

Sound POS

User Guide

Version 1.2

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Version History

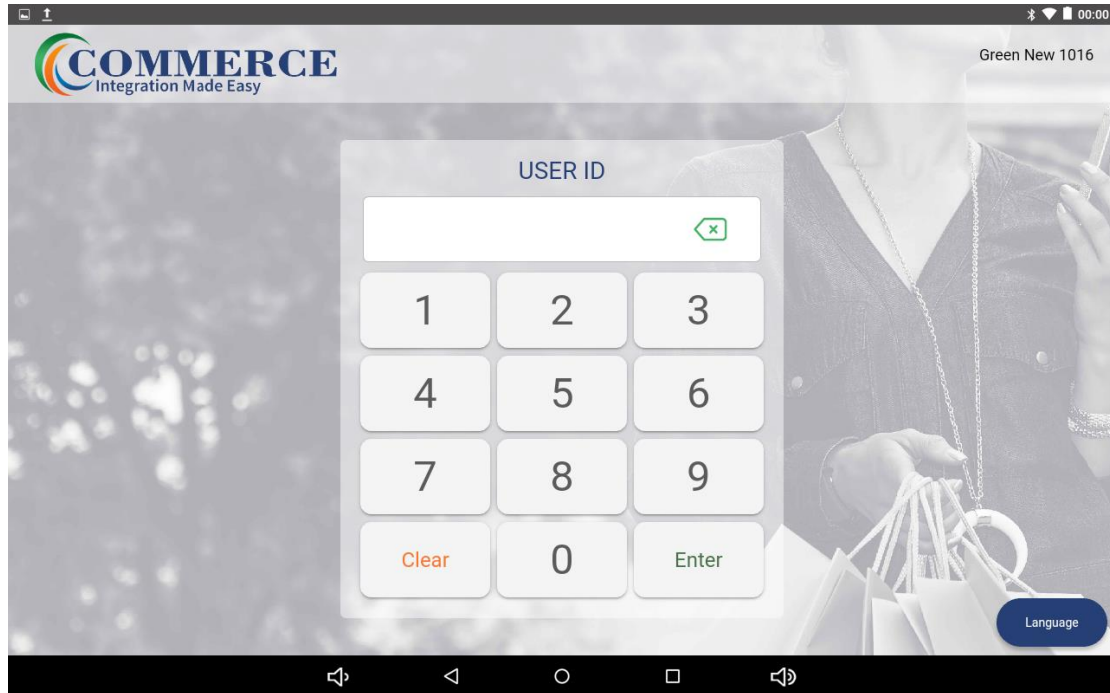
Version	Date	Owner	Description
1.1	2019/07/22	Dennis Palmer	Creation
1.1.2	2019/08/25	Dennis Palmer	Edits to screenshots to reflect release
1.2	2019/11/23	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.5.3

Glossary of Terms

Term	Description
Store	Merchant Location
Bar Code Scanner	USB Scanner Sound POS enabled peripheral to read Barcodes
Customer Display	Front Facing display - Q20
Seamless Commerce Portal	<p>Back Office- There are 2 environments users can login to Demo, Production.</p> <p>Reseller Demo: https://demo.seamlesscommerce.com/Reseller/ResellerEntrance/Login</p> <p>Reseller Production: https://portal.seamlesscommerce.com/Reseller/ResellerEntrance/Login</p> <p>Store Demo: https://demo.seamlesscommerce.com/StoreAdmin/OfflineLogin/Login</p> <p>Store Production: https://portal.seamlesscommerce.com/StoreAdmin/Admin/</p>
Level I provider	Implementation: Responsible for configuration each admin user in Seamless Commerce. Please see Seamless Commerce User Guide for additional information. If you have not received your credentials, please contact your LVL I provider for more information.
Sync	Synchronization to Seamless Commerce Cloud
Transaction ID	Number assigned to each transaction
EMV	Europay, Mastercard and Visa — is a global standard for cards equipped with computer chips and the technology used to authenticate chip-card transactions
SNAP	Supplemental Nutrition Assistance Program (SNAP)
EBT	Electronic Benefits Transfer issued by (SNAP) See Snap
Attribute	A quality or feature regarded as a characteristic of a product

Log In

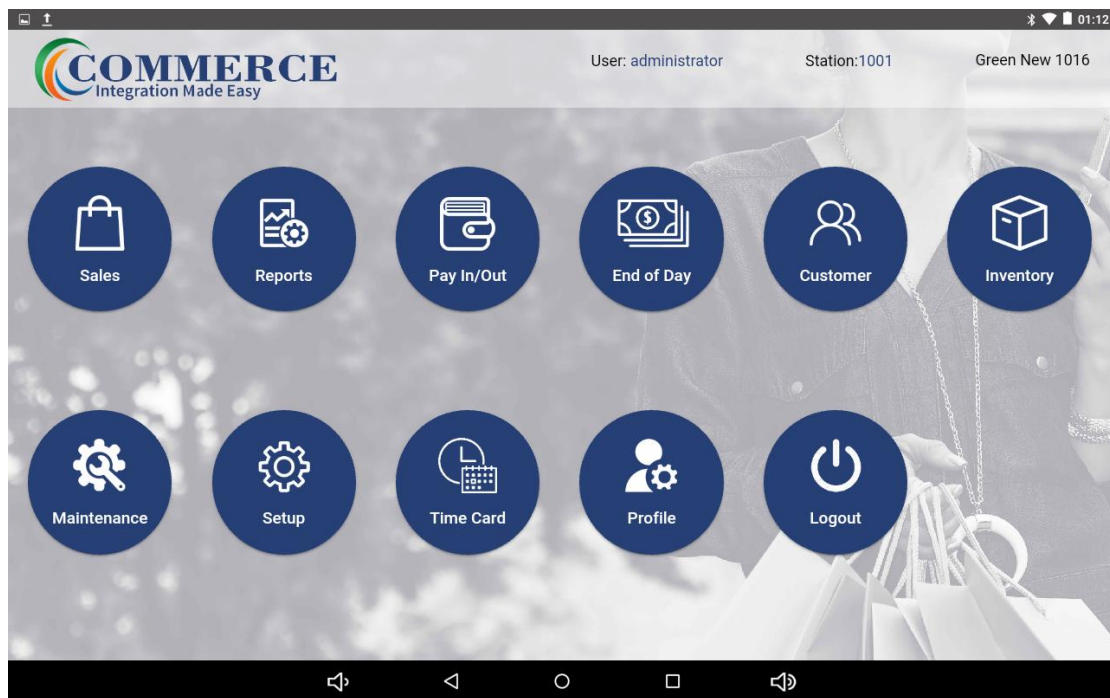
Users can enter the system by logging in.



There are two login methods:

- 1.** Enter the user ID and password manually to log in. Admin receives password from Seamless Commerce Setup and Configuration via email. Additional users can be setup either on Sound POS or the Seamless Commerce Portal.
 - 2.** Use the Scanner to scan the user's barcode on the login screen to log in.
- Notes:** When you add a user, a barcode is generated for the user to log in (which can be printed upon setup of that user). Please refer to User setup section on page 25 for additional information.

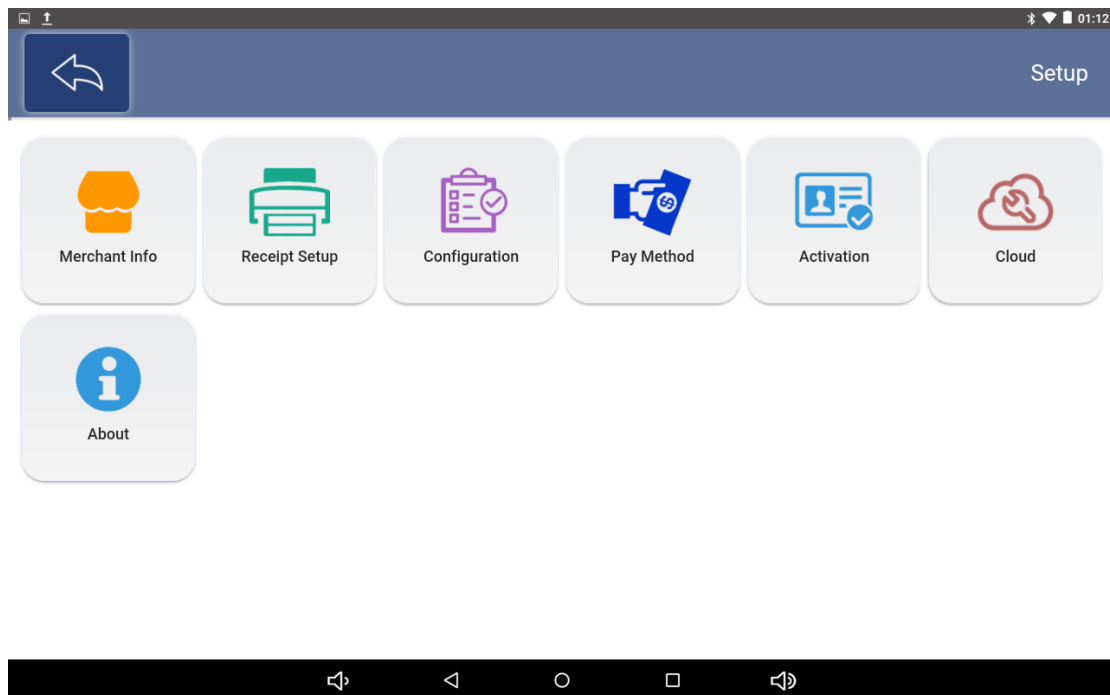
After logging in successfully, you enter the Main Menu.



1 Setup

Navigation: From the Main Menu Select: Setup.

Within the Setup Menu you can manipulate Merchant information, Receipts, Device Configuration, Pay Method, Activation, Cloud and About

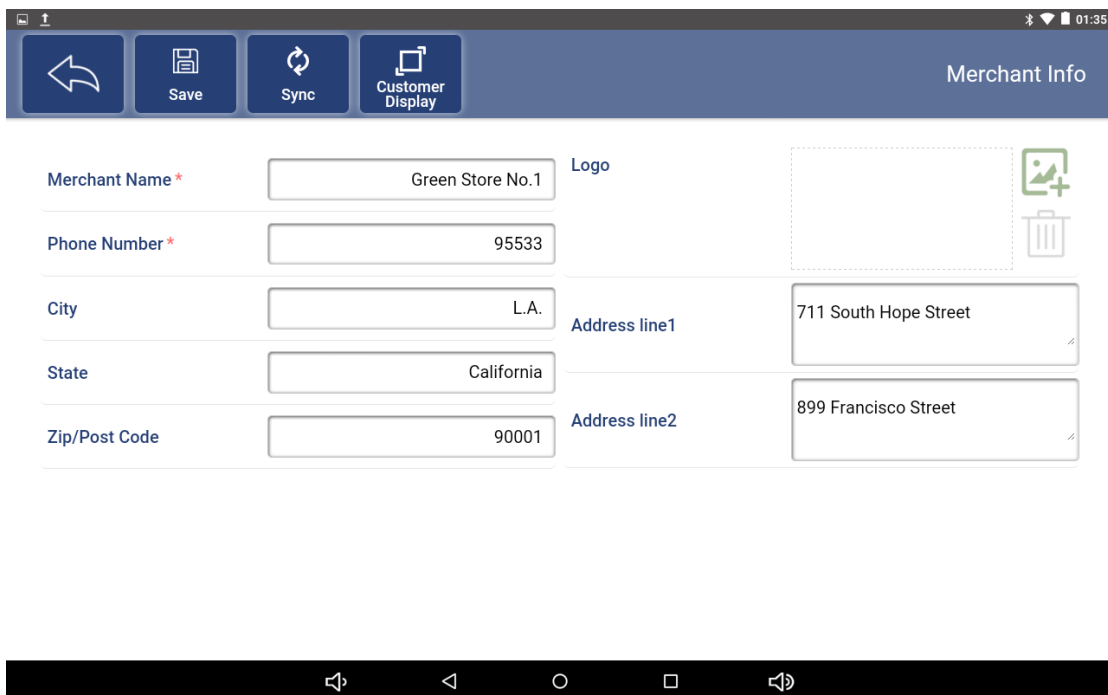


1.1 Merchant Info

Navigation: From the Main Menu, Select Setup, Select Merchant Info

This page displays information about the store, such as Merchant Name, Phone Number, Logo, Address. Please refer to provisioning user roles and permissions within Seamless Commerce Portal for additional information on access.

Note: Fields Marked with “*” are Required

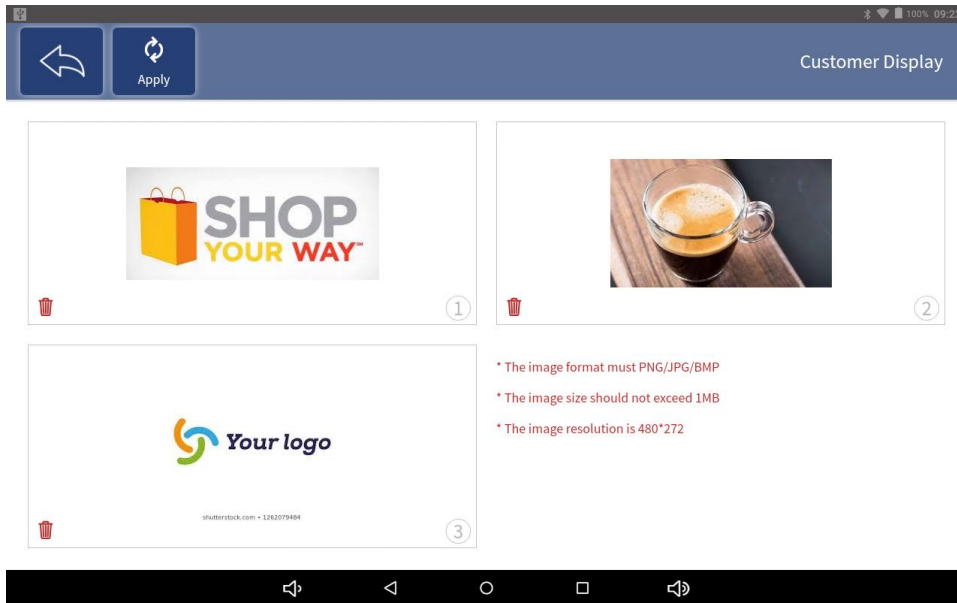


Field	Value
Merchant Name *	Green Store No.1
Phone Number *	95533
City	L.A.
State	California
Zip/Post Code	90001
Logo	[Placeholder]
Address line1	711 South Hope Street
Address line2	899 Francisco Street

Save: Save changes after editing Merchant Info. If Save is not selected previous values will remain and not be overwritten. Screen will prompt “There are unsaved changes, Discard change?”

Sync: Click on the "Sync" button above to synchronize the Merchant Info in the POS with the background.

Customer Display: After clicking the button, you will enter the image settings page, add a picture by clicking "+". Pictures can be uploaded from USB or from Seamless Commerce Portal. Please refer to Seamless Commerce User Guide for additional information on “Customer Display Logo”. Once the picture is set, click the Apply button above to make the settings take effect. The picture will be displayed in turn on the customer display.



1.2 Receipt Setup

Modify the settings for receipt.



Logo: When switch is turned on, Select "Upload a logo" The image selected will print at the top center of the ticket.

Tip: When Toggle switch is turned on, to enable tip

Barcode: When switch is on, a barcode will print out at the bottom of the receipt. This Barcode can be used to recall transactions by using the barcode scanner.

Copy: Set the number of tickets to print.

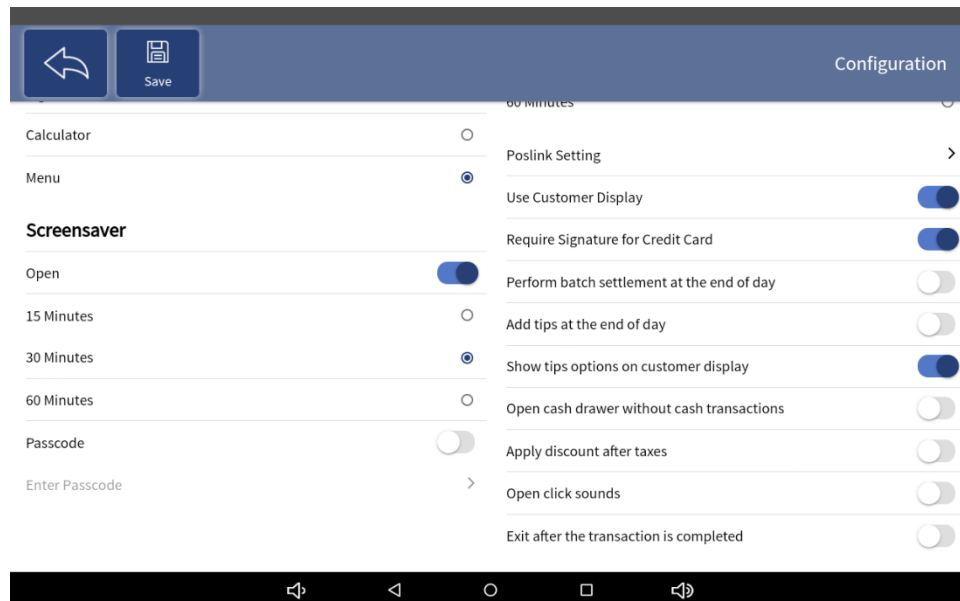
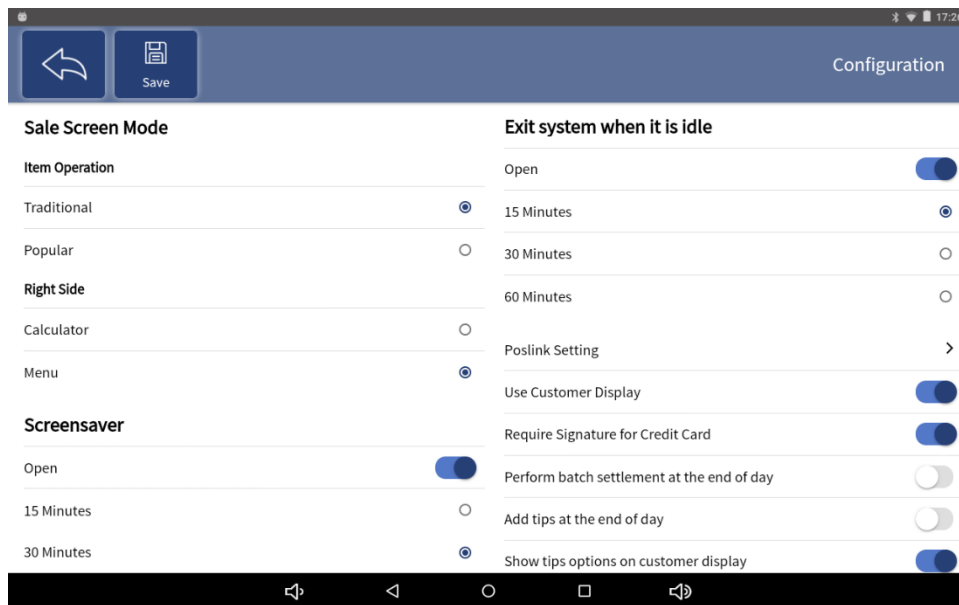
Header: Select the add button, to provide a message in the "Header" position.

Footer: Select Footer Tab, and select add button, to provide a message in the "Footer" position. I.e. terms of sale or other messaging.

After the setup is complete, click the “Save” button above to save.

1.3 Configuration

Modify system settings such as Sale Screen Mode, Screensaver, Timeout when it is idle, etc. Please refer to provisioning user roles and permissions within Seamless Commerce Portal for additional information on access.

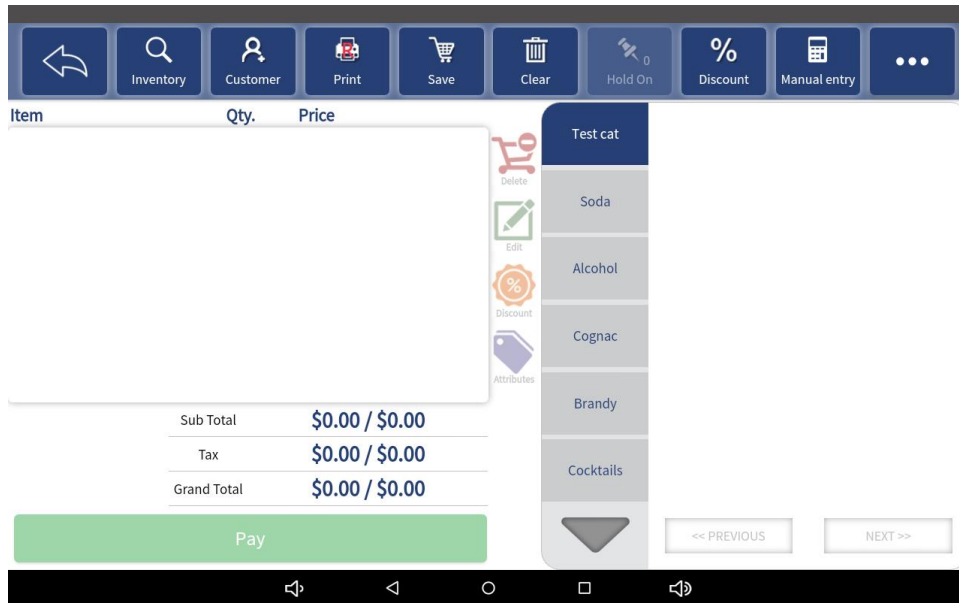


Sale Screen Mode : Within the [Sales page](#).

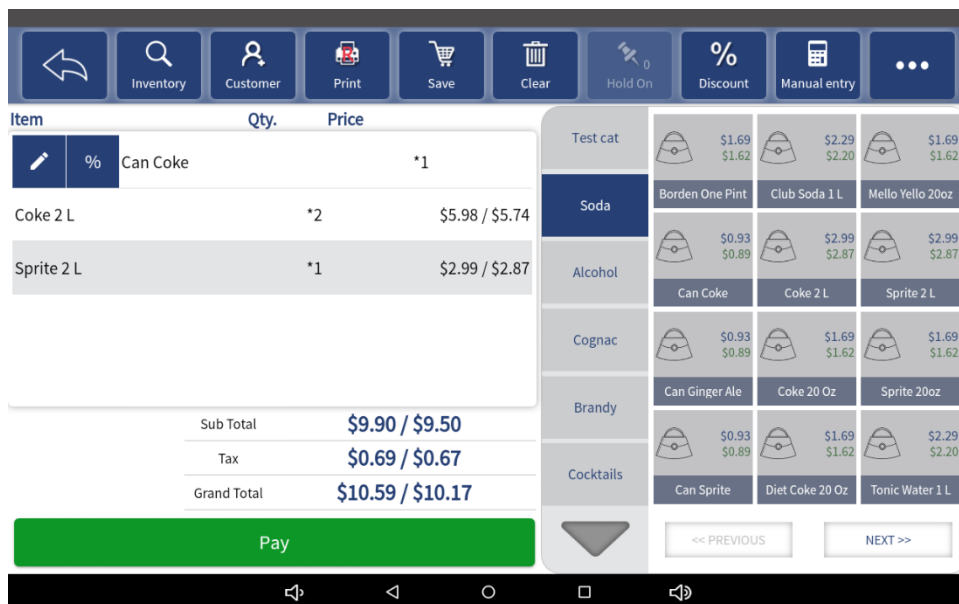
Select how individual items can be modified, deleted, edited, discounted.

