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Operation

Starting your System

Starting your System

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

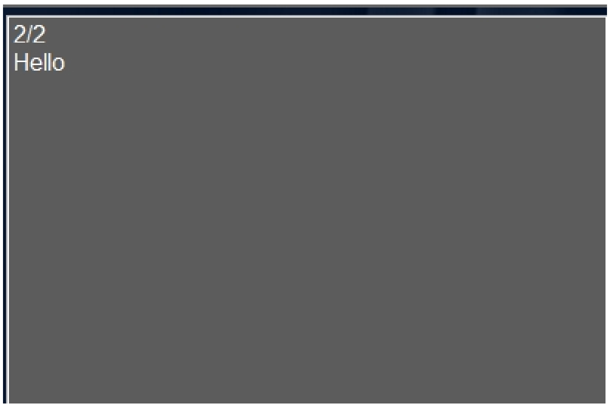
When the system starts up you will be presented with the below screen click on start POS Mode

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.

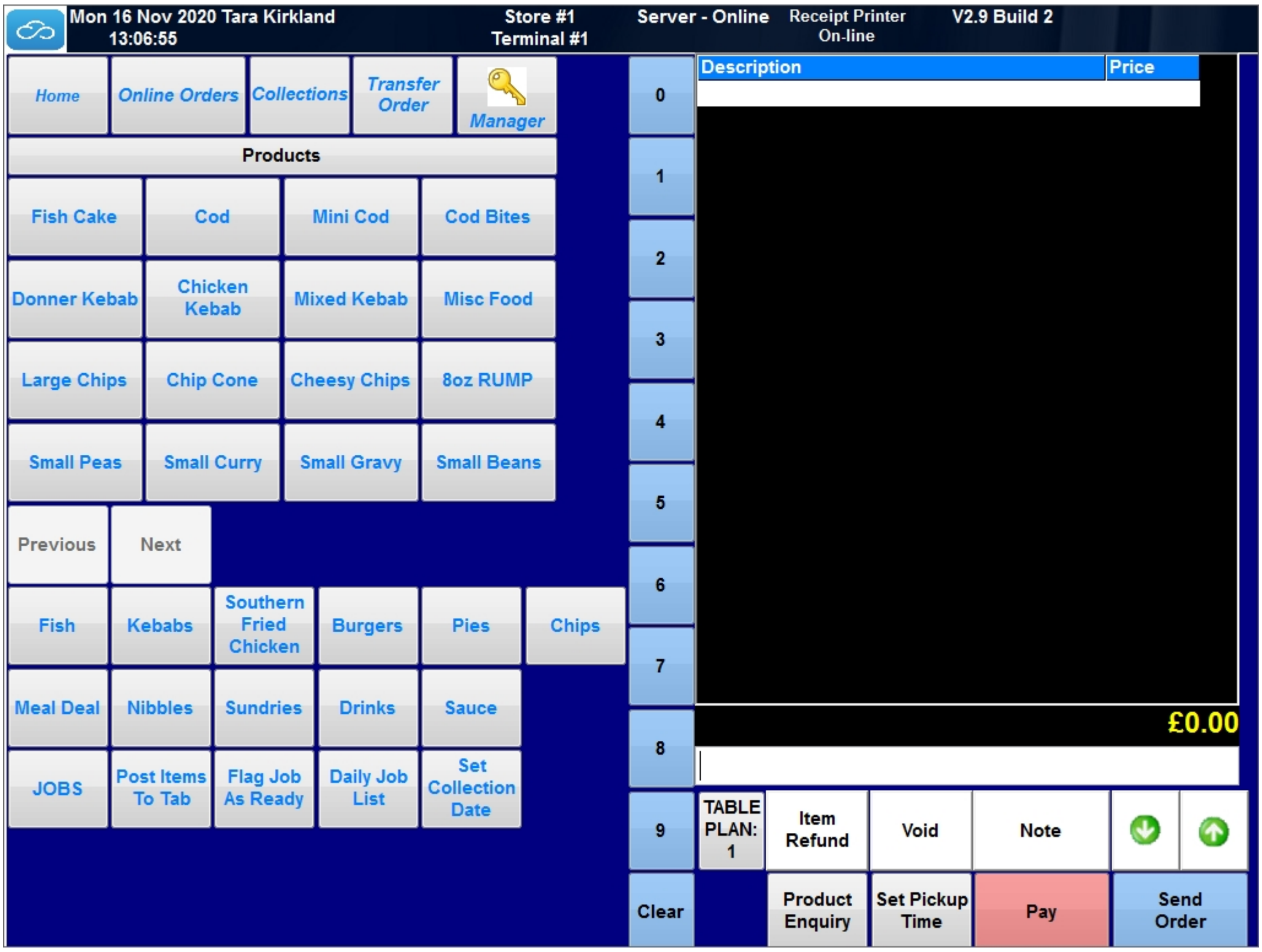
Log On For Sales

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.

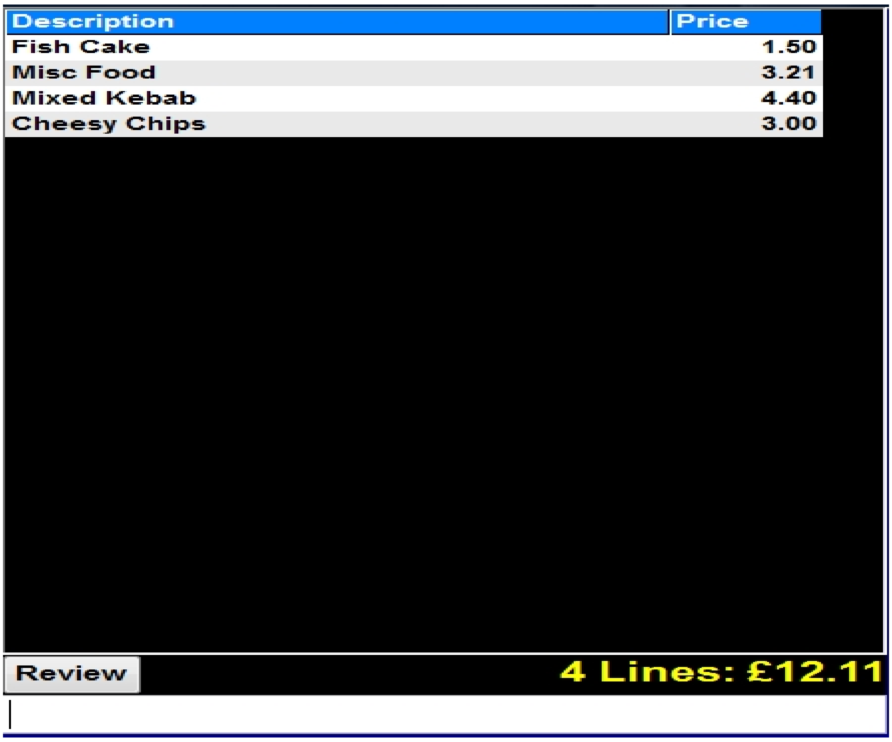
Selling Items

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.



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

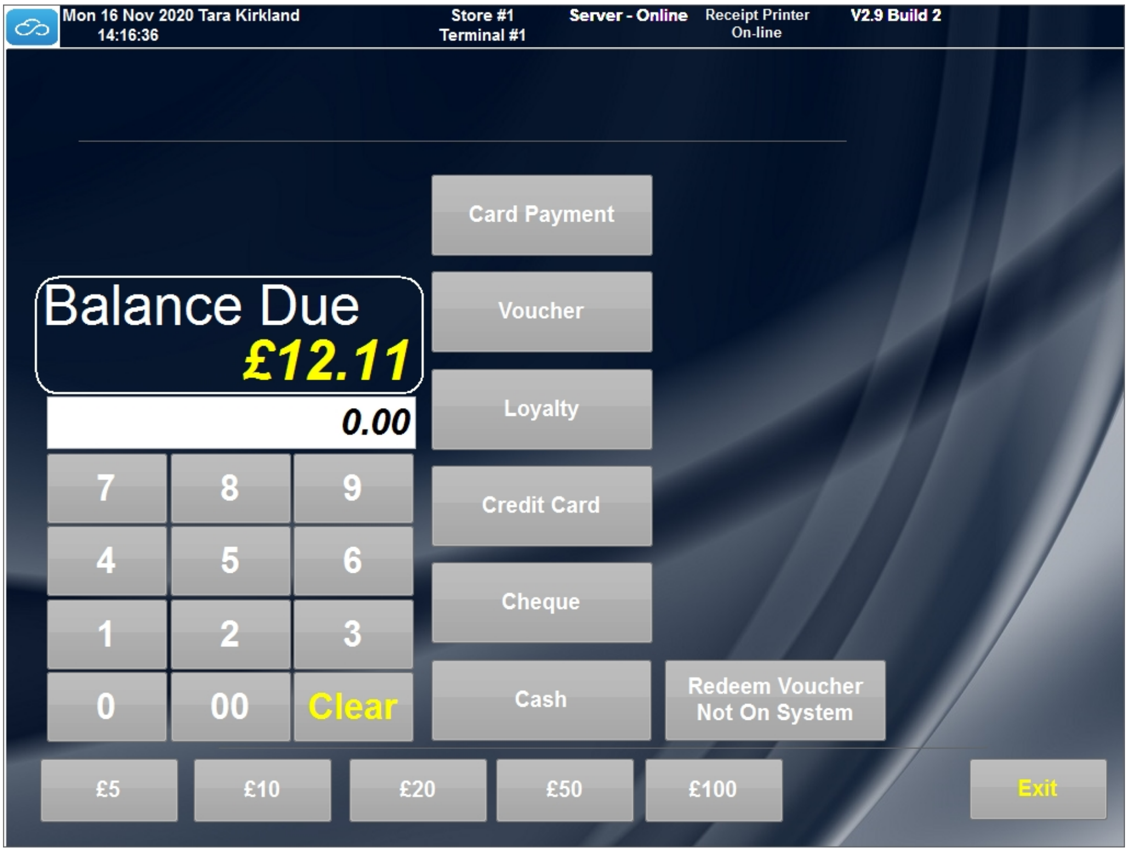
VOID: Use your finger or mouse to highlight a product in the journal window then press VOID. You will be prompted VOID LINE? YES/NO. Yes will remove that single line from the trasaction.
NOTE: Use your finger or the mouse to highlight the product in the journal window, then press NOTE. You can then add up to three lines of notes which will print on the reciept.
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 highligh 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 EXIT 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 reciept.

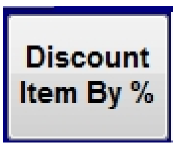
If you wish to calculate the change, or split tender; enter the amount E.g. Balance is £12.11 and the customer gives £20 CASH you can enter the amount 2000 then cash (Or use a quick tender £5, £10, £20, £50, £100 buttons). This would then show the change of £7.89.

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 Dsicount 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

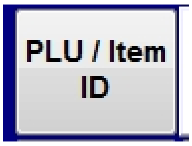
If you want to void the last item only after selling it press Void Last Item

Selling Scanned Items

Selling Scanned Items

PLU Or Barcode Number Manual Entry

PLU or Barcode Number Manual Entry



If a barcode label is damanged 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.

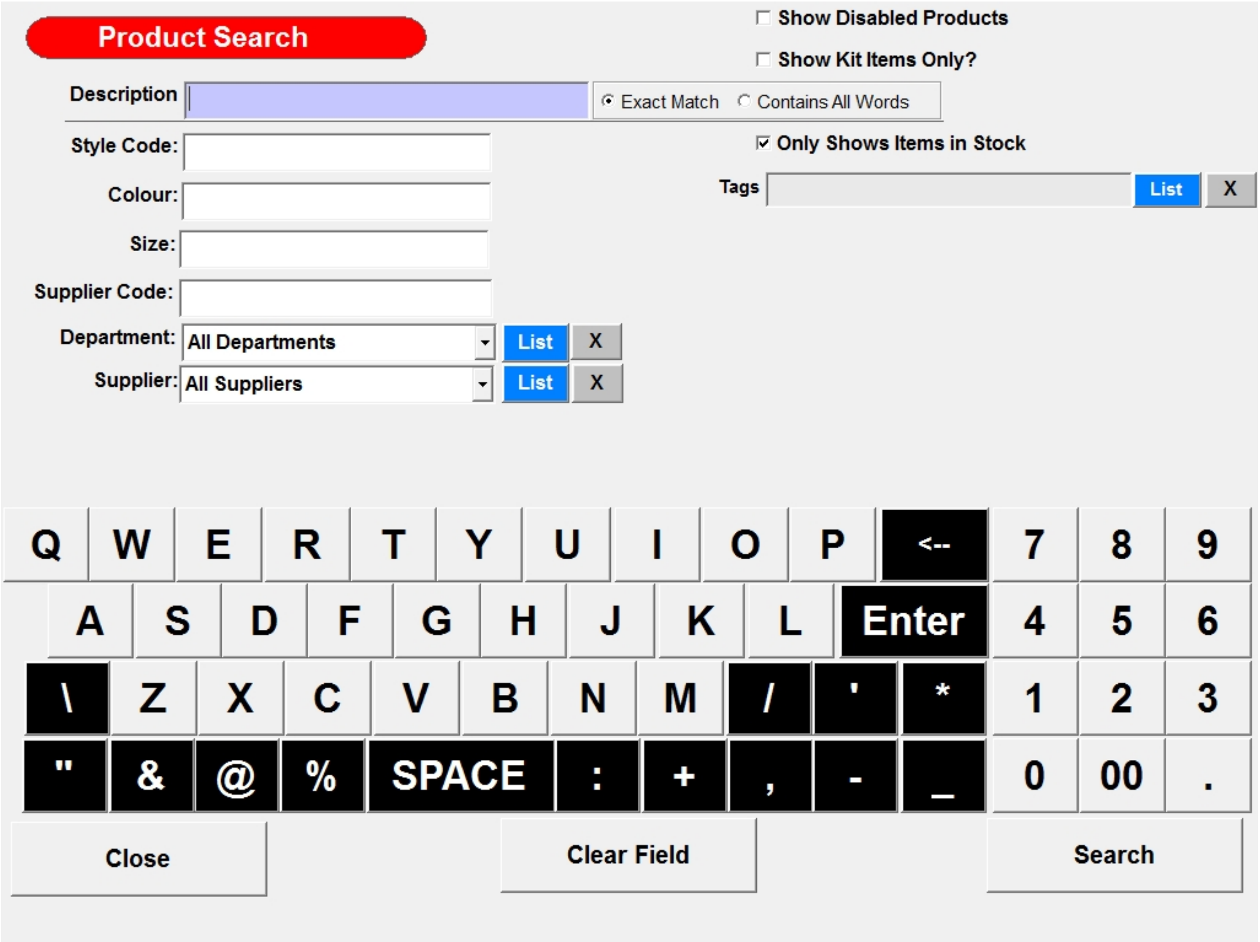
Either press Close or Sell Item.

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

Item Seach

Item Search at Point of Sale Screen

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



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 reciept. 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 in 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.

Reciepts

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.

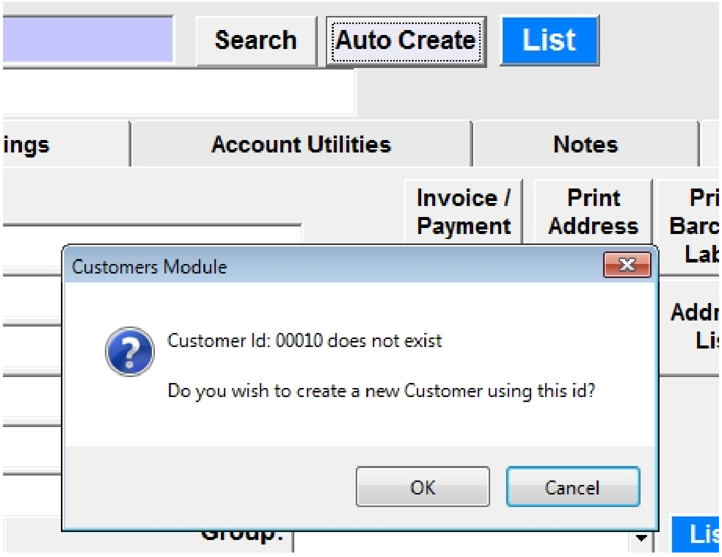
Customers

Customers

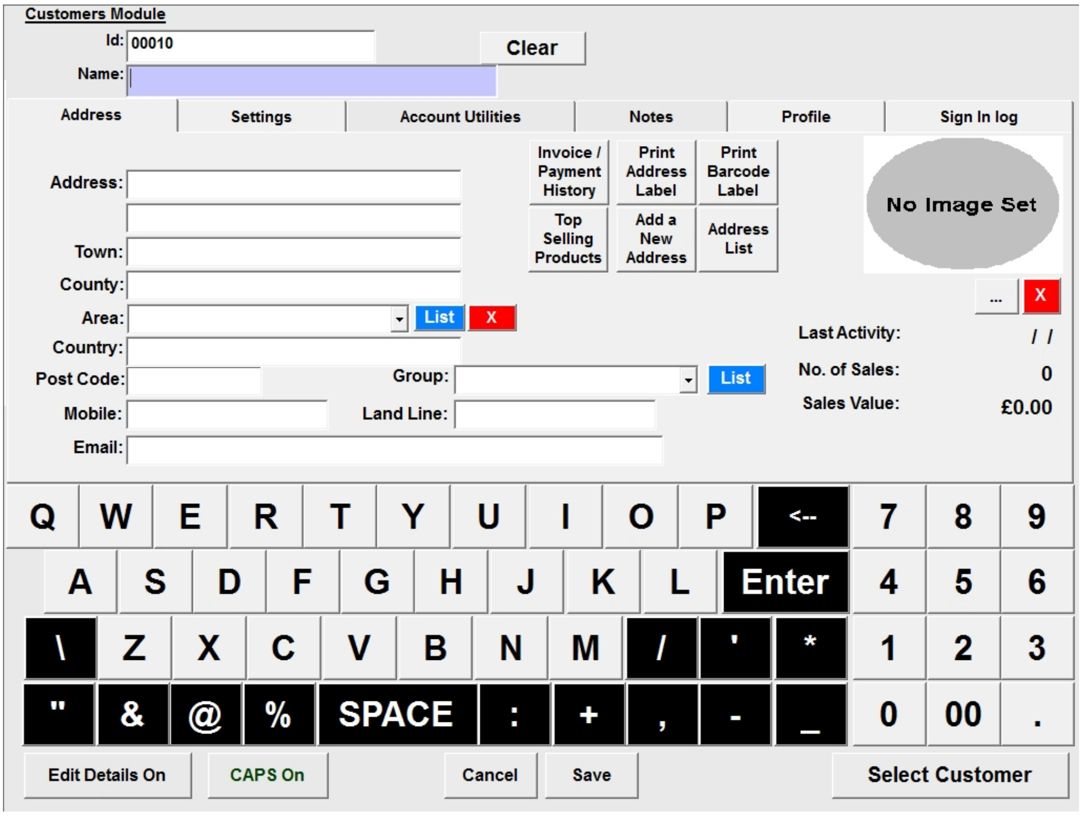
Add a new customer.

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.

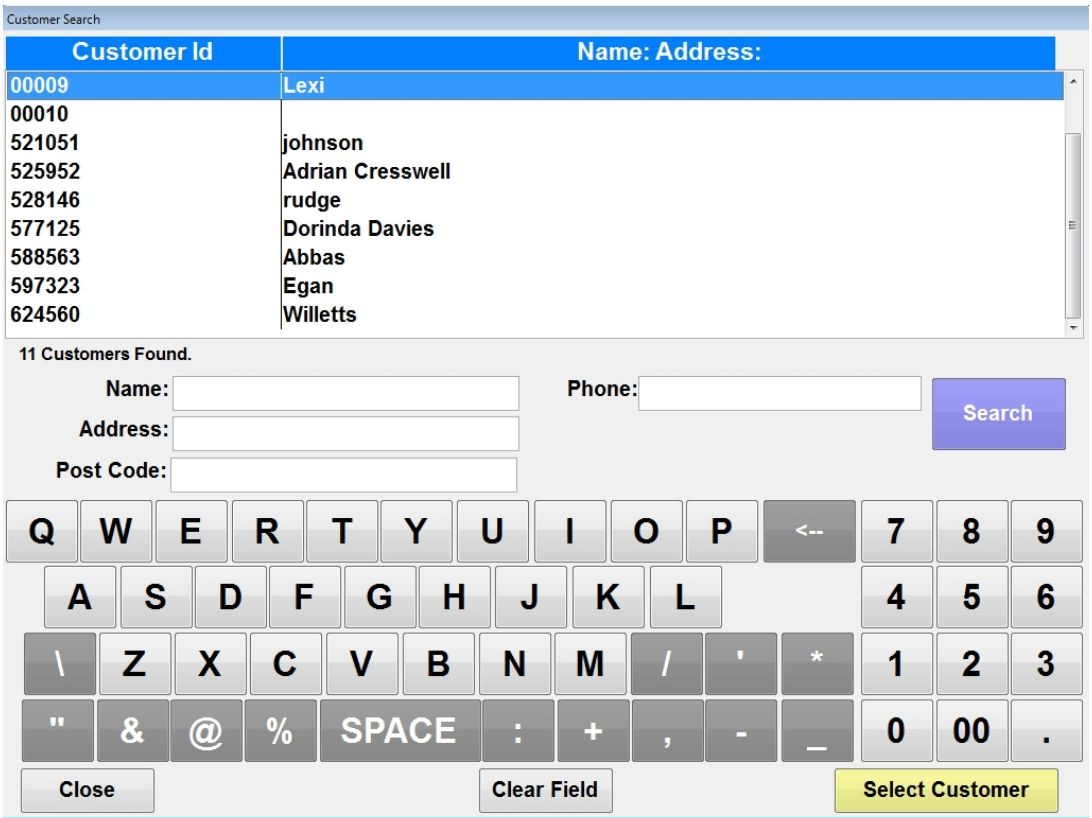


Then select customer.

