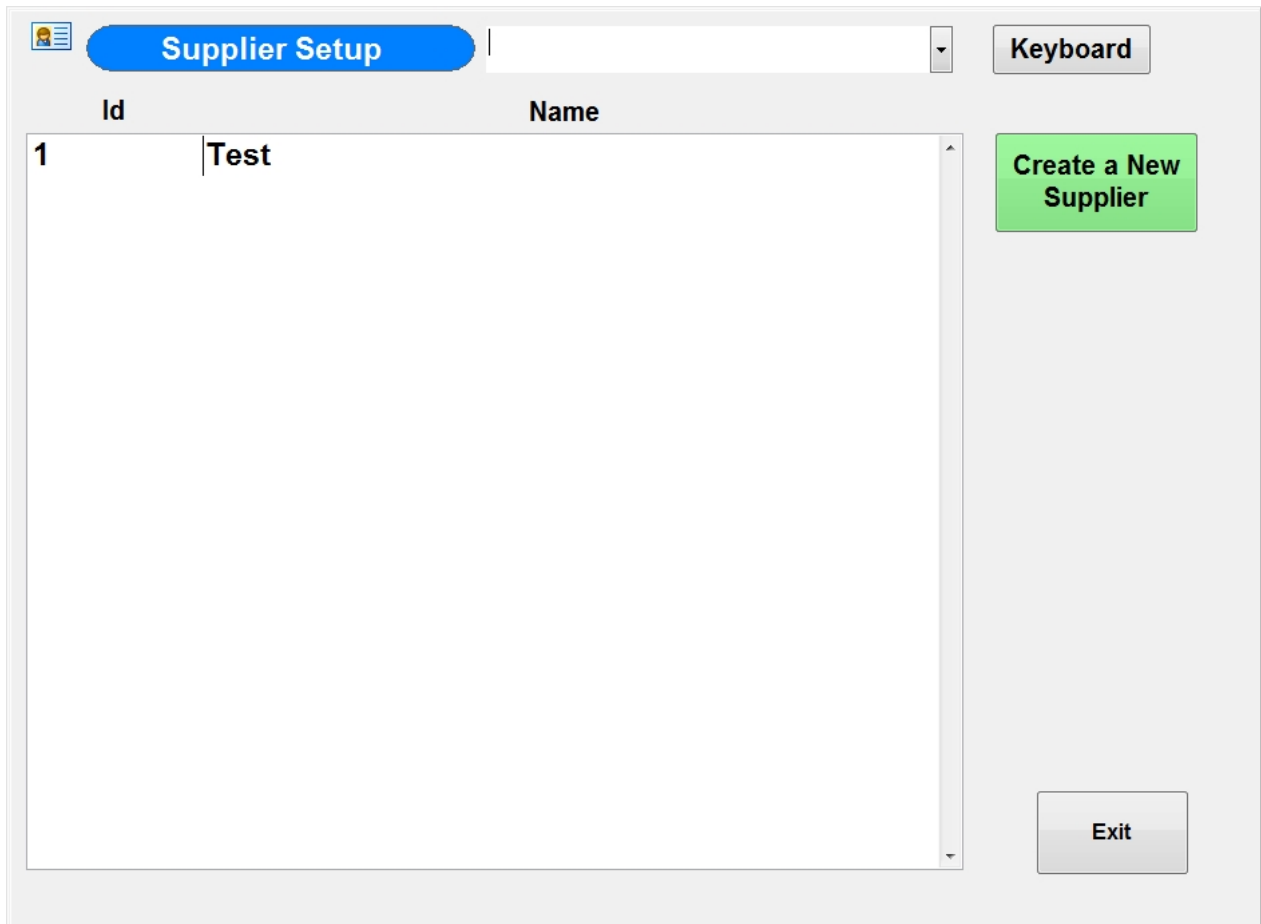
Bank:	Bank Name
Sort Code:	Sort Code
A/C Number:	Account Number
A/C Name:	Account Name
Credit Limit:	Credit Limit

[Edit an Existing Supplier](#)

## Edit An Existing Supplier



Choose the Supplier you want to edit, you are now presented with the same screen as create a supplier.



## Create a New Product

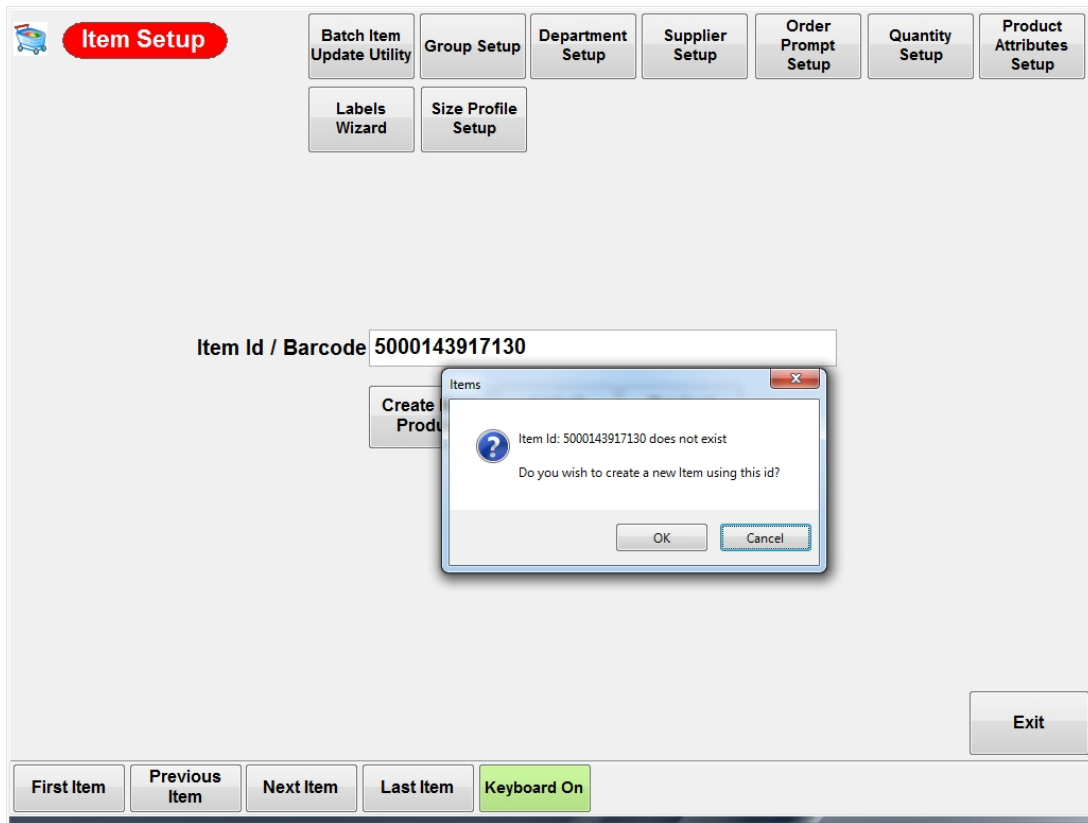
### Create a New Product

There are 2 methods to create a New product, You can either create an item with a barcode (For convenience settings) or by name (For Bars/ Restaurants)

#### With Barcode

### Create with Barcode.

In the item setup section scan the barcode of the item and press ok.



This loads the below screen that needs to be completed.

Fields marked with \* are optional.

Id 5000143917130    Supplier Code:     Copy    Print Barcodes    Quick Shelf Label

Name     Additional Name     Sync From Hq

Department Chips

Supplier

Style Code     Colour       Size

Vat Details: 1     Vat @ 20%    20.00    Use Sub Menus     Shelf Label     Kit     Sell Online

Case Quantity	Case Cost	Unit Cost	Average Cost	Unit Qty	Qty Name	Suggested
Open <input type="button" value="v"/>	10.0000	50.00	5.0000	0.00	0.0000	£6.67

Price Band	Quantity	Price	Exc. Price	Profit	% Margin	Barcode	Up
Price Band 1	EACH <input type="button" value="v"/>	1.0000	0.00	0.00	-5.00	*****	
Price Band 2	Not Set <input type="button" value="v"/>						
Price Band 3	Not Set <input type="button" value="v"/>						
Price Band 4	Not Set <input type="button" value="v"/>						
Price Band 5	Not Set <input type="button" value="v"/>						
Price Band 6	Not Set <input type="button" value="v"/>						
Price Band 7	Not Set <input type="button" value="v"/>						
Price Band 8	Not Set <input type="button" value="v"/>						
Price Band 9	Not Set <input type="button" value="v"/>						
Price Band 10	Not Set <input type="button" value="v"/>						

Loyalty Settings:    Issue Points with Sale Total     Bonus Points:

Supplier Code\*:

Name:

Additional Name\*:

Alternative Item ID used at supplier

Name of Item

Additional Name Field



Department:	Department the item will be reported in
Group:	Group the item will be reported in
Style Code*:	Used in Fashion ( See Fashion Guide for further Info)
Colour*:	Used in Fashion ( See Fashion Guide for further Info)
Size*:	Used in Fashion ( See Fashion Guide for further Info)
Vat Details:	VAT information for this product.
Use Sub Menus*:	Enables the Sub Menu settings.
Shelf Label*:	Generate shelf label for product
Kit*:	Item is part of a Kit
Sell Online:	Flag item for online sale (Linked to Shopify)

You also have a series of sub menus on the bottom of the screen.