Item Operation :

- **Traditional** This mode fixes the operations such as Delete, Edit, Discount, and Attributes in a small column position in the middle of the page.



- **Popular:** In this mode, Select the desired operation such as Edit, Discount, and Attributes by sliding the single item in the shopping cart right and left to Delete.



Right Side : On the right side of the Sales page, there are two settings by default, "Menu" or "Calculator".

- **Calculator :** Set the right side to the mode of the Calculator by default.
- **Menu :** Set the right side to the mode of Menu by default.

Screensaver : Toggle on and select a suitable time period.

Passcode : Set a password which are used to enter the system during

screen saver.

Exit when it is idle : Log out automatically after a period of idle time. If enabled, a suitable time period must be selected.

When Enabled:

- **Use Customer Display** : The customer can see the actions in Sales, such as adding items to the shopping card, re-editing the item information in the shopping cart, returning operations,
- **Require Signature for Credit Card** : Customers are required to sign on the customer's display when paying by credit card.
- **Perform batch settlement at the end of day** : The Q20 will send batch settlement to the bank at End of Day.
- **Add tips at the end of day** : The Add Tips button appears on the End of Day page.
- **Show Tip options on Customer Display**- Customer can add tip to transaction
- **Open cash drawer without cash transactions** Users can open the cash drawer without a cash transaction.
- **Apply discount after taxes**: The tax amount of the item is the original price of the item multiplied by the tax rate, and it will not change due to price changes caused by the promotion of the item. Conversely, when not enabled, the tax amount of the item is the final price after the discount multiplied by the tax rate.
- **Open click sounds**: The system's touch screen sound is turned on.
- **Exit after the transaction is completed**: The user will automatically log out of the system when a transaction is completed.

Notes: After completing the changes, Select the Save button to save all changes. Re-login is forced and is required for these settings to take effect.

1.4 Pay Method

Set the payment methods displayed on the Sales page.

Cash Discount
Open cash discount
Discount

Markup
Open Markup
Markup Rate

Cash Back
Open cash back
Max amount

Pay Method

Default Method Of Payment	General	Cash Discount	Custom Payment Methods	General	Cash Discount
Credit Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Exchange	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Debit Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Check	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Gift Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Local Gift Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Loyalty	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
EBT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Cash Discount: Cash Discount provides a discount for transactions where Cash payment method is selected. If set On, enter amount of discount.

Markup: Set on/ off, if set on enter amount of discount Change all items in inventory by percentage

Cash Back: Set on/ off, if set to On Enter Max Amount of Cash Back. Ie EMV Pin Required, EBT Pin Required

Pay Method:

General: When checkbox is select payment type will appear as an available payment selection upon checkout.

Cash Discount: When checkbox is selected this payment type will be enabled for Cash Discounting

Note: Custom Payment Methods can be configured for selection in Seamless Commerce. Please reference Seamless Commerce User Guide for additional information.

1.5 Activation

- If the local POS has been activated,
 - The page will prompt “This device has been activated.” and display the Serial Number (SN) of the local POS.
- If the local POS has not been Activated Select on Activation button on upper left corner.
 - The page will be prompt “This device is not activated”



✔ This device has been activated

POS Serial Number: 1150051106

Environment: Demo Environment



1.6 Cloud

This page allows you to set the "Cloud Synchronization Interval Time". Time which is set where the POS communicates to the Seamless Commerce Portal to update information.

Setting Cloud Synchronization Interval Time:

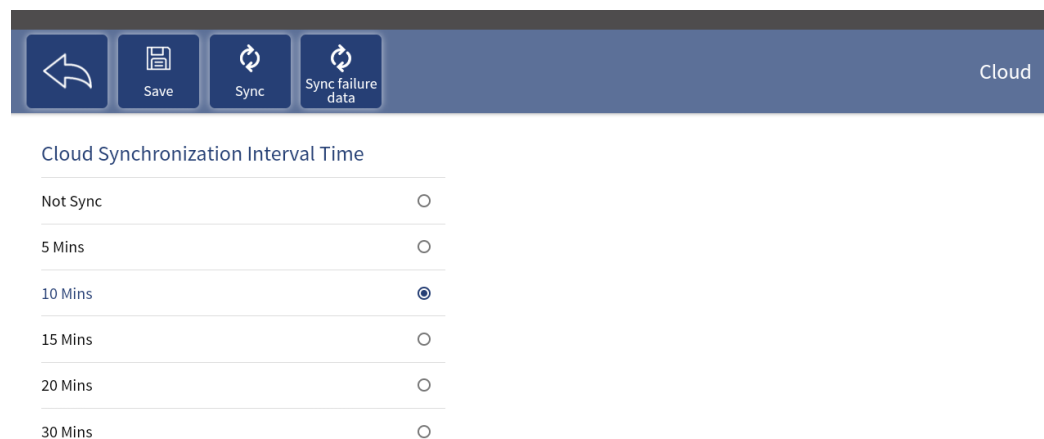
Sync- Synchronization: Provides most current information back to

Selection options available: Seamless Commerce Backoffice

*Selection of "Not Sync" - Store is required to sync to Seamless Commerce manually no selection for time has been set for automatic sync.

Administrator or permissioned user is required to select sync from menu system will not sync automatically

Interval times available: Time in which the system will perform synchronization to Seamless Commerce Backoffice



Cloud Synchronization Interval Time

Not Sync	<input type="radio"/>
5 Mins	<input type="radio"/>
10 Mins	<input checked="" type="radio"/>
15 Mins	<input type="radio"/>
20 Mins	<input type="radio"/>
30 Mins	<input type="radio"/>

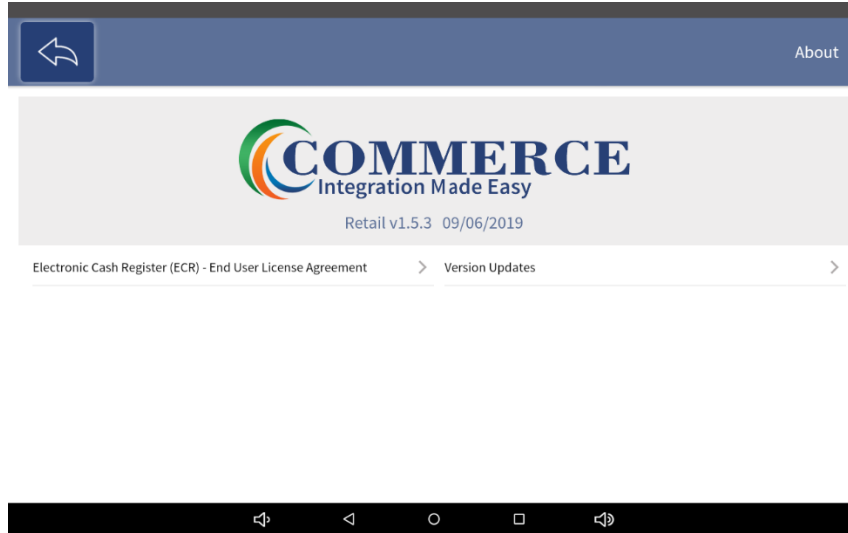
Save : After selecting the time, click the "Save" button above to complete the setting.

Sync : Click the button to synchronize now.

Sync Failure Data: Provides synchronization for Failed data response

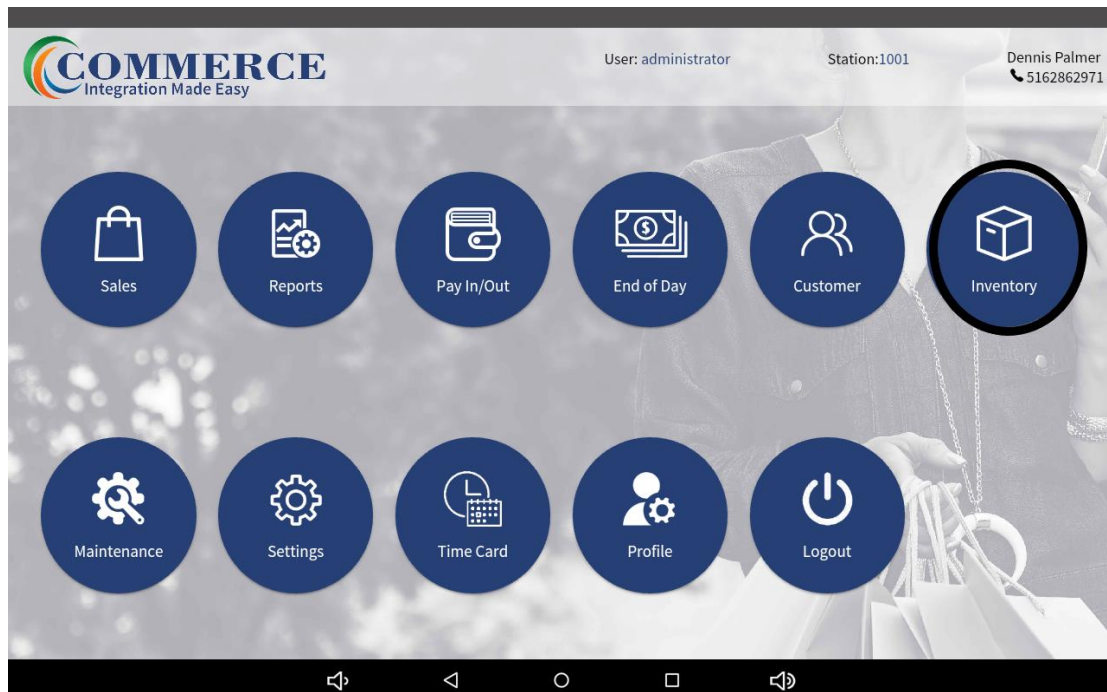
1.7 About

View information about the software, such as "Copyright Information", "Software License Agreement" and Version Updates.

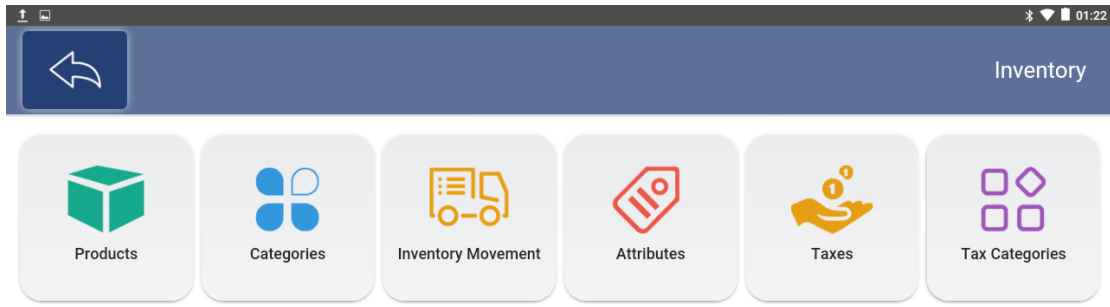


2 Inventory

Select Inventory from Main Menu

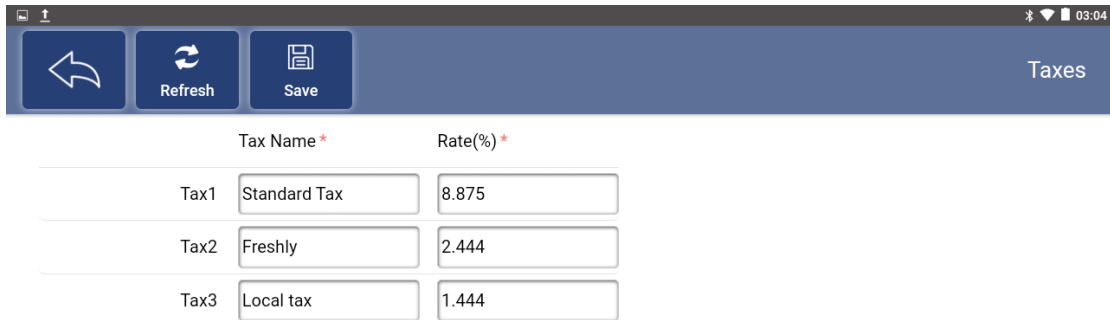


Product-related settings such as taxes, categories, attributes, inventory, etc. can be adjusted in this module.



2.1 Taxes

This page is used to Change Tax Names, along with tax amounts Tax Categories can not be changed in this menu.



Refresh: Refresh the current Taxes list.

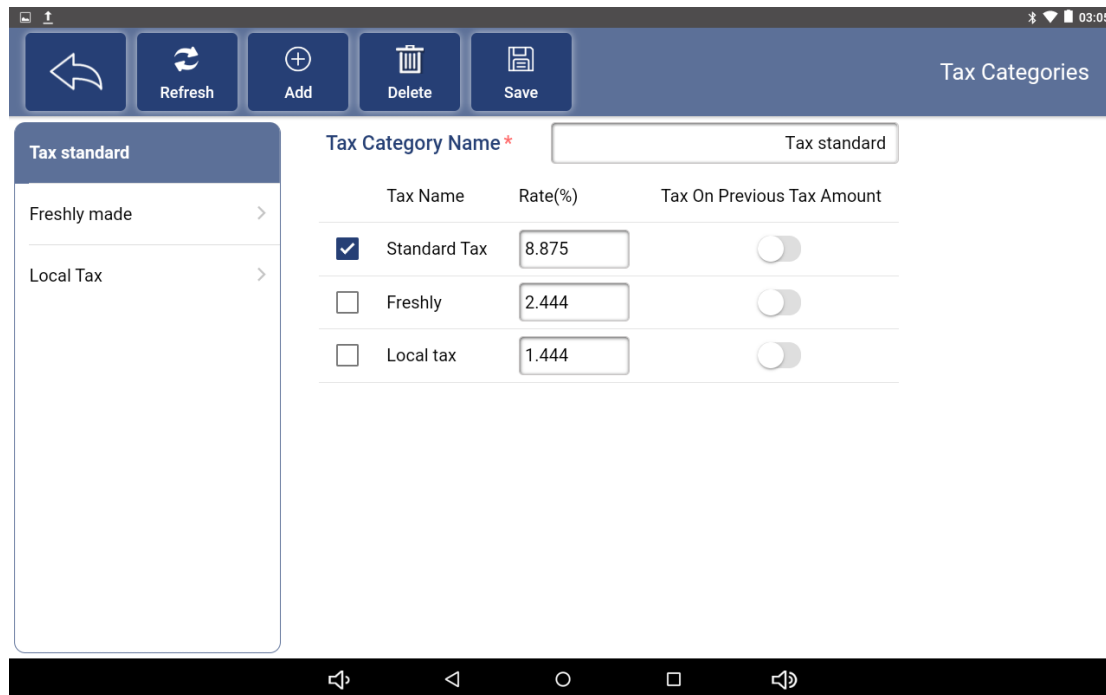
Save: Save changes after editing Taxes.

2.2 Tax Categories

Usage: On-demand tax decisions, enabling accurate rates and product taxability.

This page displays the Tax Categories list of the store

Example: Tax categories break down Local, State, and applicable Village taxes which are set to be collected.



Tax Name	Rate(%)	Tax On Previous Tax Amount
<input checked="" type="checkbox"/> Standard Tax	8.875	<input type="checkbox"/>
<input type="checkbox"/> Freshly	2.444	<input type="checkbox"/>
<input type="checkbox"/> Local tax	1.444	<input type="checkbox"/>

Tax Category Name: Provide name for the tax category which you want to create

Select checkbox: To apply this Tax Name to the tax Category

Rate %: Define the rate at which this Tax name will be added to the items within the checkout.

Tax on Previous Tax Amount: When Multiple tax categories or tax rates need to apply on the same product.

Refresh: Refresh the current Tax Categories list.

Save: Save changes after making any adjustments or changes.

Add: Add a Tax Category for an item by clicking the "Add" button. First enter the correct Tax Category Name, then check the desired Tax, and finally click the "Save" button above to save.

Delete: Select a Tax Category in the list on the left and click the "Delete" button to delete it, then click "Save" button to save the changes.

Notes: When adding a Tax Category, modify the information of the selected Tax, but this modification will only be saved to the added Tax Category.

Example

Tax on Previous Tax Amount

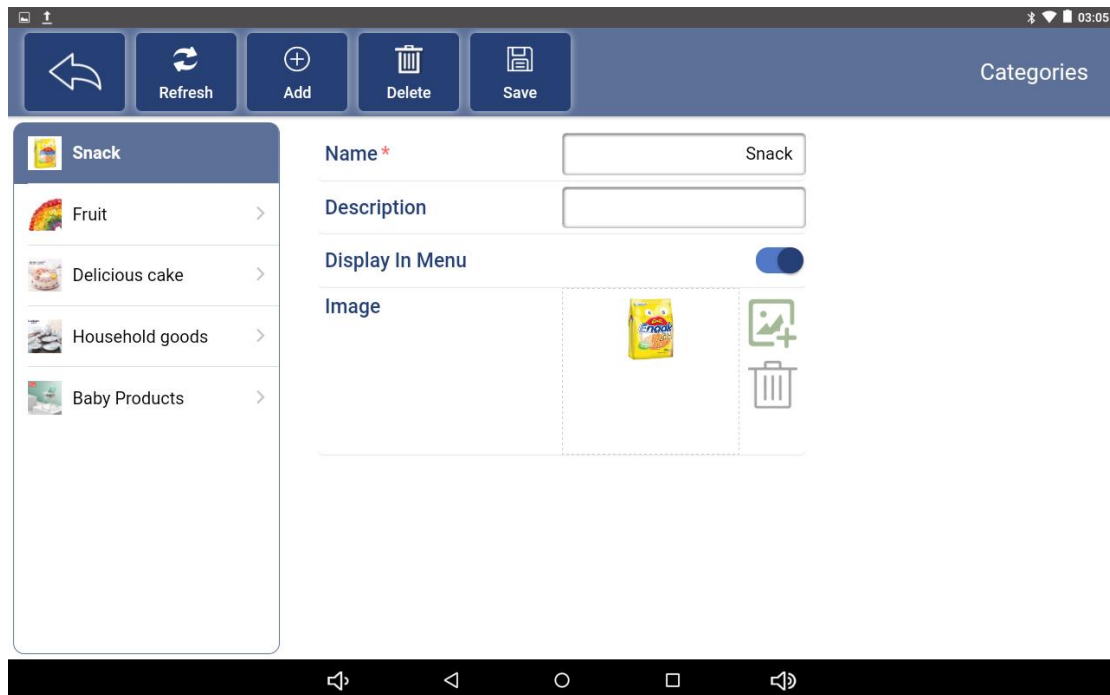
Item	Qty.	Price
Tax on previous amount ex	*1	\$10.75 / \$10.32

Sub Total	\$10.75 / \$10.32
Tax	\$1.34 / \$1.29
Grand Total	\$12.09 / \$11.61

City 1.5%
 State 8.625%
 Local Tax 1.5%
 Additional Tax 2%
 Would all be applicable for this order of products

2.3 Categories

This page displays and allows you to manage Categories list



Refresh: Refresh the current Tax Categories list.

Add: Create a new "Category" of items by clicking the "Add" button.

1. Enter the required name of the Category
2. Description (optional)
3. Enable Display in Menu (optional)
4. Image
 - a. Upload Image through selection of Picture
5. Delete Image through Trash
6. Click "Save" button.

Delete: Select, Category from the list on the left and click the "Delete" button to delete it.

*If a Category has items in it those items must be removed from Category in order to delete Category

Save: This button is used to save changes after editing, adding, and deleting Categories.

2.4 Attributes

This page displays and allows for management of Attributes list.



To add New Attributes

- Select “+”
- Provide Name
- Provide Value
 - Provide Price

To Remove unwanted attribute:

- Select “-“ Attribute will be removed

Refresh: Refresh the current Attributes list.

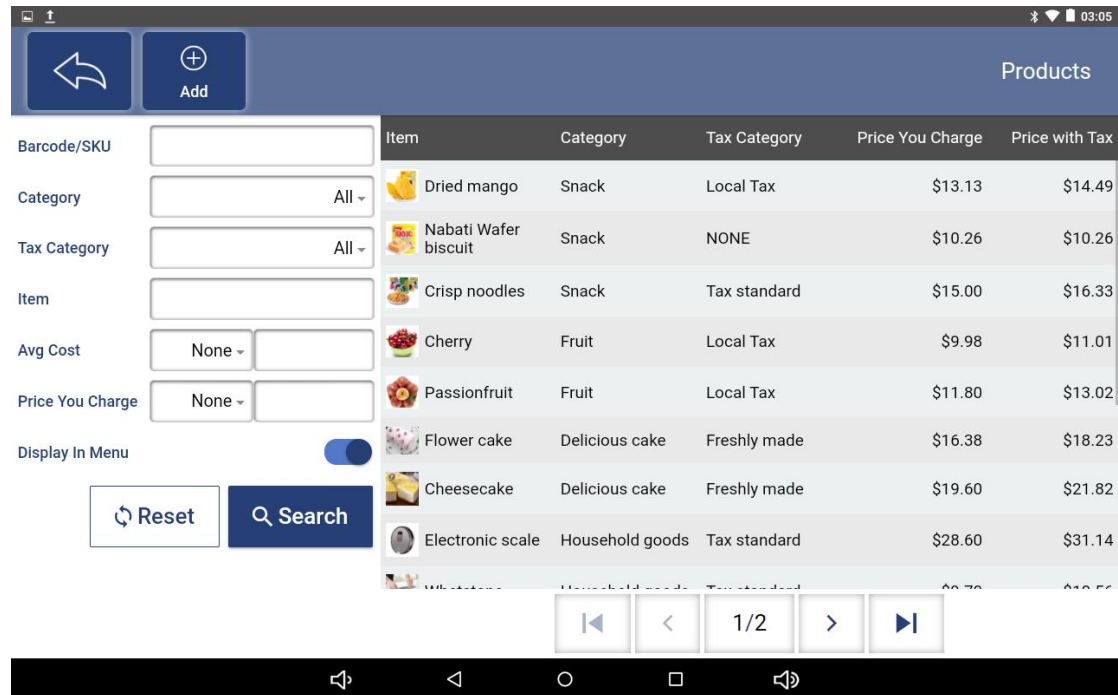
Save: This button is used to save changes after editing, adding, and deleting Attributes.

Add: Add a "Category" to the item by clicking the "Add" button. First enter the required name, value and price of the Category, and then click the "Save" button above to save.

Delete: Select an Attributes in the list on the left and click the “Delete” button to delete it, then click “Save” button to save the changes.

2.5 Product

This page displays the Products list of the store.



Add: Add a new item by clicking the Add button above the item list page. When you select the Add button above the item list page to add a new item or click on an item in the Product list, and you will be taken to the product details page.

Search: for items by entering

Barcode/SKU- Assigned to a specific product

Category- Classification in which item can be placed

Tax Category- Tax Categories available

Item- Product Name

Avg Cost- Your Cost of Product from Distributor

Price You Charge- Price you charge for the item that your looking up information on the left side of the screen

Reset: Clears all variables

Search: Provides compiled Product list of all product meeting your search criteria.