Select existing Customer

Press select customer from your till screen

Search by name.



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 reciept.

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.

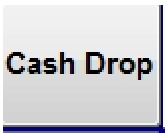
The system will ask you if you want to redeem this Gift Voucher. Press OK

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

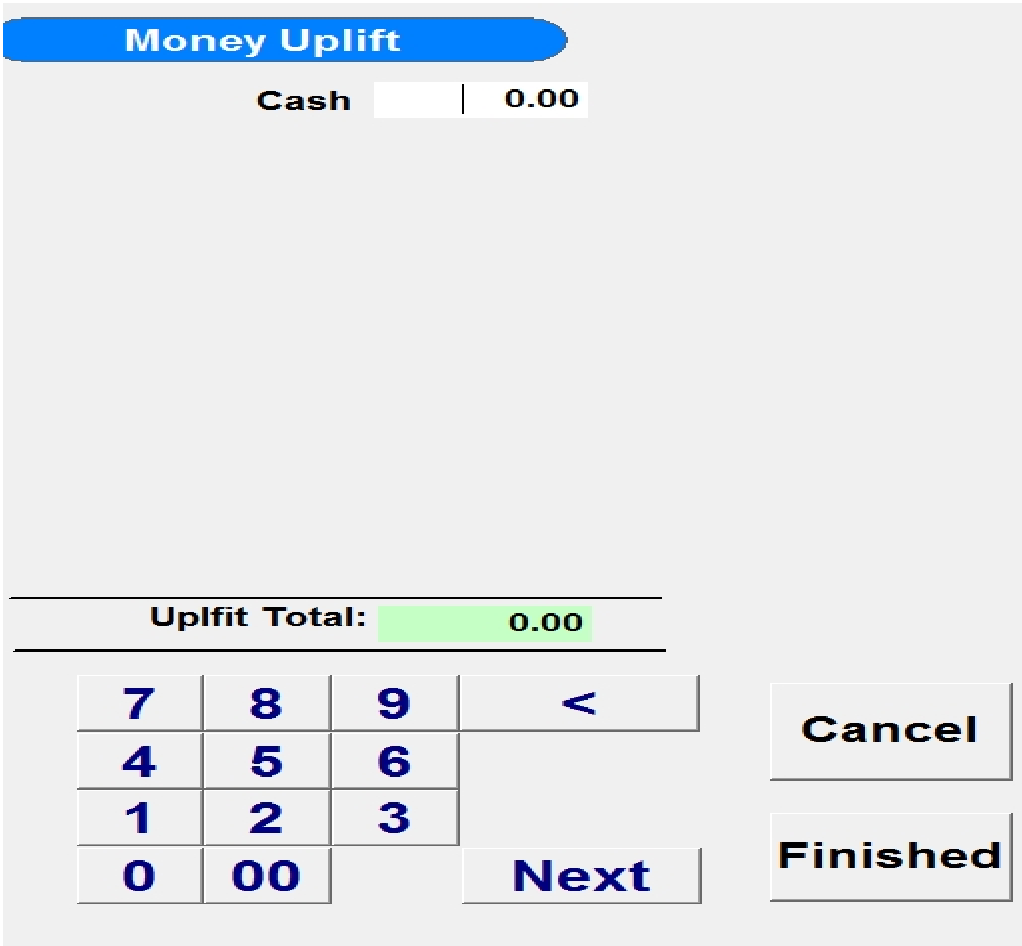
Manager Functions

Cash Drop

Cash Drop



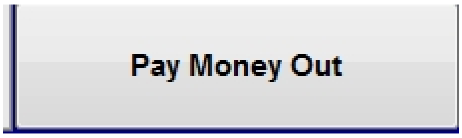
If you decide to take money out of the till to put in the safe during the day, this can be accounted for by pressing the cash drop button.



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

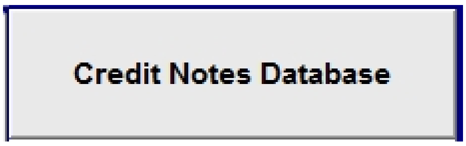
Gift Vouchers Database

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

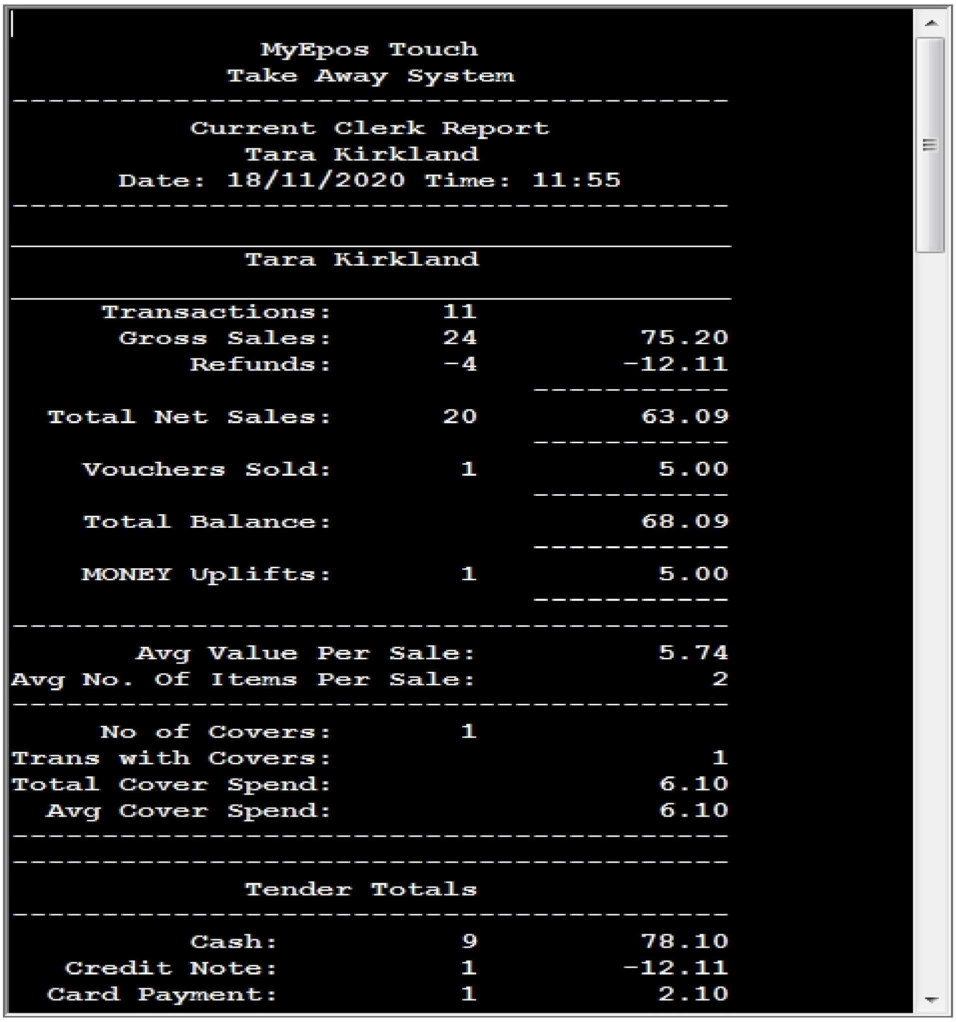
Reports Mode

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.

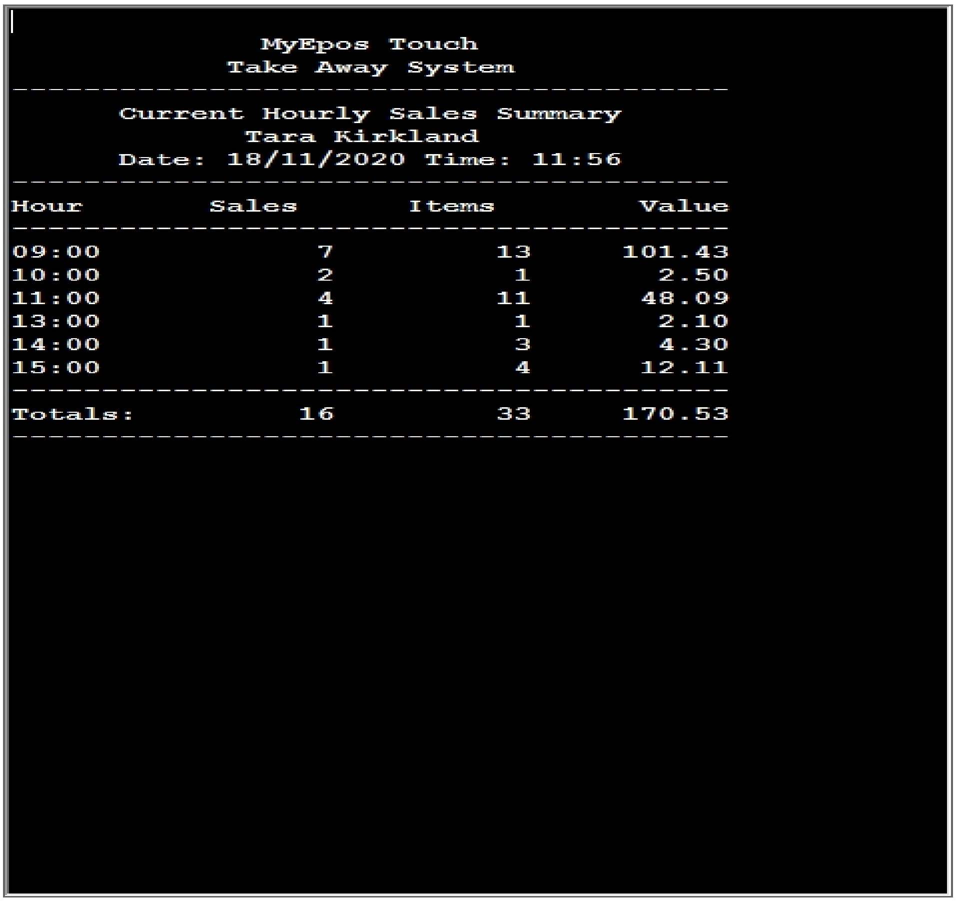


```
              MyEpos Touch
            Take Away System
----------------------------------------
          Current Clerk Report
             Tara Kirkland
      Date: 18/11/2020 Time: 11:55
----------------------------------------

             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:

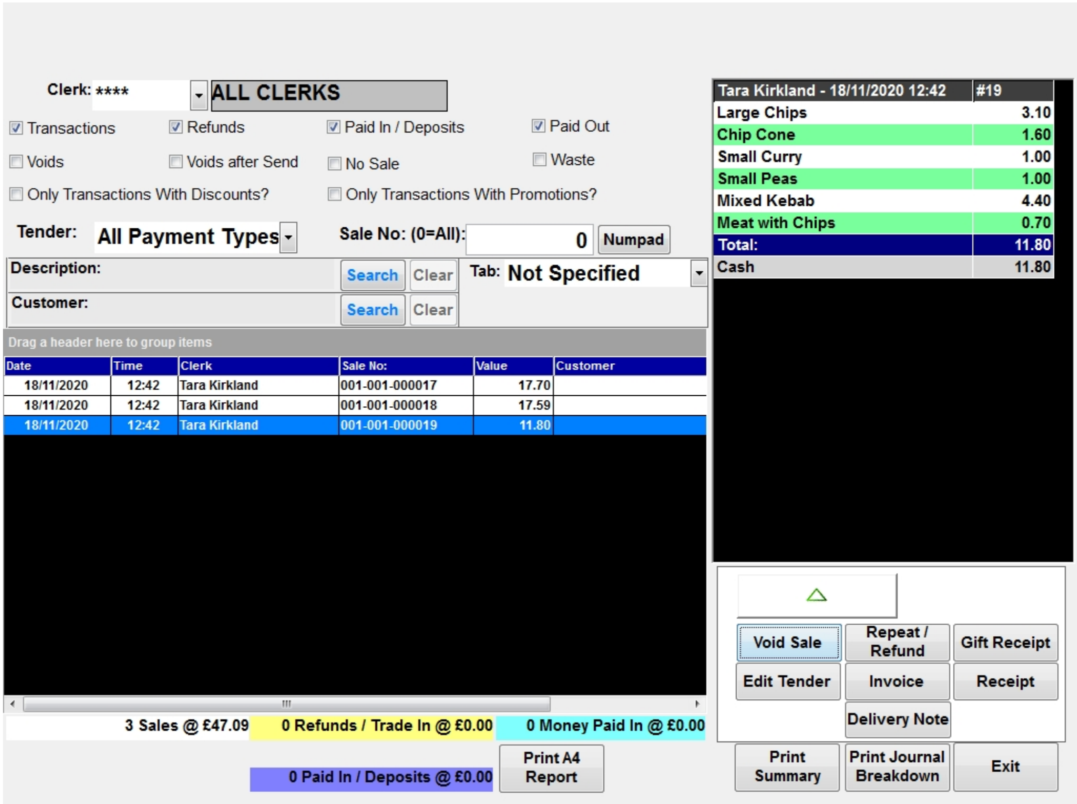
Transactions:	Number of Transactions
Gross Sales:	Number and Value of Gross Sales
Refunds:	Number and Value of Refunds
Total Net Sales:	Number and Value of Net Sales
Vouchers Sold:	Number and Value of Voucher Sales
Total Balance:	Total of Net Sales & Voucher Sales
Avg Value per Sale:	Value of Transactions 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
Tender Totals:	
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
VAT	
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

Current Sales

Current Sales

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



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:

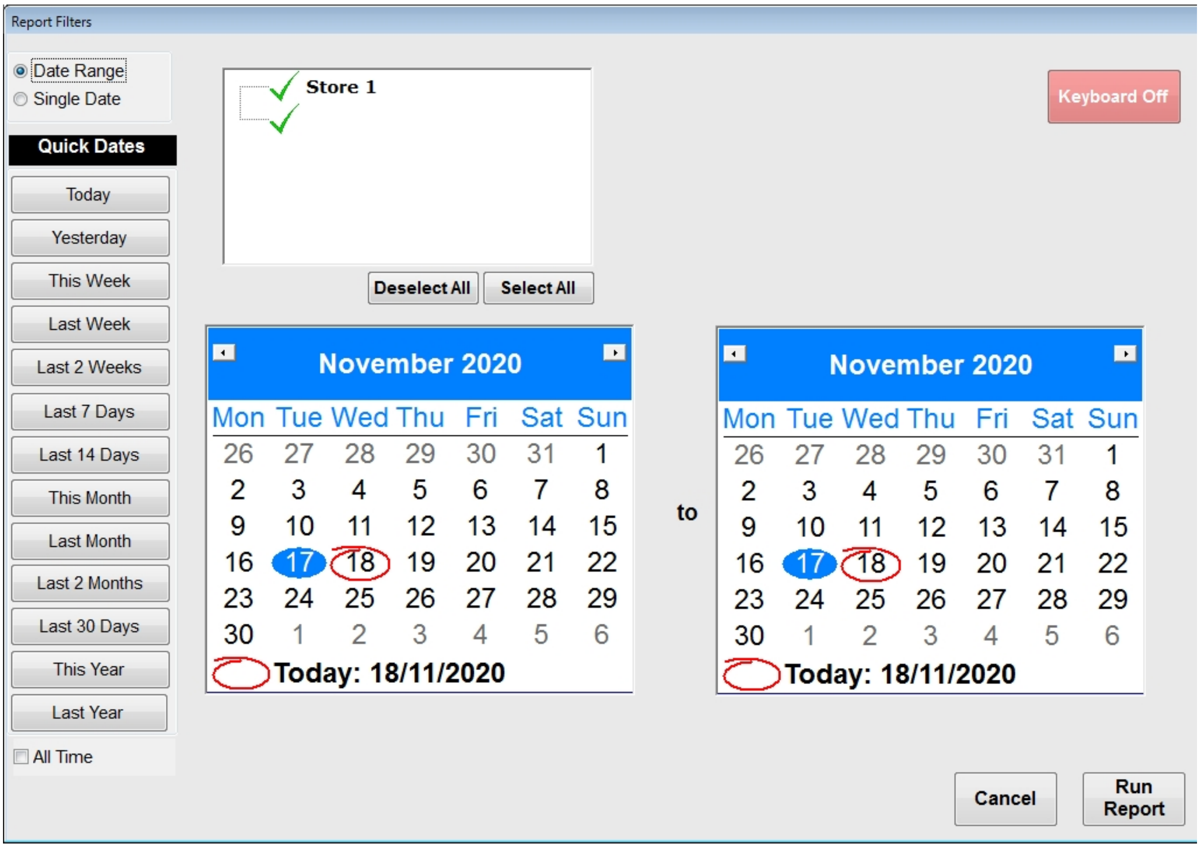
Transactions:	Number of Transactions
Gross Sales:	Number and Value of Gross Sales
Refunds:	Number and Value of Refunds
Total Net Sales:	Number and Value of Net Sales
Vouchers Sold:	Number and Value of Voucher Sales
Total Balance:	Total of Net Sales & Voucher Sales
Avg Value per Sale:	Value of Transactions 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
Tender Totals:	
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
VAT	
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

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

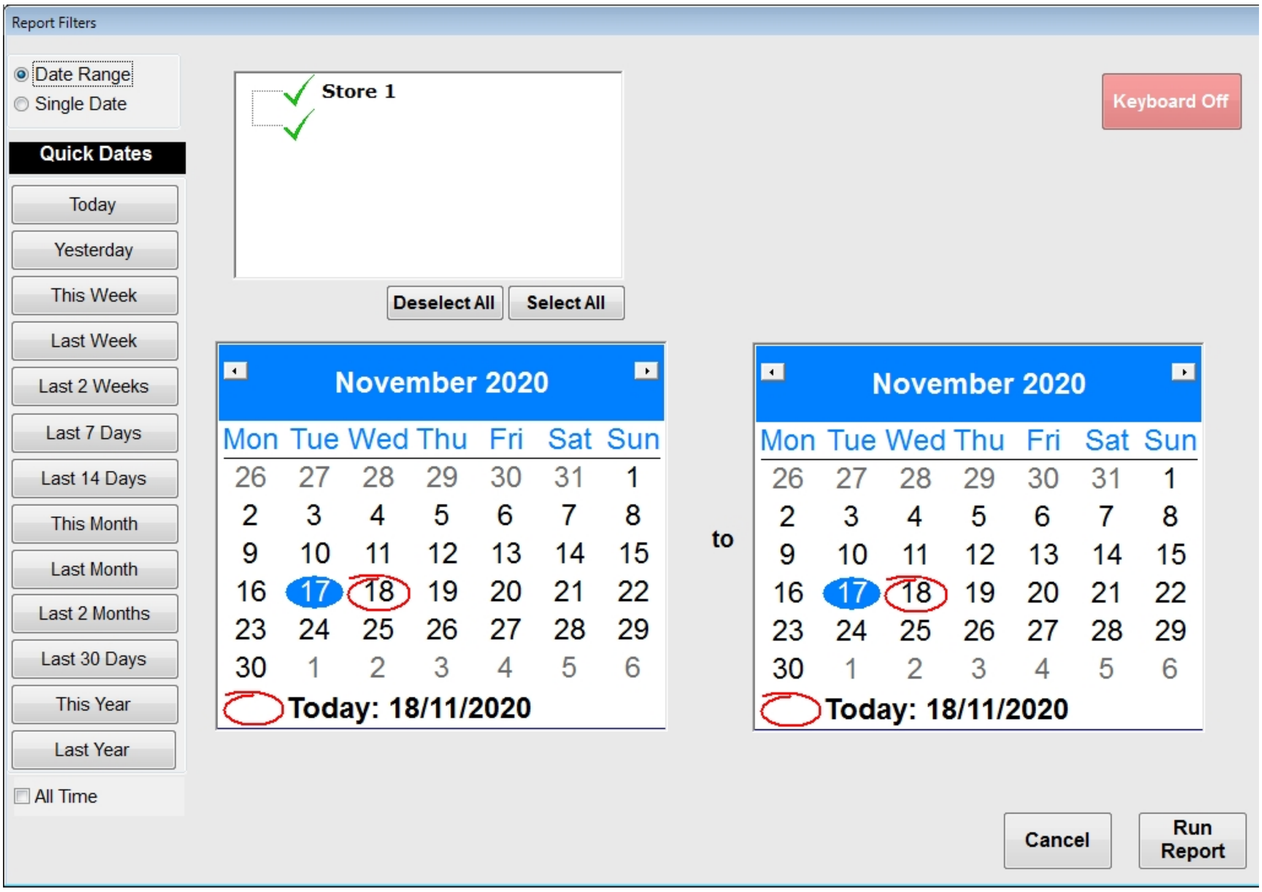
Clerk sales by period allows you to see the clerk sales for a specified date range.



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
Tender Totals:	
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
VAT	
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

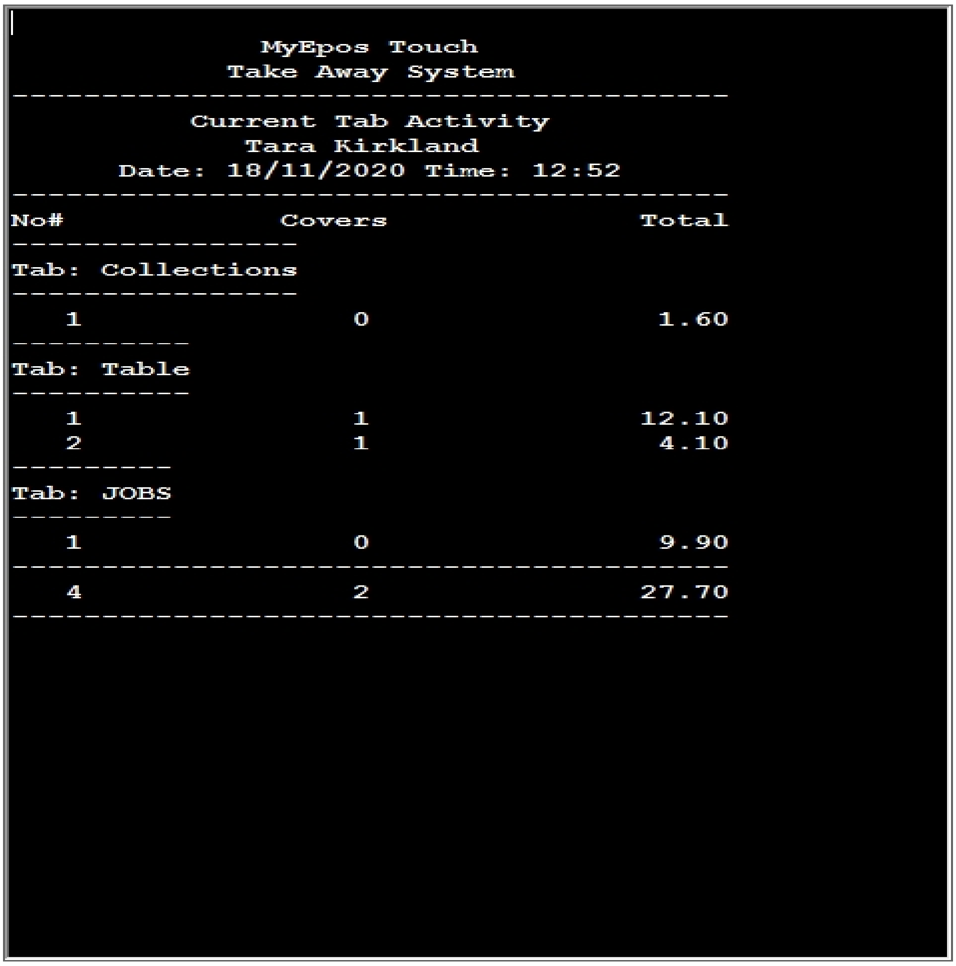
Time and attendance report shows the hours worked by clerk.

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

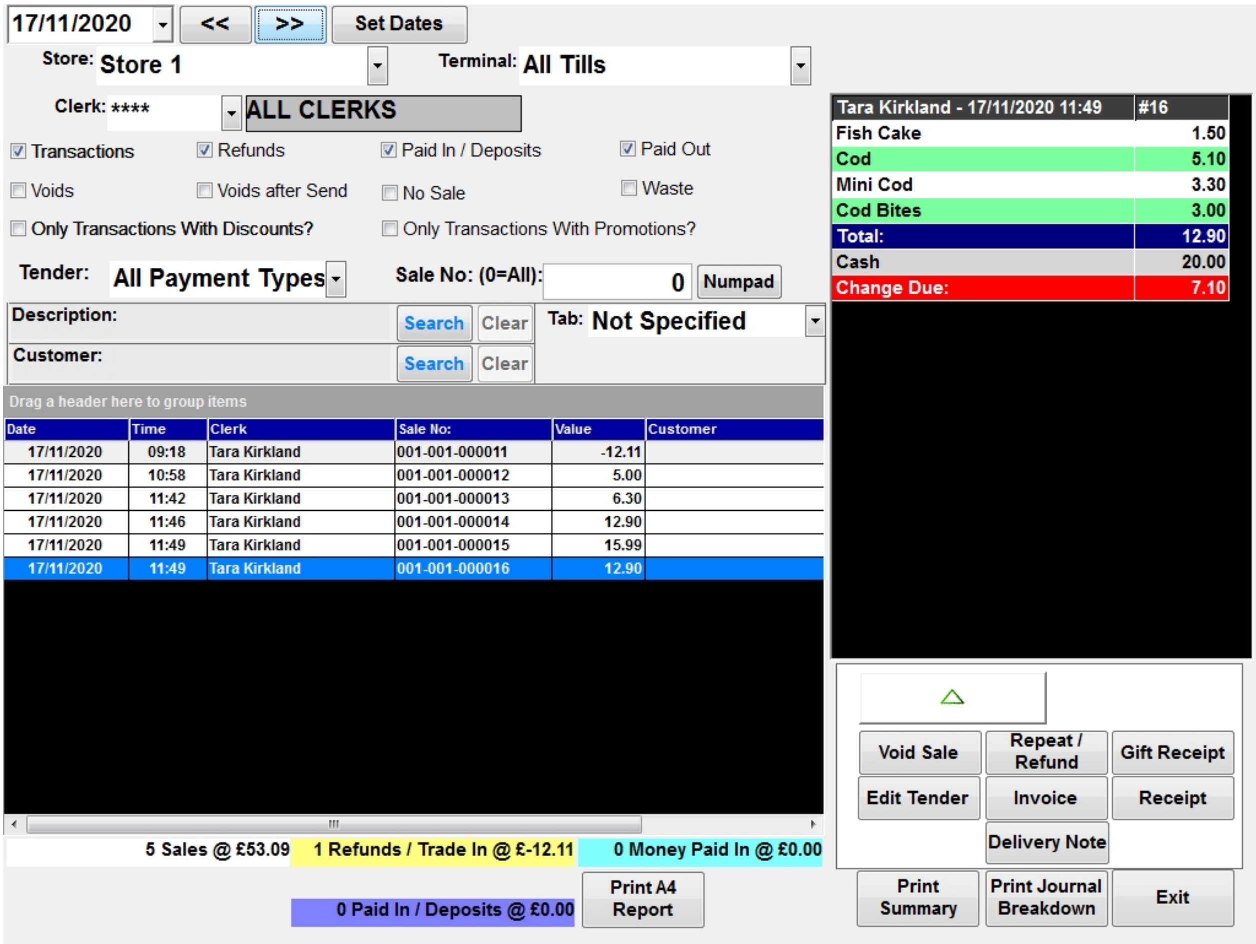