Prices	Stock Settings	POS Settings	Notes & Alergens	Graphics	Sub Menus	Barcodes	Suppliers	Deals	Sales History	Attributes
Case Quantity	Case Cost	Unit Cost	Average Cost	Unit Qty	Qty Name	Suggested				
Open	10.0000	50.00	5.0000	0.00	0.0000			£6.67		
Price Band	Quantity	Price	Exc. Price	Profit	% Margin	Barcode	Up			
Price Band 1	EACH	1.0000	0.00	0.00	-5.00	*****				
Price Band 2	Not Set									
Price Band 3	Not Set									
Price Band 4	Not Set									
Price Band 5	Not Set									
Price Band 6	Not Set									
Price Band 7	Not Set									
Price Band 8	Not Set									
Price Band 9	Not Set									
Price Band 10	Not Set									
Loyalty Settings:	Issue Points with Sale Total <input checked="" type="checkbox"/>		Bonus Points:		0					

**Prices**

Case Qty*:	How many units are in an outer from the supplier
Case Cos*t:	How much does one case cost
Unit Cost*:	Calculated Automatically
Average Cost*:	Calculated automatically (When item case cost is edited in future)
Unit Qty*:	How many units form an outer are sold when you sell this item.
Qty Name*:	Name of Qty e.g. Each, 6 Pack
Suggested*:	Suggested Sell Price. Calculated based on unit cost and expected margin as set up in Department
Price Bands:	Here you can set the price to sell the item at each price band
<b>Loyalty Settings*</b>	
Issue Points with Sale Total:	If ticked the customer will earn points on sale of this item.
Bonus Points:	Number of bonus points issued with sale of product

**Stock Settings\***

- Quantity in Stock: Number in current stock
- On Tabs: Qty on current Tabs (Calculated Automatically) In effect these are items on promise.
- Total Stock Available: Number in stock minus number on tabs
- On Order from Supplier: Number of units on order from supplier
- Minimum Stock: Here you can set minimum stock level to be prompted for reorder.
- Preferred Stock: Here you can set your preferred stock level.
- Meters Per Stock Unit: How many meters are sold per unit of stock.

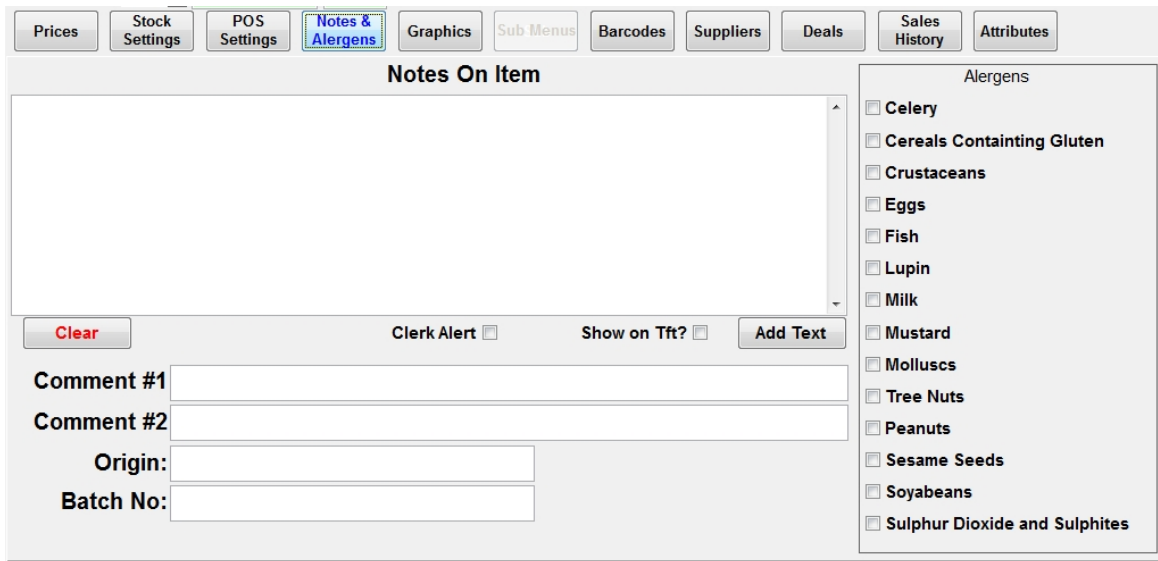
**POS Settings\***

- Order Prompts: Here you can allocate order prompts (See order prompts) to the product
- Price Shifts: Here you can set the price shifts (See Price Shifts) for the product
- Question: Here you can add a question that will be asked when item is sold such as an age check.
- Function: Here you can assign a function to be completed when an item is sold
- Dry Cleaning Product: Tick if item is a dry cleaning product and set the number of pieces (e.g. a 2 piece suit would be 2 pieces)
- Disable Product: If ticked product cant be sold.
- Indicate VAT: If ticked this item will be marked as a course item
- Course Item: If ticked product will be sold by weight
- Weighted Item:

Tare Weight: If item is sold by weight here you should enter tare weight  
 Always Print scale label: Print scale label on sale of product.  
 Generate GS1 Barcode: Generate GS1 Barcode for product  
 GS1 Code: Code for GS1 Barcode  
 Expiry Days: Expiry date for GS1 Codes  
 Add Days to Membership: When item is sold add number of days to membership  
 Always Prompt for Price: When ticked when item is sold it will prompt for price on every sale  
 Negative PLU: When sold item adds credit to the transaction.  
 Disable Discount: Disable discount from item.

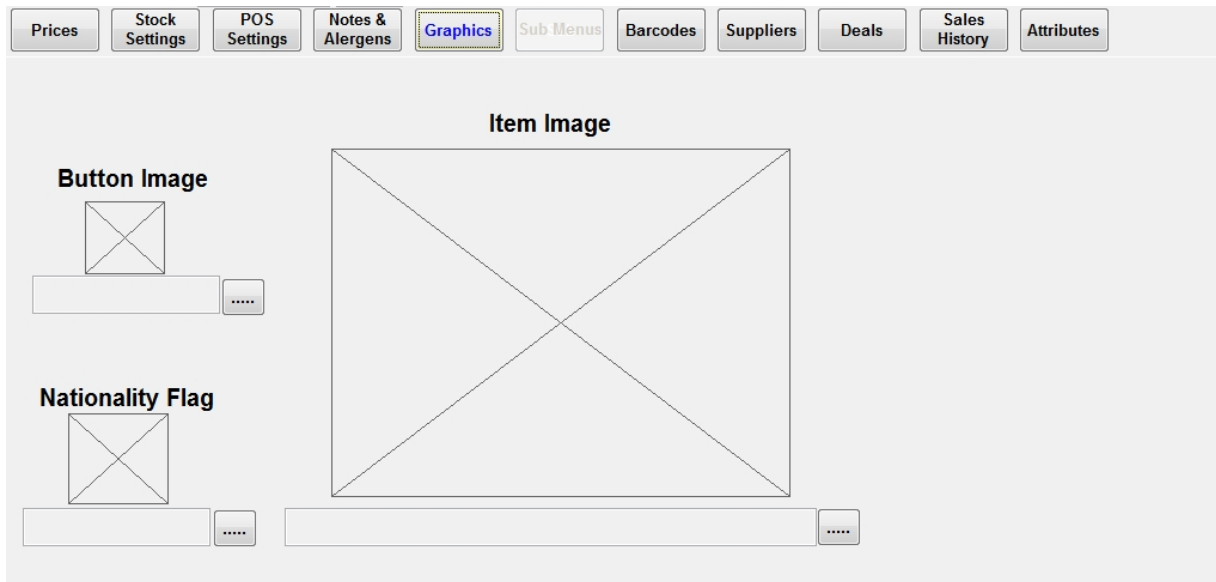
**Printer Settings**

Here you can tick on an individual product basis what printers you want the product to print on.  
 Print red on order printer: If ticked this item will print in red on printer  
 OP Text: Optional text for Order Printers