Notes:

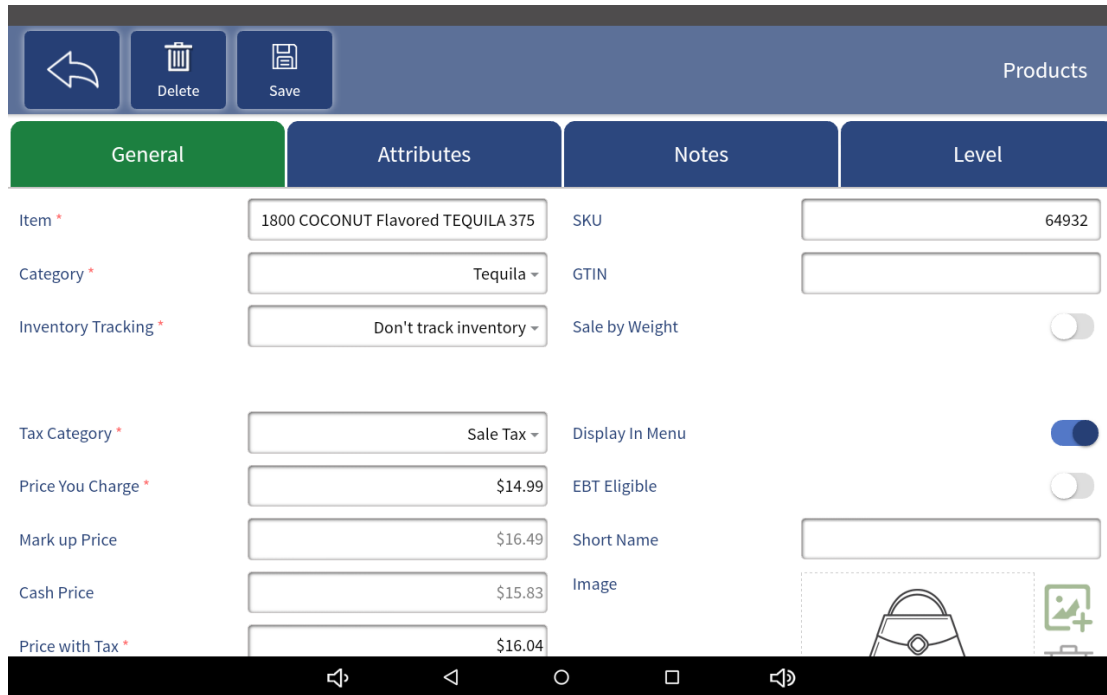
By Default, Taxes are calculated on Subtotal provided.


*Refer to Seamless Commerce Manual page 5 where product information can be Exported or Imported.

Select on Product:

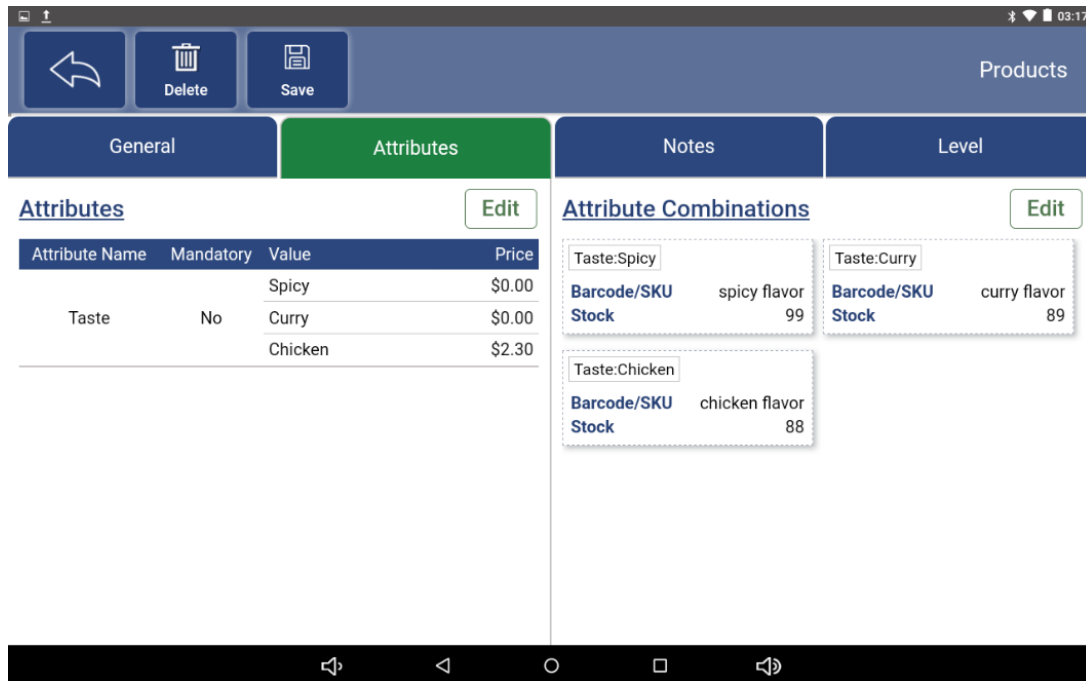
See Products for additional information

General: This Tab displays general information about the product, such as category, inventory, tax, price, etc.



Products			
General	Attributes	Notes	Level
Item *	1800 COCONUT Flavored TEQUILA 375	SKU	64932
Category *	Tequila	GTIN	
Inventory Tracking *	Don't track inventory	Sale by Weight	<input type="checkbox"/>
Tax Category *	Sale Tax	Display In Menu	<input checked="" type="checkbox"/>
Price You Charge *	\$14.99	EBT Eligible	<input type="checkbox"/>
Mark up Price	\$16.49	Short Name	
Cash Price	\$15.83	Image	
Price with Tax *	\$16.04		

Attributes: This tab shows the attributes and attributes combination information for the item.



Assumptions:

- No Small available
- No XL available
- No Medium Yellow Shirts

Attribute Combination information can only be edited if the Attribute is added to the item

*Only Attributes that have been defined can be added

Edit Attributes

- Select Edit button
 - To Add New Attributes, refer to Attributes Section
- To modify existing Attributes
- Modify Value
- Modify Price
 - To Remove Value select “-“and attribute will be removed

Edit Combinations: All possible combinations of attributes for this product

- Select possible combinations which product is dependent upon or not
 - If item is dependent this must be marked as “Is Required”

Attribute Example:

Product: Shirts

- Colors

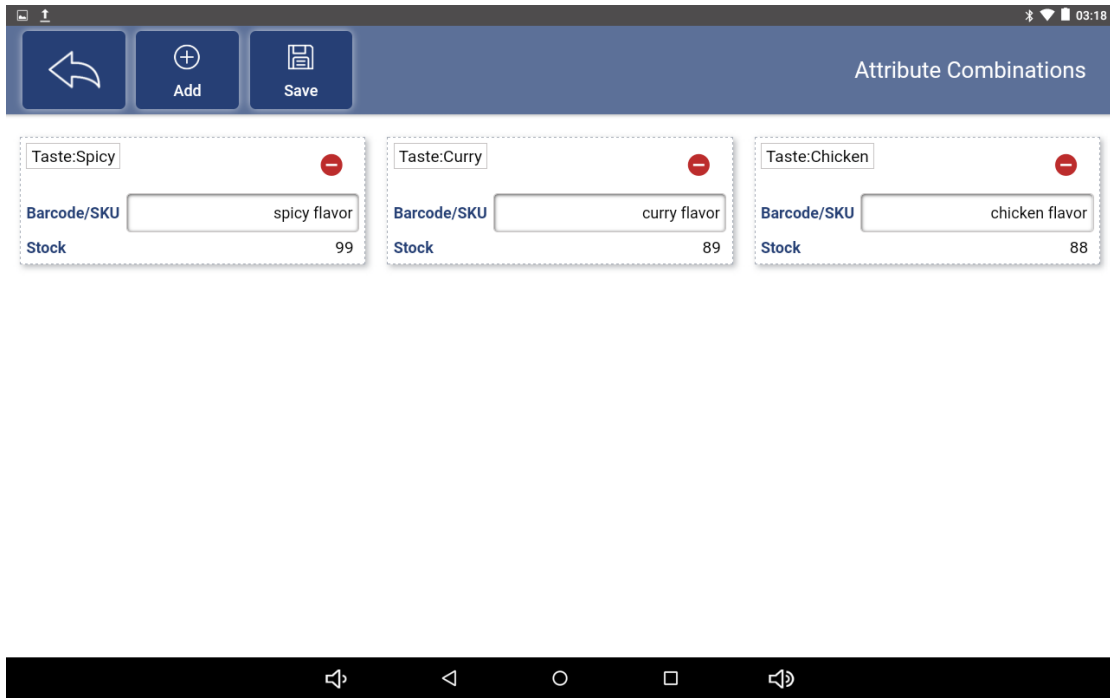
- Green
- Yellow
- Sizes
 - Medium
 - Large
- Combinations
 - Medium Green Shirts
 - Large Yellow Shirts
 - Large Green Shirts

Attributes

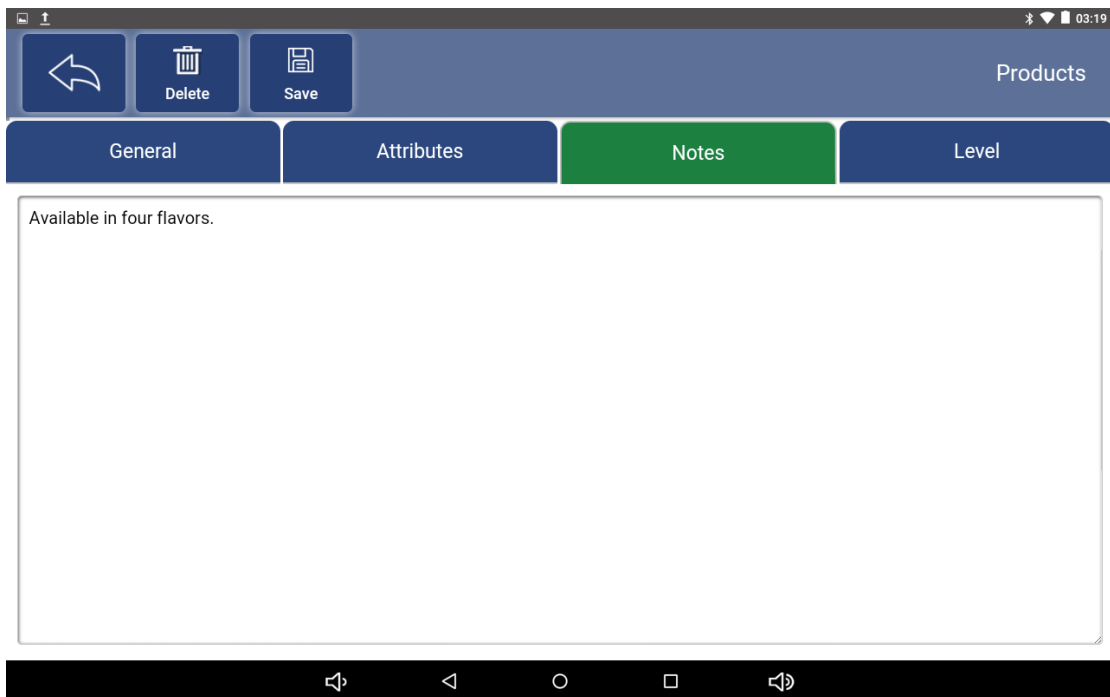
←
+ Add
 Save

Attribute Name	Mandatory	Value	Price	
<div style="display: flex; align-items: center; gap: 10px;"> - Taste <input style="margin-left: 20px;" type="checkbox"/> </div>	<input type="checkbox"/>	<input style="width: 100%;" type="text" value="Spicy"/>	<input style="width: 100%;" type="text" value="0"/>	-
		<input style="width: 100%;" type="text" value="Curry"/>	<input style="width: 100%;" type="text" value="0"/>	-
		<input style="width: 100%;" type="text" value="Chicken"/>	<input style="width: 100%;" type="text" value="2.3"/>	-
+				

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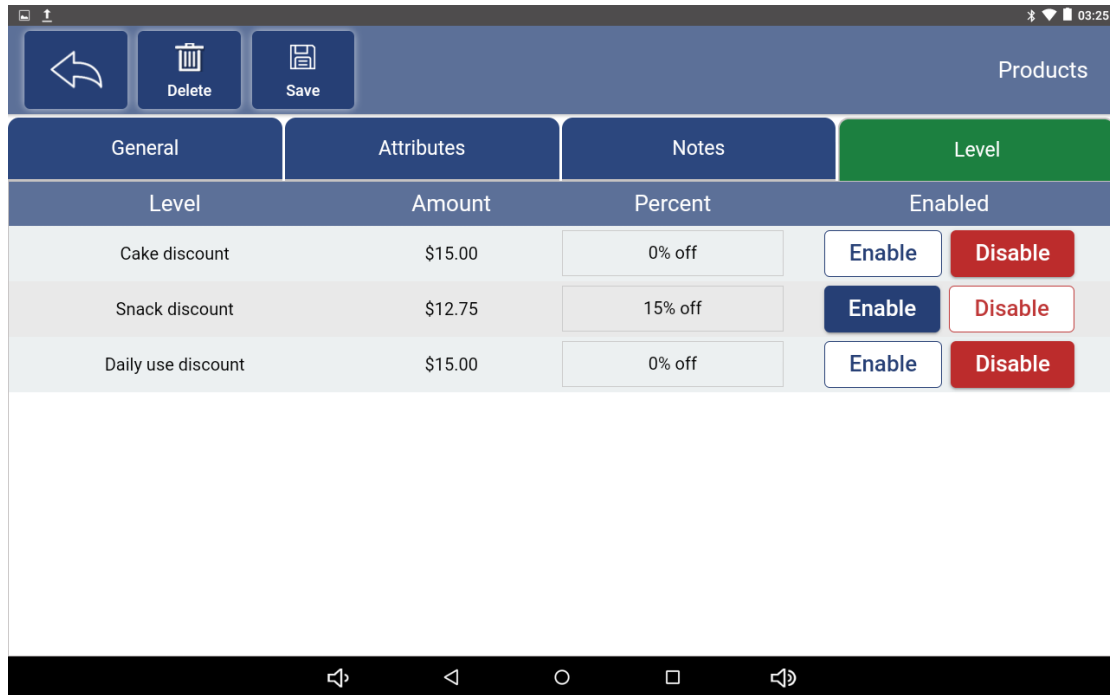


Notes: This Tab shows the Notes information for the item.



Level: This tab shows the [Price Level](#) information for the item.
Set how much discount the item has on a Price Level and whether it has been enabled for a Price Level.

Notes: I'll show you how to add a [Price Level](#) and how to make it work later.



Level	Amount	Percent	Enabled	
Cake discount	\$15.00	0% off	Enable	Disable
Snack discount	\$12.75	15% off	Enable	Disable
Daily use discount	\$15.00	0% off	Enable	Disable

2.6 Inventory Movement

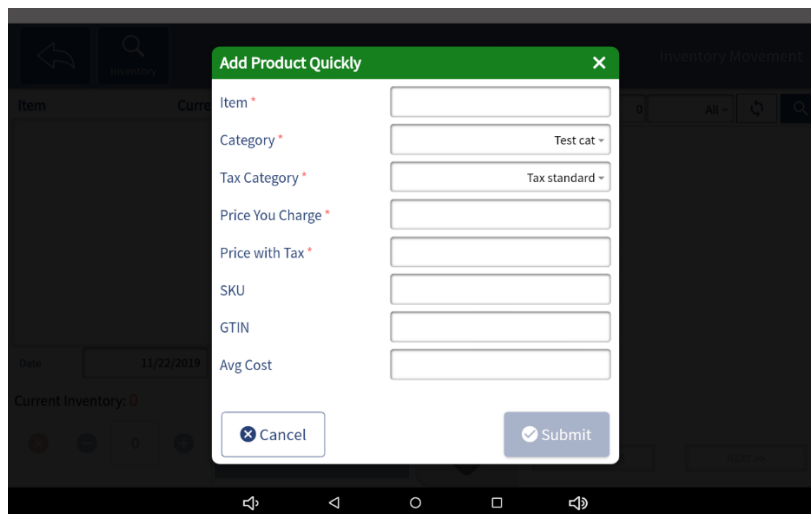
Manage inventory for your products. Tracked and non-tracked items will appear on this page. If the product is moved from one location to another and Item is not tracked. Prompt will display that this is a non-tracked item do you want to move item out of inventory.

Manage the inventory of your items according to the following steps:

1. Select Date and Reason in left side of the page,
2. Select the item in the list on the right,
3. Enter the number of items to change,
4. Finally click Submit button.



Inventory: Search for items by Selecting on the Inventory button above. From inventory Lookup you can also add product quickly by selecting on “Add Product Quickly” button.



Stock: In the upper right-hand corner there is a Stock

1. Insert criteria in search fields
2. Filter the items in the store according to the quantity of stock

Note: This makes it easier to manage stock for products

3 Maintenance

In this Maintenance module,

Manage Employees- Users

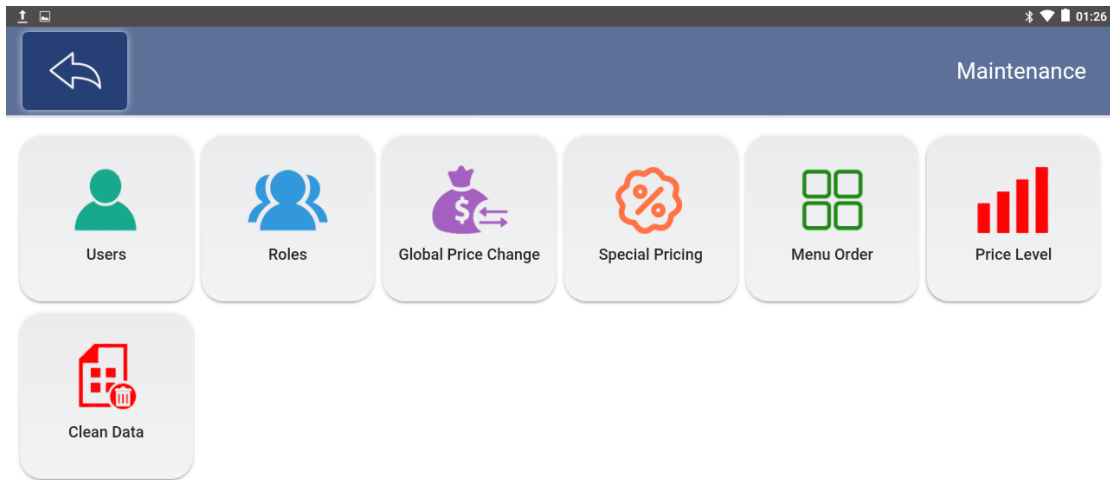
Manage permissions- Roles

Global Price Change- adjust the price of store items

Menu Order- Change the order in which items/ categories are displayed.

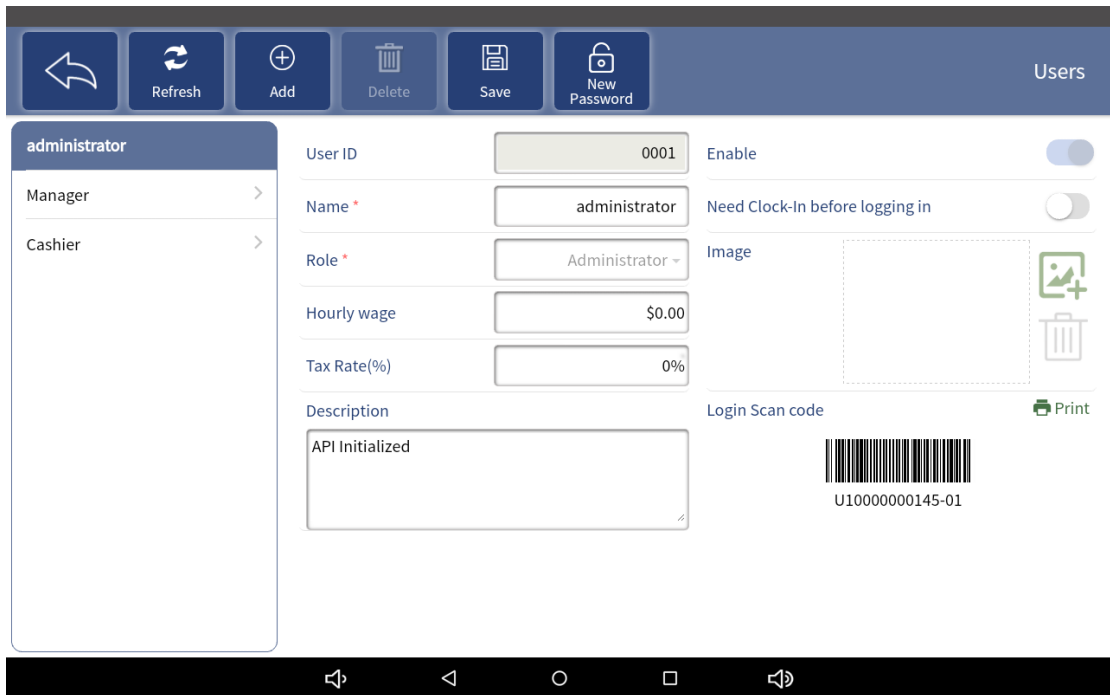
Price Level- Name a Price Level

Clean Data- Clean Transactions, Reset Tickets, Clean Log



3.2 Users

Manage the store's User accounts for Employees.



Refresh: Refresh the current Users list.

Add: Add a User to the current store by clicking the "Add" button.

1. Enter required Name and Role for the User
 - a. Other information can be optionally filled according to your needs,
2. Click the "Save" button above to save.

Delete: Select a User in the list on the left and click the "Delete" button to delete User.

Save: This button is used to save changes after editing, adding, and deleting Users.

New Password: Click this button to change the login password for the selected User.

Print: To print out the Login Scan Code of the selected User. Select Print. Barcode will be printed. User can then use barcode which has been printed to clock in/clock out.

Note: User ID is generated by system and cannot be reused once deleted

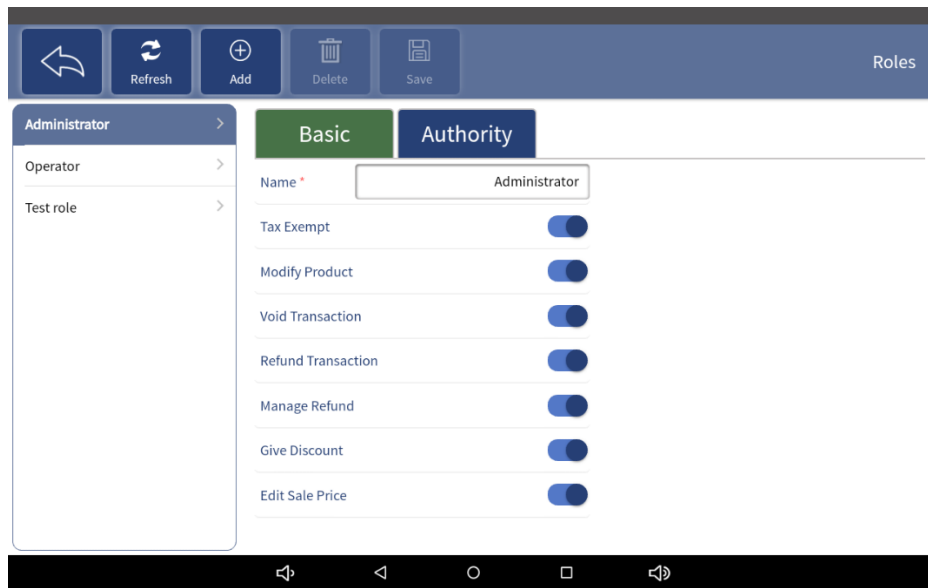
3.1 Roles

The list on the left side of the page shows all the Roles under the current store, and the right side is the permission information corresponding to the Role.