```
              MyEpos Touch
            Take Away System
----------------------------------------
           Current Tab Activity
              Tara Kirkland
      Date: 18/11/2020 Time: 12:52
----------------------------------------
No#             Covers              Total
----------------
Tab: 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

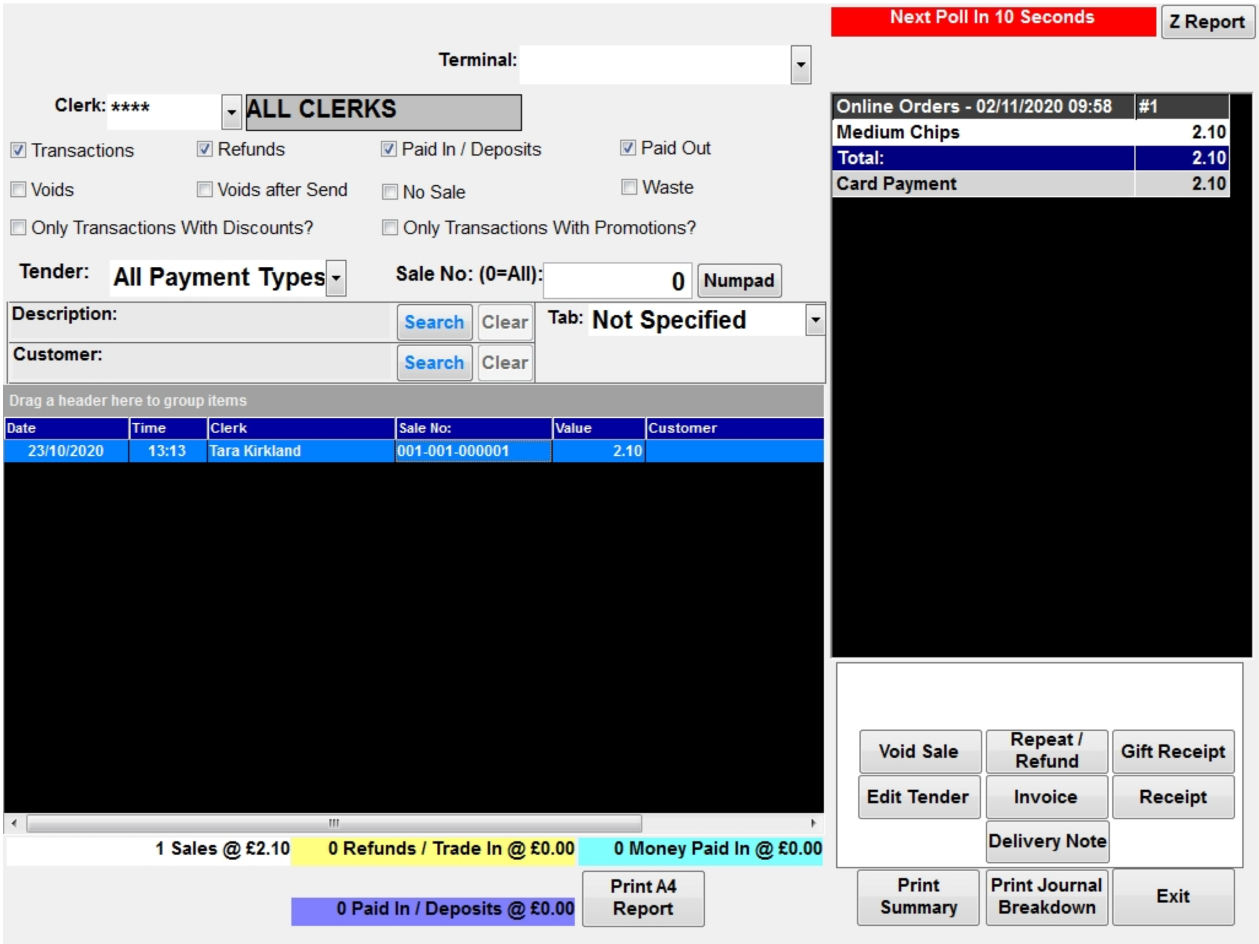
Till journals is similar to Current sales in that it allows you to search and view sales. However in till journals you can review sales from previous days, and also all terminals.



Till Viewer

Till Viewer

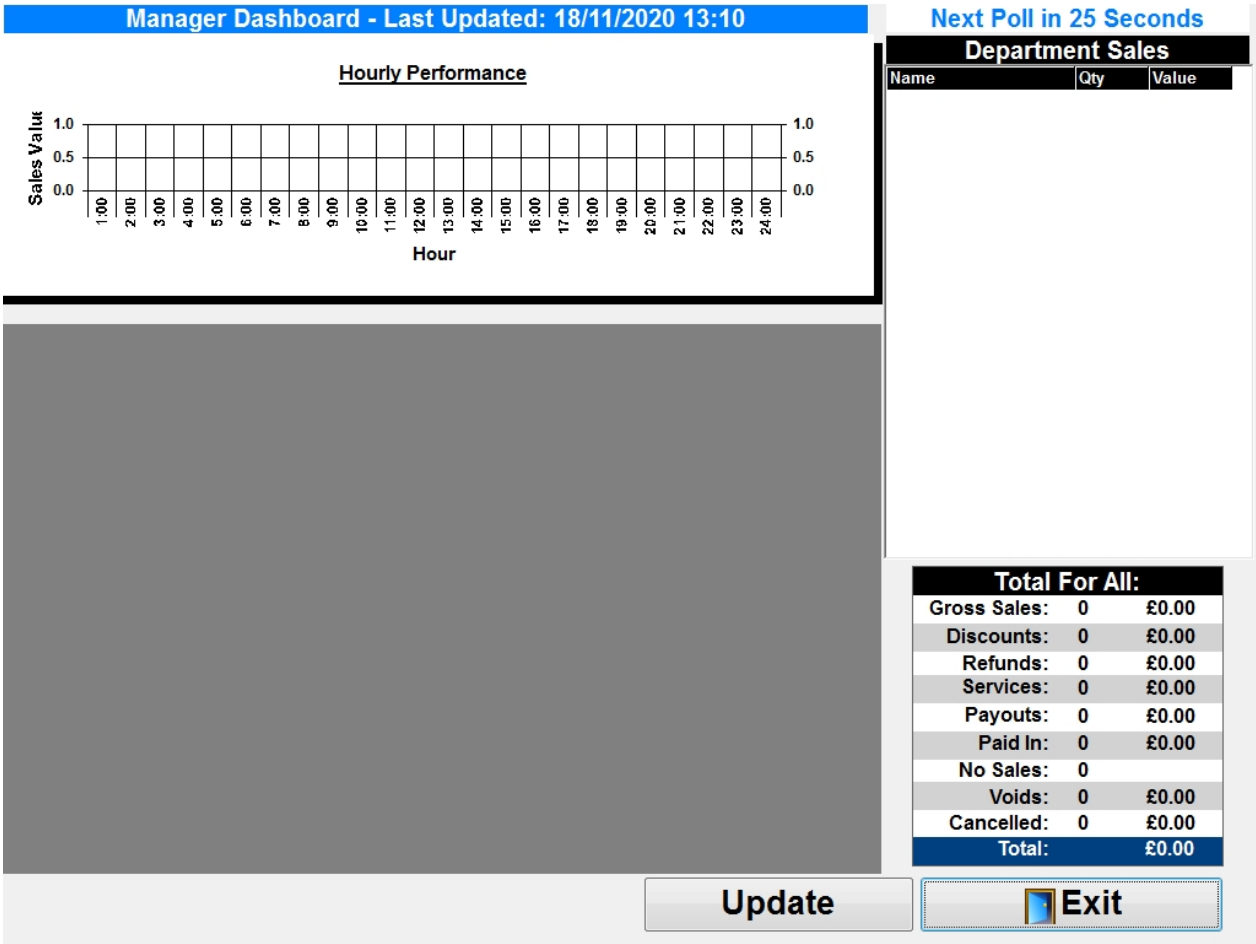
Allows you to view other tills Current Sales



Manager Dashboard

Manager Dashboard

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



POS Program Mode

Item Set Up

Item Set Up

Each Product is liked to a department and supplier for reporting. In turn each department is liked to a group.

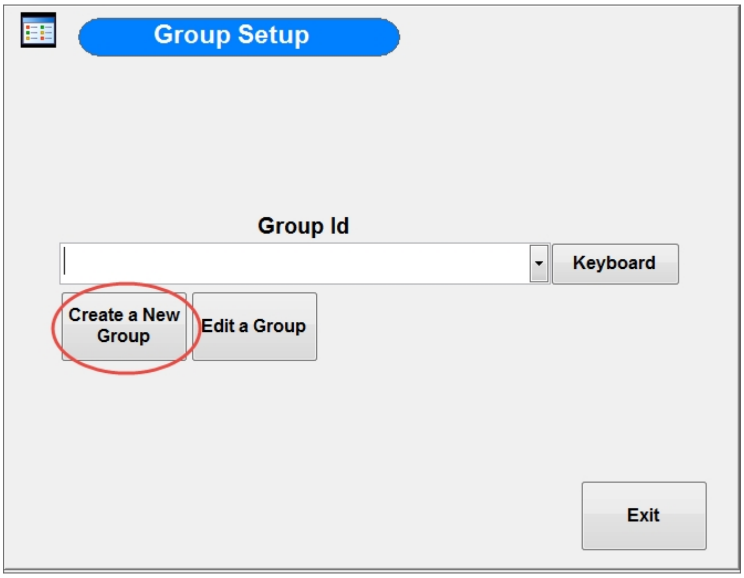
New supplier, departments and group can be added through the buttons in Item Set-Up.

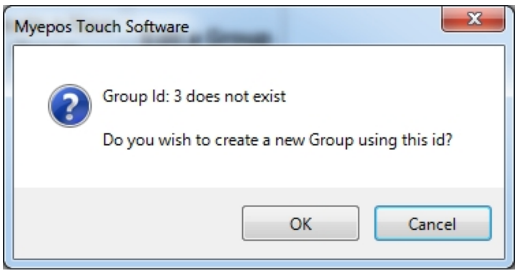
It is best to work in a top down level method, e.g set up all Groups, Departments, and Suppliers, before setting up products. Therefore when setting up products all links are available in the drop downs.

Create a New Group

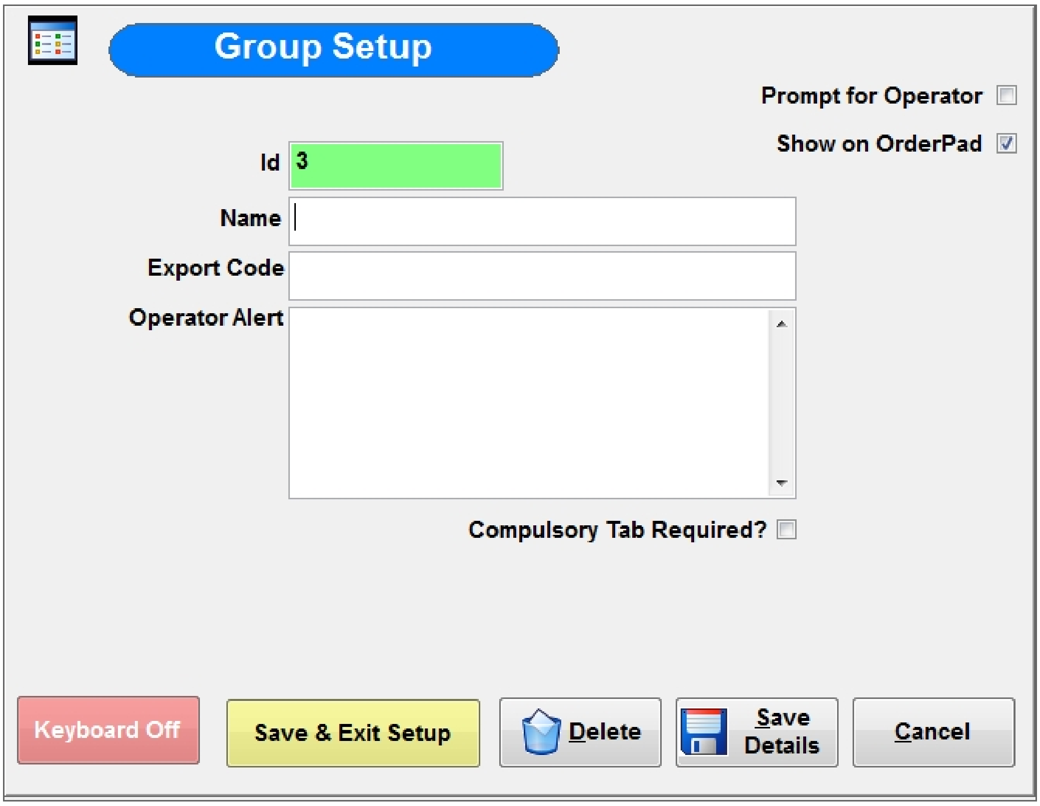
Create a New Group

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





This then loads the below screen:



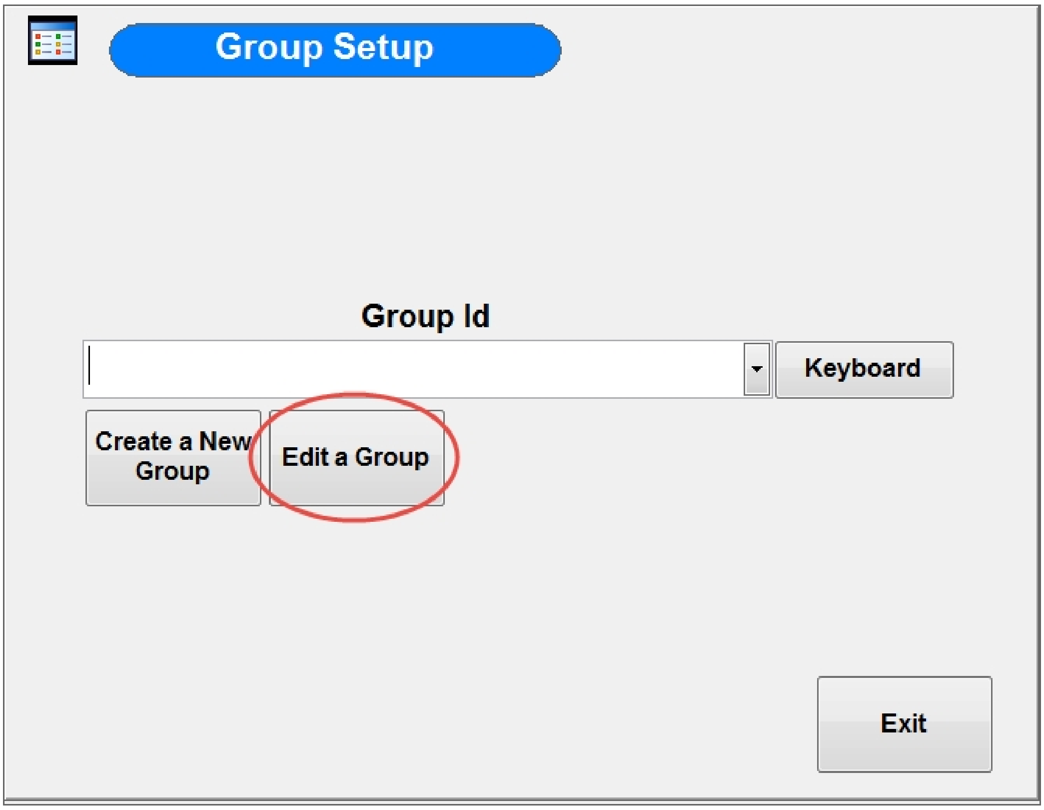
Name:	Give the group a name
Export Code:	Code that can be used in an external system
Operator Alert:	Text that pops up for operator when item is sold from group
Compulsory Tab Required:	Items in this group Must go on a Tab when this box is ticked
Prompt For Operator:	Prompt for operator who served the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

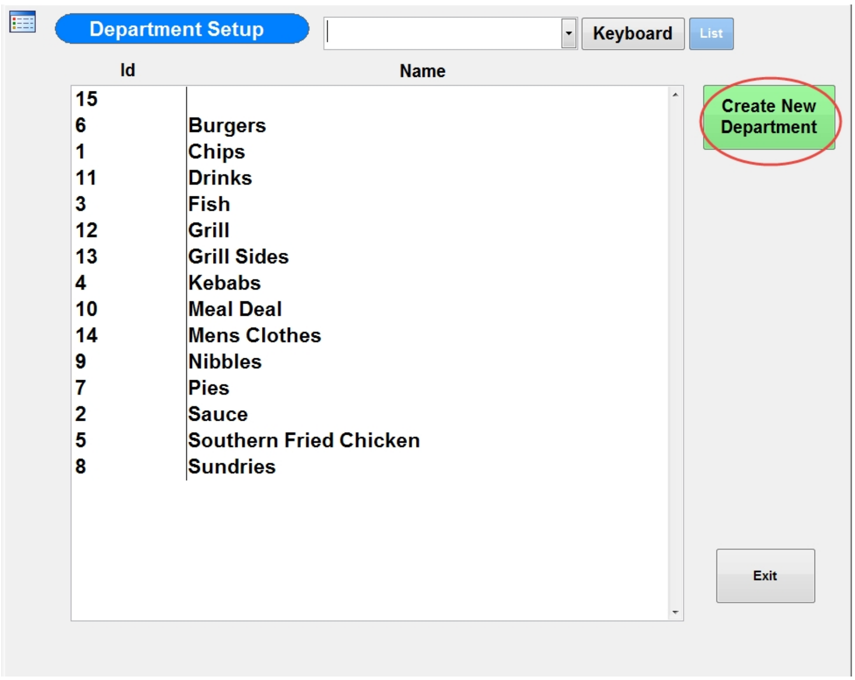


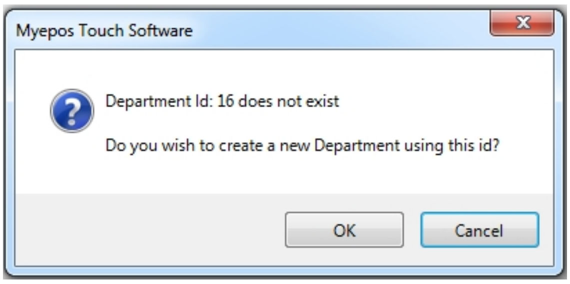
This opens all current groups. Select the one you wish to edit and you are now presented with the same screen as create a new group.