**Notes & Allergens\***

Notes on Item: Here you can enter any notes for the item  
 Clerk Alert: If ticked notes are shown to clerk on sale  
 Show on TFT: If ticked notes are displayed on the rear customer display  
 Comment #1: Here you can enter comments for item  
 Comment #2: Here you can enter comments for item  
 Origin: Enter the origin of the item  
 Batch No: Enter the batch number of the item  
 Allergens: Tick any relevant allergens



**Graphics\***

Item Image:

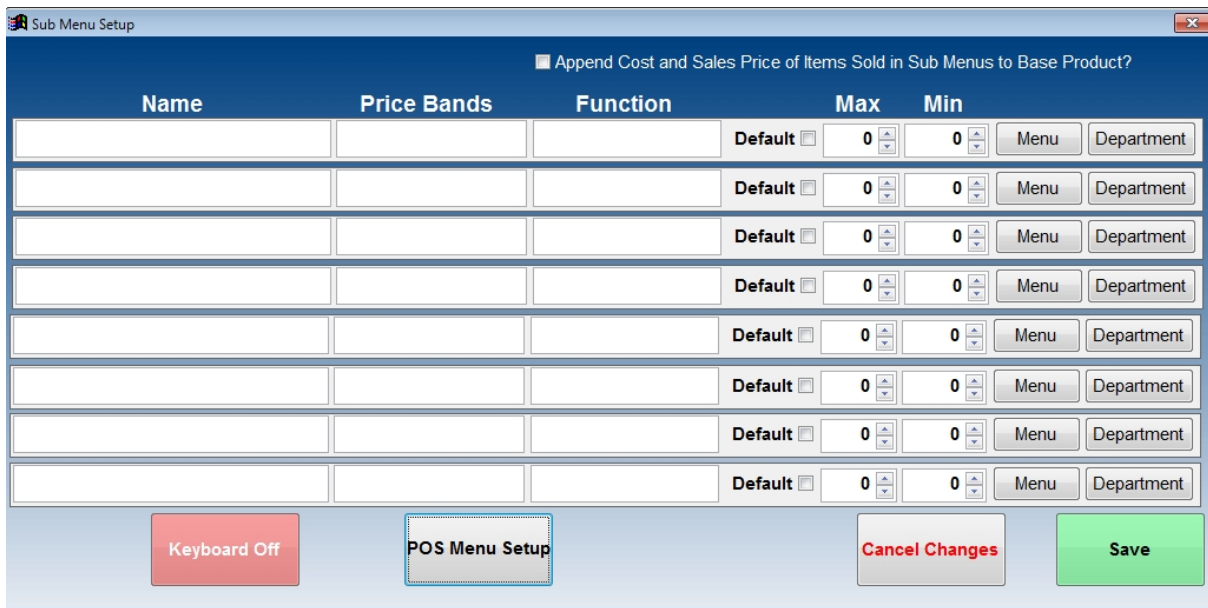
Image of item

Button Image:

Image to be shown on button

Nationality Flag:

Nationality Flag of item



**Sub Menus\***

See Set Menu guide for how to use.

- Barcodes

**Master Product**

Search bar: [ ] [Lookup] [Remove]

PLU	Quantity Band	Price
-----	---------------	-------

[Add New] [Close]

**Barcodes\***

Here you can enter additional barcodes for a product. For example promotional items will be the same but have a different barcode.

- Item Suppliers

Supplier	Order Id	Case Cost	Case Qty	Unit Cost
----------	----------	-----------	----------	-----------

[Add New] [Exit]

**Suppliers\***

Here you can enter the suppliers for each item, the case cost and qty for each supplier.

Prices	Stock Settings	POS Settings	Notes & Allergens	Graphics	Sub Menus	Barcodes	Suppliers	Deals	Sales History	Attributes
--------	----------------	--------------	-------------------	----------	-----------	----------	-----------	-------	---------------	------------

Quantity Break	Price
<input type="text" value="0"/>	0.00
<input type="text" value="0"/>	0.00
<input type="text" value="0"/>	0.00
<input type="text" value="0"/>	0.00

### Deals\*

Here you can enter price breaks for each item. For example 3 for £5.

Please Specify Date Range

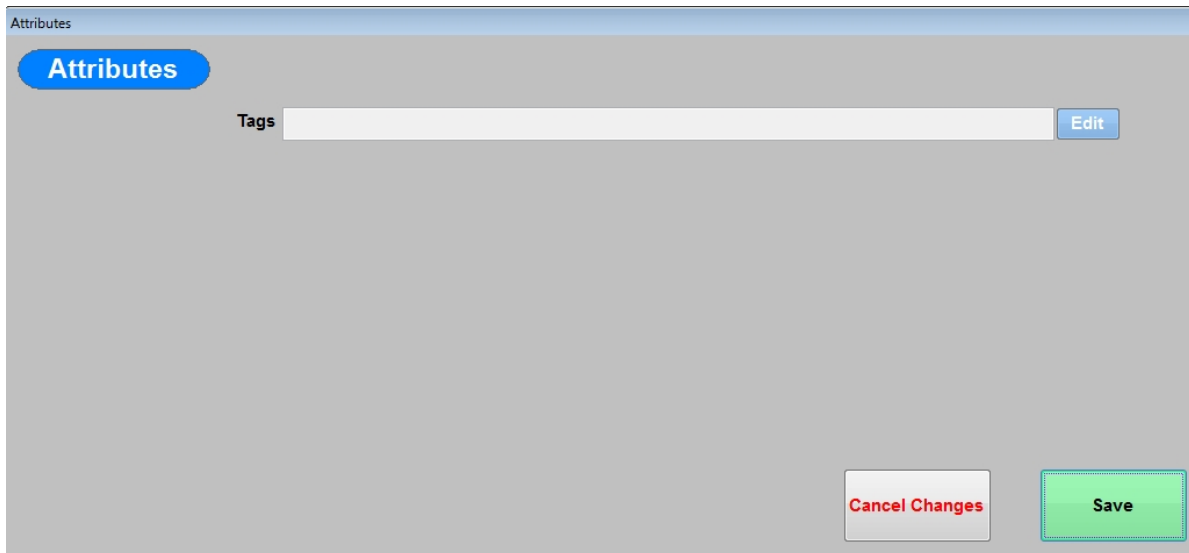
Date Range  
 Single Date

**Quick Dates**

Date From							Date To						
November 2020							November 2020						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1	26	27	28	29	30	31	1
2	3	4	5	6	7	8	2	3	4	5	6	7	8
9	10	11	12	13	14	15	9	10	11	12	13	14	15
16	17	18	19	20	21	22	16	17	18	19	20	21	22
23	24	25	26	27	28	29	23	24	25	26	27	28	29
30	1	2	3	4	5	6	30	1	2	3	4	5	6

### Sales History\*

Here you can see the sales history for the item.