Roles – Define user access for a based upon selection of permissions.

Basic: This tab shows the basic information of each Role, Permissions such as the options listed below can be enabled by toggling on option.

1. Name
2. Tax Exempt
3. Modify Product
4. Void Transaction
5. Refund Transaction
6. Manage Refund
7. Give Discount
8. Edit Sale Price



9.

Refresh: Click this button to refresh the current Roles list.

Add: Add new Roles.

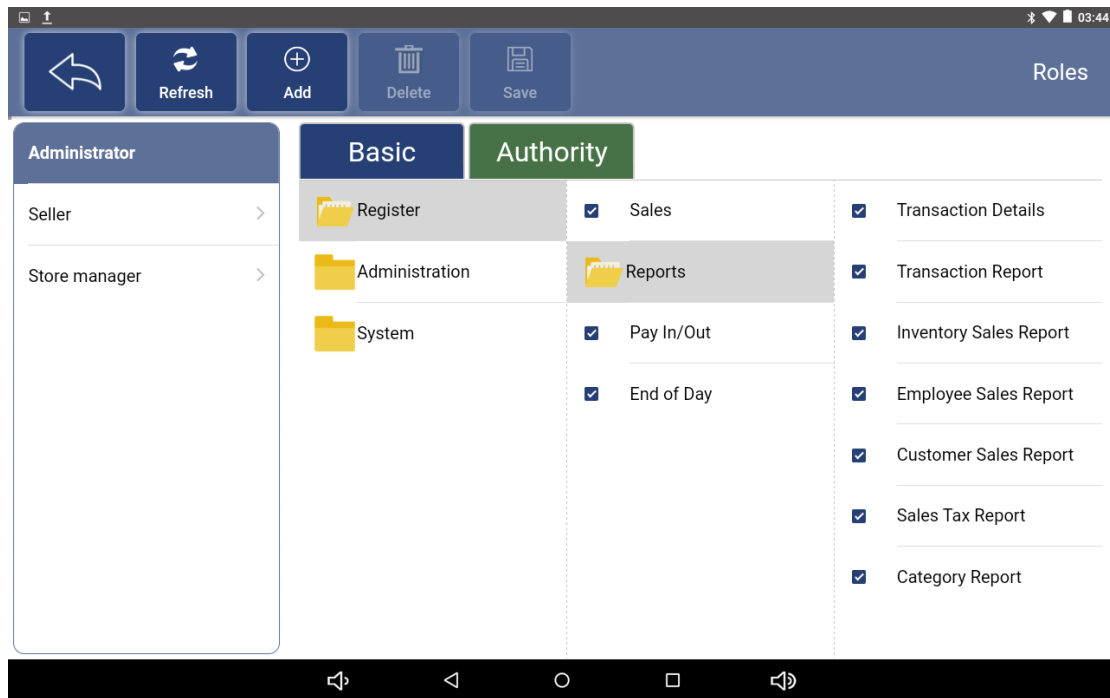
1. Enter the required name,
2. Choose the appropriate permissions and authority
3. Click the "Save" button above to save.

Delete: Select a Role in the list on the left and click the "Delete" button to delete it.

Save: This button is used to save changes after editing, adding, and deleting Roles.

*Note: Any Modifications to Roles requires a save otherwise it will revert back to previous values

Authority: Tab allows the Administrator access to permission the entire tree of the system. Administrators can provide permissions or change permissions to any role. Ensuring that each user has the appropriate level of access. Ex. Changes can be made to the Main Menu screen of that User. If the Administrator decides that this user will have access only to Sales here is where that can be provisioned.



3.3 Global Price Change

Change the price of the product in a variety of different ways.

1. Select which item you want to adjust the price on
 - a. All Items
 - b. Items in Category
 - c. Select Items
2. Select How to Change.
 - a. By Amount
 - b. By Percentage
 - c. By Rounding

←
Global Price Change

Which Items

All Items

Items In Category

Select Items

How To Change

By Amount

By Percentage

By Rounding

Submit

←
◀
○
□
▶

All Items: Price changes for all items in the store.

Which Items

All Items

Items In Category

Select Items

Items

All Items

Items in Category: Price changes for items in a specific category in the store.

Which Items

All Items

Items In Category

Select Items

Items

Category

Select Items: Price changes for specific items in the store.

Which Items

All Items

Items In Category

Select Items

Items

🔍
🛒

How to Change:

By Amount: Set a price of the selected item or set a value that is scaled up or down.

⚙️ How To Change

By Amount
By Percentage
By Rounding
Submit

Method

- Price Change
- X% Price Increase
- X% Price Decrease

By Percentage: Set the value of Profit or Gross Margin to determine the price of the item.

⚙️ How To Change

By Amount
By Percentage
By Rounding
Submit

Method

- Profit
- Gross Margin

By Rounding: Set the price of the item to the format of XX.99 or XX.95.

⚙️ How To Change

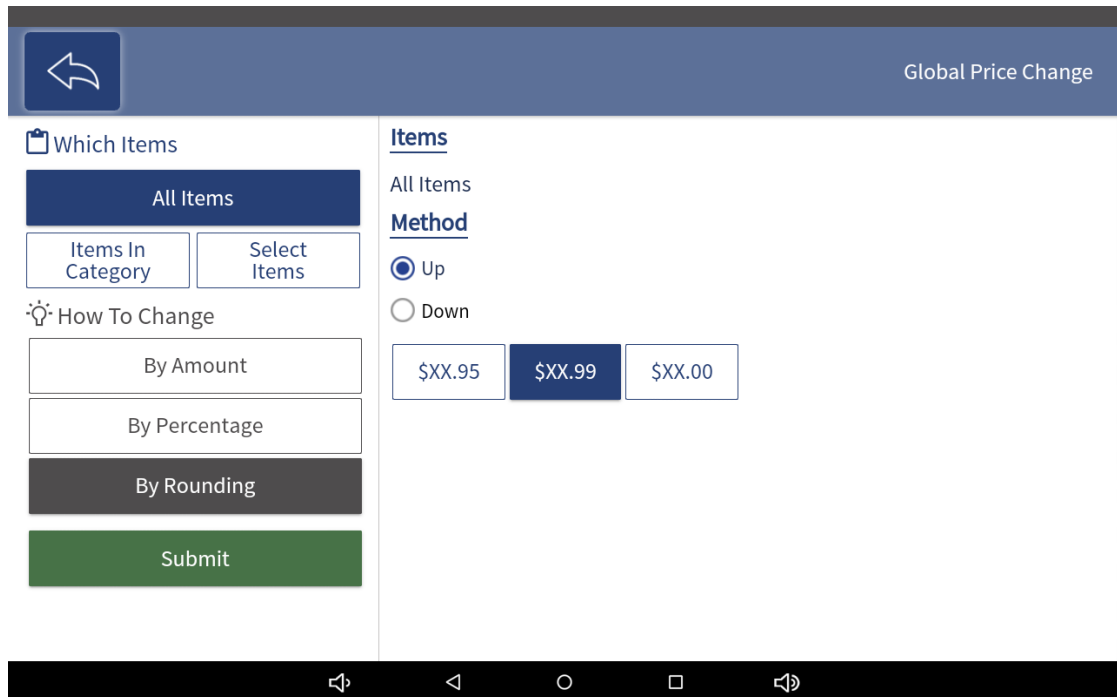
By Amount
By Percentage
By Rounding
Submit

Method

- Up
- Down

Example:

All Items in inventory selected. For Price increase, Rounding up to xx.99.

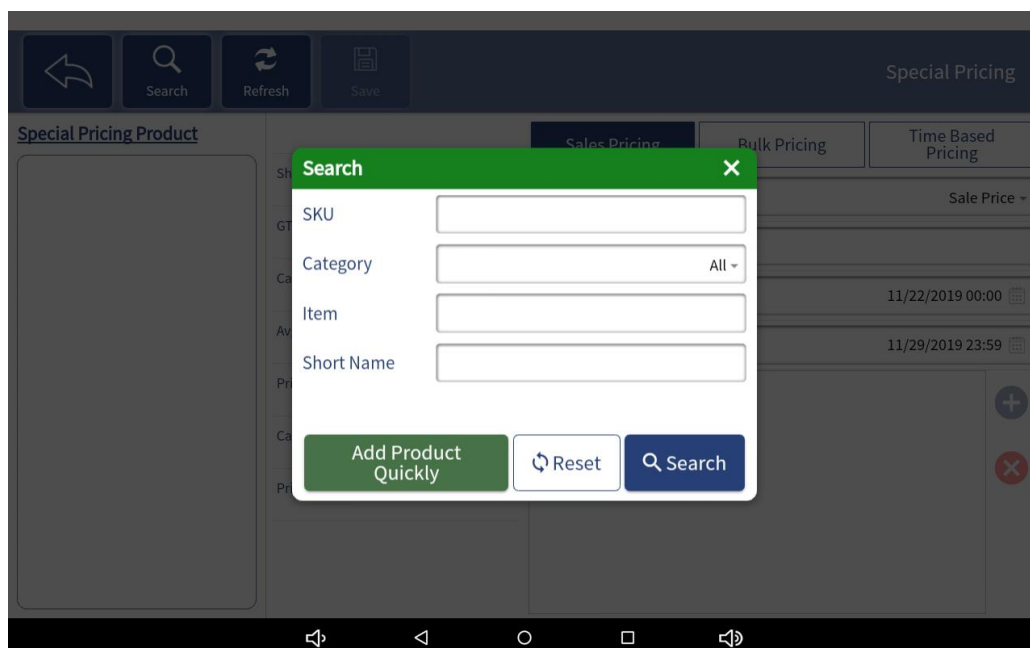


3.4 Special Pricing

On this page, manage various promotions for store items.

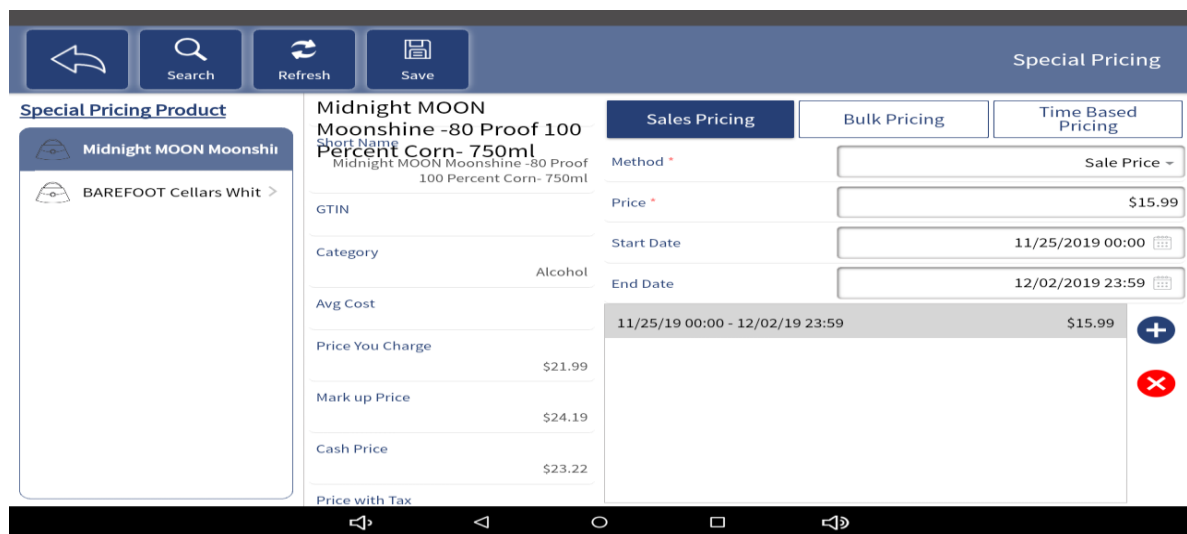
Search: Click this button to find an item and set up a promotion method for it.

- Add Product Quickly is also available



Sale Pricing: Defines a time period with a beginning and an end for a product
 Example: Provide a lower price on Product for a defined period of time

1. Select Sale Pricing Tab
 - a. Method:
 - i. Sale Price
 - ii. Percentage
 - b. Define Value
 - i. Sale Price: rice
 - ii. Percentage: Percentage
 - c. Start Date- When will this Sale Start
 - d. End Date-When will this Sale End



Refresh: Refresh the current Special Pricing Product list.

Save: This button is used to save changes after editing, adding, and deleting Special Pricing product.

“+” Button- Adds new special pricing variables set additional criteria variable. With “+” Set new variables for same product.

Example-

Product 1 on sale for 3 days @ x prices

Product 1 on sale for different period of time @ x price

Product 1 on sale for a different period of time @ y price

“x” Button- Removes special pricing criteria set for special pricing to occur. Removing special pricing for that product.

Example: Removal of Variable

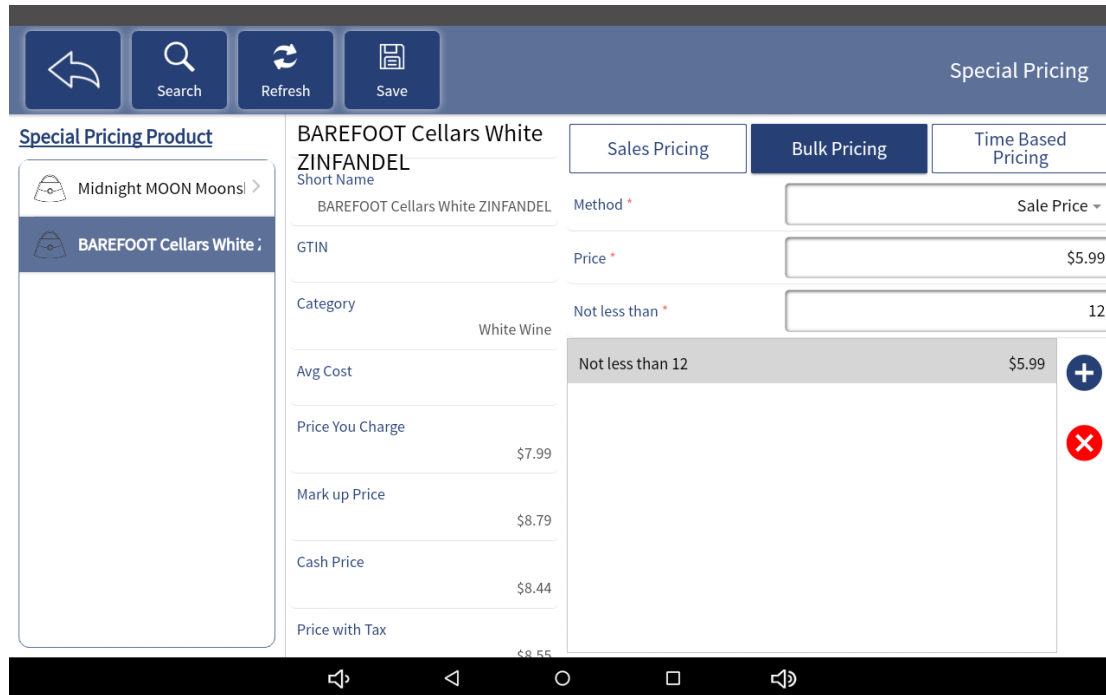
Product 1 on sale for 3 days @ x prices

Product 1 on sale for different period of time @ x price

~~Product 1 on sale for a different period of time @ y price~~ - **This Variable**

will no longer be an available option

Bulk Pricing: Set a promotional price for multiple purchases of the same item at same time.



Method:

- Sale- Set new price for “Price You Charge”
- Percentage- Discounted off “Price You Charge”

Variable:

- Sale: Price
- Percentage: Percent

Not Less than: Value which is set in order to receive Bulk pricing if x meet get bulk pricing if less then no bulk pricing.

“+” Button- Adds new special pricing variables set additional criteria variable. With “+” Set new variables for same product.

Example:

Purchase 10 x pay x price

Purchase 15 x pay y price

Purchase 25 x pay z price

“x” Button- Removes special pricing criteria set for special pricing to occur. Removing special pricing for that product.

In this example remove:

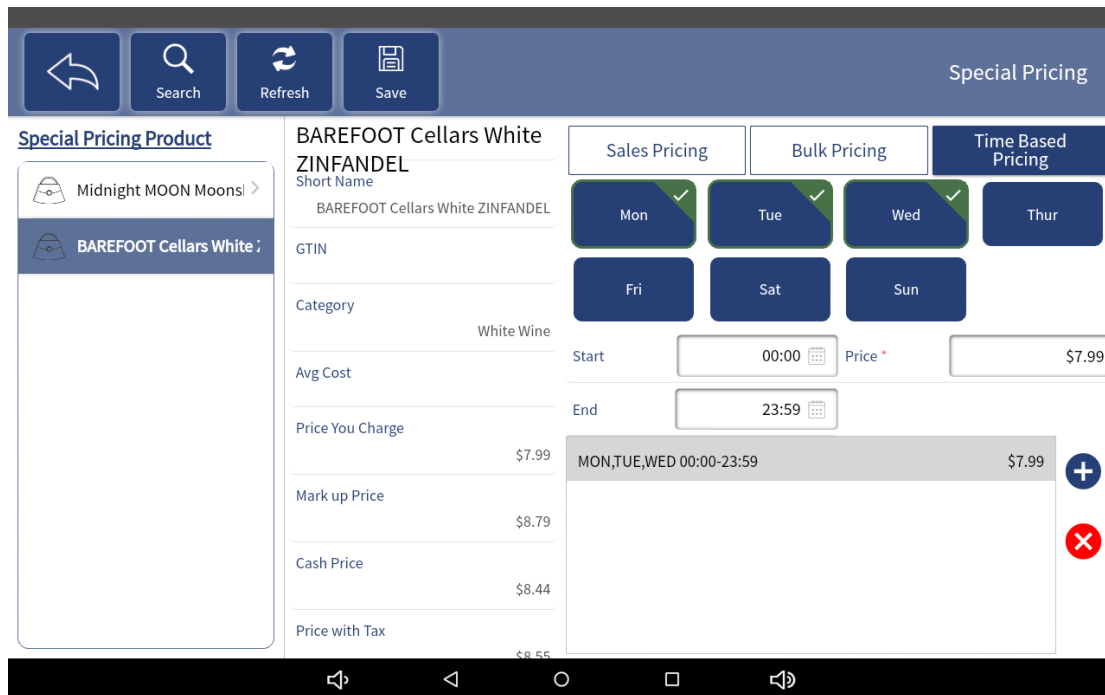
Purchase 10 x pay x price

Purchase 15 x pay y price

~~Purchase 25 x pay z price~~ -< **This Variable will no longer be an**

available option

Time Based Pricing: Set the promotion price for the item based on time.



Short Name- Item Selected from Search

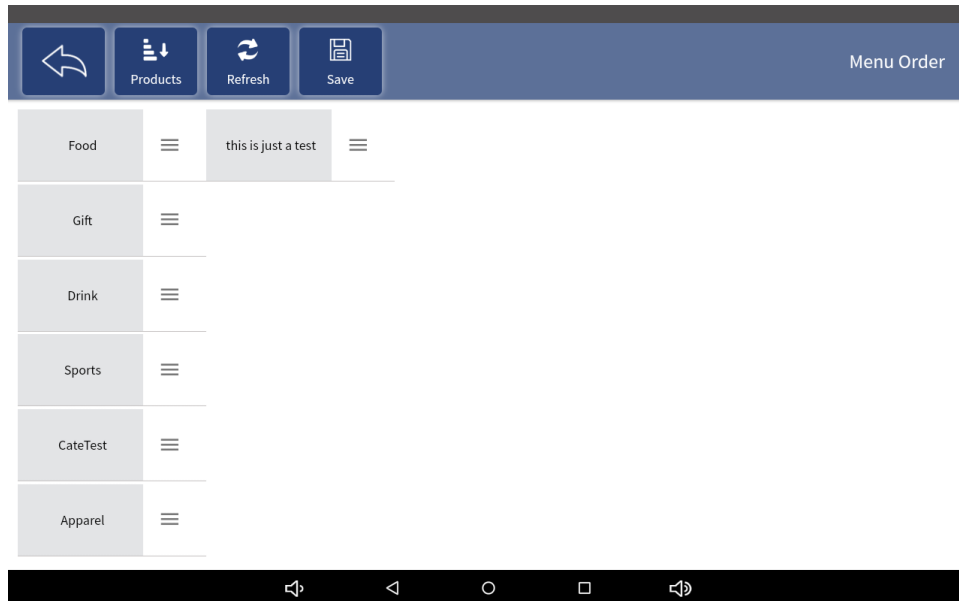
1. Select Days of the week that Time Based Pricing will be active
 - a. Mon-Monday
 - b. Tue- Tuesday
 - c. Wed- Wednesday
 - d. Thur-Thursday
 - e. Fri- Friday
 - f. Sat- Saturday
 - g. Sun- Sunday
2. Start Time- Select Time
3. End Time- Select Time
4. Price- Set price for product selected during this Time-Based Pricing

Ex Happy Hour

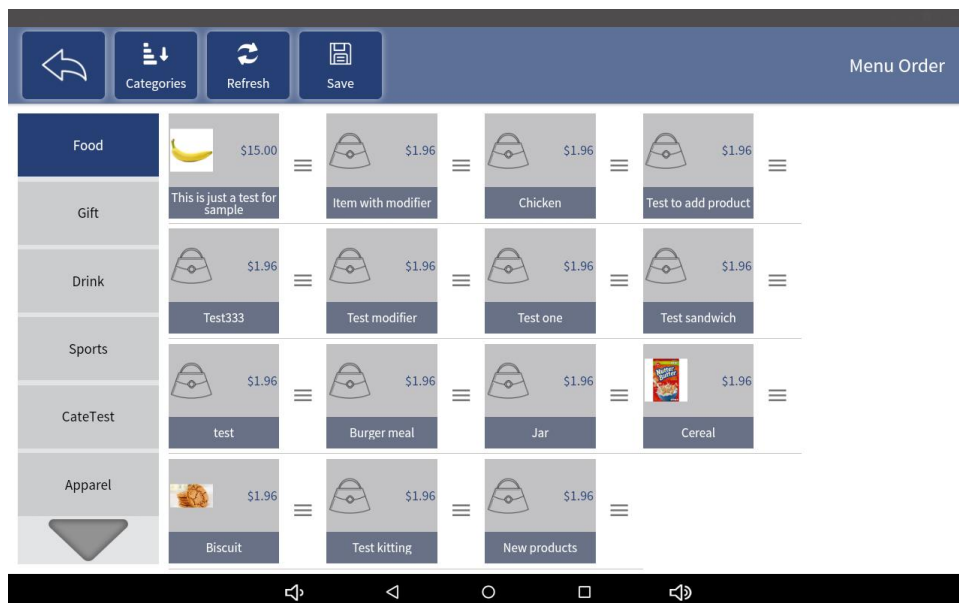
3.5 Menu Order

Menu Order allows the user to select how products or categories are displayed within the Sales Screen.