Create a New Department

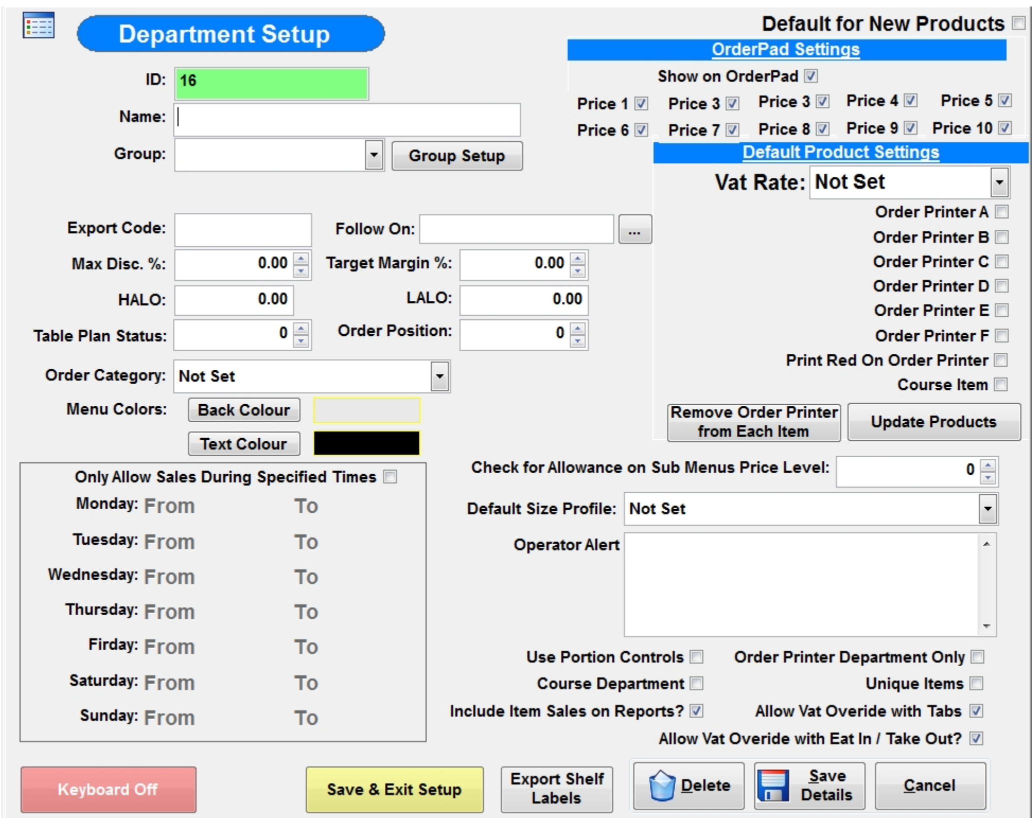
Create a New Department

Select Create a New Department and OK





This loads the below screen:



Name: Name of Department
Group: Group Department is to be reported in as set up previously.
Export Code: Code that can be used in an external system
Follow On: Function to be preformed after an item is sold from this department
Max Disc %: Maximum % Discount to be granted on items from this department
Target Margin %: Suggests sell price for items in this department based on this %
HALO: High Amount Lockout for department
LALO: Low Amount Lockout for department
Table Plan Status: When items from this department are sold what table plan status should be assigned
Order Position: Position items from this department are shown in on orders
Order Category: Category Items are shown in from this department
Menu Colours: Colour of button on sales screen
Allow Sales During Specified Times: Only allow sales from this department on certain days or times (Perfect for Sunday Lunch Or Set Menus)

Order Pad Settings

Show on Order Pad: Show Department on Order Pad.
Price Levels: Define price levels available on Order Pad.

Default Product Settings

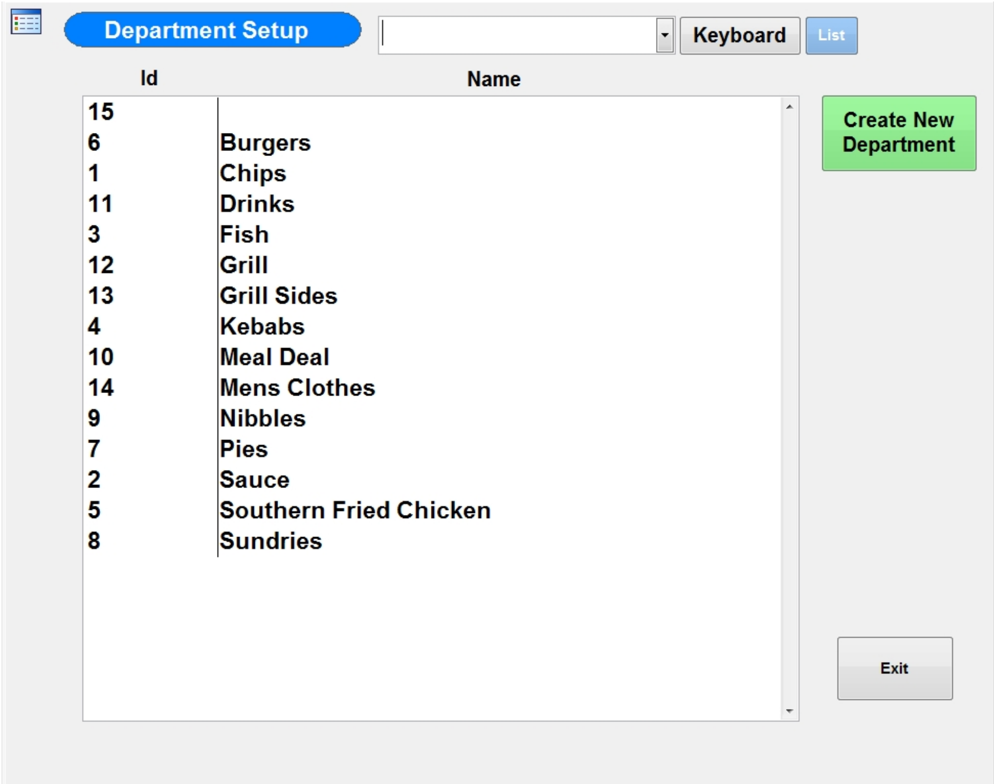
VAT Rate: VAT Rate for items in this department
Printers: Select which printer/s items in this department should print to.
Remove Order Printer from Each Item: Remove all current set printers for items in this department
Update Products: Update printer settings in for each item in this department
Check for Allowance on Sub Menus Price Level: If Items are part of a set menu check for allowance using price level. (See Set Menu guide for More Information)
Default Size Profile: Default Size Profile for items in this department
Operator Alert: Text that pops up for operator when item is sold from department
Use Porton Controls: Use portion controls for items sold in this department
Order Printer Department Only:
Course Department: Department is a course department
Unique Items: If ticked items when sold from this category are listed as individual items rather than grouped into identical products e.g. 5 x Pizza
Include Items on Sales Reports: Items from this department should be included on sales reports
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

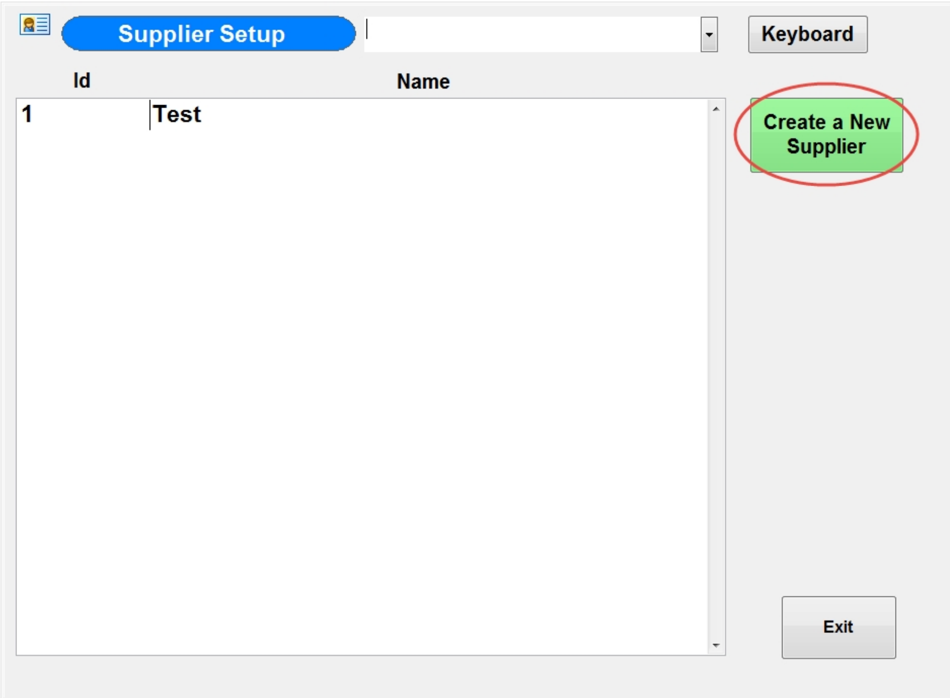
Select the department you wish to edit, you are now presented with the same screen as create a new department.

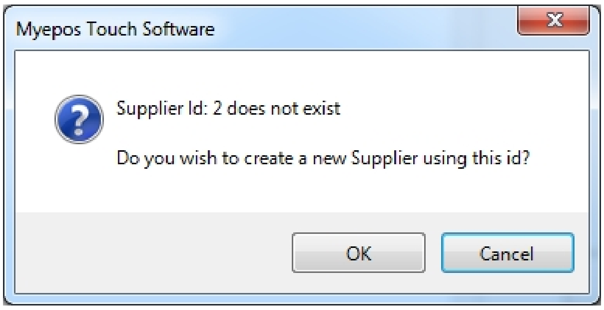


Create a New Supplier

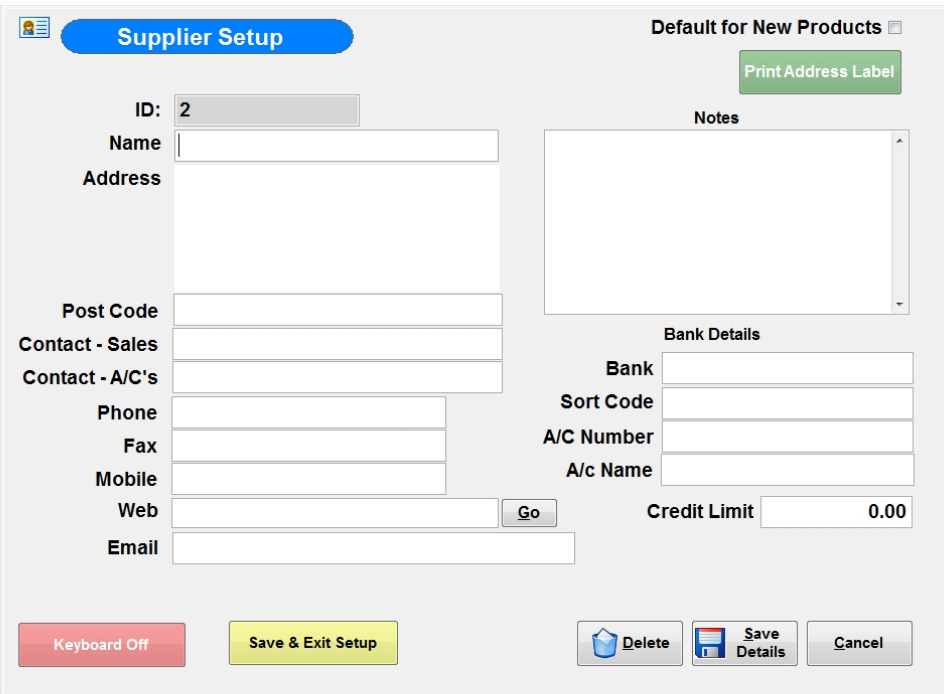
Create a New Supplier.

Select Create a New supplier and click OK





This Loads the below screen which needs to be completed.



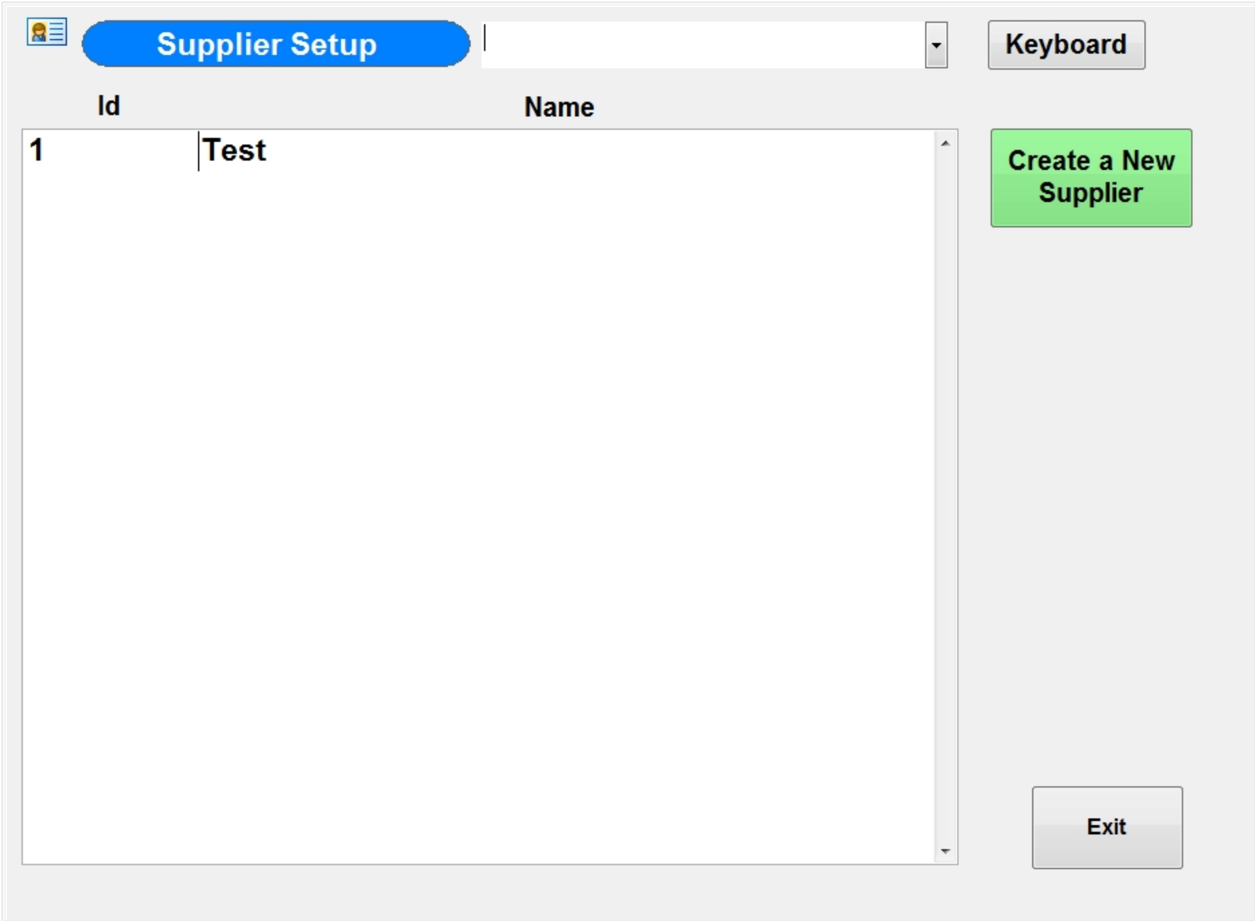
Default for New Products:	If Ticked this supplier will appear by Default for any new items
Name:	Supplier Name

Adddress:	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

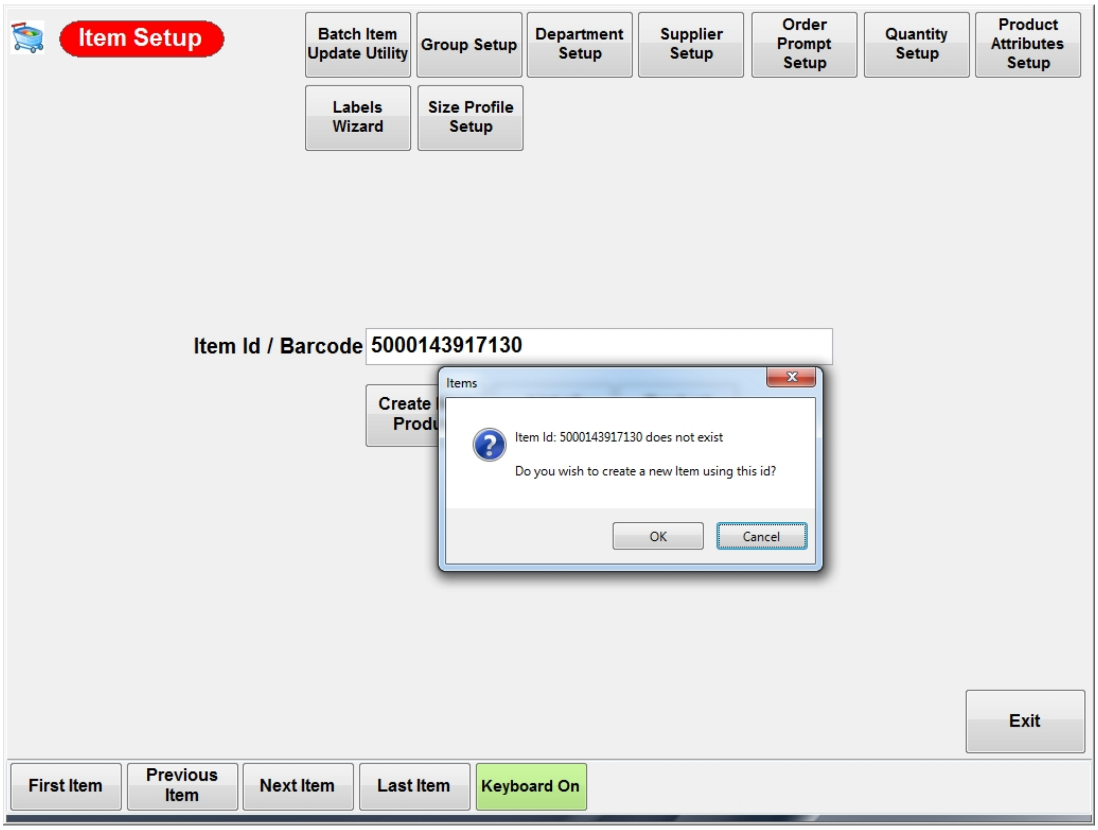
Create a New Product

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

With Barcode

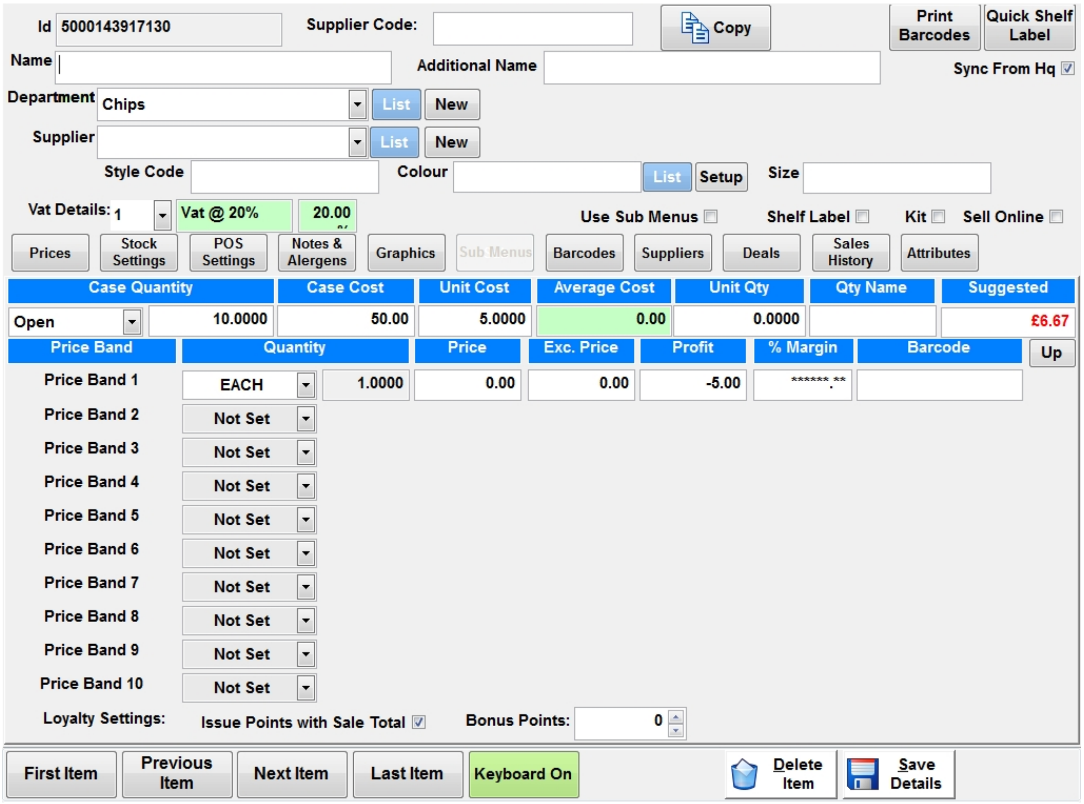
Create with Barcode.