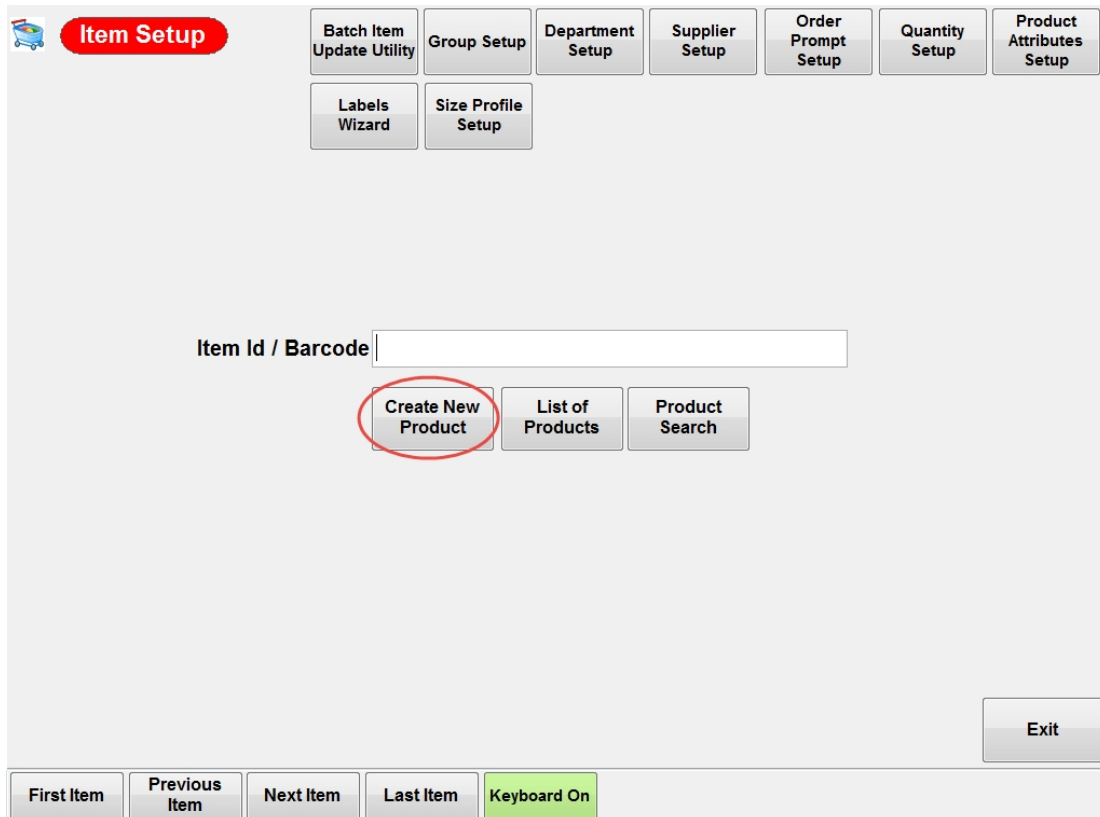
**Attributes\***

Here you can apply attribute tags to items if required

With PLU number

**Create with PLU number**

In the item setup screen select create a new product and OK



This loads the below screen that needs to be completed.

Fields marked with \* are optional.

Id 5000143917130 Supplier Code:

Name  Additional Name  Sync From Hq

Department Chips

Supplier

Style Code  Colour    Size

Vat Details: 1  20.00

Case Quantity	Case Cost	Unit Cost	Average Cost	Unit Qty	Qty Name	Suggested
Open <input type="button" value="v"/>	10.0000	50.00	5.0000	0.0000		£6.67

Price Band	Quantity	Price	Exc. Price	Profit	% Margin	Barcode	Up
Price Band 1	EACH <input type="button" value="v"/>	1.0000	0.00	0.00	-5.00	***** **	
Price Band 2	Not Set <input type="button" value="v"/>						
Price Band 3	Not Set <input type="button" value="v"/>						
Price Band 4	Not Set <input type="button" value="v"/>						
Price Band 5	Not Set <input type="button" value="v"/>						
Price Band 6	Not Set <input type="button" value="v"/>						
Price Band 7	Not Set <input type="button" value="v"/>						
Price Band 8	Not Set <input type="button" value="v"/>						
Price Band 9	Not Set <input type="button" value="v"/>						
Price Band 10	Not Set <input type="button" value="v"/>						

Loyalty Settings:  Issue Points with Sale Total Bonus Points:

- Supplier Code\*: Alternative Item ID used at supplier
- Name: Name of Item
- Additional Name\*: Additional Name Field
- Department: Department the item will be reported in
- Group: Group the item will be reported in
- Style Code\*: Used in Fashion ( See Fashion Guide for further Info)
- Colour\*: Used in Fashion ( See Fashion Guide for further Info)
- Size\*: Used in Fashion ( See Fashion Guide for further Info)
- Vat Details: VAT information for this product.
- Use Sub Menus\*: Enables the Sub Menu settings.
- Shelf Label\*: Generate shelf label for product
- Kit\*: Item is part of a Kit
- Sell Online: Flag item for online sale (Linked to Shopify)

You also have a series of sub menus on the bottom of the screen.

Case Quantity	Case Cost	Unit Cost	Average Cost	Unit Qty	Qty Name	Suggested
Open <input type="button" value="v"/>	10.0000	50.00	5.0000	0.0000		£6.67

Price Band	Quantity	Price	Exc. Price	Profit	% Margin	Barcode	Up
Price Band 1	EACH <input type="button" value="v"/>	1.0000	0.00	0.00	-5.00	***** **	
Price Band 2	Not Set <input type="button" value="v"/>						
Price Band 3	Not Set <input type="button" value="v"/>						
Price Band 4	Not Set <input type="button" value="v"/>						
Price Band 5	Not Set <input type="button" value="v"/>						
Price Band 6	Not Set <input type="button" value="v"/>						
Price Band 7	Not Set <input type="button" value="v"/>						
Price Band 8	Not Set <input type="button" value="v"/>						
Price Band 9	Not Set <input type="button" value="v"/>						
Price Band 10	Not Set <input type="button" value="v"/>						

Loyalty Settings:  Issue Points with Sale Total Bonus Points:



**Prices**

- Case Qty\*: How many units are in an outer from the supplier
- Case Cos\*t: How much does one case cost
- Unit Cost\*: Calculated Automatically
- Average Cost\*: Calculated automatically (When item case cost is edited in future)
- Unit Qty\*: How many units form an outer are sold when you sell this item.
- Qty Name\*: Name of Qty e.g. Each, 6 Pack
- Suggested\*: Suggested Sell Price. Calculated based on unit cost and expected margin as set up in Department
- Price Bands: Here you can set the price to sell the item at each price band

**Loyalty Settings\***

- Issue Points with Sale Total: If ticked the customer will earn points on sale of this item.
- Bonus Points: Number of bonus points issued with sale of product

Prices	Stock Settings	POS Settings	Notes & Allergens	Graphics	Sub Menus	Barcodes	Suppliers	Deals	Sales History	Attributes		
Quantity In Stock		0.0000	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">Add Units to Stock</td> <td style="text-align: center;">Subtract Units from Stock</td> </tr> <tr> <td style="text-align: center;">Add Cases to Stock</td> <td style="text-align: center;">Subtract Cases from Stock</td> </tr> <tr> <td colspan="2" style="text-align: center;">Stock by Branch</td> </tr> </table>		Add Units to Stock	Subtract Units from Stock	Add Cases to Stock	Subtract Cases from Stock	Stock by Branch		Case Id: Open	
Add Units to Stock	Subtract Units from Stock											
Add Cases to Stock	Subtract Cases from Stock											
Stock by Branch												
On Tabs / Sales Pending		0.0000			Case Qty: 10.0000							
Total Stock Available		0.0000			Case Cost: 50.0000							
On Order from Supplier		0.0000			Calculate Stock <input checked="" type="checkbox"/>							
Minimum Stock:		0.0000			Order by Unit? <input type="checkbox"/>							
Preferred Stock:		0.0000			Requires Product Labels <input type="checkbox"/>							
Meters per Stock Unit		0.0000			Requires Tracking Number <input type="checkbox"/>							
Total Qty Sold:		0.0000										
Total Value Sold:		0.00										
Last Sold // : :												
Created 19/11/2020 12:02												
Last Modified // : :												
Last Delivered // : :												
Last Ordered // //												

**Stock Settings\***

- Quantity in Stock: Number in current stock
- On Tabs: Qty on current Tabs (Calculated Automatically) In effect these are items on promise.
- Total Stock Available: Number in stock minus number on tabs
- On Order from Supplier: Number of units on order from supplier
- Minimum Stock: Here you can set minimum stock level to be prompted for reorder.
- Preferred Stock: Here you can set your preferred stock level.
- Meters Per Stock Unit: How many meters are sold per unit of stock.

**POS Settings\***

Order Prompts: Here you can allocate order prompts (See order prompts) to the product

Price Shifts: Here you can set the price shifts (See Price Shifts) for the product

Question: Here you can add a question that will be asked when item is sold such as an age check.

Function: Here you can assign a function to be completed when an item is sold

Dry Cleaning Product: Tick if item is a dry cleaning product and set the number of pieces (e.g. a 2 piece suit would be 2 pieces)

Disable Product: If ticked product cant be sold.

Indicate VAT: If ticked this item will be marked as a course item

Course Item: If ticked product will be sold by weight

Weighted Item: If item is sold by weight here you should enter tare weight

Tare Weight: Print scale label on sale of product.

Always Print scale label: Generate GS1 Barcode for product

Generate GS1 Barcode: Code for GS1 Barcode

GS1 Code: Expiry date for GS1 Codes

Expiry Days: When item is sold add number of days to membership

Add Days to Membership: When ticked when item is sold it will prompt for price on every sale

Always Prompt for Price: Always Prompt for Price: sale

Negative PLU: When sold item adds credit to the transaction.