Grab (3-seconds) the Categories in the list on the left or grab on the item icon under the selected Category, then freely move its position on the Menu.



To Change how products are displayed in the menu select on products Grab (3-seconds) to move and move it to desired position.



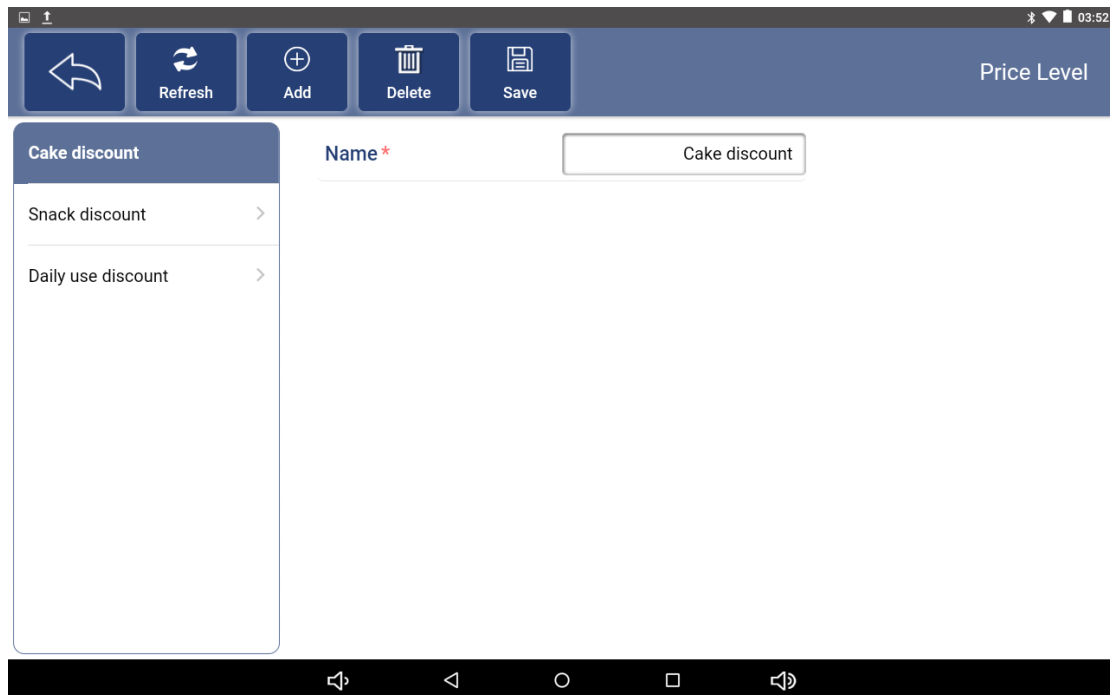
Refresh: Click this button to refresh the current Menu Oder.

Save: After the move is complete, you need to click the Save button above to save the changes.

3.6 Price Level

Price Level allows the user to set a reason code as to why that individual is receiving a discount.

Examples include Veteran, Senior, Family/Friend



Refresh: Click this button to refresh the current Price Level list.

Save: This button is used to save changes after editing, adding, and deleting Price Level.

Add: Add a "Price Level". First enter the required Name, and then click the "Save" button above to save.

Delete: Select a Price Level in the list on the left and click the "Delete" button to delete it.

Notes: In order for Price Level to be active on product.

Price Level Status must be enabled

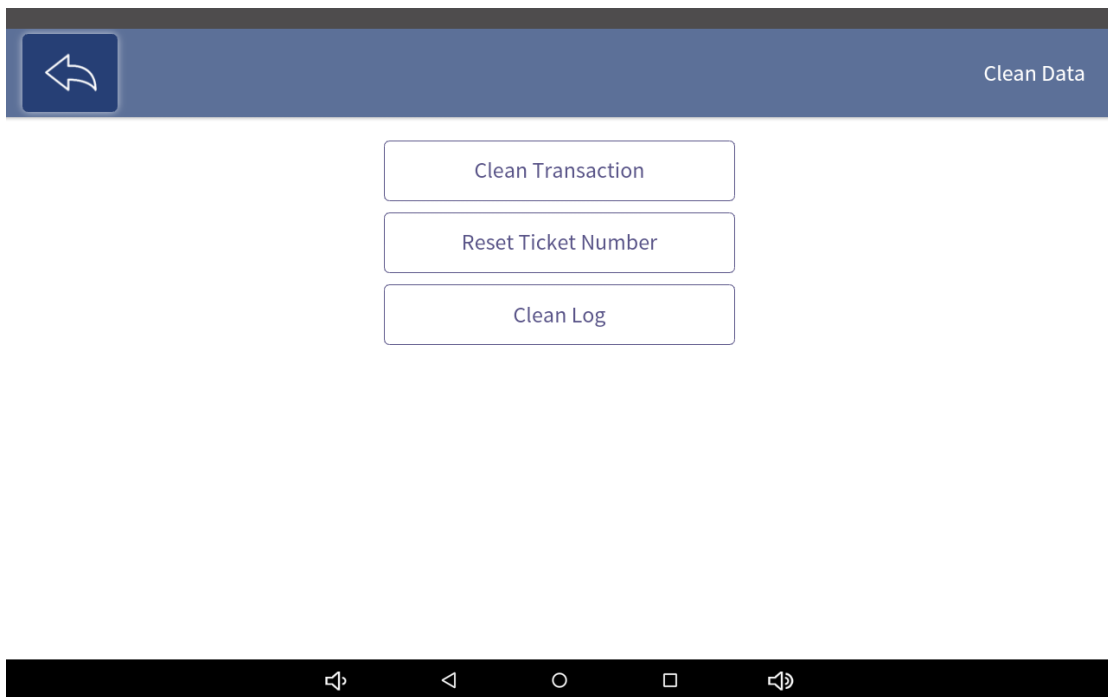
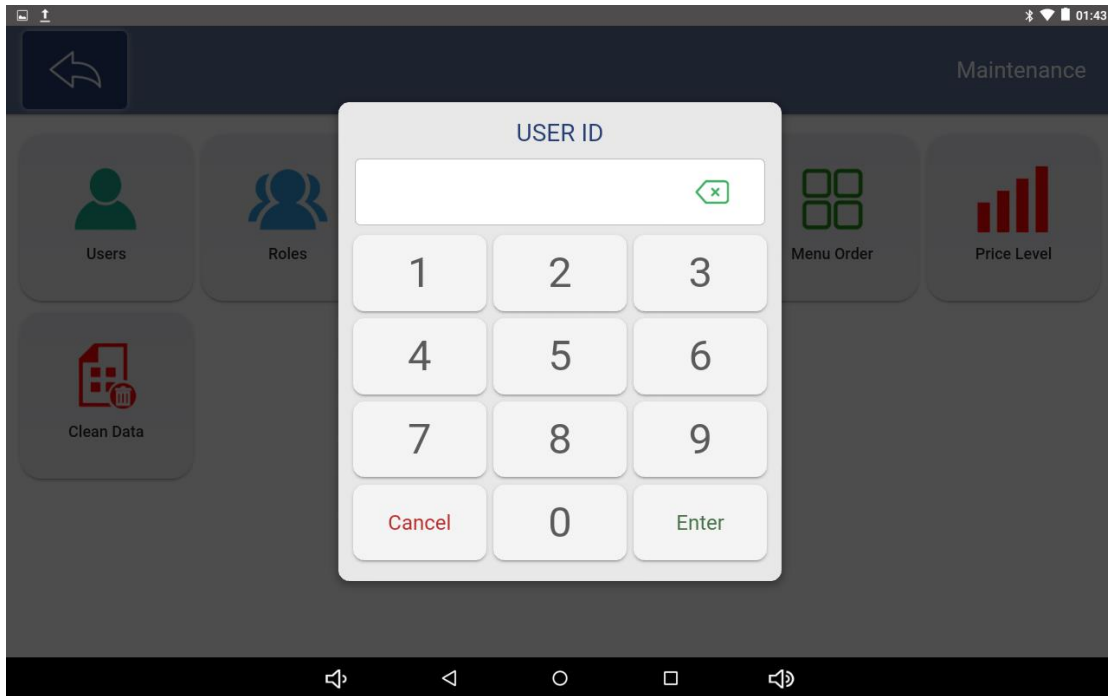
Customer must be assigned a permissioned Price Level

Customer must be Selected within the Sales Screen before selecting pay with ["Sales"](#)

Customer price level discount will be applied.

3.7 Clean Data

User's password must be entered before continuing.



Clean Transaction: After selecting the start and end time, click the Save button to clear the transaction record for this time period.

Clean Transaction

Start Date 11/27/2018

End Date 05/26/2019

Cancel Clean



Reset Transaction Number: When you click this button, it will immediately pop up the message, "Do you want to reset transaction number?". Click "Yes" button to instantly reset the transaction Number.

Clean Transaction

Info

Do you want to reset ticket number?


No Yes

- This task Cannot be undone. The system will log whom deleted and when it was deleted

4 Profile

Set the language (English, Chinese, Spanish, Portuguese), or modify the password of the currently logged in user. This will change system menus used for navigation to reflect language selected this will not change Categories or the name of the item.

Profile

 **administrator**
User ID:0001
Role:Administrator

Which language do you like?

English

中文 - Chinese

Español - Spanish

Português - Portuguese

Change Password Save

Old Password *


New Password *


Confirm New Password *


5 Timecard

- Timeclock
- Clock in
- Clock out
- Break
- Clock Detail
- Clock Reports

Time Card

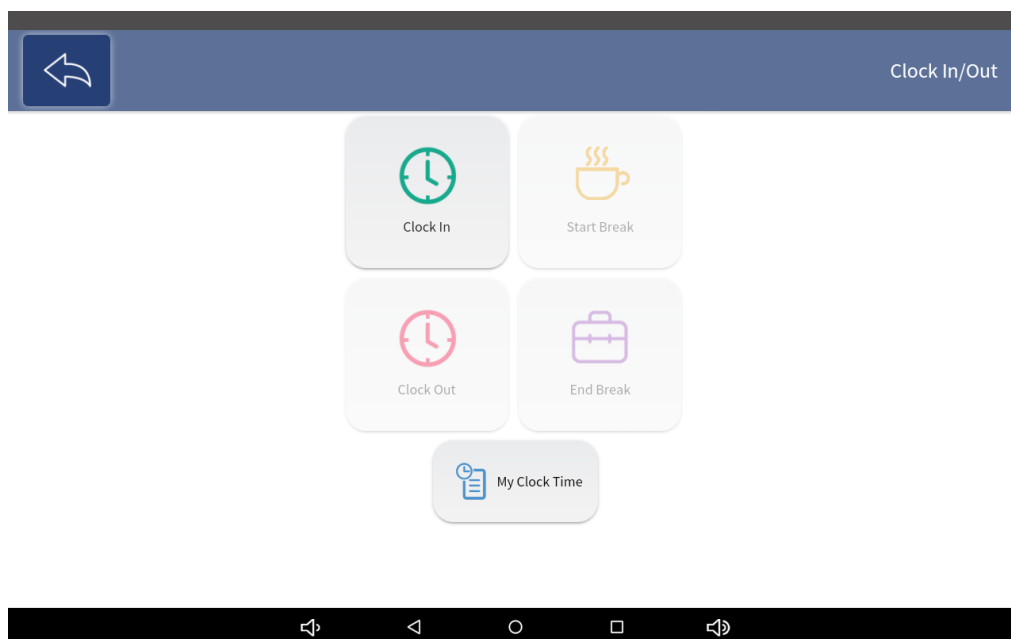
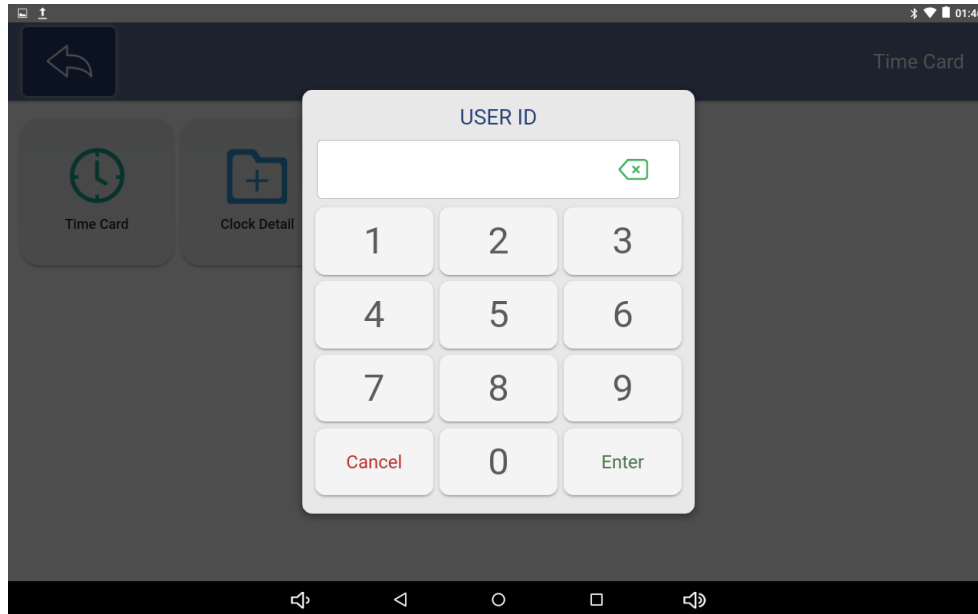
 Time Card

 Clock Detail

 Clock Reports

5.1 Timecard

Before the user punches the card, they need to log in to confirm their identity.



Clock In: Record the time that employee started working.

Start Break: Record the time that employee started break.

End Break: Record the time that employee ended break.

Clock Out: Record the time that employee left work.

My Clock Time: Report of hours worked based upon filters provided by the user.

← Clock In/Out

Start Date: End Date:

#	Clock In	Clock Out	Wages	Paid	Break
No Record!					

⏪ < 0/0 > ⏩



5.2 Timecard Detail

View and edit clock record for each employee.

← Refresh Timecard Details

Clock In:

Clock Out:

Hourly wage(\$)

Tax Rate(%)

Invalid: Mark Timecard period as Invalid. Only Administrator has permissions by default to enable additional users to have access to Invalid Administrator must configure Role

Pay Roll: Pay the employee for the salary.

5.2 Clock Reports

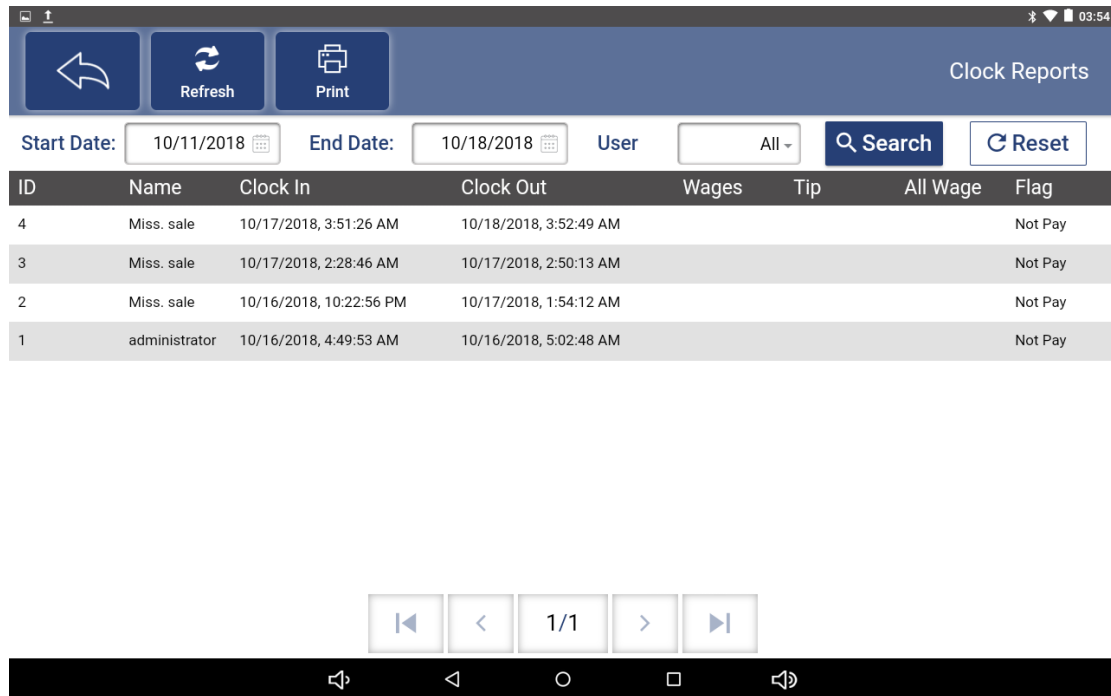
This page shows all the clock records for all employees.

Refresh: Renews Page

Print: Prints out based upon variables provided and what has been displayed.

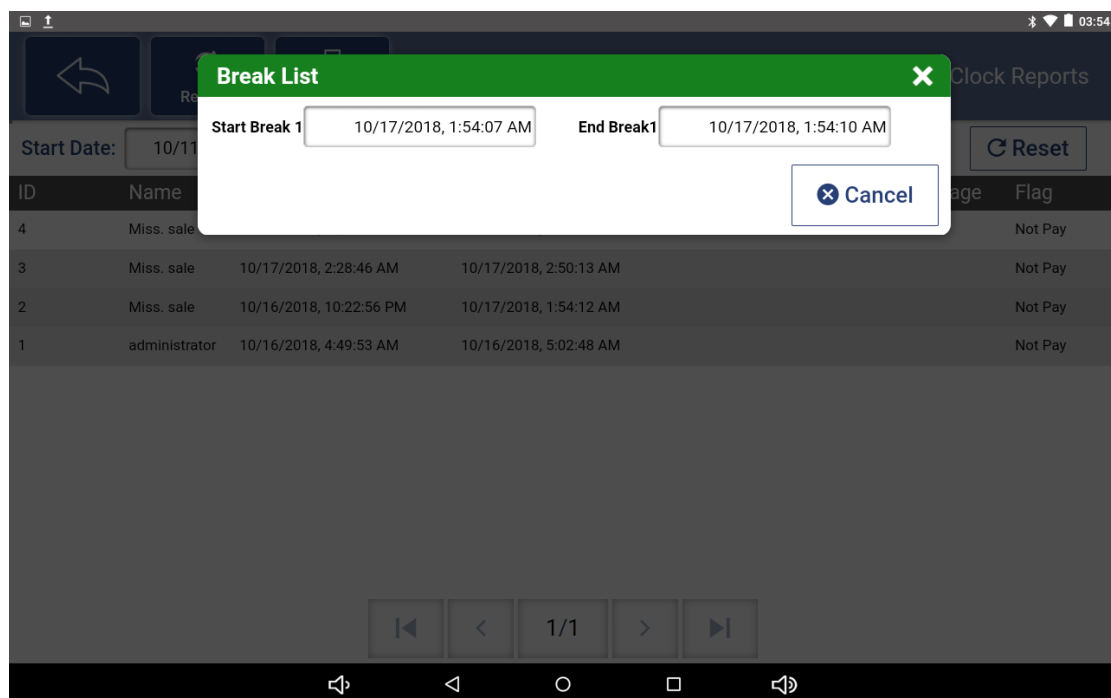
Search: Based upon criteria provided in fields provides report

Reset: Clears all values previously input in search fields.



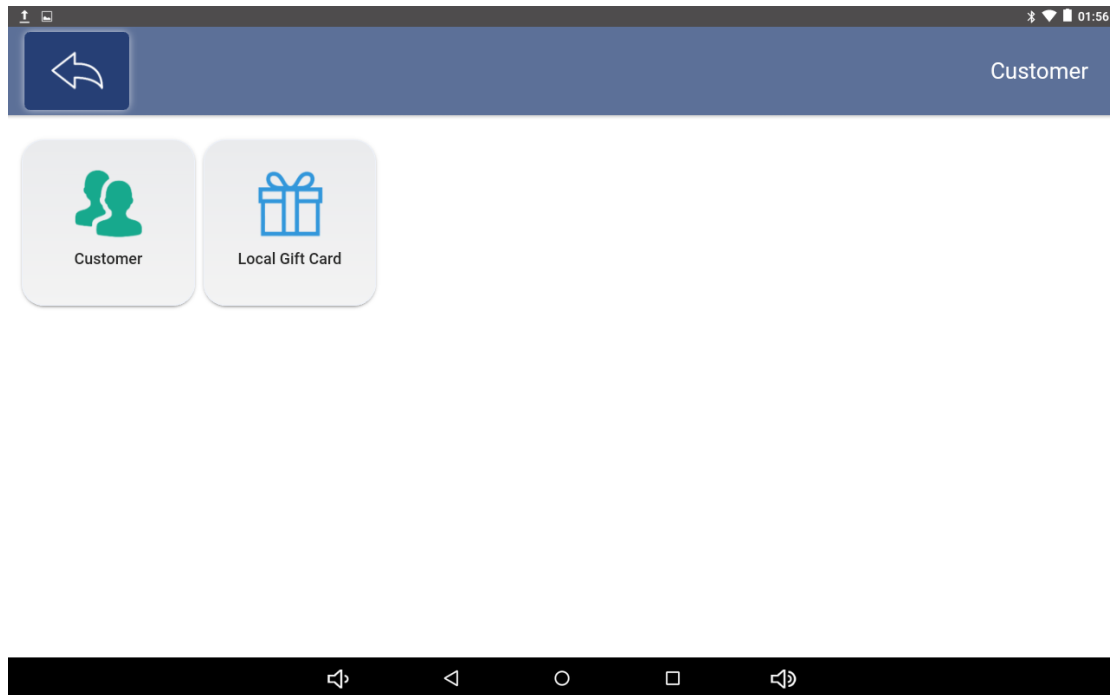
ID	Name	Clock In	Clock Out	Wages	Tip	All Wage	Flag
4	Miss. sale	10/17/2018, 3:51:26 AM	10/18/2018, 3:52:49 AM				Not Pay
3	Miss. sale	10/17/2018, 2:28:46 AM	10/17/2018, 2:50:13 AM				Not Pay
2	Miss. sale	10/16/2018, 10:22:56 PM	10/17/2018, 1:54:12 AM				Not Pay
1	administrator	10/16/2018, 4:49:53 AM	10/16/2018, 5:02:48 AM				Not Pay

Click on a record to view the Break time.