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



This loads the below screen that needs to be completed.

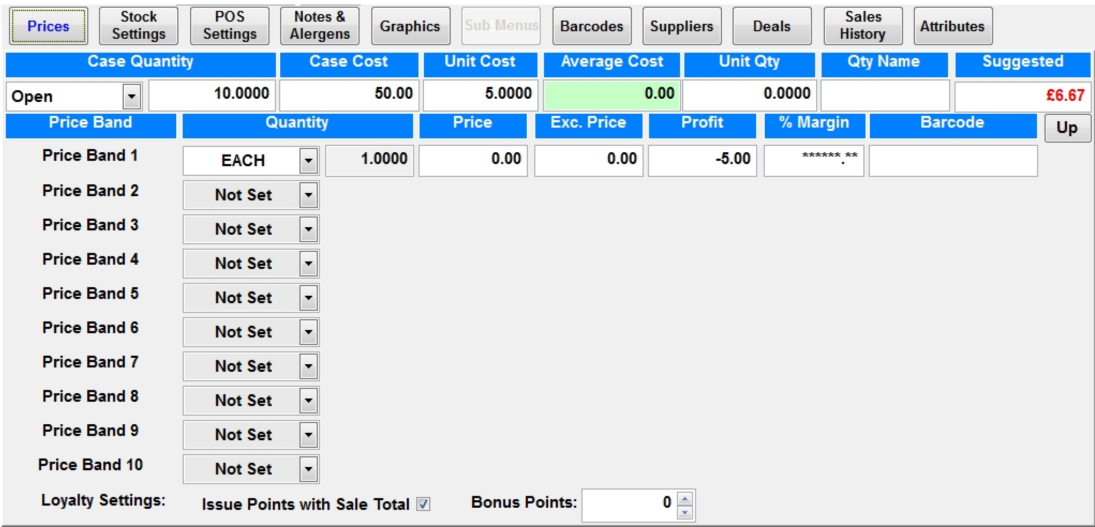
Fields marked with * are optional.



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.



Prices

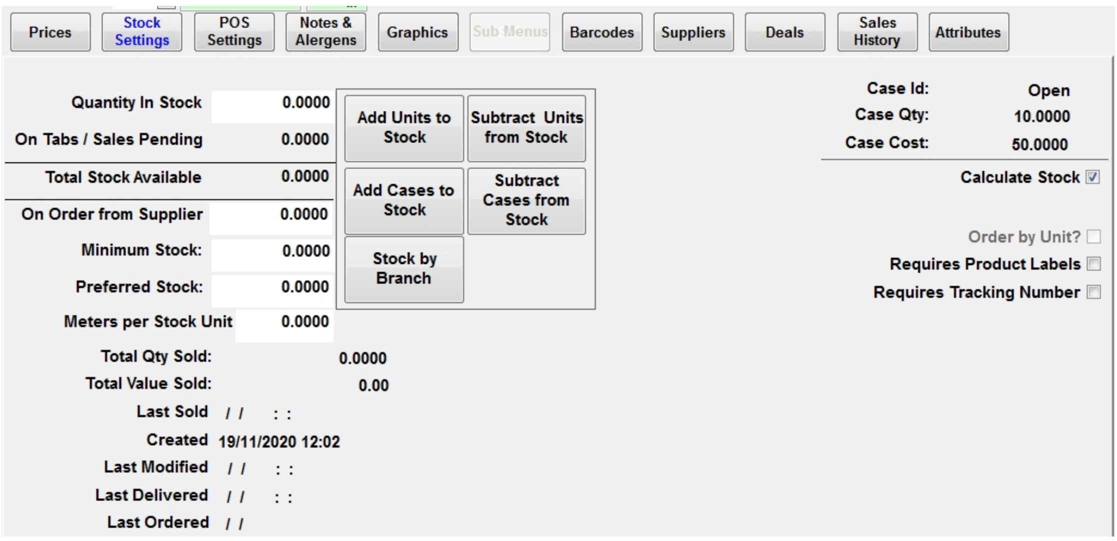
Case Qty*:	How many units are in an outer from the supplier
Case Cos*t:	How much does one case cost
Unit Cost*:	Calculated Automatically
Average Cost*:	Calculated automatically (When item case cost is edited in future)
Unit Qty*:	How many units form an outer are sold when you sell this item.
Qty Name*:	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

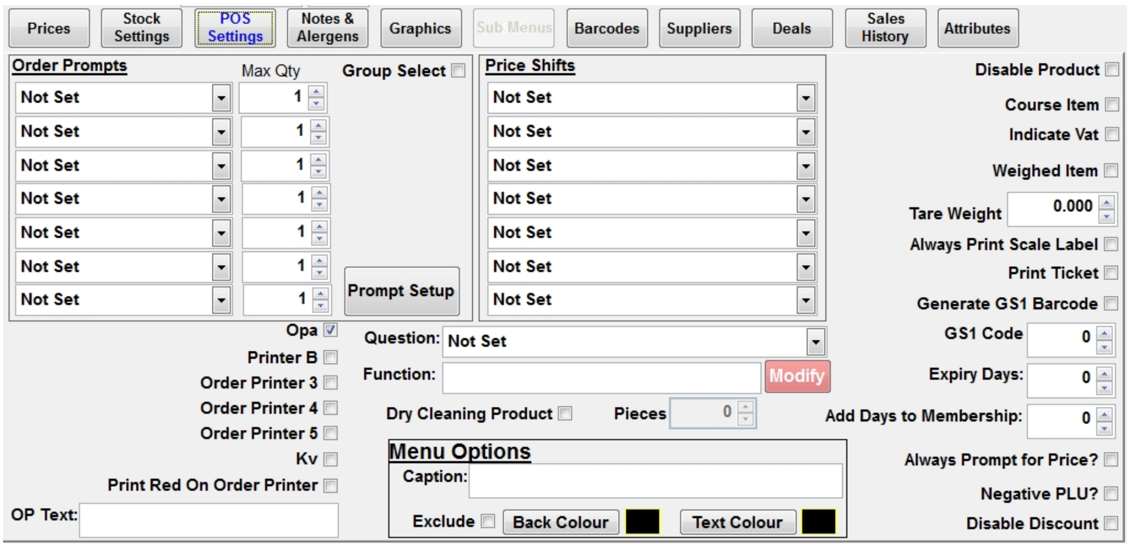
Loyalty Settings*

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



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*

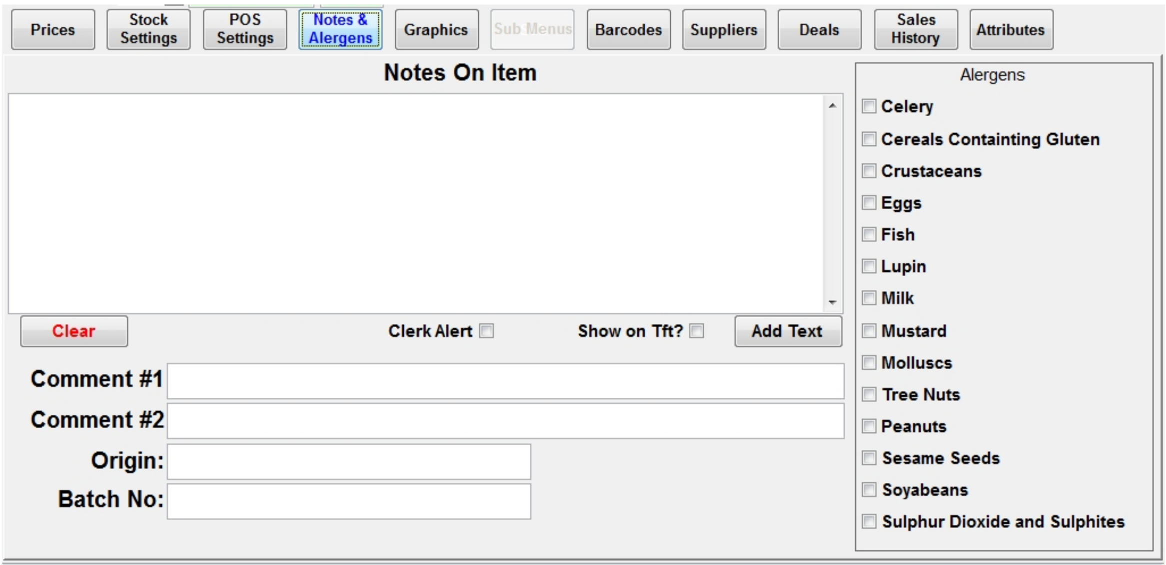
Order Prompts:	Here you can allocate order prompts (See order prompts) to the product
Price Shifts:	Here you can set the price shifts (See Price Shifts) for the product
Question:	Here you can add a question that will be asked when item is sold such as an age check.
Function:	Here you can assign a function 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:	
Course Item:	If ticked this item will be marked as a course item
Weighted Item:	If ticked product will be sold by weight

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

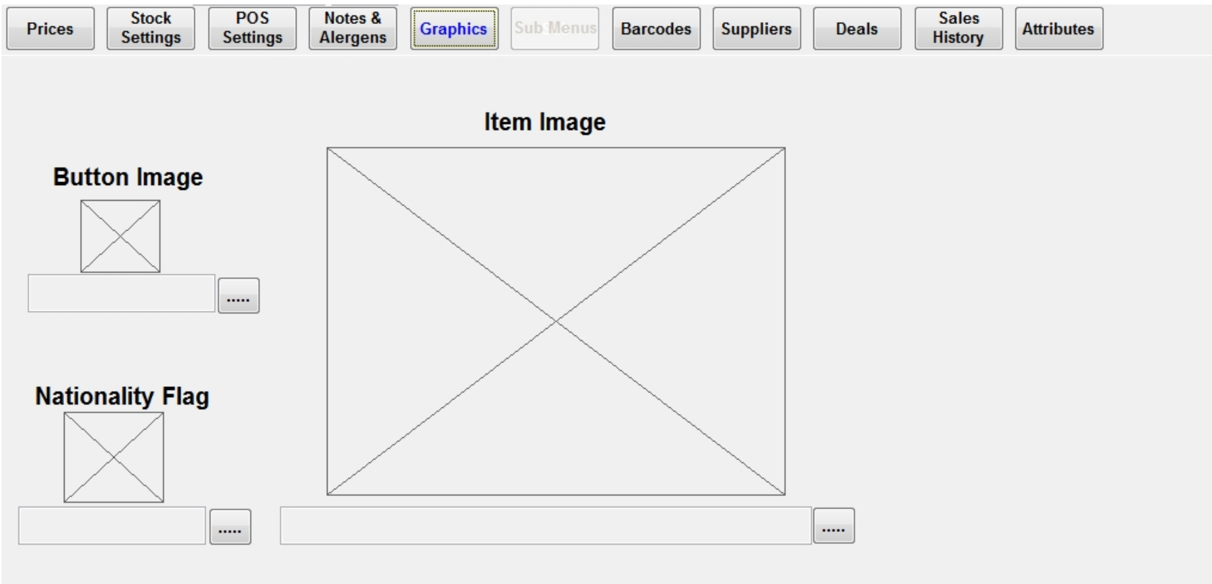
Here you can tick on an individual product basis what printers you want the product to print on.

Print red on order printer: If ticked this item will print in red on printer
OP Text: Optional text for Order Printers



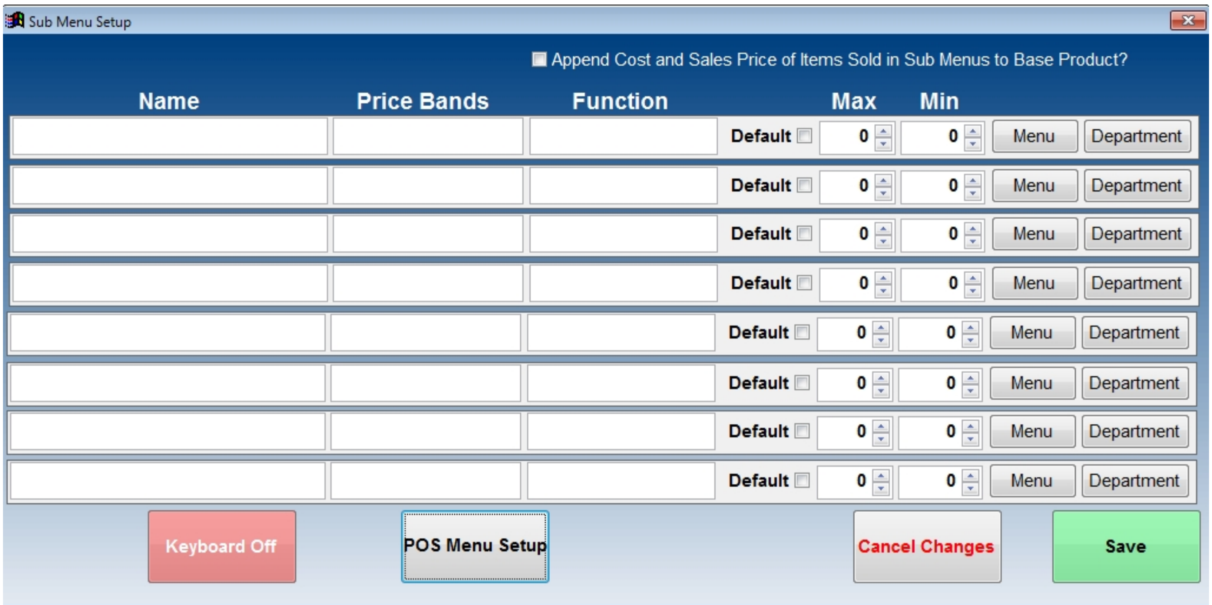
Notes & Allergens*

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



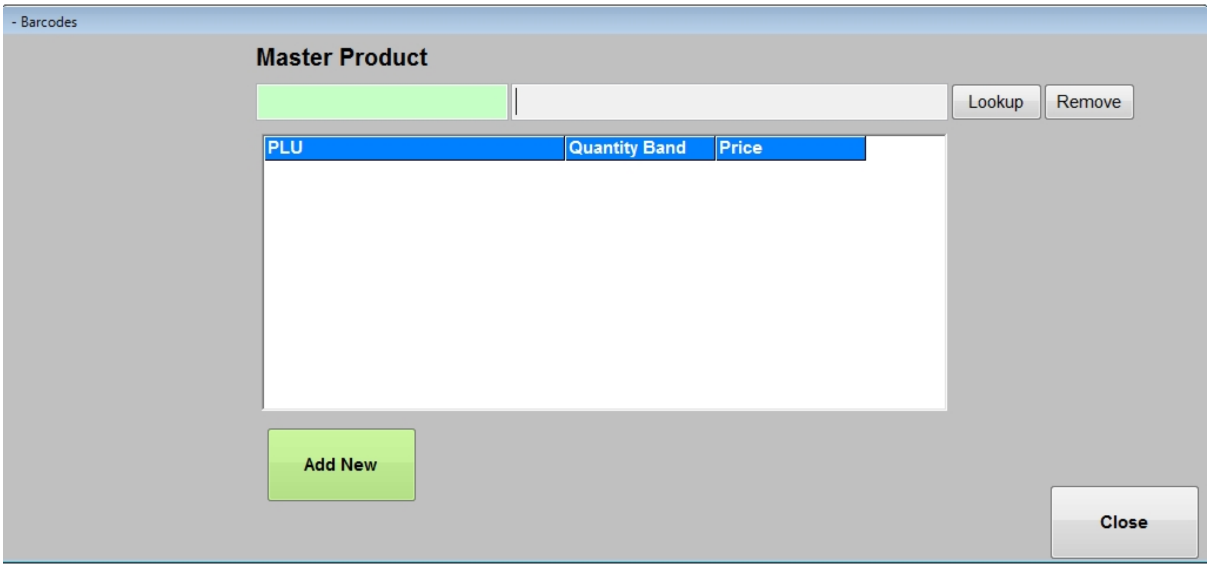
Graphics*

Item Image:	Image of item
Button Image:	Image to be shown on button
Nationality Flag:	Nationality Flag of item

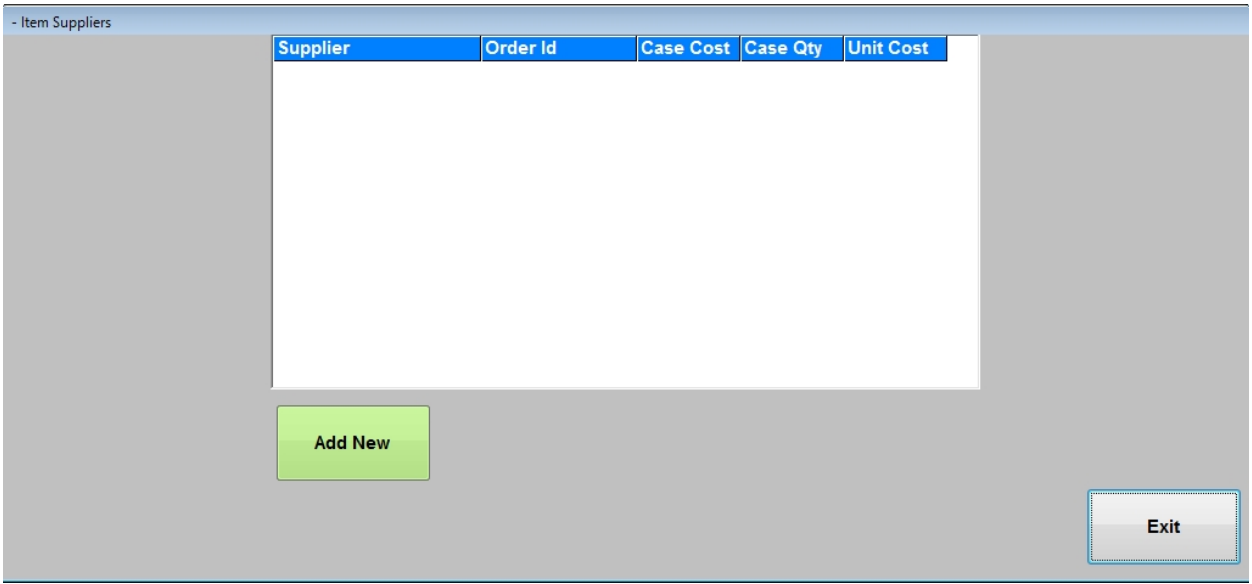


Sub Menus*

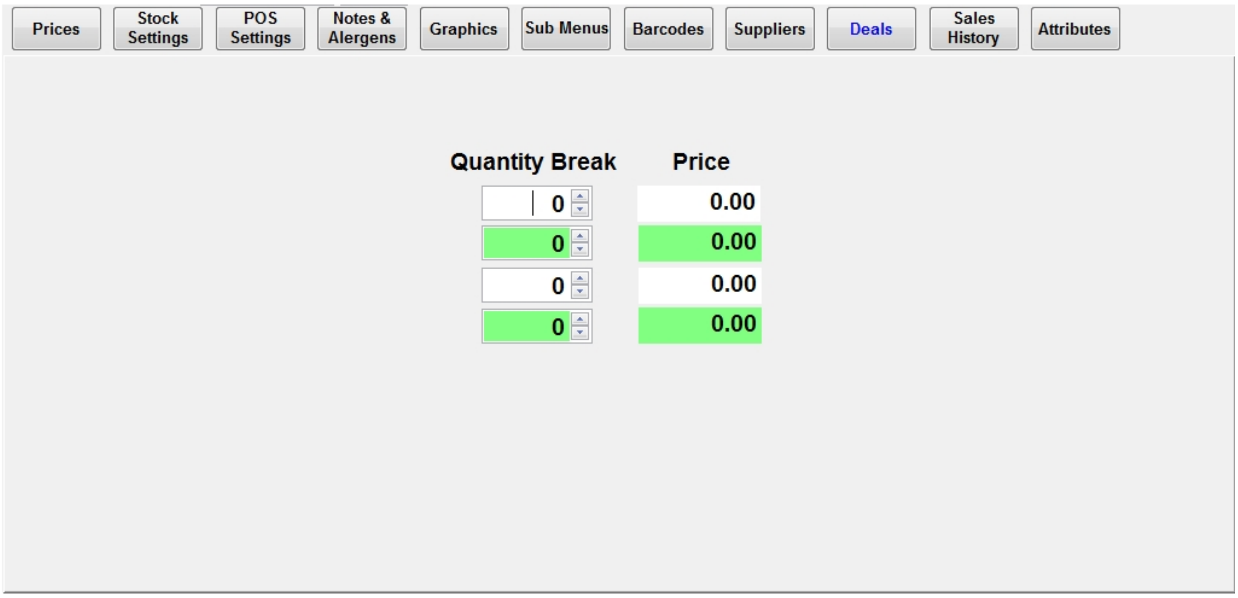
See Set Menu guide for how to use.