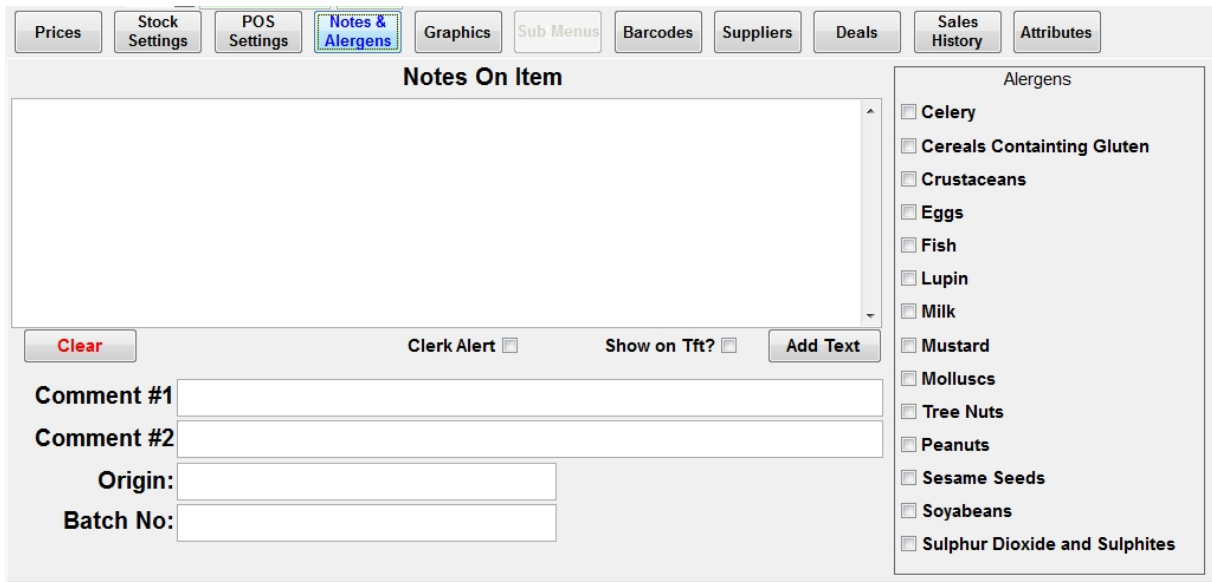
Disable Discount: Disable discount from item.

**Printer Settings**

Here you can tick on an individual product basis what printers you want the product to print on.

Print red on order printer: If ticked this item will print in red on printer

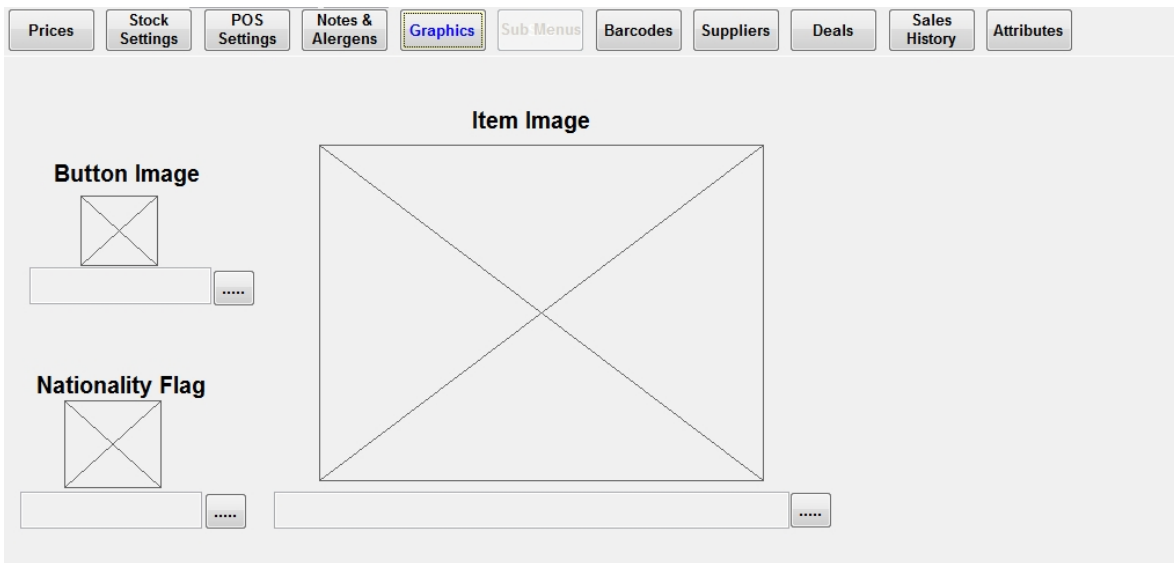
OP Text: Optional text for Order Printers



**Notes & Allergens\***

Notes on Item:  
 Clerk Alert:  
 Show on TFT:  
 Comment #1:  
 Comment #2:  
 Origin:  
 Batch No:  
 Allergens:

Here you can enter any notes for the item  
 If ticked notes are shown to clerk on sale  
 If ticked notes are displayed on the rear customer display  
 Here you can enter comments for item  
 Here you can enter comments for item  
 Enter the origin of the item  
 Enter the batch number of the item  
 Tick any relevant allergens



**Graphics\***

Item Image:  
 Button Image:  
 Nationality Flag:

Image of item  
 Image to be shown on button  
 Nationality Flag of item

Sub Menu Setup

Append Cost and Sales Price of Items Sold in Sub Menus to Base Product?

Name	Price Bands	Function	Max	Min			
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department
			Default <input type="checkbox"/>	0	0	Menu	Department

Keyboard Off    POS Menu Setup    Cancel Changes    Save

**Sub Menus\***

See Set Menu guide for how to use.

- Barcodes

**Master Product**

PLU	Quantity Band	Price

**Barcodes\***

Here you can enter additional barcodes for a product. For example promotional items will be the same but have a different barcode.

- Item Suppliers

Supplier	Order Id	Case Cost	Case Qty	Unit Cost

### Suppliers\*

Here you can enter the suppliers for each item, the case cost and qty for each supplier.

Prices Stock Settings POS Settings Notes & Allergens Graphics Sub Menus Barcodes Suppliers Deals Sales History Attributes

Quantity Break	Price
0	0.00
0	0.00
0	0.00
0	0.00

### Deals\*

Here you can enter price breaks for each item. For example 3 for £5.

Please Specify Date Range

Date Range  Single Date

**Quick Dates**

Today  
Yesterday  
This Week  
Last Week  
Last 2 Weeks  
Last 7 Days  
Last 14 Days  
This Month  
Last Month  
Last 2 Months  
Last 30 Days  
This Year  
Last Year

**Date From**

November 2020						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 20/11/2020

**Date To**

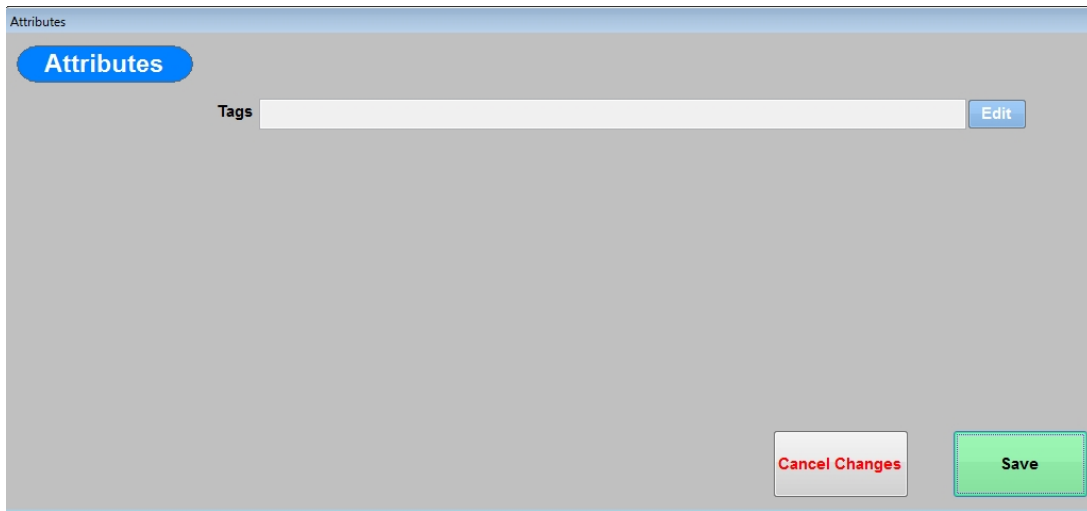
November 2020						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 20/11/2020

Cancel Continue

### Sales History\*

Here you can see the sales history for the item.