6 Customer

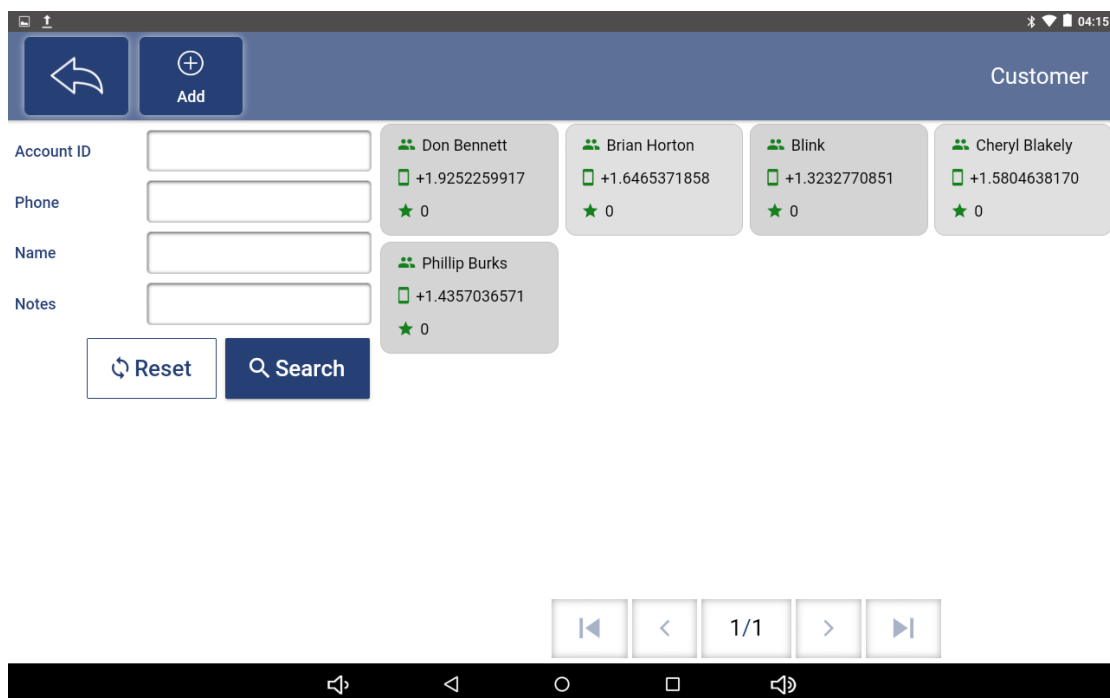
Manage the Customers of the store, and recharge Local Gift Cards.



6.1 Customer

This page shows all the Customers in the store.

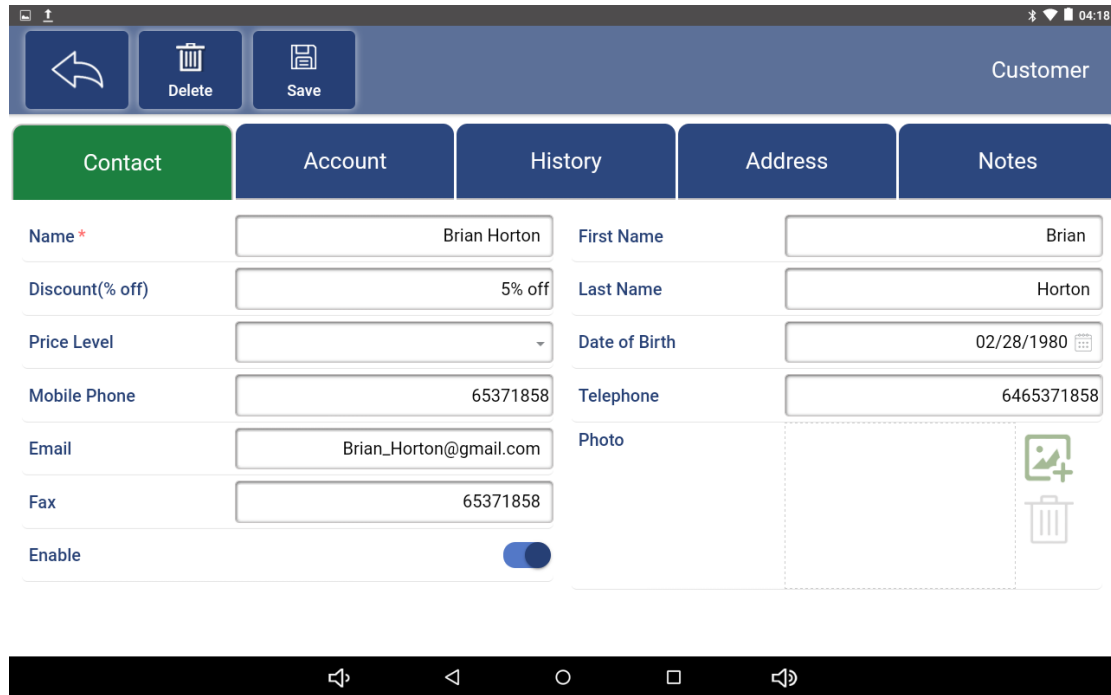
Search for Customers by entering the appropriate information on the left side of the screen. Click the Reset button to reset the search information.



Select “Add” button- To add a new item

Select on an existing Customer on the right side, and you will be taken to the Customer details page.

Contact: This tab displays general information about the Customer, such as Name, Discount, Email, Birthday, etc.



Customer

Back Delete Save

Contact Account History Address Notes

Name * Brian Horton First Name Brian

Discount(% off) 5% off Last Name Horton

Price Level Date of Birth 02/28/1980

Mobile Phone 65371858 Telephone 6465371858

Email Brian_Horton@gmail.com Photo

Fax 65371858

Enable

Save: This button is used to save changes after editing, adding, and deleting Customers.

Delete: Delete this Customer.

Account: This tab shows the account credit information for the Customer and the current remaining loyalty.

Maximum Credit- Assigned in store value or House Account Credit value which can be determined by permissioned user. For purchases to be paid back later.

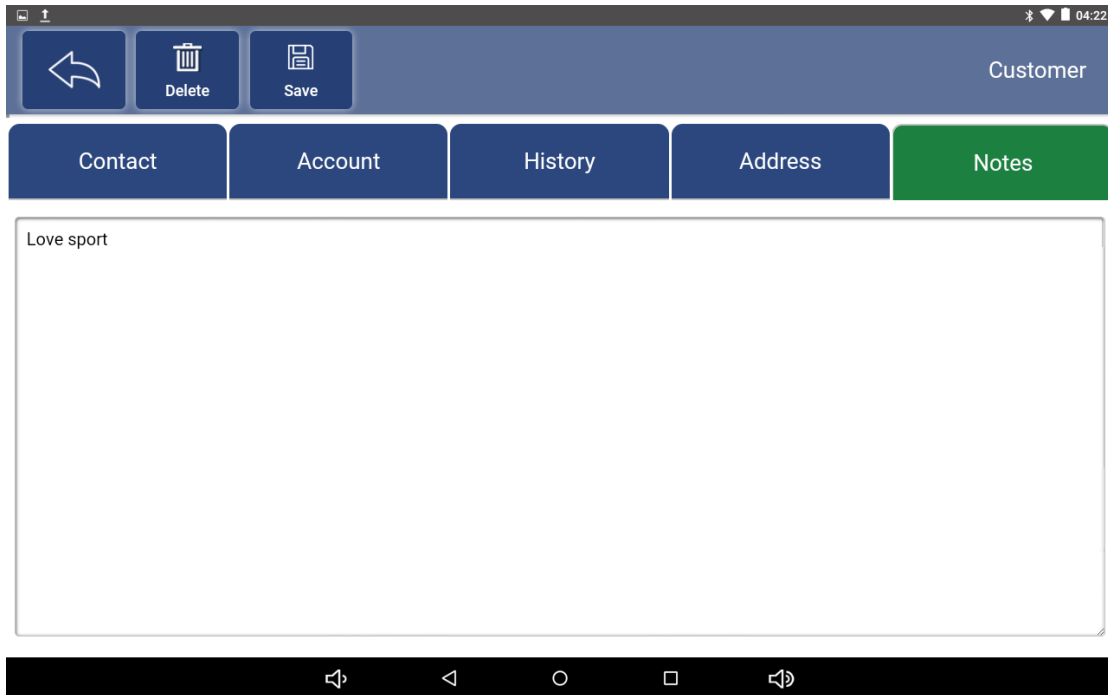
Loyalty- Amount of Loyalty points that a customer has on their account accrued through purchases.

History: This page shows the purchase record for this Customer.

Date	Invoice#/Ticket#	Trans. Type	Total
2019/09/20, 14:29:11 PM	100135/3	Sale	\$16.03
2019/09/20, 8:32:43 AM	100134/2	Sale	\$129.13
2019/09/16, 8:45:40 AM	100124/10	Sale	\$214.87
2019/09/16, 8:39:40 AM	100123/9	Sale	\$276.58
2019/09/16, 8:33:02 AM	100122/8	Sale	\$305.59
2019/09/16, 8:29:01 AM	100121/7	Sale	\$179.37
2019/09/16, 8:24:40 AM	100120/6	Sale	\$58.57
2019/09/16, 8:18:28 AM	100119/5	Sale	\$165.77

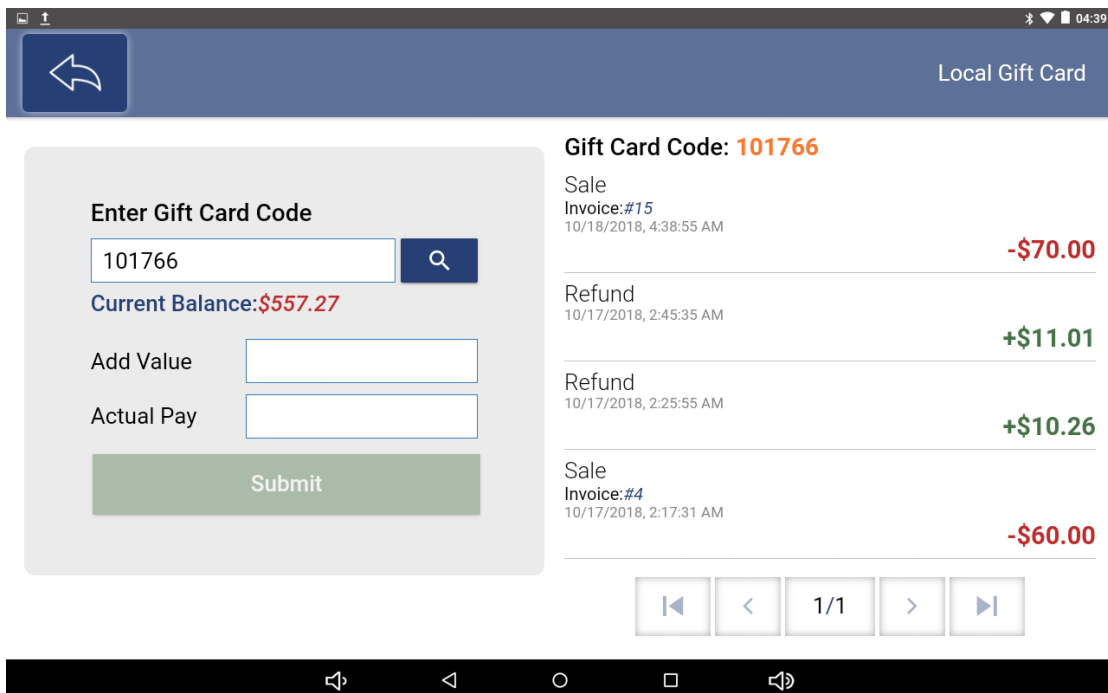
Select on any transaction within History to bring up the transaction and “Reprint Transaction”

information text field about that customer. This information can be edited within any of the Customer Screens. See [Customer](#)



6.2 Local Gift Card

On this page, preview the previous transaction history of the Local Gift Card or recharge the Local Gift Card in the store.

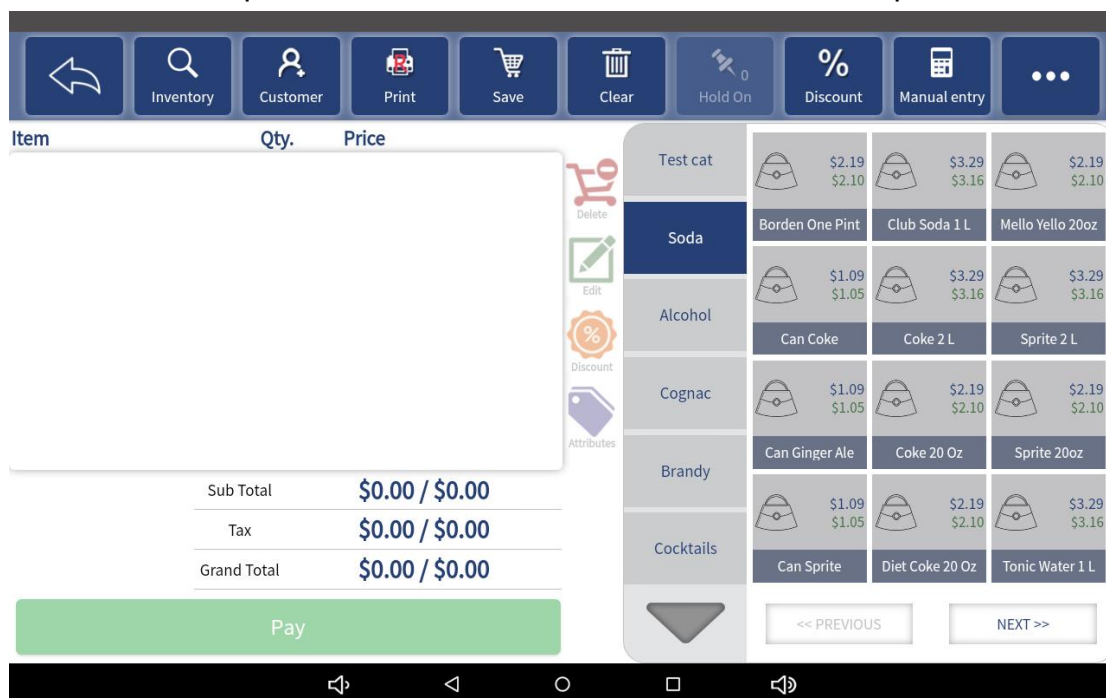


Gift Card

1. Enter the correct Gift Card Code
 2. Select the search button
- Result:
- Current Balance: Displays the Cash Value of the Gift Card
- Display the Gift Cards purchase history on the right.
- a. Add Value- Recharge with additional value this value will be added to the existing value of the Gift Card
 - b. Actual Pay- The amount the customer is paying for the Local Gift card
3. Submit to make the Payment
 4. After the Payment is completed, the recharge will be successful
 5. Receipt with balance will print.

7.Sales

In this module, operations are related to the sale and return of products.



Screenshot in "Traditional Mode": [See Configuration for details](#)

Shopping Cart: Products selected appear here for purchase

Traditional Mode- The column of buttons in the center of the page is for editing a single product in the shopping cart.

Categories are to the right

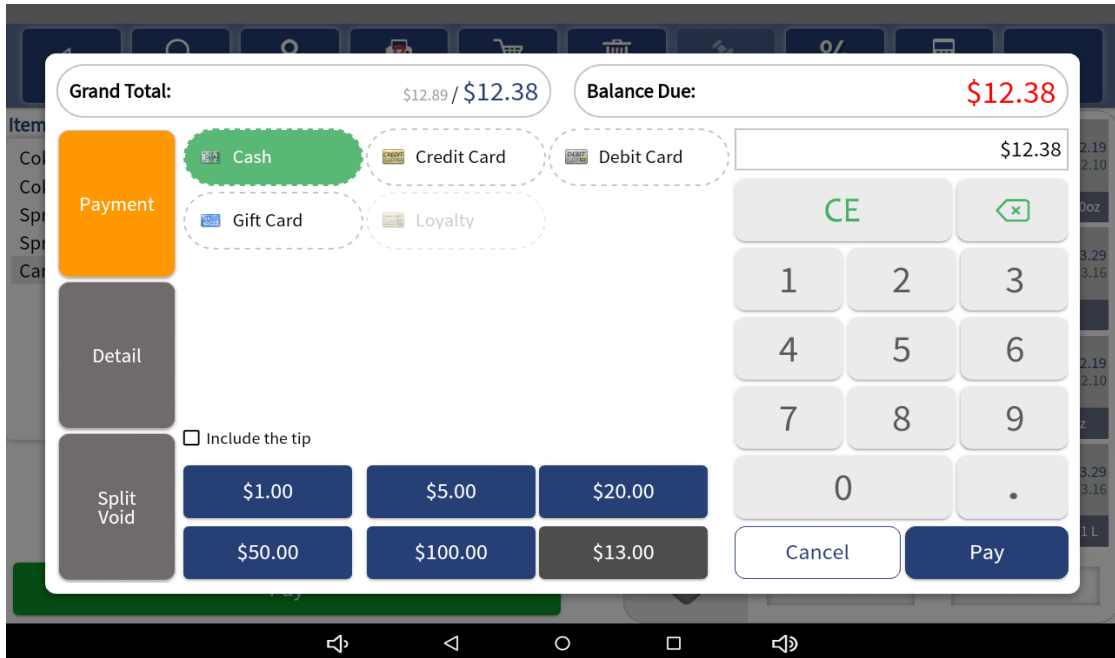
Products are displayed in a 3x4 for a total of 12 per page

Additional products within a selected category can be found by selecting "NEXT" which will go to the next page. To go back to previous page select "Previous"

Once products selected, they are put in shopping cart

Completing a Sale:

1. Select product to be purchased from Menu
2. Select “Pay” button to bring up payment selection screen where payment type can be selected. See screenshot below for more detail.
 - a. To Split Transaction
 - i. Enter Value to be charged on method of payment
3. Select “Pay”



*When hand keyed manual entry is needed

Select Card type Credit/ Debit/ Gift

Manually keyed into the customer facing unit.

Customer Selects keyboard located on bottom right side of unit.

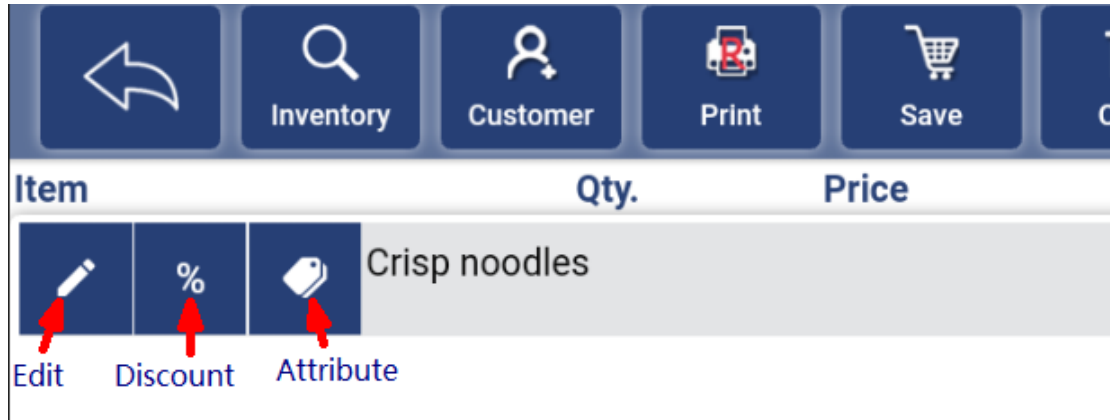
Prompt on Customer Screen

1. Please Enter Card number
2. Please Enter Expiry date on Card
3. Please Enter Your CVV2
4. Please Enter Your Zip

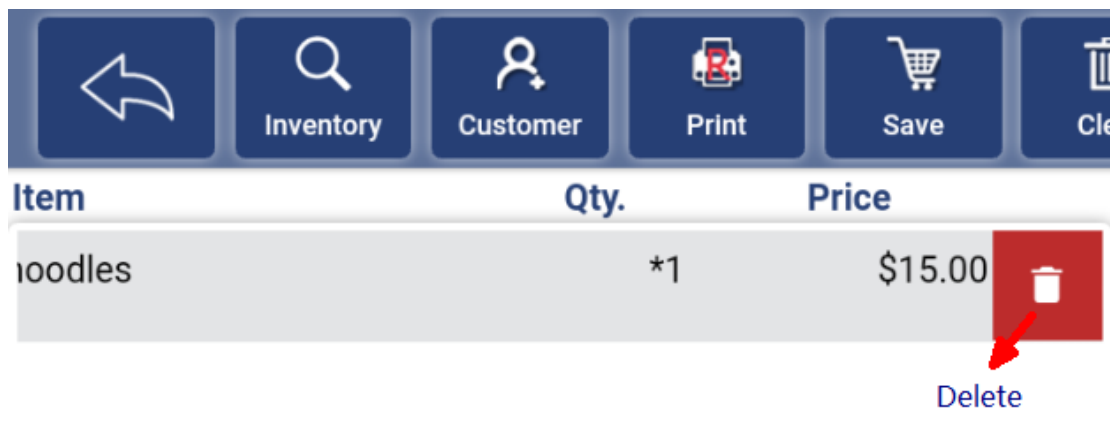
*Screen will timeout if left for a period greater than 10s

7.1 Single line operation

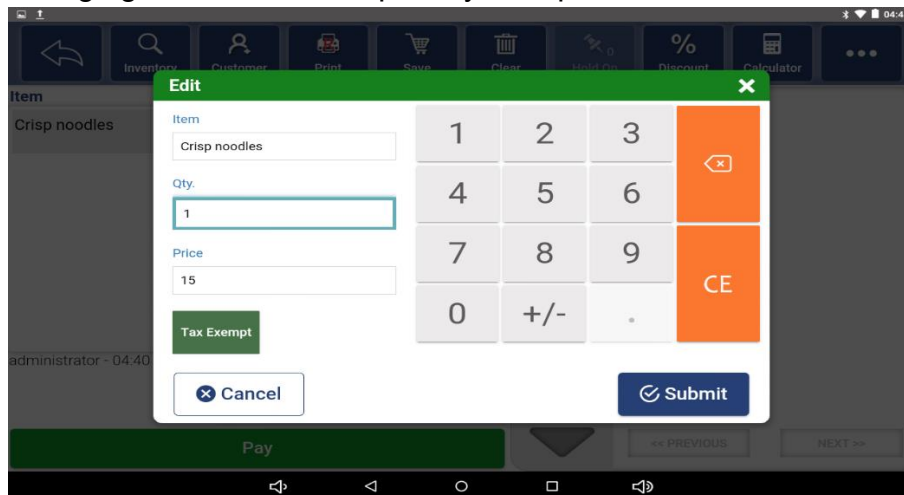
Swipe Right: See the Edit, Discount, and Attribute options.