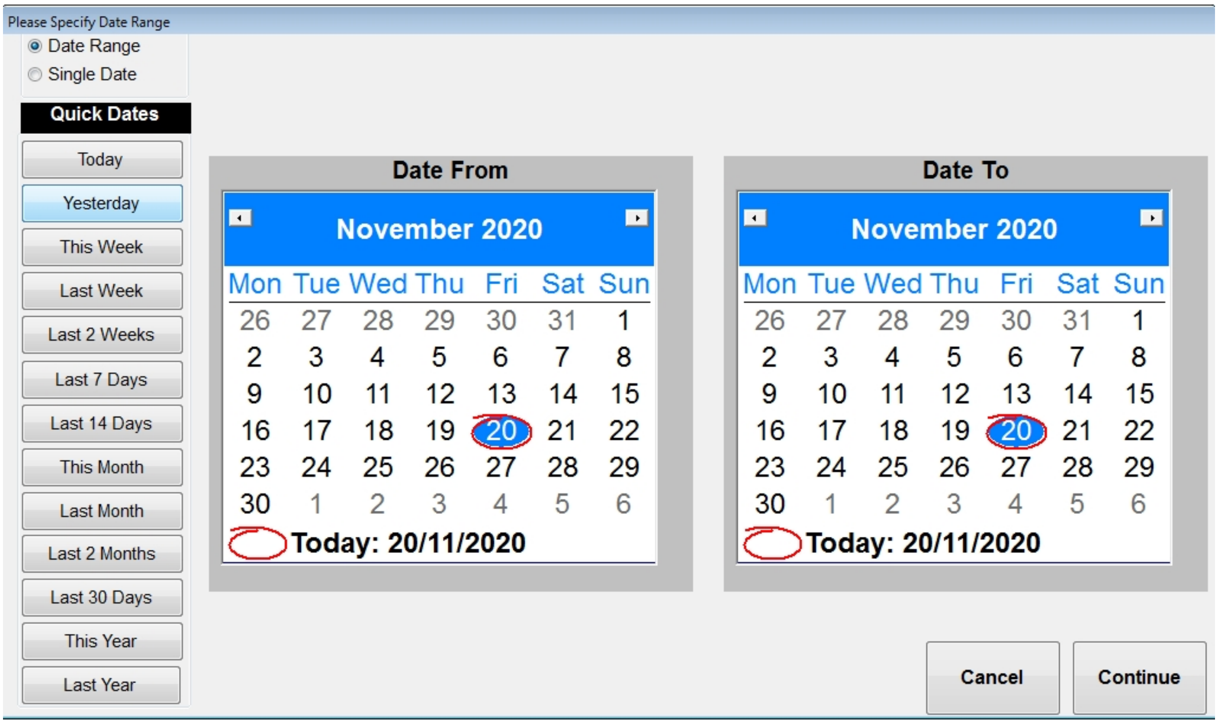
Barcodes*
Here you can enter additional barcodes for a product. For example promotional items will be the same but have a different barcode.



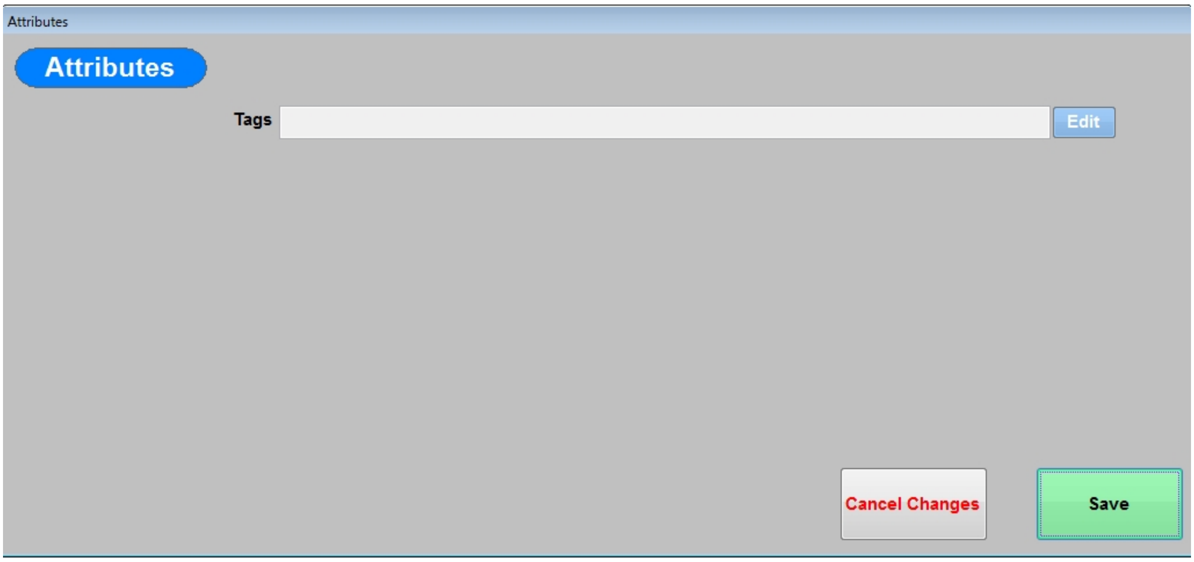
Suppliers*
Here you can enter the suppliers for each item, the case cost and qty for each supplier.



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



Sales History*
Here you can see the sales history for the item.

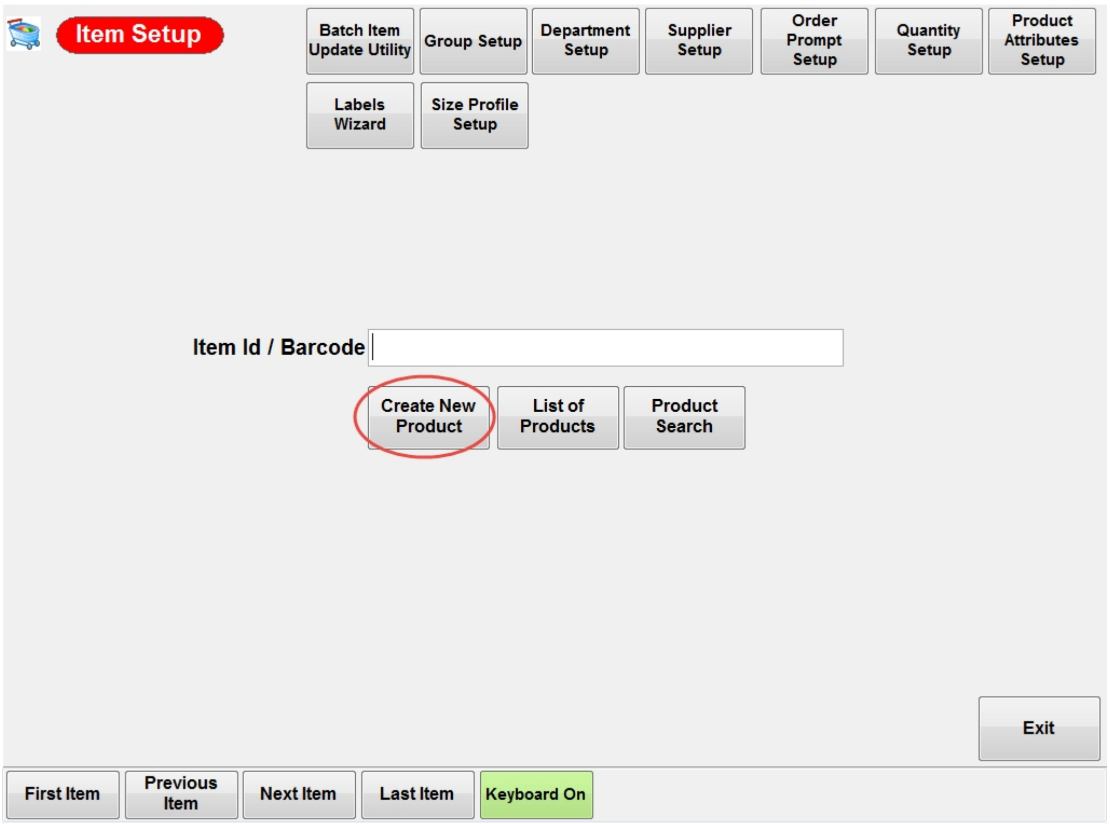


Attributes*
Here you can apply attribute tags to items if required

With PLU number

Create with PLU number

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



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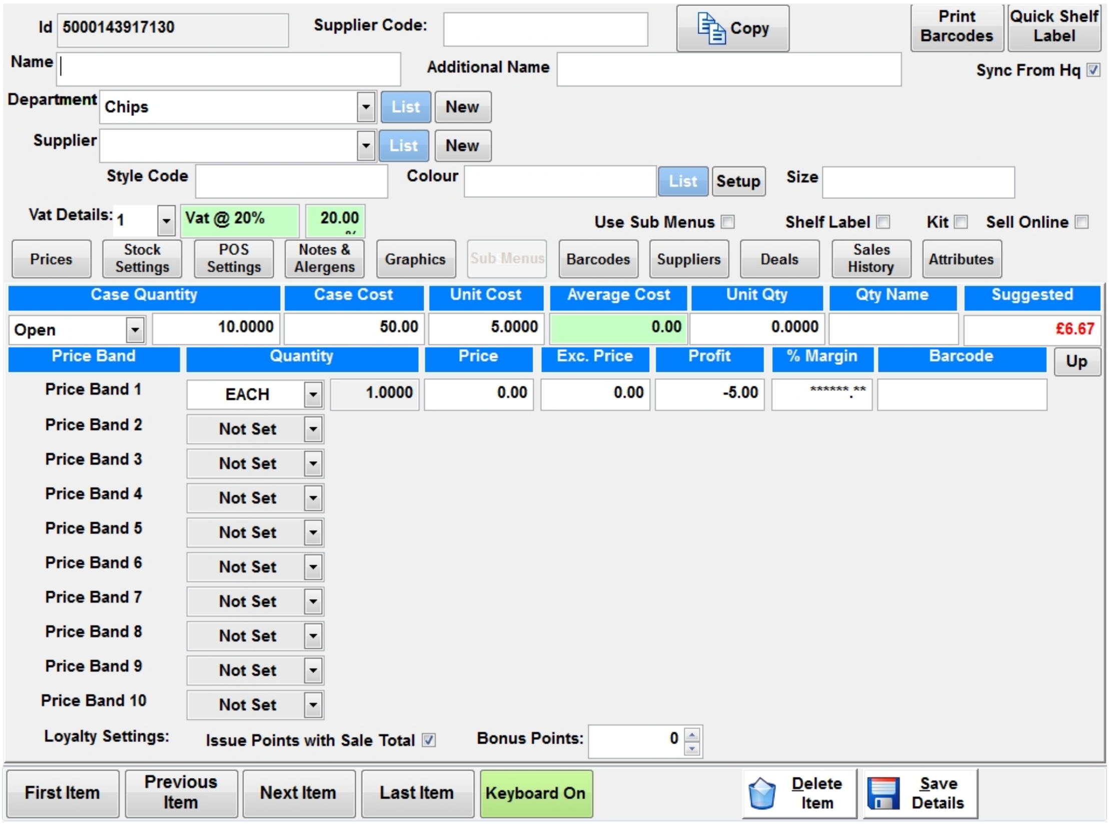

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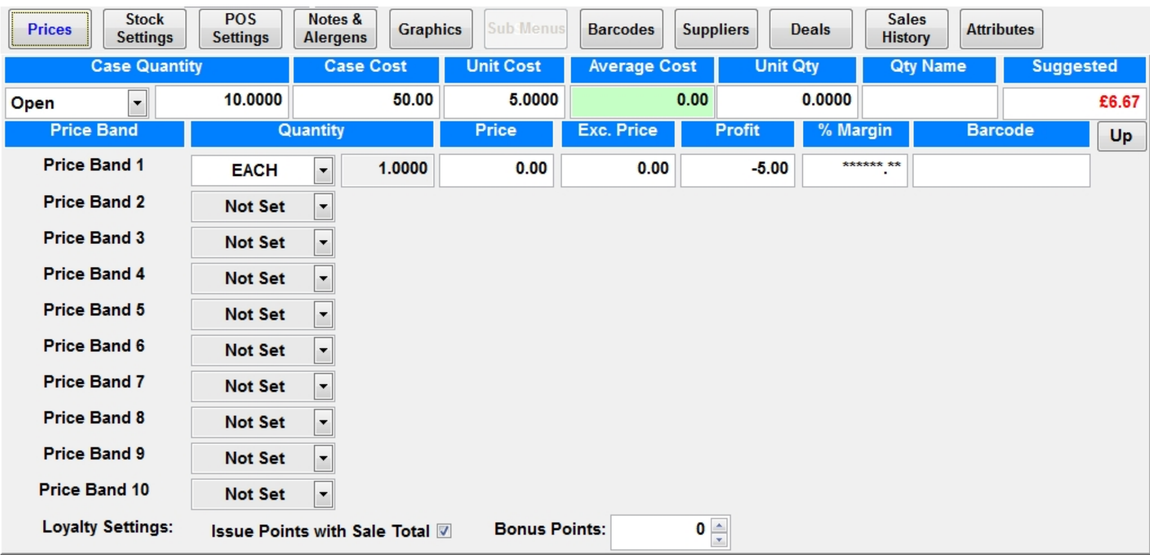

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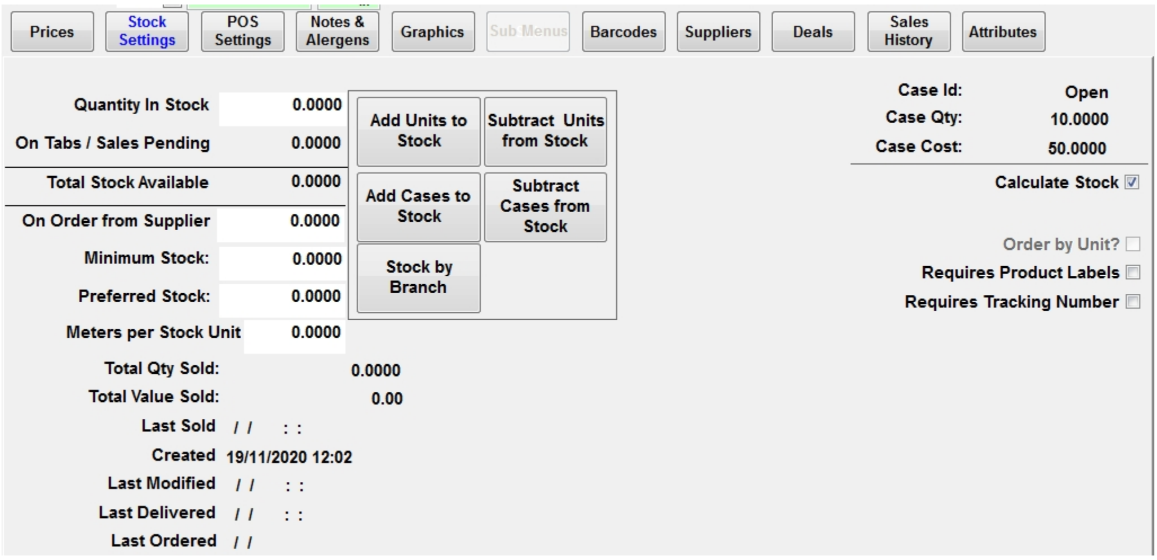

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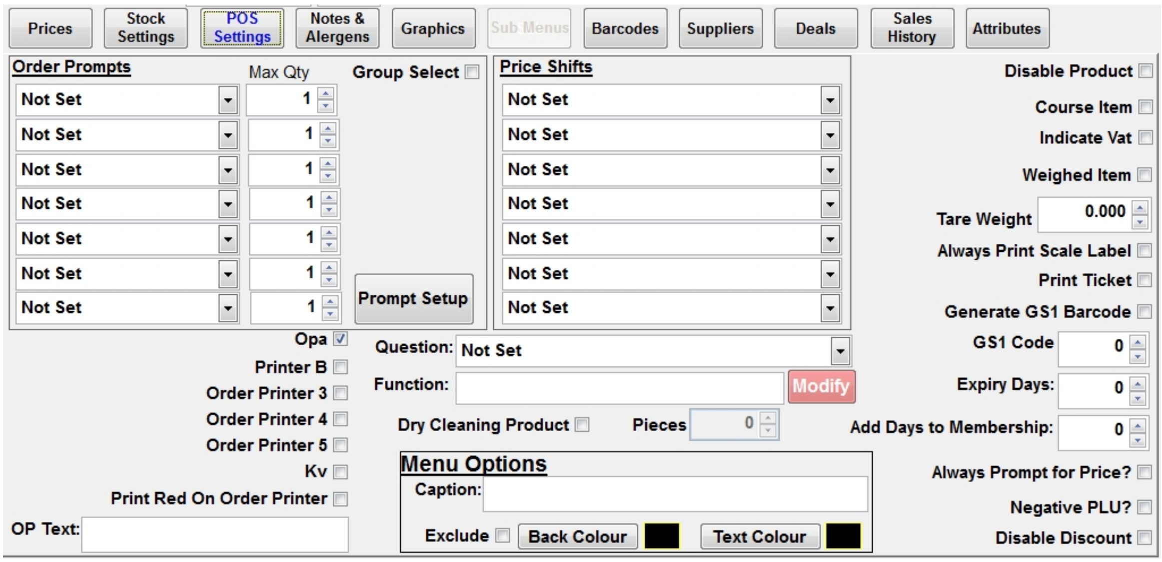
Preferred Stock: Here you can set your preferred stock level.
Meters Per Stock Unit: How many meters are sold per unit of stock.



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Disable Product:	If ticked product cant be sold.
Indicate VAT:	
Course Item:	If ticked this item will be marked as a course item
Weighted Item:	If ticked product will be sold by weight
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
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Here you can tick on an individual product basis what printers you want the product to print on.