### Attributes\*

Here you can apply attribute tags to items if required

## Labels

# Labels

### Product Label Wizard.

From the item set up menu choose label wizard.



This opens the below window where you can add items you require labels printing for by department or group. Choose the type of label you wish to print and press view to print them.

## Label Wizard

**Add Items  
from  
Department**

**Add All Items  
from a  
Supplier**

Product Labels

Shelf Labels

Quick Labels

Item Code:

Item Id	Item Description	No. of La

Exit

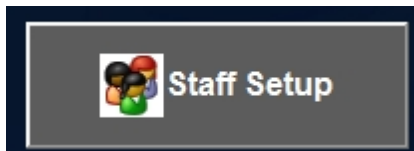
Clear List

View

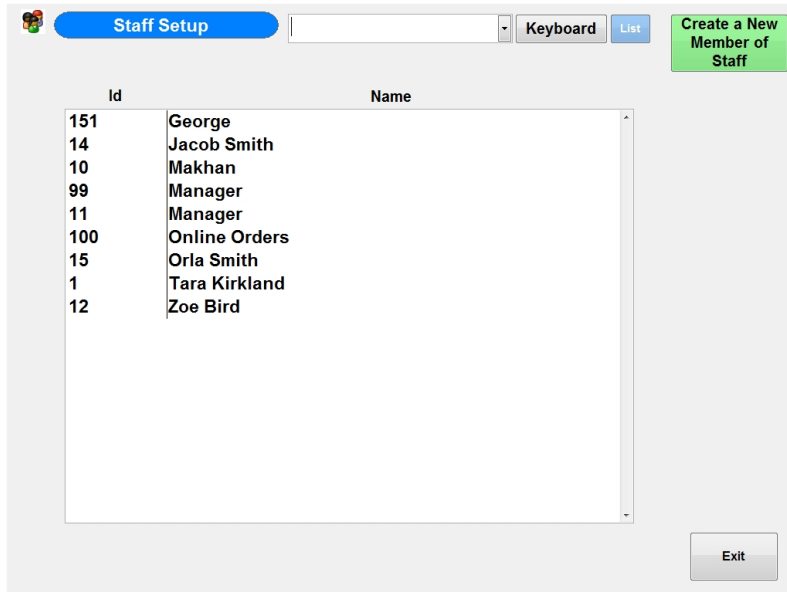
## POS Menu

## Staff Set Up

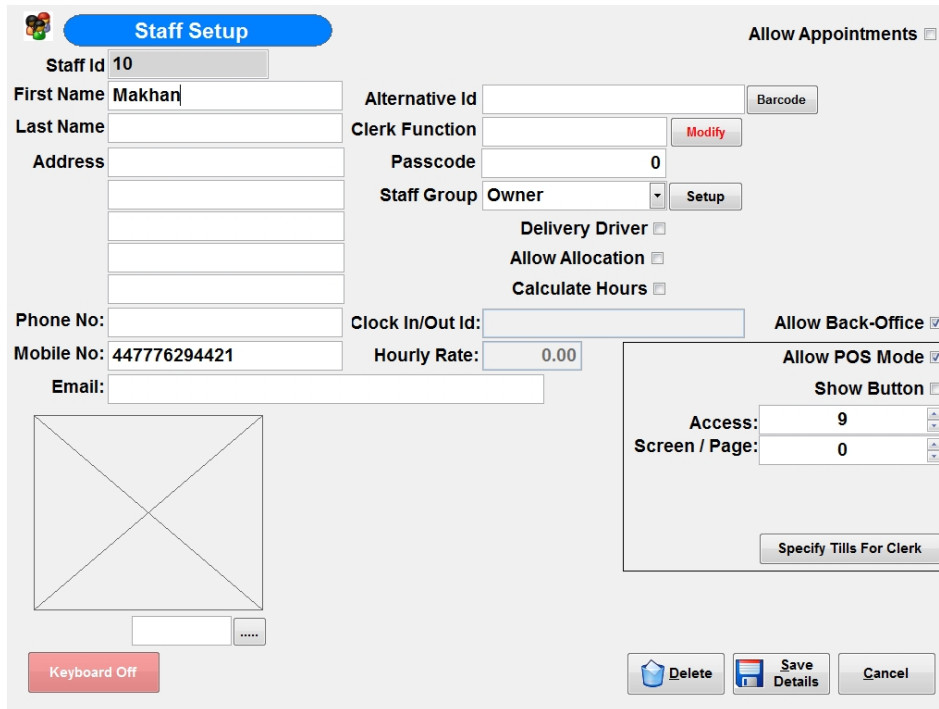
### Staff Set up



This enables editing and creation of operators.



To create a new operator select create new or alternatively to edit an operator select the staff member you wish to edit this loads the below screen:



You need to complete the below fields. Fields marked with \* are optional.

- First Name: Name of operator
- Last Name\*: Last Name of Operator
- Address\*: Address of Operator
- Phone Number\*: Phone number of Operator
- Mobile Number\*: Mobile Number of Operator
- Email\*: Email for Operator
- Image\*: Photo for Operator
- Alternative ID\*: Dallas Key/ Barcode for sign on
- Clerk Function\*: Select Function for Clerk
- Passcode\*: Code for clerk Sign on
- Staff Group: Assign Staff to staff group ([See Staff Group set up](#))
- Allow Appointments\*: If ticked staff member can be assigned appointments



Delivery Driver*:	If ticked staff member is a delivery driver
Allow Allocation*:	This sets a staff override for the sale, this is used in the event of a store wanting to track who sold the items, but there is a different staff member processing the sale at the till.
Calculate Hours*:	If ticked the system will calculate hours based on the clock in/out ID
Clock In/Out ID*:	ID used for clock in/out
Hourly Rate*:	For staff reports
Allow Back Office*:	If Ticked staff member has access to back Office Module (If available on till)
Allow POS Mode*:	If Ticked staff member is allowed POS Access
Show Button*:	If Ticked button for log on is shown on staff log in page.
Access:	Here you can set access level for staff ( <a href="#">See Access Setup</a> )
Screen/ Page*:	Default screen when staff log on.

## Staff Group Set Up

### Staff Group Set Up

From the staff set up page choose Setup next to staff group,

Allow Appointments

Alternative Id  Barcode

Clerk Function

Passcode

Staff Group **Owner**

Delivery Driver

This loads the below screen where you can create or edit an existing group.

Staff Groups

Group Id

Edit existing group

Create a new group

This loads the below screen.

Name: Name of group

### Preset Preferences

Till Mode: If ticked staff in this group have access to the till. You can set the default pos access level and page number.

Admin Mode:

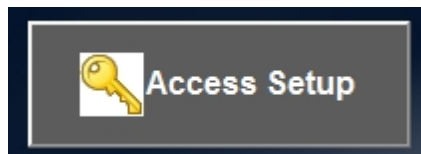
Delivery Driver: If ticked staff in this group are delivery drivers

Sales Assistant: If ticked staff in this group are sales assistants and can have sales assigned to them

Calculate Hours: If ticked the system will calculate hours based on the clock in/out ID

## Access Set Up

## Access Setup



This allows you to set different access levels for staff members, you assign each category a number from 1 to 9. Each number can access areas as defined by their number and also the numbers below them.