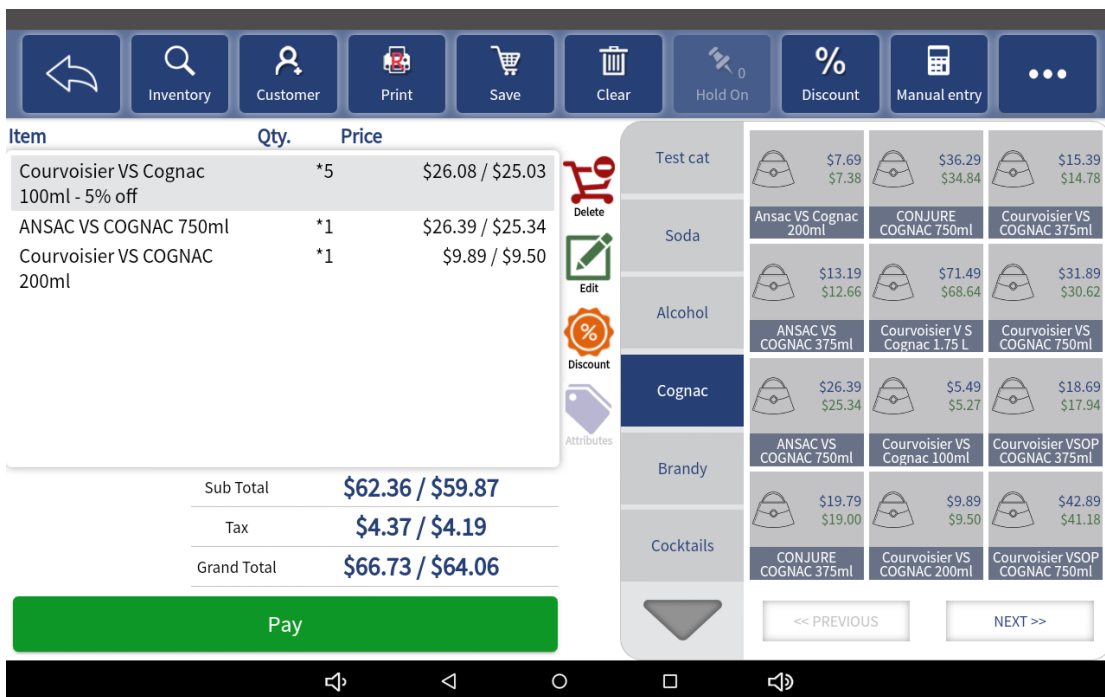
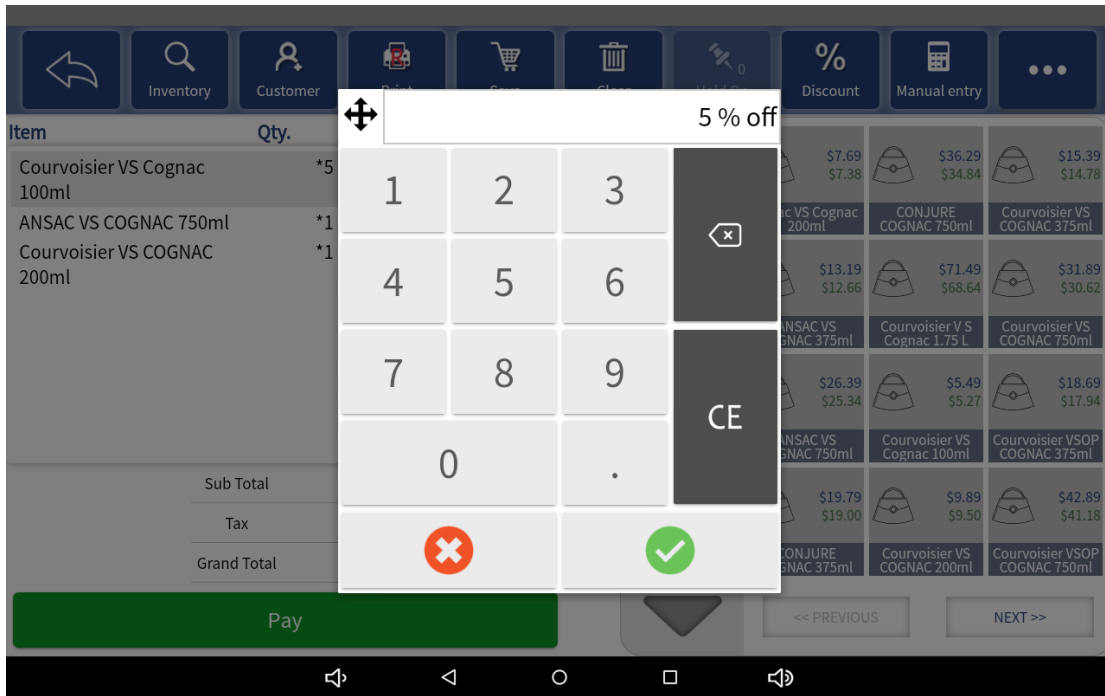
Swipe Left: See the Delete option.



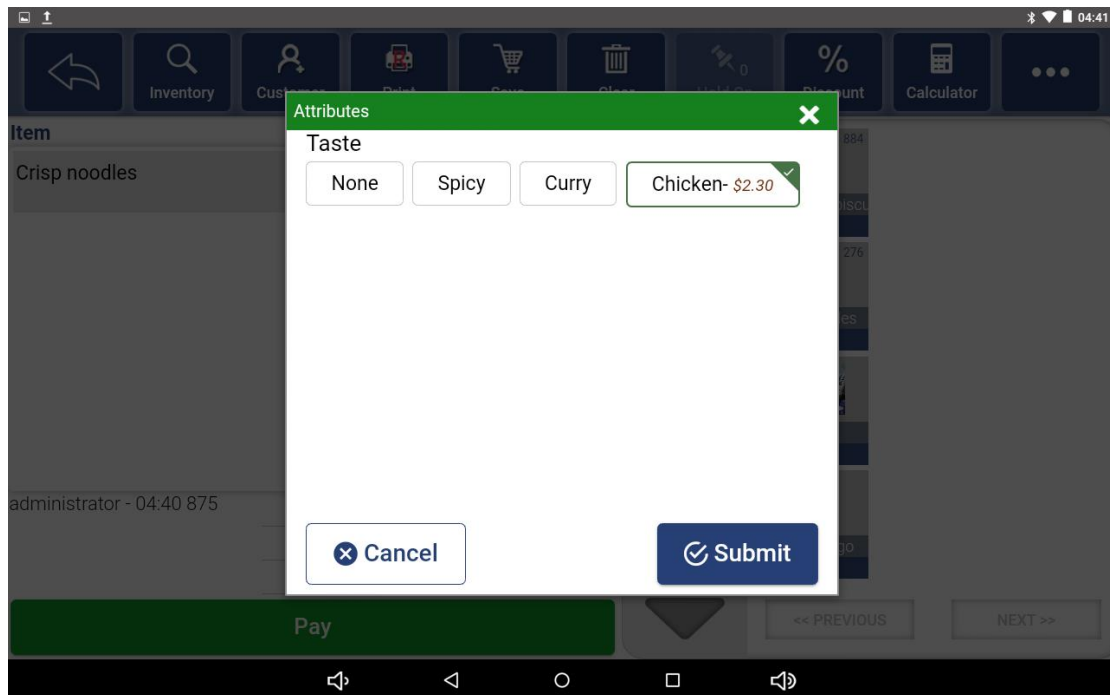
Edit: Click this button to re-edit an item selected in the shopping cart, such as changing the item name, quantity, and price.



Discount: Select this button to add a discount to an item selected in the shopping cart.



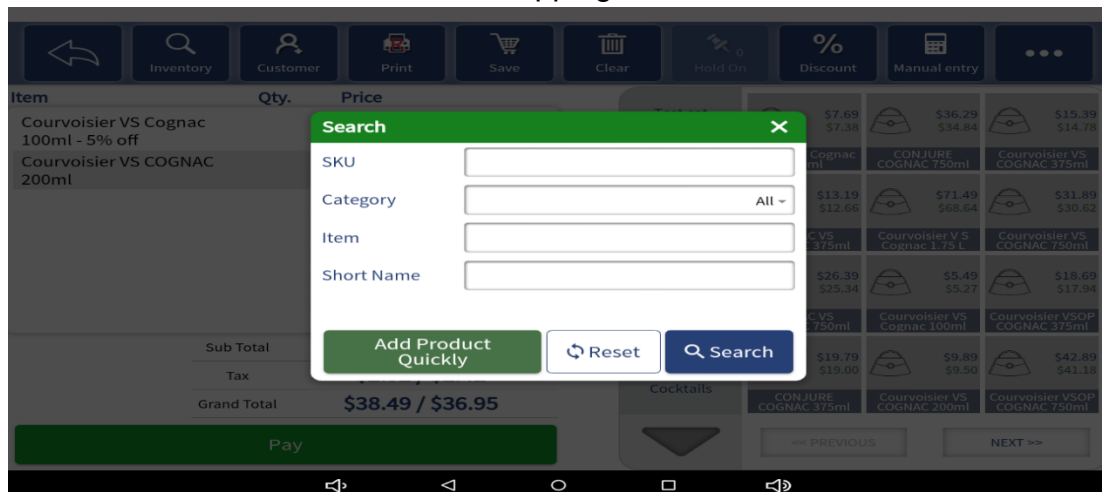
Attributes: Click this button to re-select Attributes to modify attributes which have been set by this product.



Delete: Click this button to delete a selected item in the shopping cart.

7.2 Inventory

Inventory: Select the "Inventory" button to enter the Search page. On this pop-up screen to search. Enter the SKU, Category, Item or Short Name to find the desired item and add it to the shopping cart.

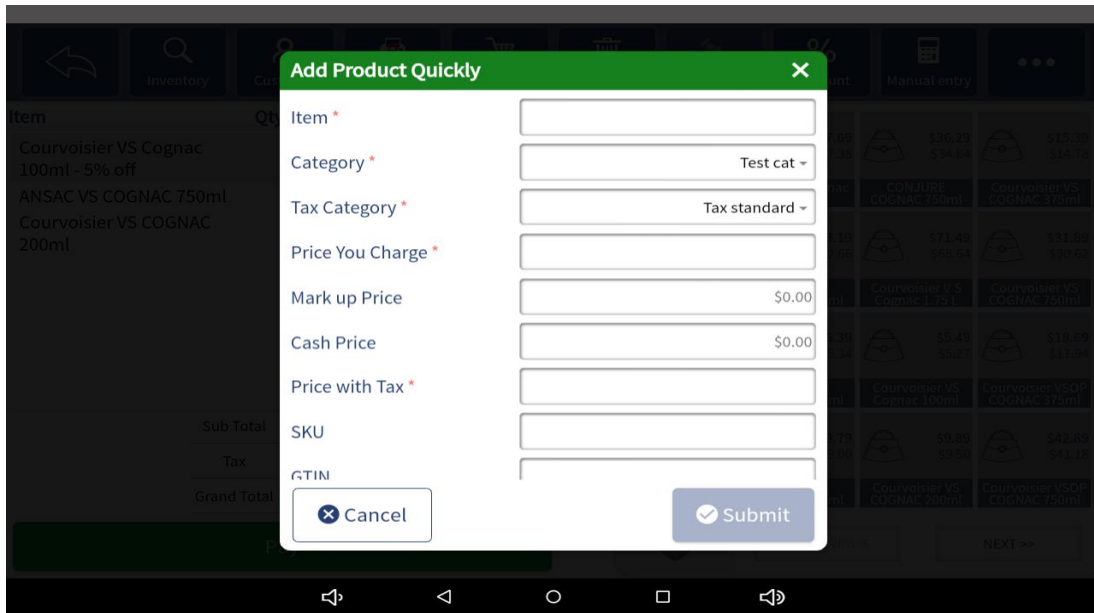


To Quickly add a Product:

Select "Add Product Quickly"

Required fields to be completed are:

1. Item name
2. Select Category from drop down
3. Select Tax Category from Drop Down
4. Enter "Price You Charge"
5. Price with Tax will be calculated based upon Tax Category Selected in Step 3



7.3 Customer

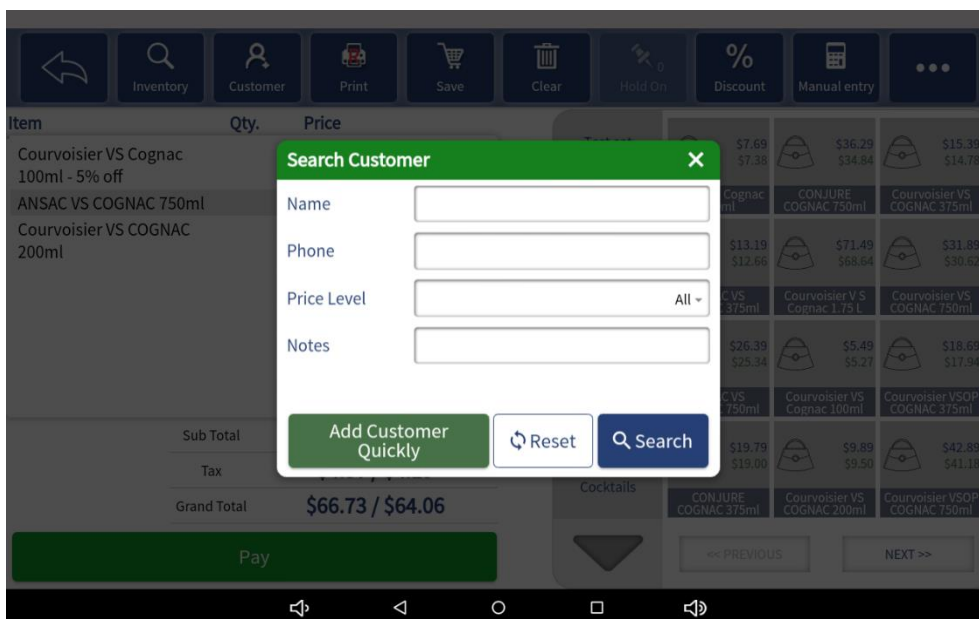
Customer: Select on the "Customer" button to assign customer to order for Loyalty and to keep track of customer history.

The Search Customer pop-up screen will be displayed.

Enter either:

- Name
- Phone
- Price Level
- Notes

Then select search

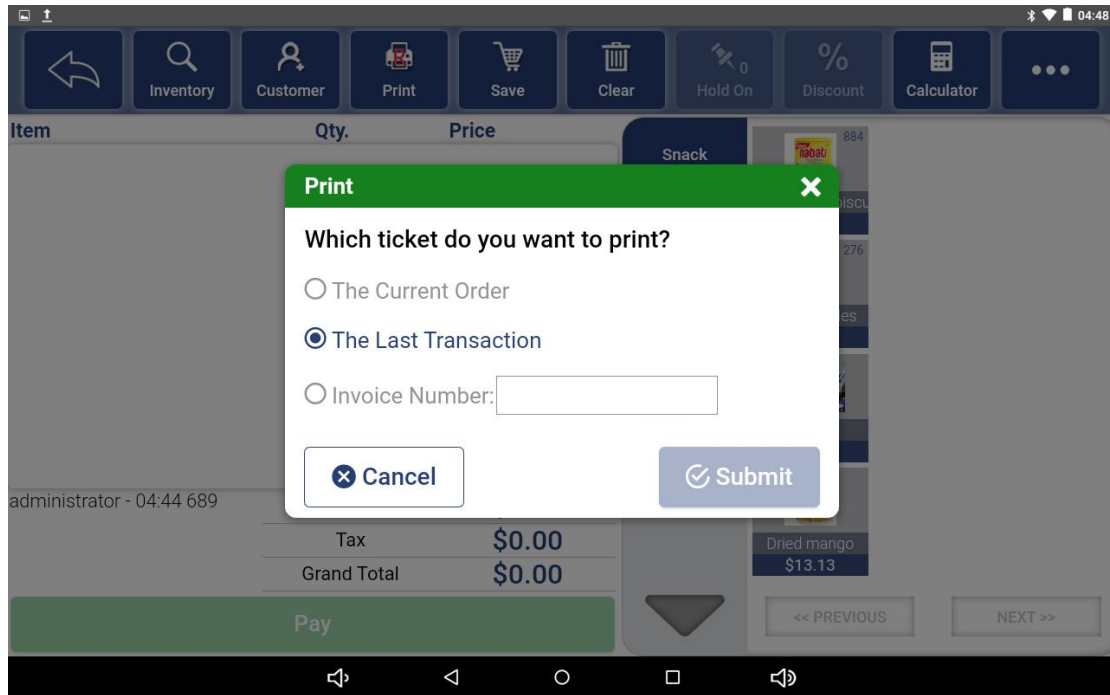


To Add New Customer

Select Add Customer Quickly
See [Customer](#) for additional information

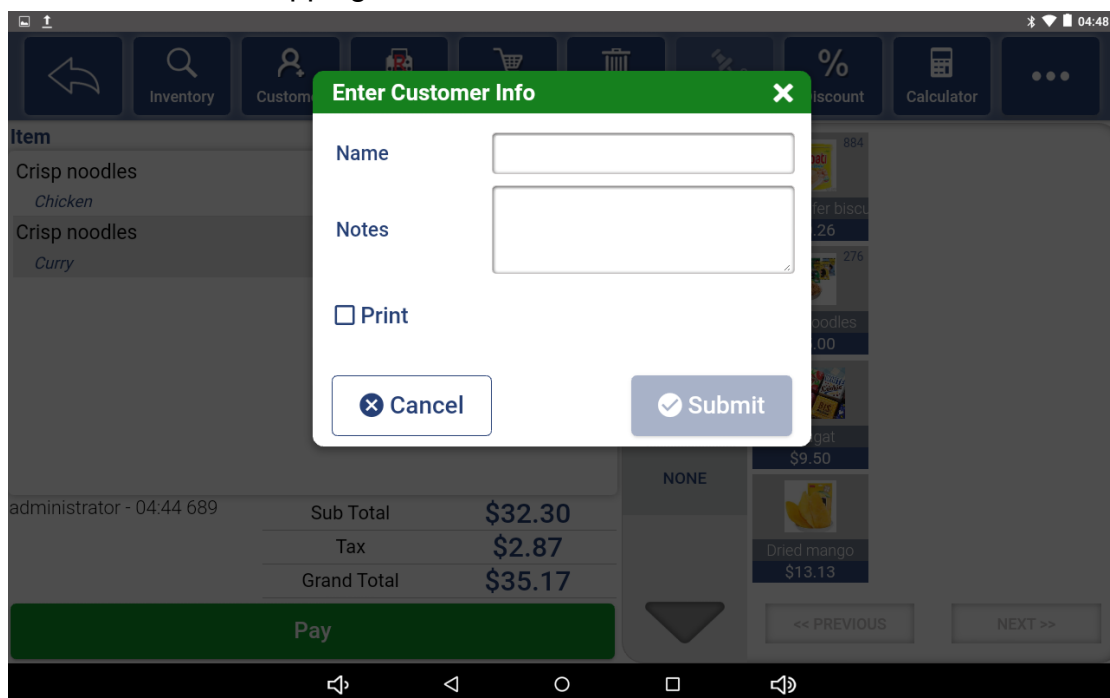
7.4 Print

Print: Print the invoice for “The Current Order”, “The Last Transaction”, or enter an Invoice Number to reprint that invoice.



7.5 Save

Save: Save the shopping cart and move it to Hold On. See Hold On

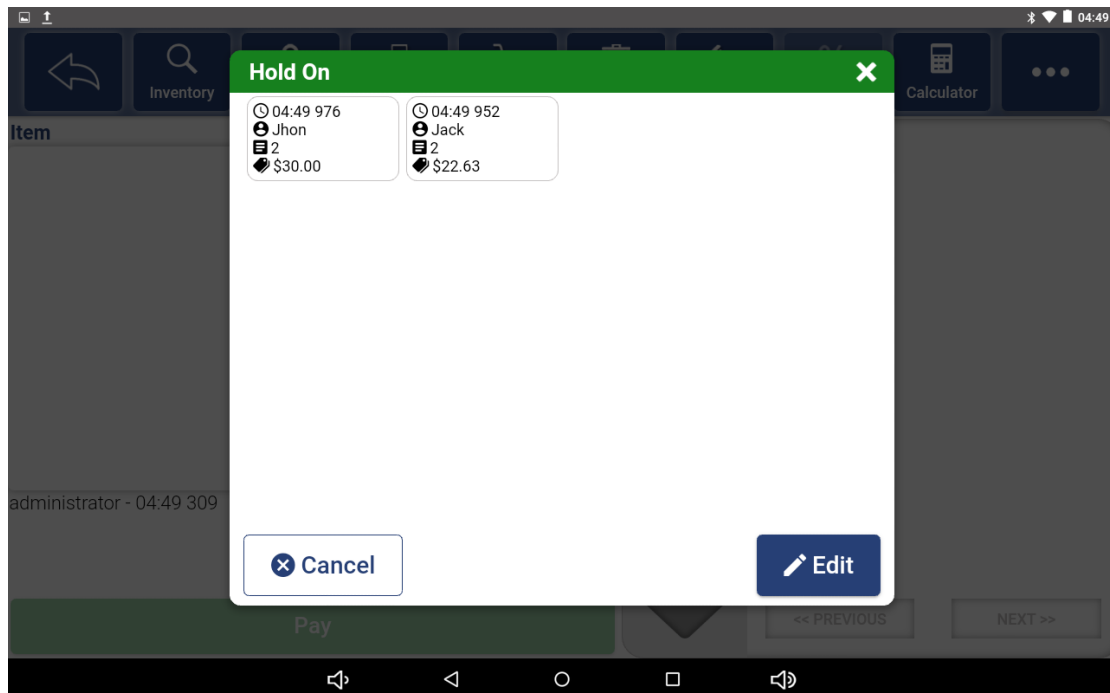


7.6 Clear

Clear: Clear the items in your current shopping cart by clicking the "Clear" button.

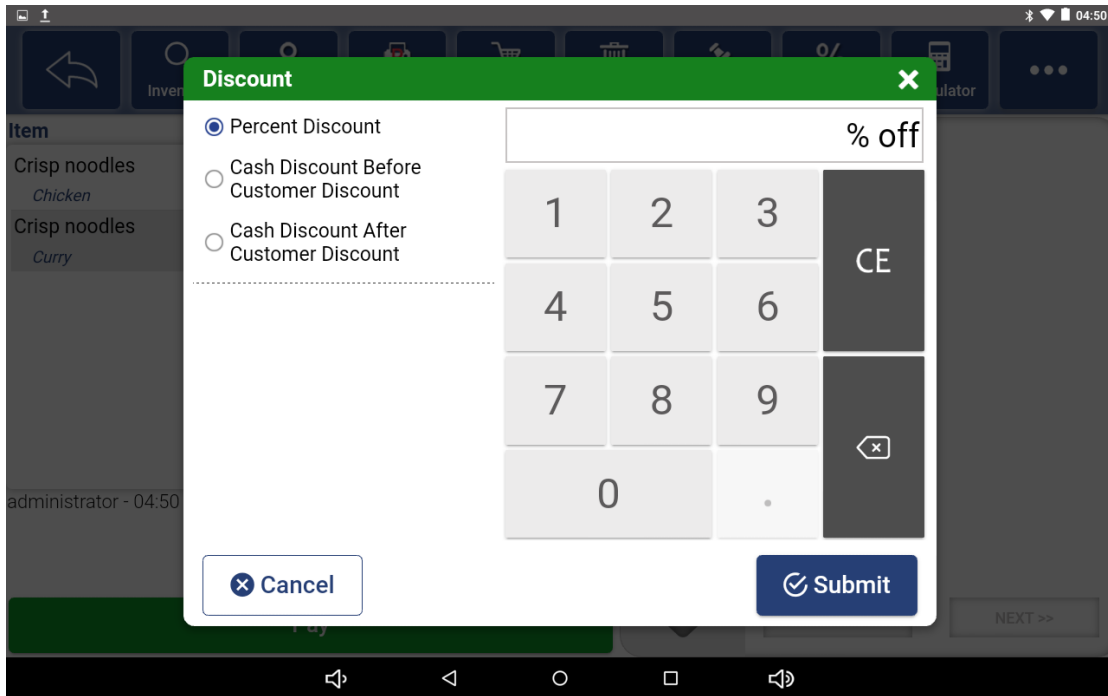
7.7 Hold On

Hold On: View the previously saved shopping cart records by clicking the "Hold On" button. Click on a record in the list to continue with this order. Select the record you want to delete by clicking the Edit button in the lower left corner.