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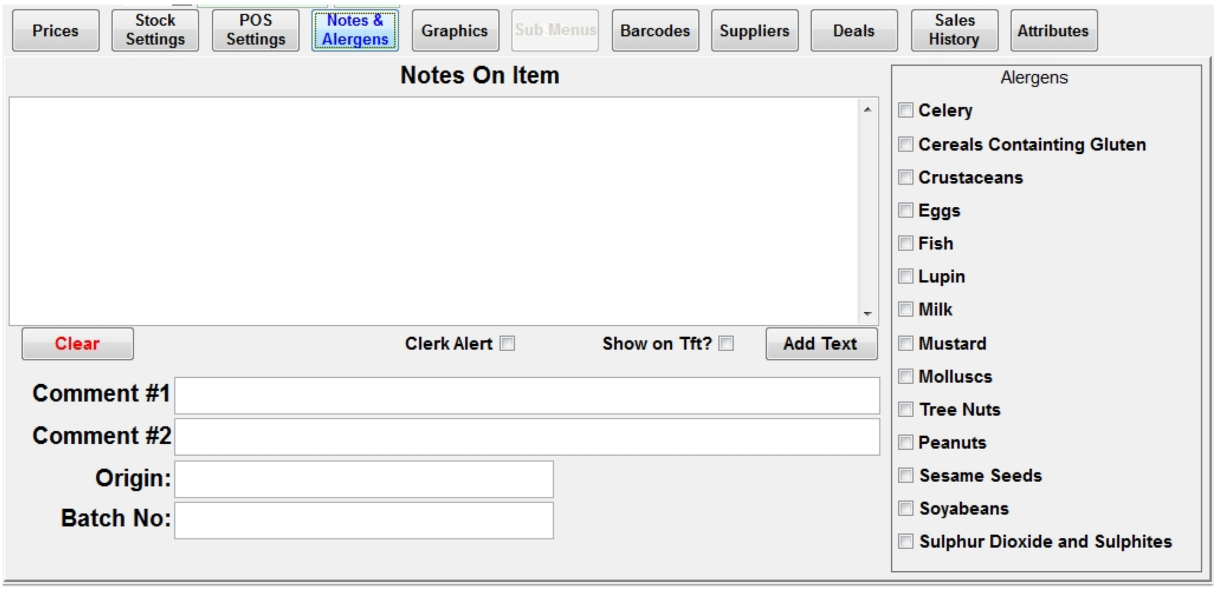

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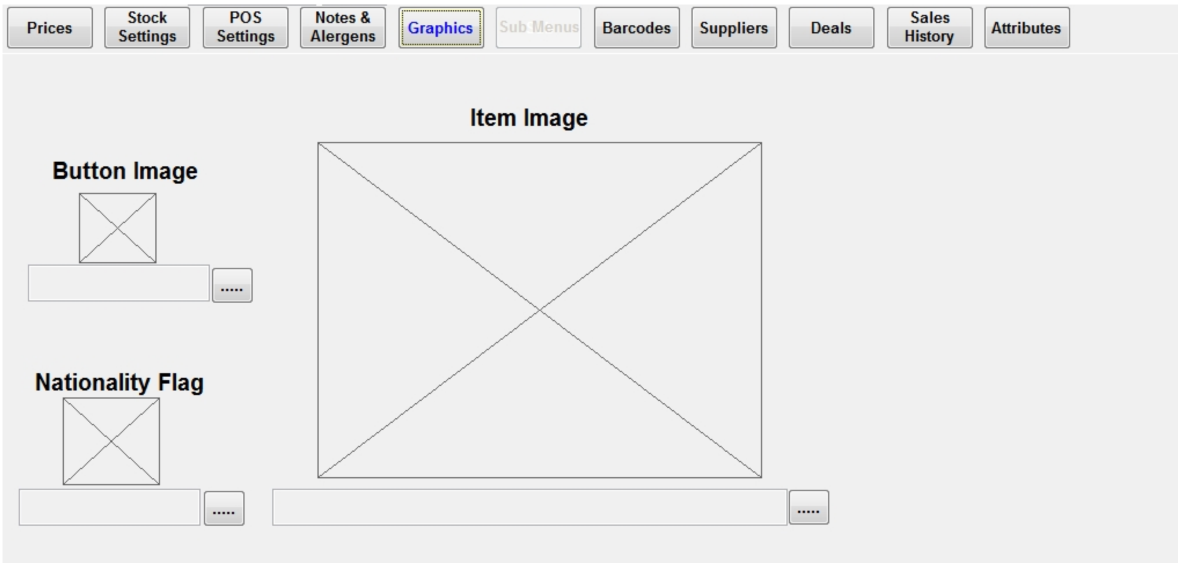
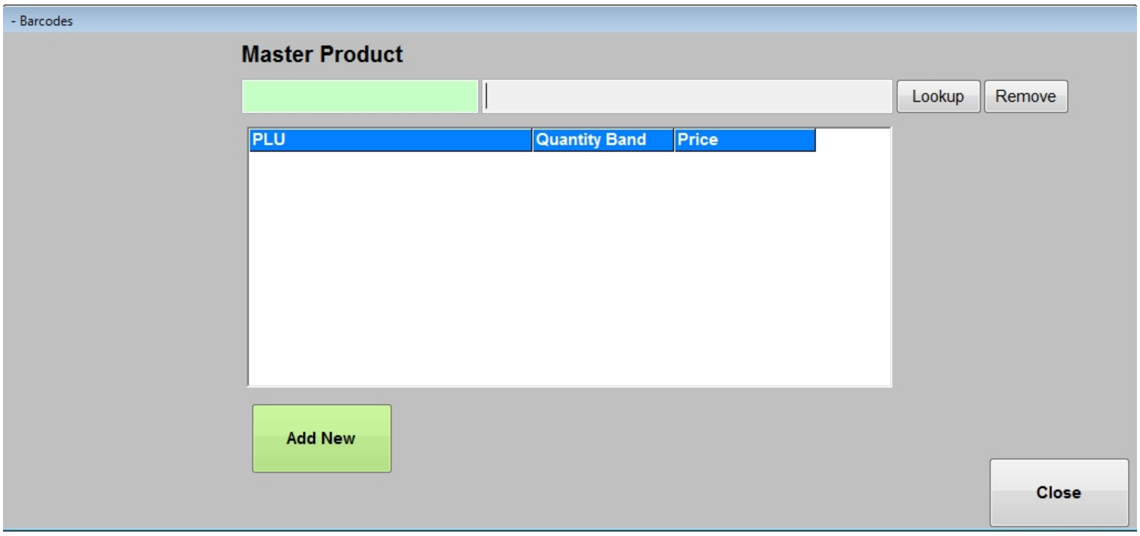
Comment #1:	Here you can enter comments for item
Comment #2:	Here you can enter comments for item
Origin:	Enter the origin of the item
Batch No:	Enter the batch number of the item
Allergens:	Tick any relevant allergens



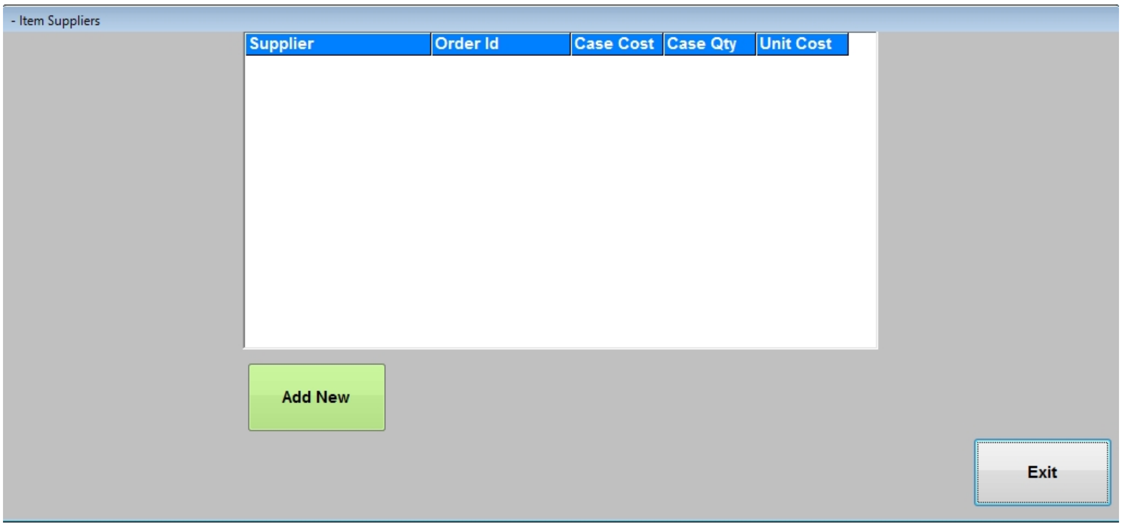
Graphics*

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



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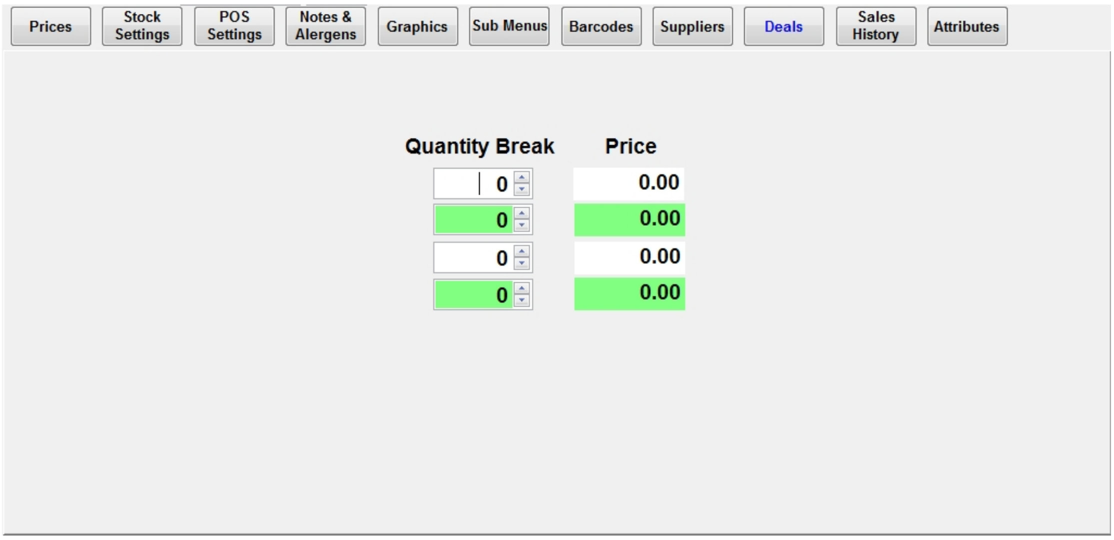
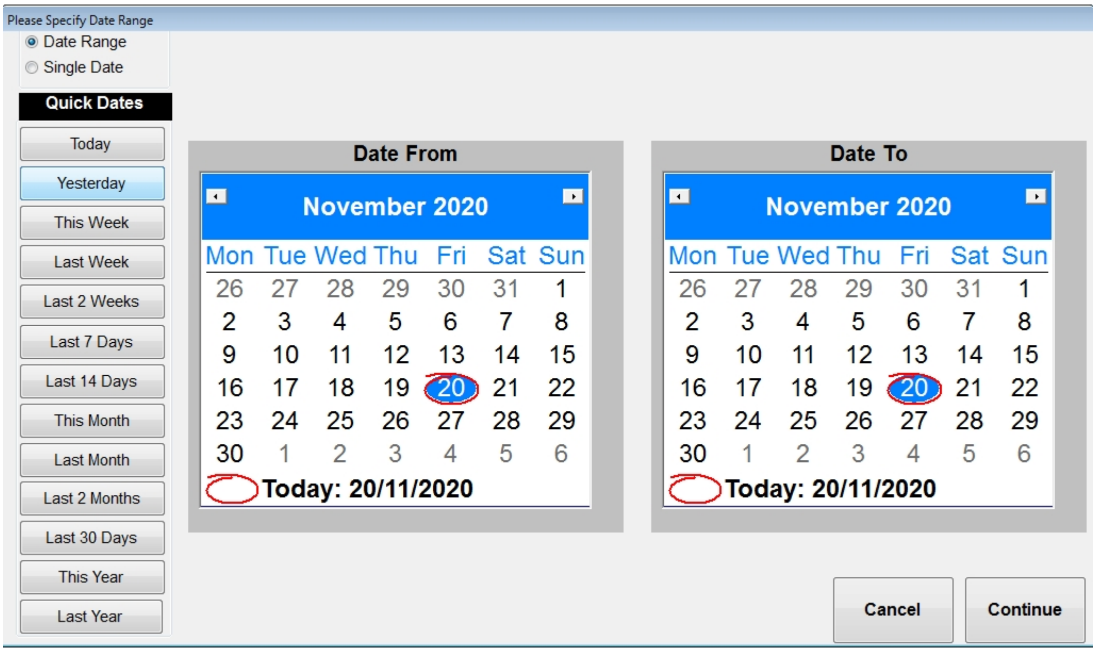
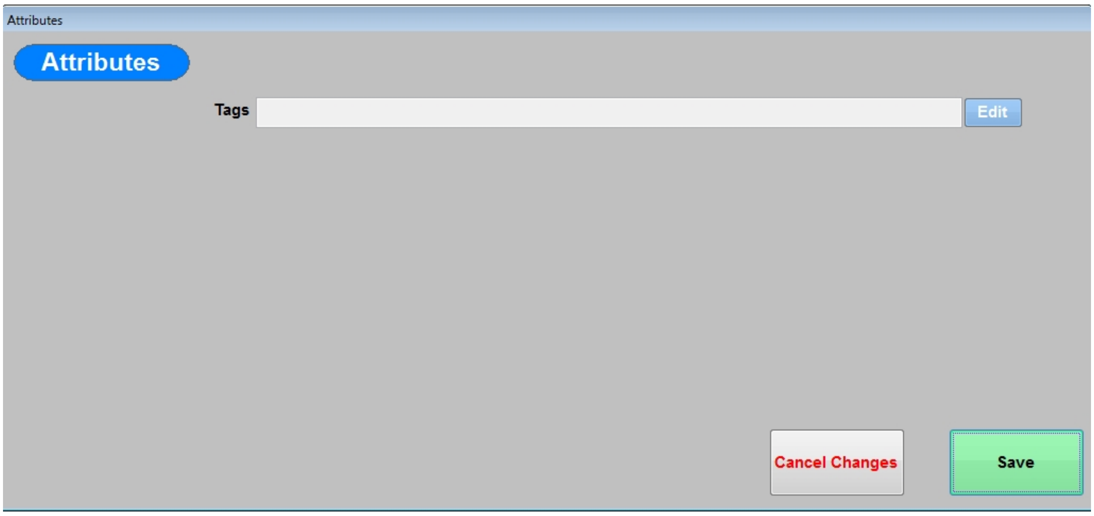


Deals*
Here you can enter price breaks for each item. For example 3 for £5.



Sales History*
Here you can see the sales history for the item.



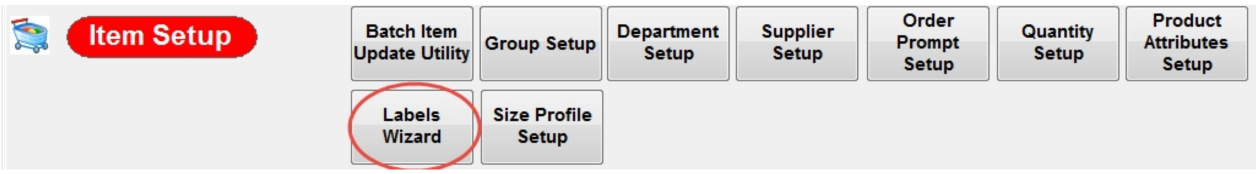
Attributes*
Here you can apply attribute tags to items if required

Labels

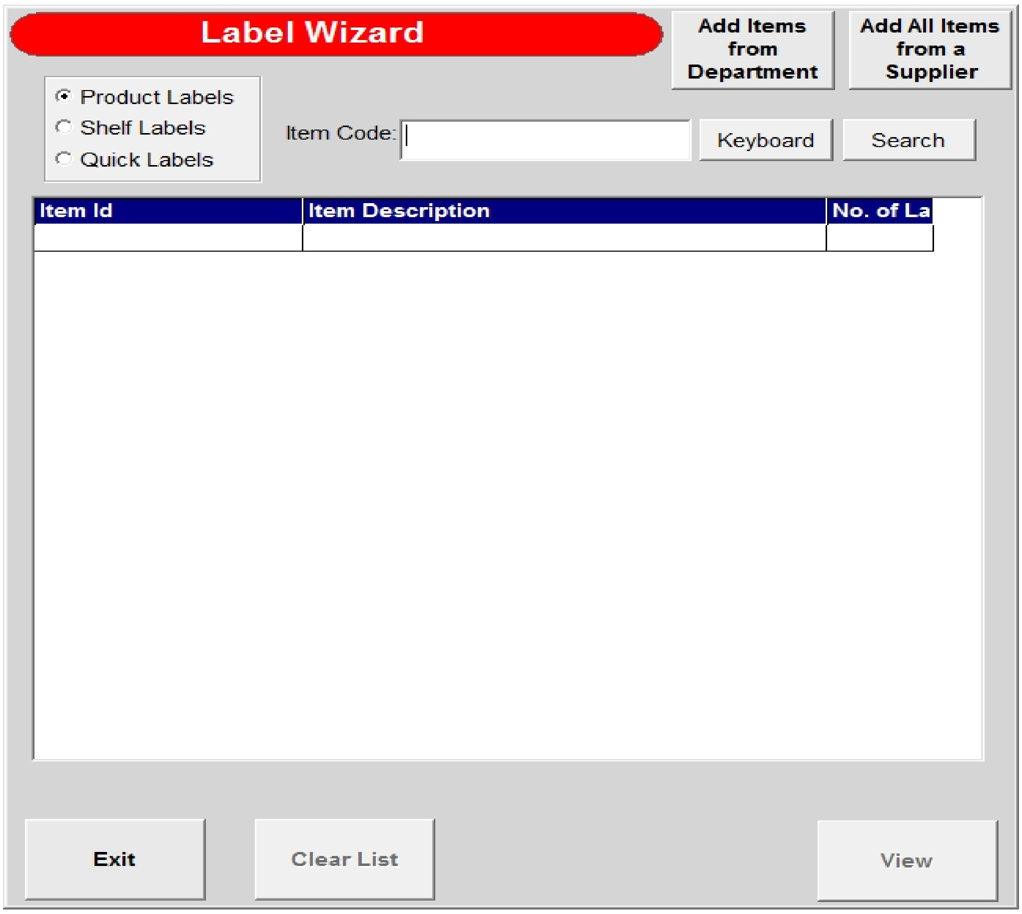
Labels

Product Label Wizard.

From the item set up menu choose label wizard.



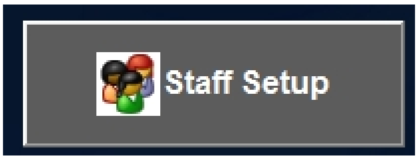
This opens the below window where you can add items you require labels printing for by department or group. Choose the type of label you wish to print and press view to print them.



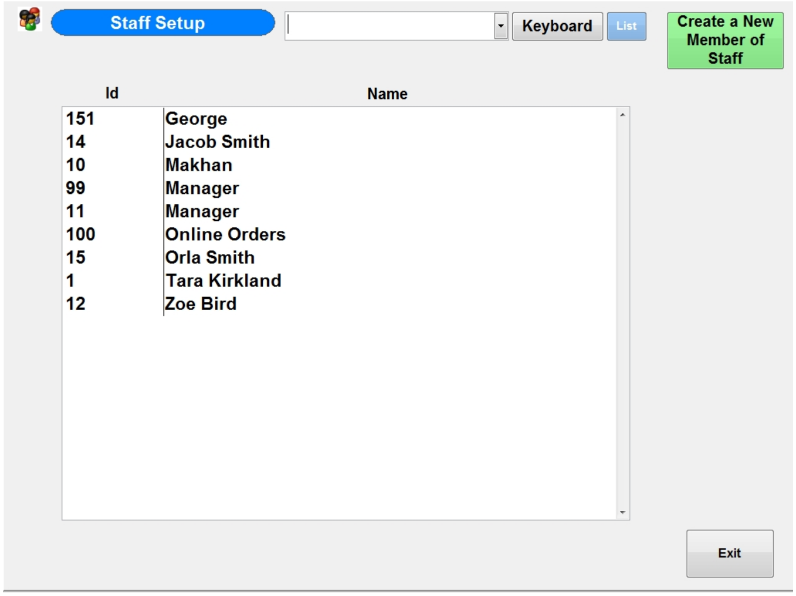
POS Menu

Staff Set Up

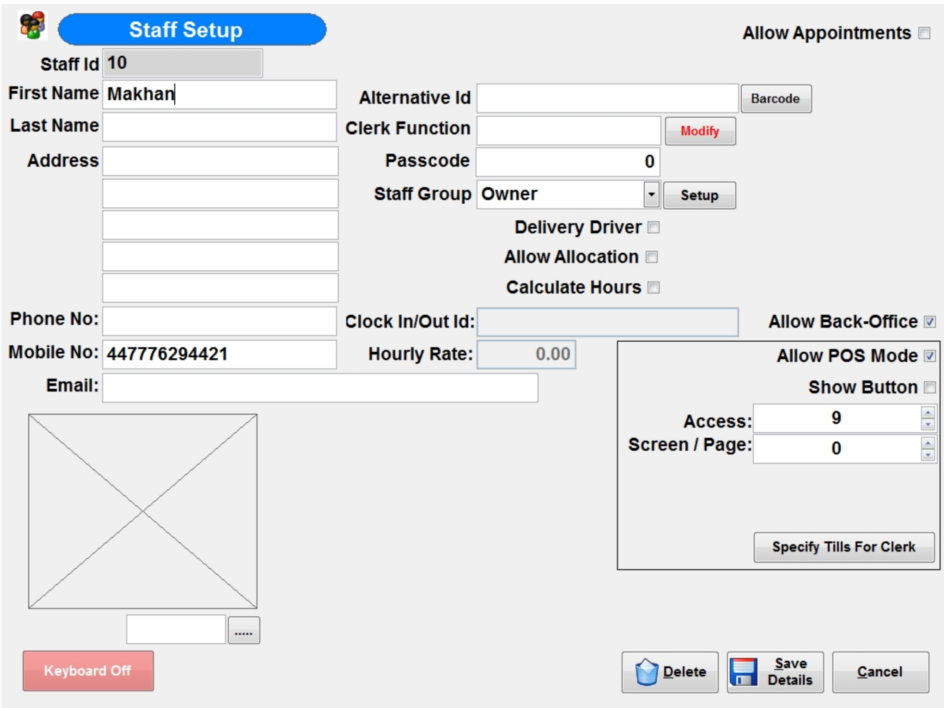
Staff Set up



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.

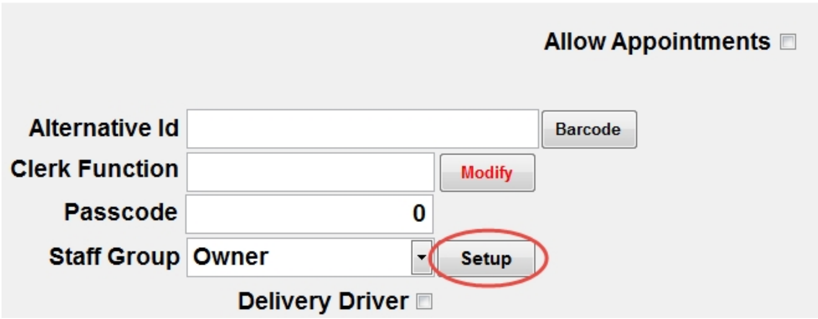
First Name:	Name of operator
Last Name*:	Last Name of Operator
Address*:	Address of Operator
Phone Number*:	Phone number of Operator
Mobile Number*:	Mobile Number of Operator
Email*:	Email for Operator
Image*:	Photo for Operator
Alternative ID*:	Dallas Key/ Barcode for sign on
Clerk Function*:	Select 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 overide 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 (See Access Setup)
Screen/ Page*: Default screen when staff log on.