Access level 5 can access levels 5, 4, 3, 2 & 1

### Access Setup

Refunds	1
Voids	1
Void - Sent Items	1
Price Change	8
No Sale	8
Pay Money Out	8
Pay Money In	8
Discounts	8
Shift Reports	8
Financial - X	9
Financial - Z	9
Periodic Reports	9
Add to Stock	8
Subtract Stock	8
Transfer Stock	8

### Access Functions Setup

Remove Service Charge	8
Apply Service Charge	8
Item Setup	8
Till Journal	1
Cancel Sale	5
Layout Setup	8
Totals in Current Sales	1
Back-Office Reports	8
POS Program Mode	8
Reports Mode	8
Gift Vouchers Database	8
Credit Notes Database	8
Allow to Set Accounts	8
Add Loyalty Points	8
Subtract Loyalty Points	8

Web Access	8
System Settings	8
Receipt Setup	1
Reason Setup	8
POS Menus	8
Promotion Setup	8
Access Setup	8
Tender Setup	8
Layout Setup	8
Table Layout Setup	8
VAT Setup	9
Tab Setup	8
Item Setup	8
Staff Setup	8
Time & Attendance Reports	1

Keyboard Off

Save Changes

Cancel

- |                                    |  |
|------------------------------------|--|
| Refunds:                           | Ability to Issue Refunds   |
| Voids:                             | Ability to Void Items in current sale                                    |
| Void- Sent Items:                  | Ability to Void items that have already been sent to Kitchen             |
| Price Change:                      | Ability to Price Change  |
| No Sale:                           | Ability to open draw without a sale                                      |
| Pay Money Out:                     | Pay Money out to Suppliers   |
| Pay Money In:                      | Pay money in to draw   |
| Discounts:                         | Ability to apply discounts   |
| Shift Reports:                     | Ability to run Shift Reports   |
| Financial X:                       | Ability to Run X Reports   |
| Financial Z:                       | Ability to Run Z Reports   |
| Period Reports:                    | Ability to run Period Reports  |
| Add to Stock:                      | Ability to Add Stock   |
| Subtract Stock:                    | Ability to subtract stock without a sale                                 |
| Transfer Stock:                    | Ability to transfer stock between stores                                 |
| Remove Service Charge:             | Ability to Remove Service Charge   |
| Apply Service Charge:              | Ability to apply a service charge  |
| Item Setup:                        | Ability to set up items  |
| Till Journal:                      | Ability to view till journals  |
| Cancel Sale:                       | Ability to cancel sale   |
| Layout Setup:                      | Ability to change the till layout  |
| Totals in Current Sales:           | If the operator access level is lower than this value, they wont see the |
| transction totals in till journals |  |
| Back Office Reports:               | Ability to view back office reports                                      |
| POS Program Mode:                  | Ability to access POS Program mode                                       |
| Reports Mode:                      | Ability to access reports mode   |
| Gift Vouchers Database:            | Ability to access the gift voucher database                              |
| Credit Notes Database:             | Ability to access the credit note database                               |
| Allow to set Accounts:             | Ability to create new accounts   |
| Add Loyalty Points:                | Ability to add loyalty points  |

Subtract Loyalty Points:	Ability to subtract loyalty points
Web Access:	Ability to access the internet
System Settings:	Ability to access system settings
Receipt Setup:	Ability to adjust receipt settings
Reason Setup:	Ability to setup reason codes
POS Menus:	Ability to access POS Menu
Promotion Setup:	Ability to setup promotions
Access Setup:	Ability to adjust access
Tender Setup:	Ability to setup tenders
Table Layout Setup:	Ability to adjust the table plan
VAT Setup:	Ability to adjust VAT
Tab Setup:	Ability to setup Tabs
Staff Setup:	Ability to add and adjust Staff
Time & Attendance Reports:	Ability to run time & attendance reports

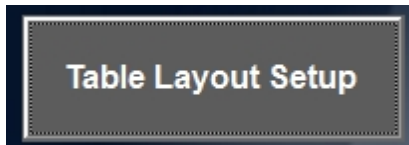
## Promotions

## Promotions

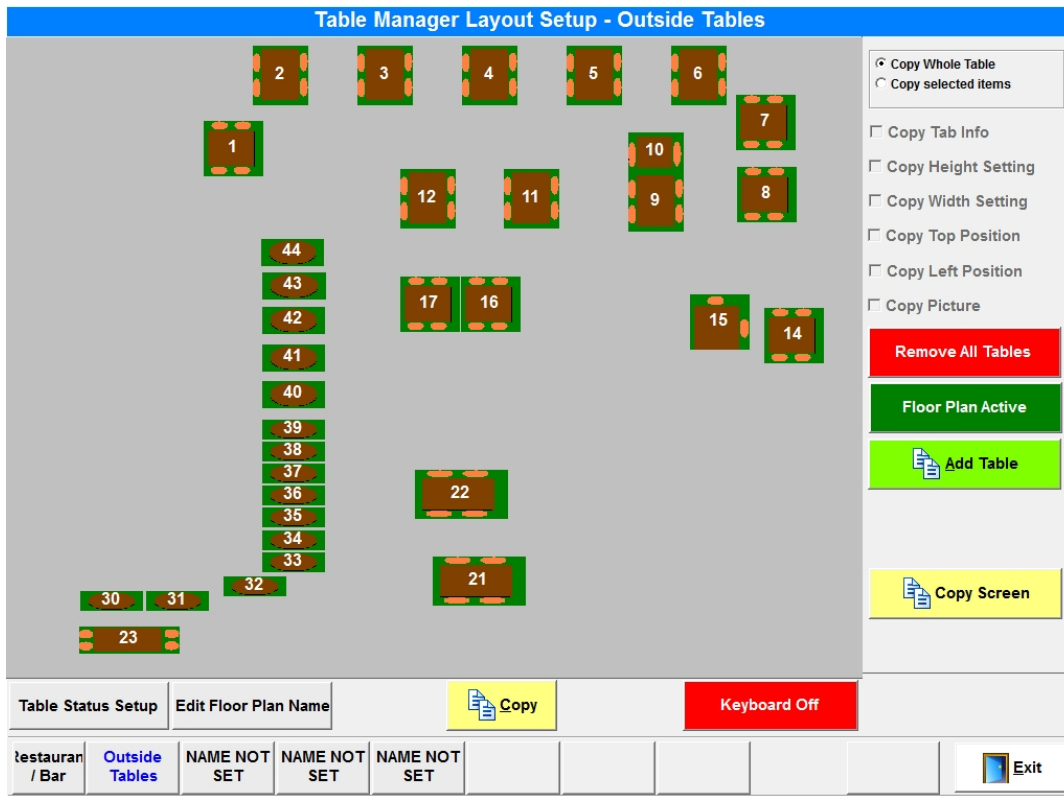
Please see separate document on [promotions](#)

## Table Layout

## Table Layout



When you open table layout set up, choose the table plan level you wish to edit.



Here you can either select a table to edit or choose to add a table this loads the below side bar:

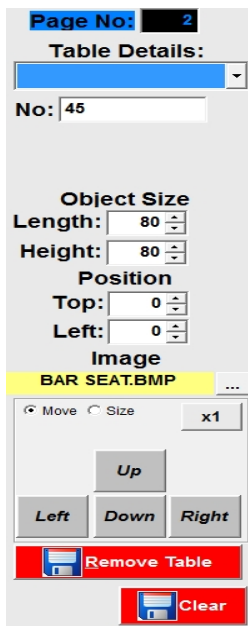


Table Details:           What kind of table it is  
 No:                        What table number  
 Size:                     Size of image

When complete hit clear and exit you have now edited the table plan

## Tab Set Up

# Tab Setup



When you open Tab Setup you are presented with the current tabs you can either select one to edit or create a new one. This presents the below menu:

**Tab Setup**

Tab Id 4

Name

Range From:  Range To:

**Options**

**No. of Printed Bills with charge:**

**Type of Bill:**

Print Balance Forward Summary from Previous Postings?

**Allow Additional Charges:**

**Page No.:**

**Level:**

Follow On:  Modify

**Order Allocation:**

**Vat Override:**

Show as Option on Customer Selection Screen

Option Text

Allow reports while active

Signature with charge slip

Request No. of Covers

Clear Info on Payment

Use With Order Sequence Numbers:

Mandatory Customer Required:

Requires Collection Date and Time

Print Barcode On Bill:

Print Receipt At End of Sale:

Use for Quotations:

Subtract Stock Immediately

Compulsory Operator

Show First Letter of Tab Name on Tables in Table Plan?

Use With Bookings System

Keyboard Off

Delete

Save Details

Cancel

Name: Tab type Name  
 Range: How many of this type of tabs are available.