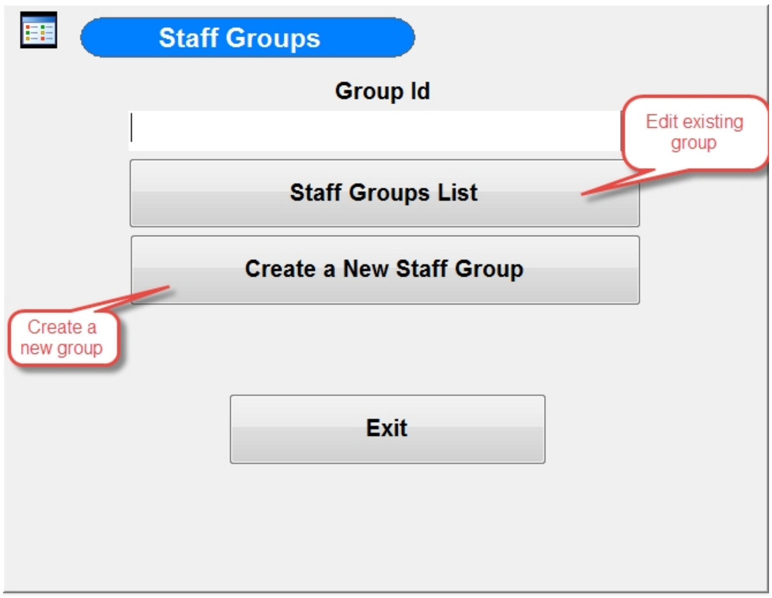
Staff Group Set Up

Staff Group Set Up

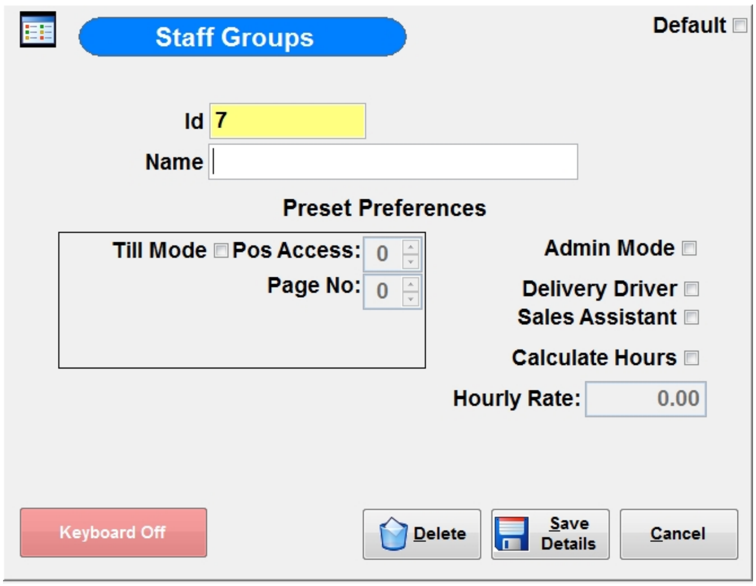
From the staff set up page choose Setup next to staff group,



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

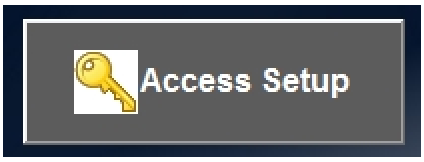
Delivery Driver: If ticked staff in this group are delivery drivers

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

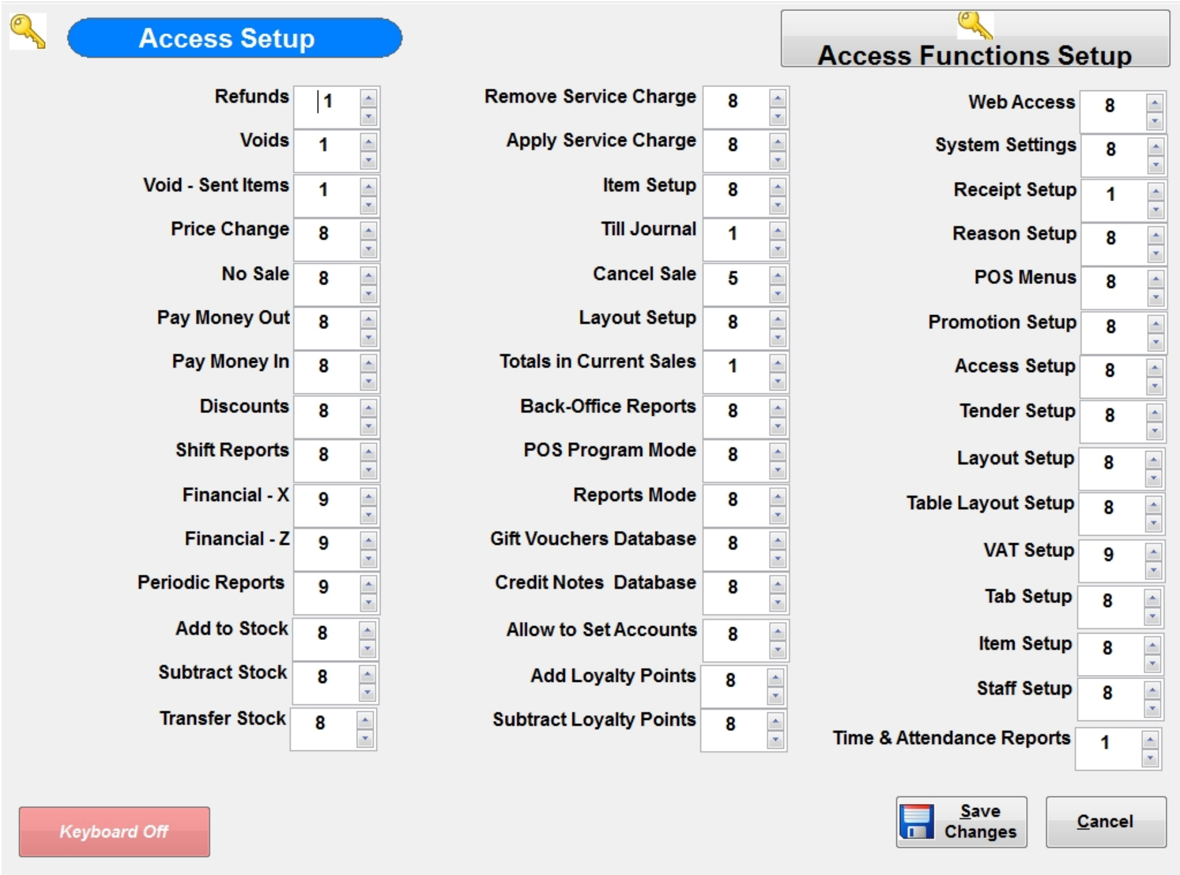
Access Set Up

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



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
Reciept Setup:	Ability to adjust receipt settings
Reason Setup:	Ability to setup reason codes
POS Menus:	Ability to access POS Menus
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

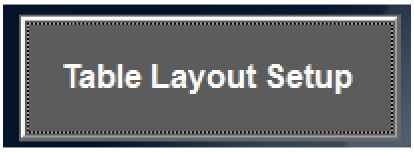
Promotions

Promotions

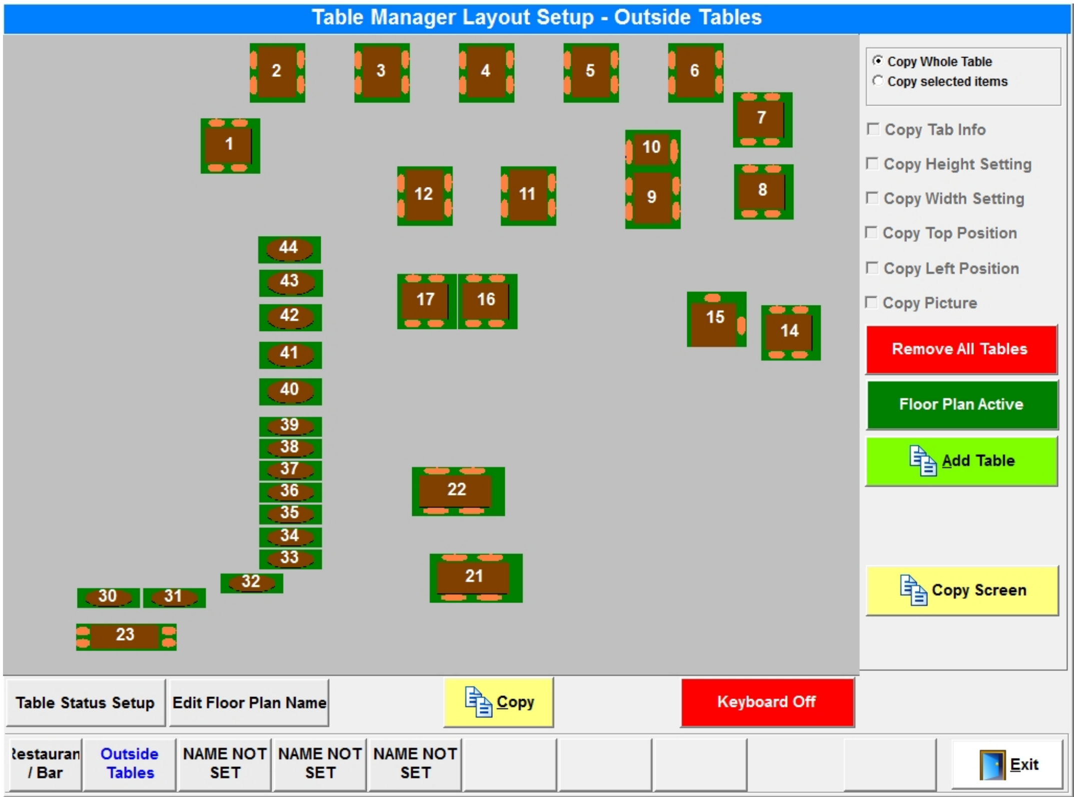
Please see separate document on promotions

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:

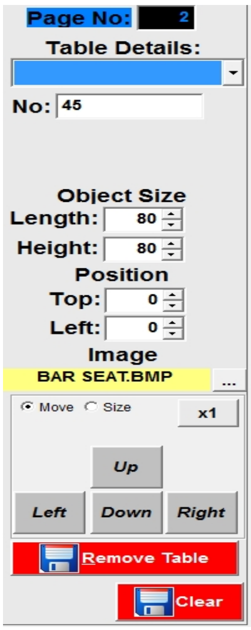


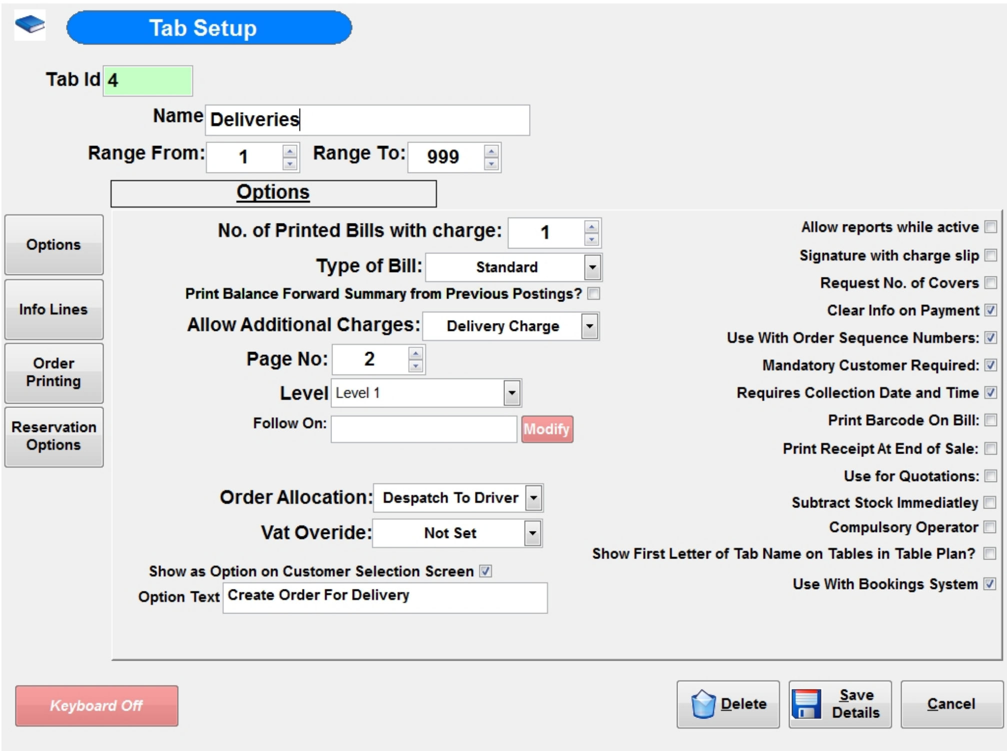
Table Details:	What kind of table it is
No:	What table number
Size:	Size of image

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:



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

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

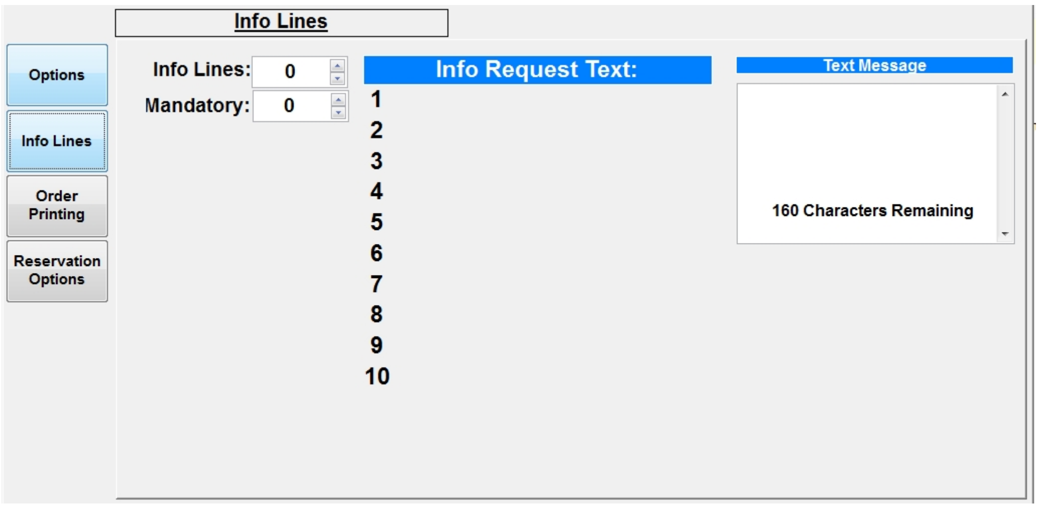
- Logo
- Date/ Time
- Clerk
- Type of Tab
- Ticket Number
- Items
- Subtotal/ Total
- Customer Details

Order: This prints the receipt in the following order

- Logo
- Customer Details
- Type of Tab
- Ticket Number
- Date/ Time
- Clerk
- Items

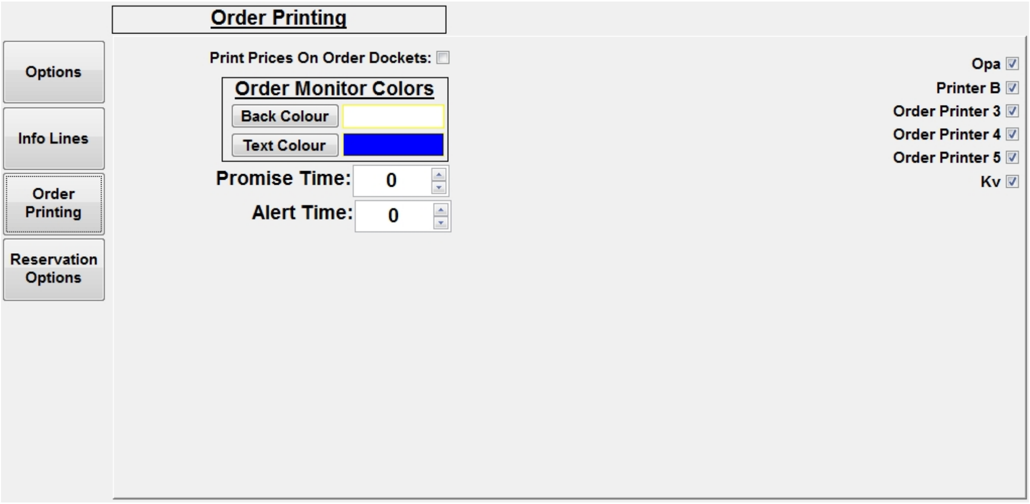
Subtotal/ Total

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

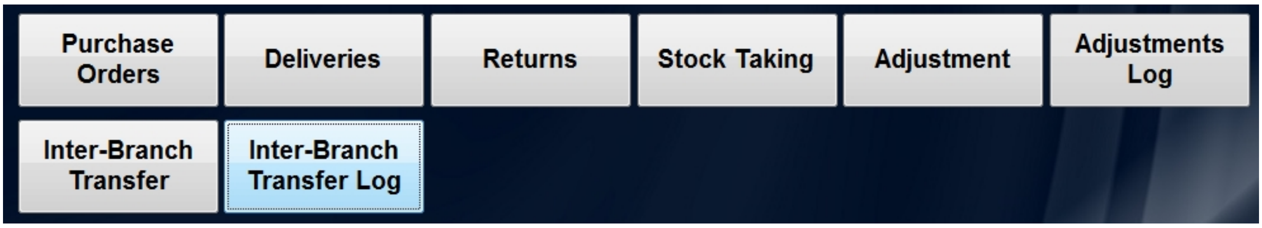
Stock Control

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.

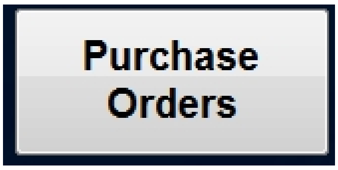
Press log on and choose stock control.

You will then have the following menu



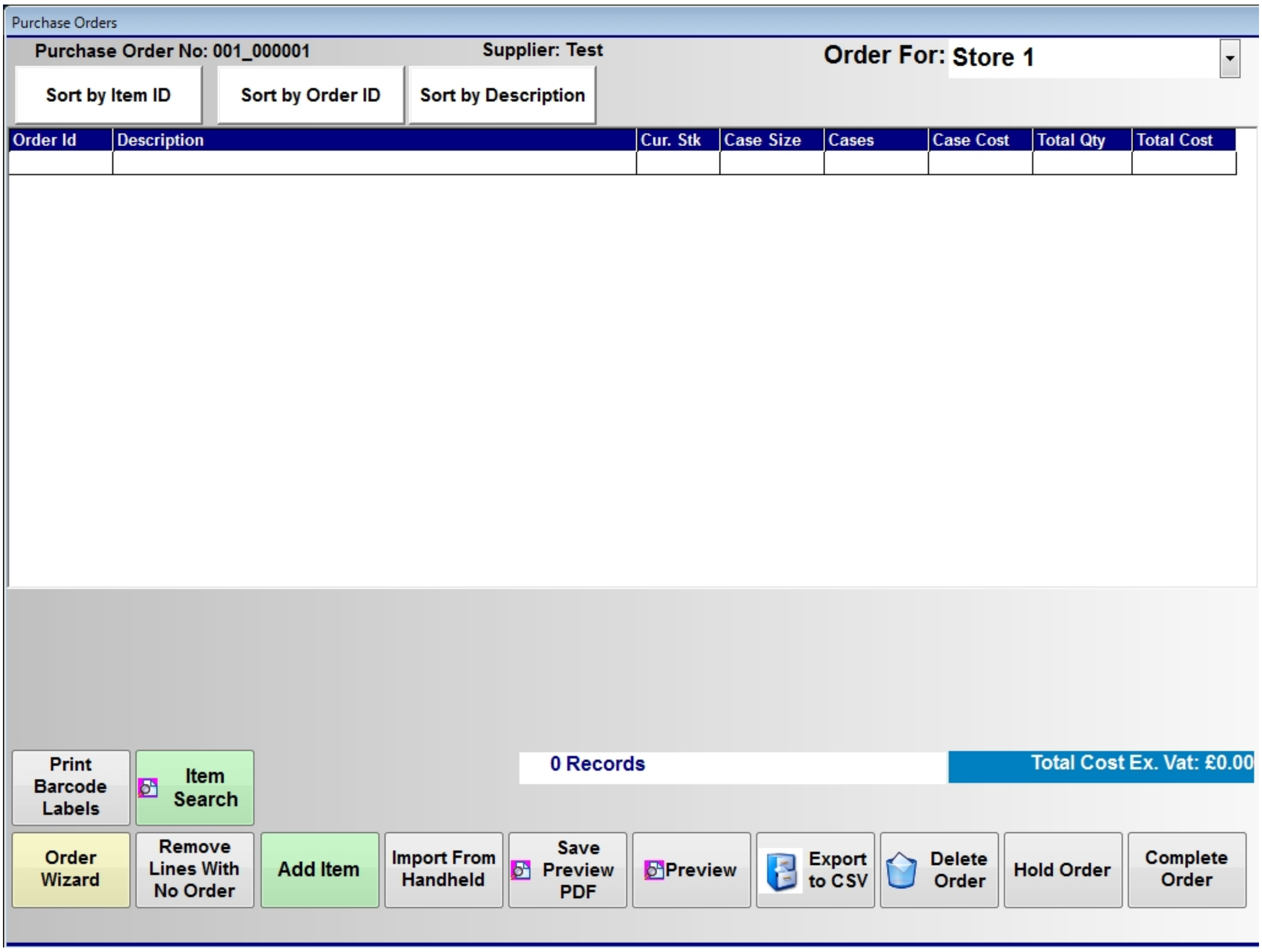
Purchase Order

Purchase Orders



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



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 minimim or prefered level and auto creates the order based on the levels you have set.

Previer order allows you to review and print the order.

If you are unable to complete the order and ned 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/unite 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.