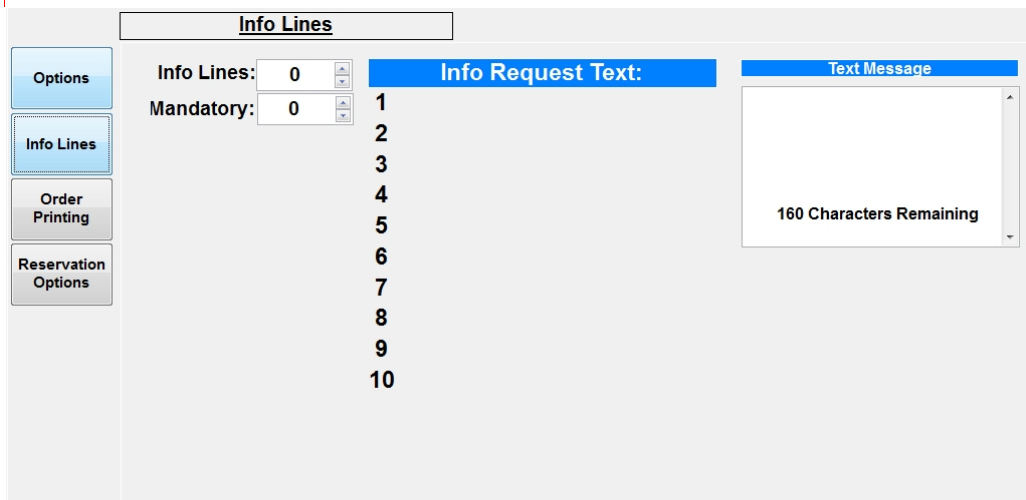
### Options

No. of Printed bills with Charge: How many copies of the bill are printed when items are assigned to this tab

Type of Bill: Standard: This prints the receipt in the following order  
 Logo  
 Date/ Time  
 Clerk  
 Type of Tab  
 Ticket Number  
 Items  
 Subtotal/ Total  
 Customer Details  
 Order: This prints the receipt in the following order  
 Logo  
 Customer Details  
 Type of Tab  
 Ticket Number  
 Date/ Time  
 Clerk  
 Items

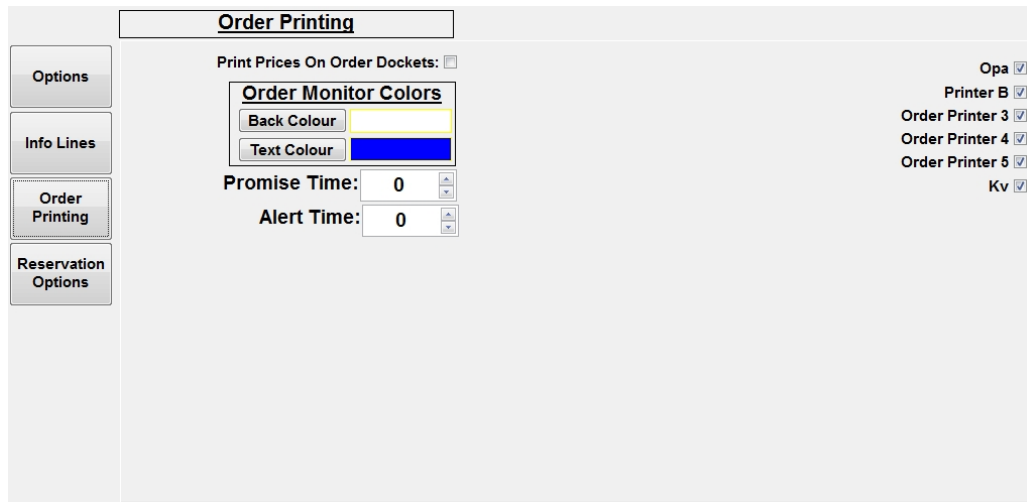
Subtotal/ Total

- Allow additional Charges: Choose if additional charges are allowed on this bill.
- Page No: The default screen number that opens when the tab opens, ie when you open the tab you may want to go to the food screen as the default screen
- Level: The screen level for the above selected page
- Follow on: Function performed when tab is used
- Order Allocation: This decides the event to happen of how an order is allocated, e.i. in takeaways for delivery tab, you may want to allocate the order to a delivery driver
- VAT Override: VAT Rate for items sold on this Tab
- Show as Option on Customer: Allow customer orders to be assigned to this type of Tabs
- Option Text: Text shown on customer selection screen
- Allow Reports while active: Allows reporting when tabs are open
- Signature with charge strip: Prints signature strip on charge receipts
- Request no. Of covers: Mandatory covers
- Clear Info on Payment: Clears tab on payment
- Use with order numbers: Every order is assigned a sequential number
- Mandatory Customer: Mandatory customer selection
- Requires Collection Time: Mandatory collection time & date
- Print Barcode on Bill: Prints barcode on bill
- Print receipt at end of sale: Prints receipt when order is paid
- Use for quotations: If this is flagged, the items on these tabs will store in a separate quotations table so they don't affect tab sales on stock on sales report
- Subtract stock: Subtract stock when items are added to tab not paid
- Compulsory Operator: Order must have operator assigned
- Show First Letter in Table Plan: The shows the first letter of the tab name, so when looking at the table plan if you hve 2 tabs (1 for tables, 2 for upstairs) the tables will show as T1,T2,U1,U2 etc
- Use with Bookings System: Use tab with room reservation software.



**Info Lines**

Here you can assign information lines to a tab



## Order Printing

Here you can provide overwrites for order printing based on tab settings

## Stock Control

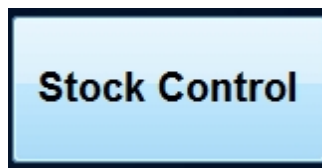
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### Stock Control

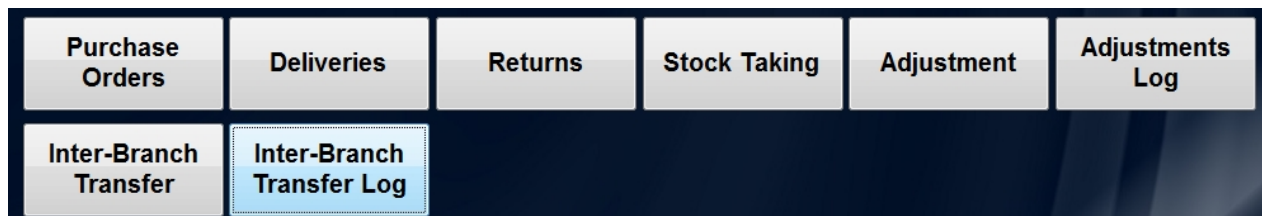
You can add products to stock when editing an item as a quick stock level change.

However the in depth way of doing it through stock which is accessed through maintenance mode.

Press log on and choose stock control.



You will then have the following menu



## Purchase Order

### Purchase Orders



## Purchase Orders

To create purchase orders select purchase orders, select create new purchase order (POs can be saved at any time then recalled to be modified)

Choose the branch and supplier the PO is for and press process this loads the below screen

Purchase Orders

Purchase Order No: 001\_000001      Supplier: Test      Order For: Store 1

Sort by Item ID    Sort by Order ID    Sort by Description

Order Id	Description	Cur. Stk	Case Size	Cases	Case Cost	Total Qty	Total Cost

0 Records      Total Cost Ex. Vat: £0.00

Print Barcode Labels    Item Search

Order Wizard    Remove Lines With No Order    Add Item    Import From Handheld    Save Preview PDF    Preview    Export to CSV    Delete Order    Hold Order    Complete Order

Use add item to search and add items to the PO. Item search goes in depth to add and search for products.

Order wizard can be used to order to minimum or preferred level and auto creates the order based on the levels you have set.

Preview order allows you to review and print the order.

If you are unable to complete the order and need to save it for editing later use Hold order this can then be recalled from Purchase order and Modify.

Once you have finished entering the order, use complete order to confirm and print it

## Deliveries

## Deliveries



Any purchase orders created can then be recalled through deliveries and booked into stock.

To do this choose create delivery from purchase order. Alternatively you can skip this step and just book a delivery note straight into the system by choosing new delivery.

Add products and quantities for new deliveries or for from a purchase order select each line and double click to process, then edit the delivered case/unit and updated.

Flag all items for delivery.

Once again you can hold a delivery and process later or finalize delivery.

At finalize delivery items are added to stock

## Returns

### Returns



This can be used for booking stock back out to a supplier and is used in the same way as creating a delivery.

## Stock Taking

### Stock Taking



**BEFORE STOCK TAKING ENSURE ALL RETURNS TO SUPPLIERS AND DELIVERIES ARE COMPLETED**

To create a new stock take choose create new stock take.

Enter a name for the stock take.

At this point you can either stock take all items (Leave all boxes ticked) or part stock take by choosing Groups/Departments then proceed to stock take.

From the next page you can print stock count sheets for the items in the list.

Next enter the count against each item as Cases/Units or combination of both.

Preview stock take at this point to produce and print a variance report. This will enable you to check on high variances and recheck certain items before posting the stock take.

Hold stock take will save the count but no update the stock. You can then recall the saved stock take and edit it (Using Modify existing stock take)

When you are happy with your stock take you can complete stock take and press yes to confirm and adjust stock.