7.8 Discount

Discount: Choose the appropriate discount for the current order.

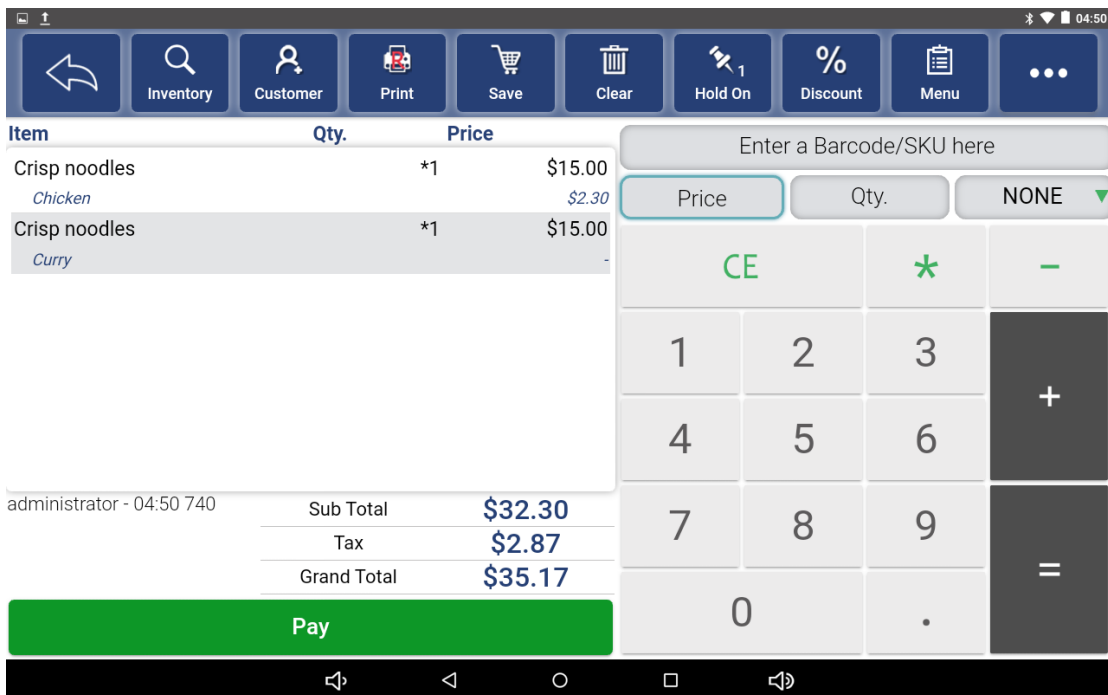


7.9 Calculator

Calculator: Click the "Calculator" button to enter the barcode, add items that are not displayed in the menu to the shopping cart.

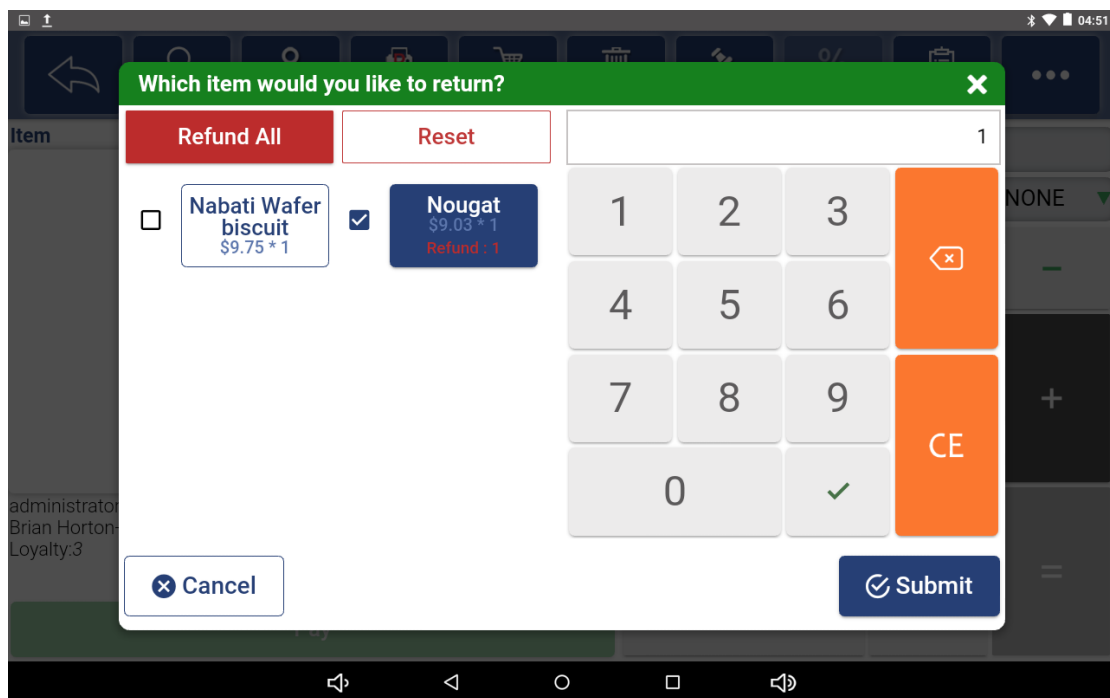
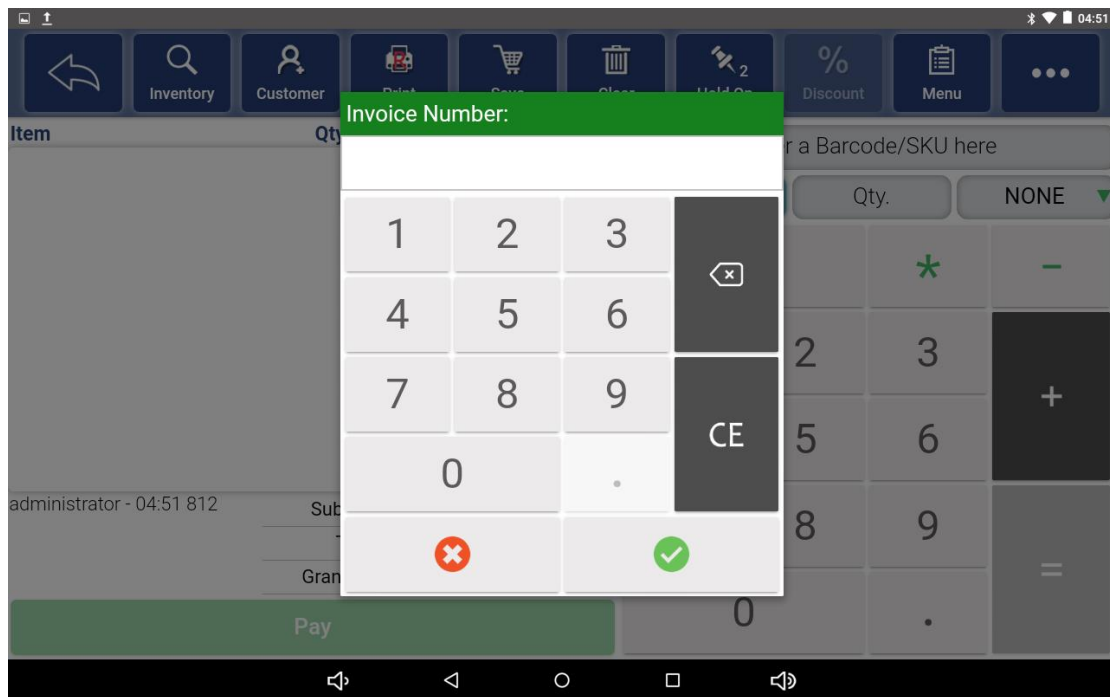
Or adjust the quantity of the items in the shopping cart by clicking the plus and minus buttons.

enter the payment page by clicking the equal sign button.

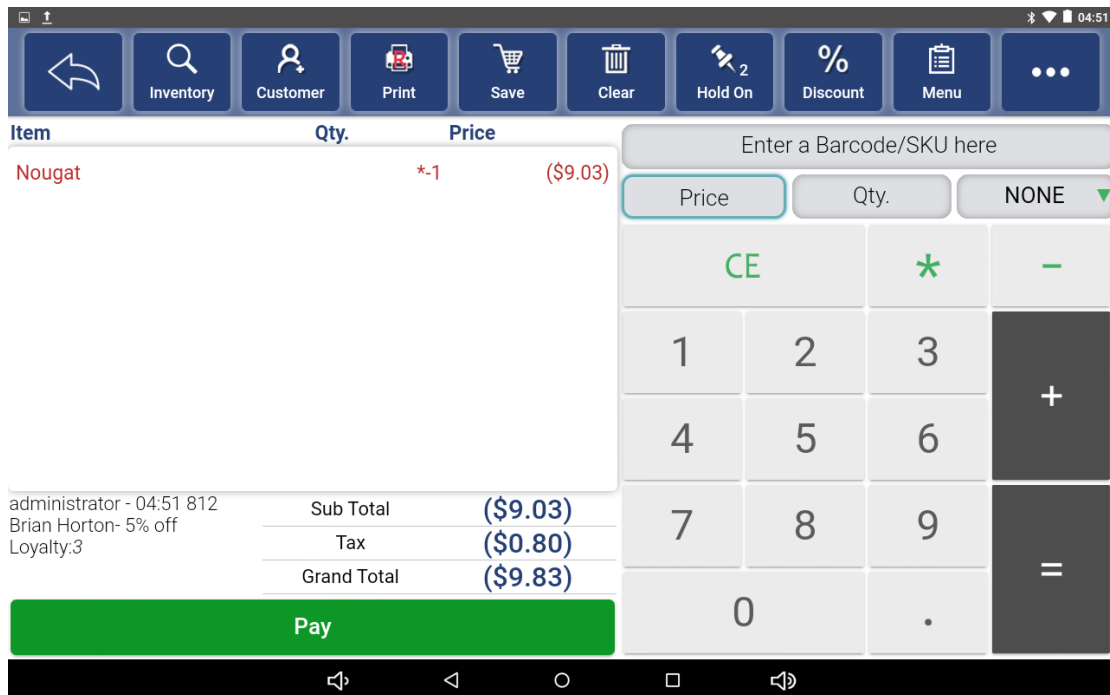


7.10 Refund

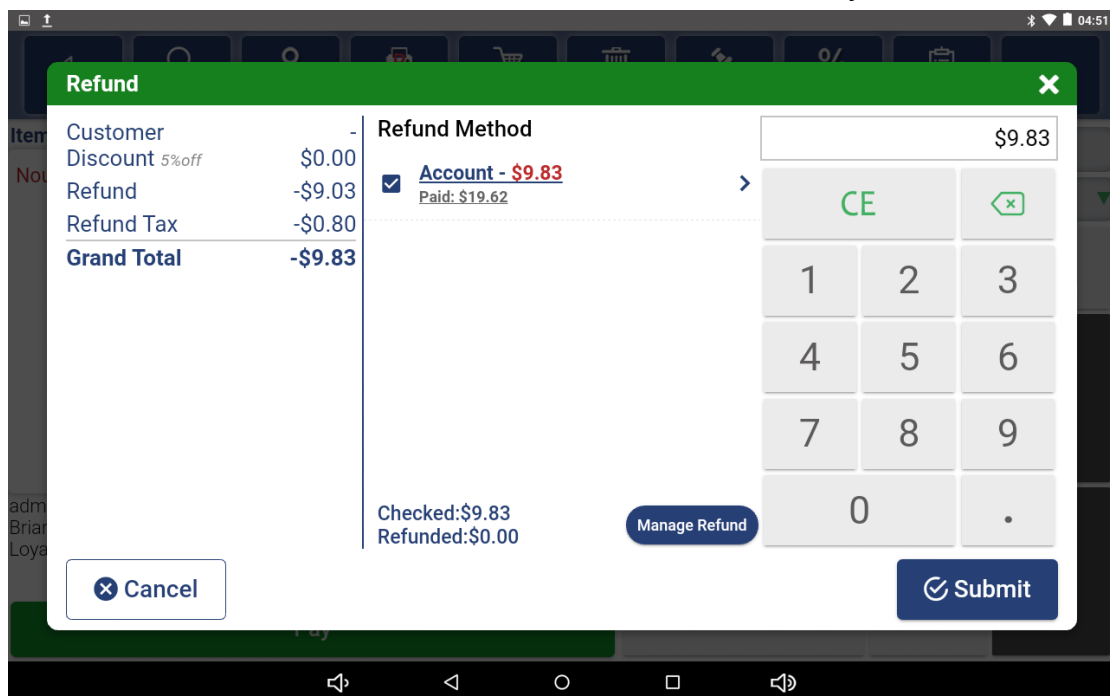
Refund: Manually enter the invoice number and click Submit or use the scanner to scan the barcode of the ticket to enter the product selection interface.



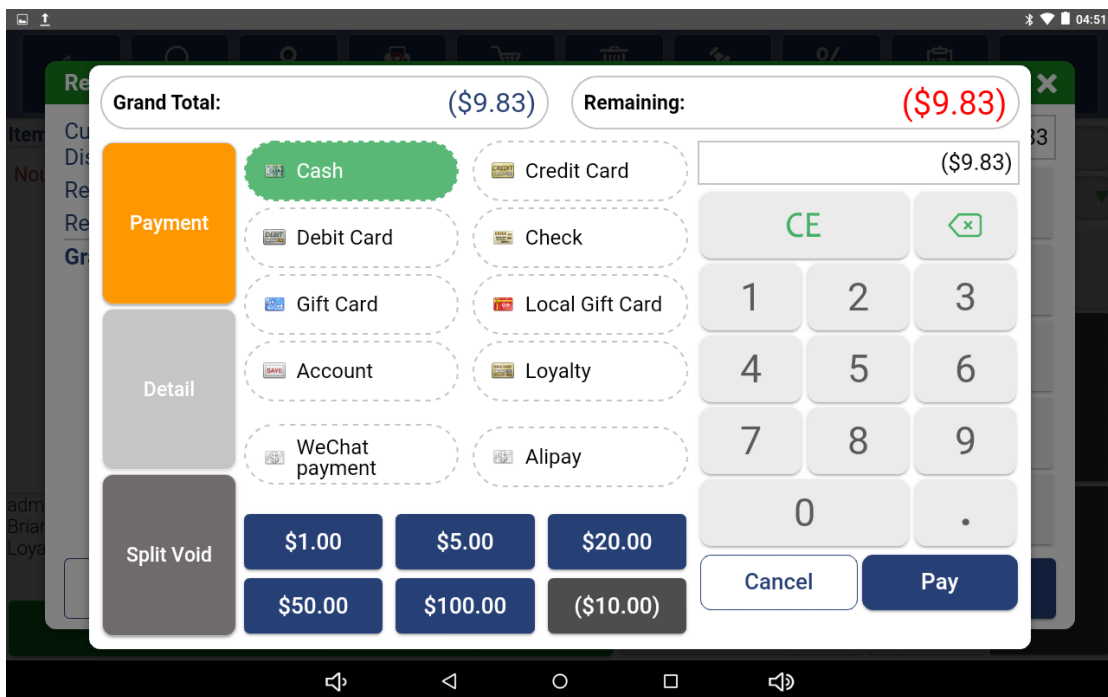
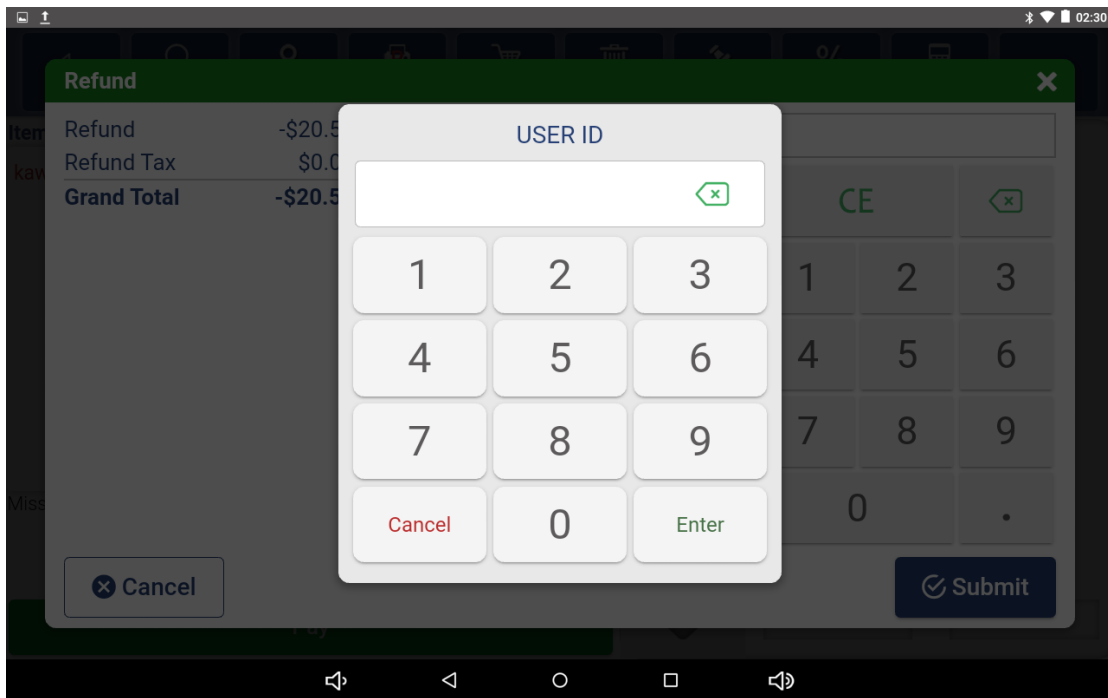
After selecting the item to be refunded, click Submit to enter the shopping cart interface, where choose to continue shopping or click Pay to refund directly.



After clicking the Pay button, you will enter the payment page. After checking the amount is correct, click the Submit button to successfully refund.



Notes: Click the Manage Refund button on the payment interface to freely choose how to return the refund amount if you have permission.

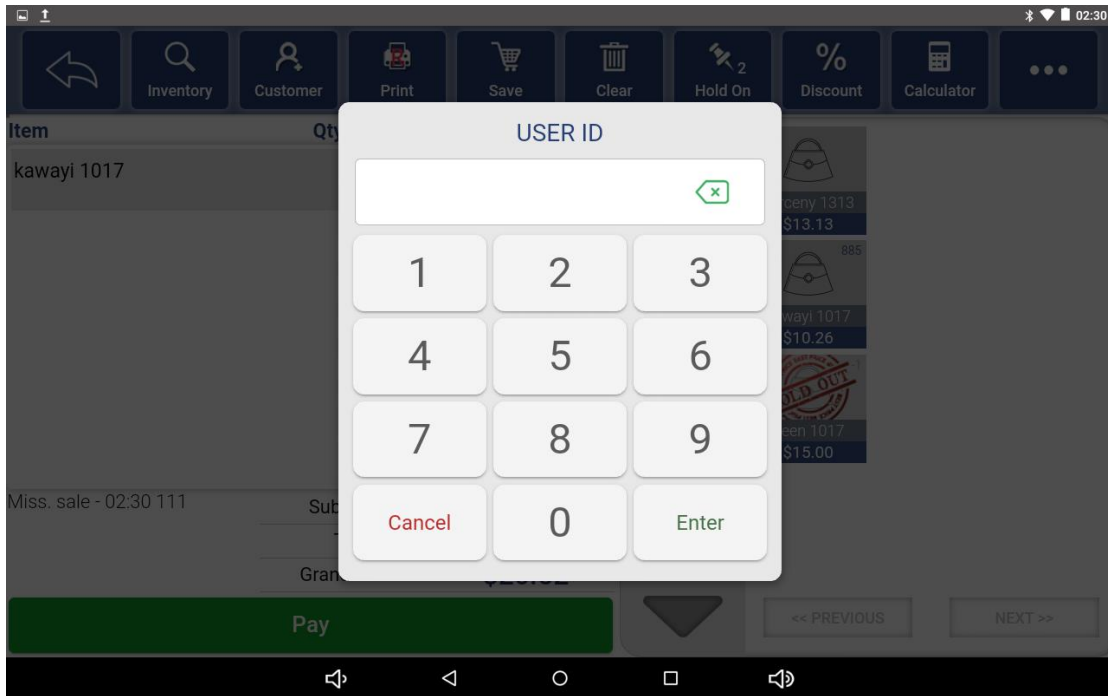


7.11 Cash Drawer

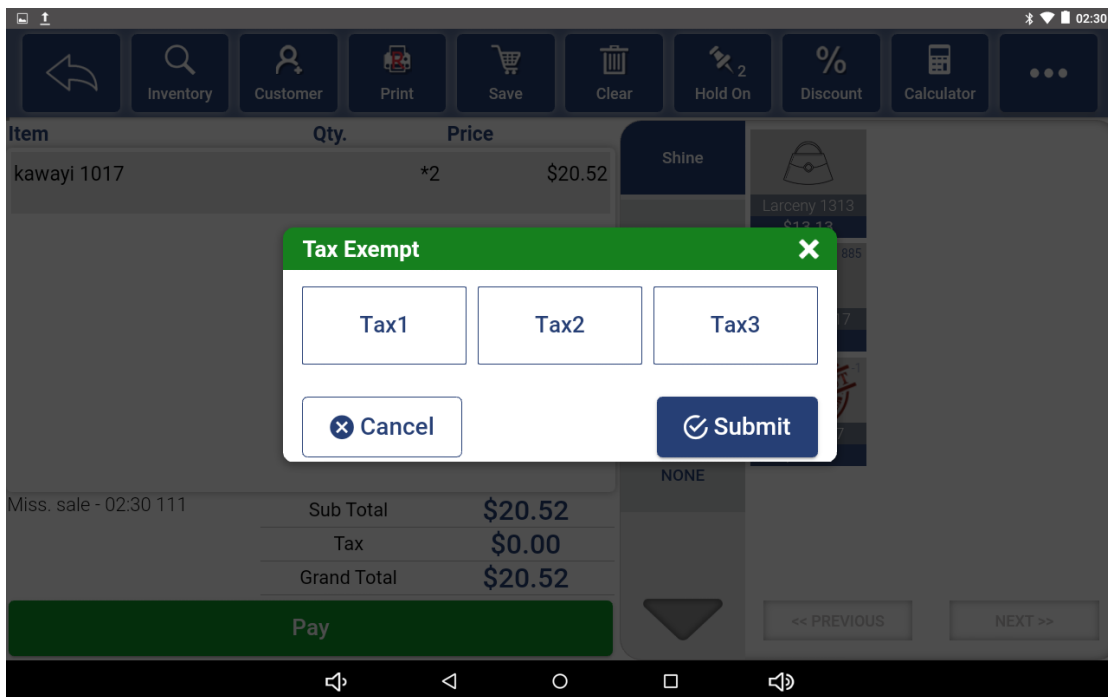
Cash Drawer: Click on the Cashdrawer button to request to open the cash box.

7.12 Tax Exempt

Tax Exempt: You need to enter the User ID and Password first to make sure that the you have permission before continuing.

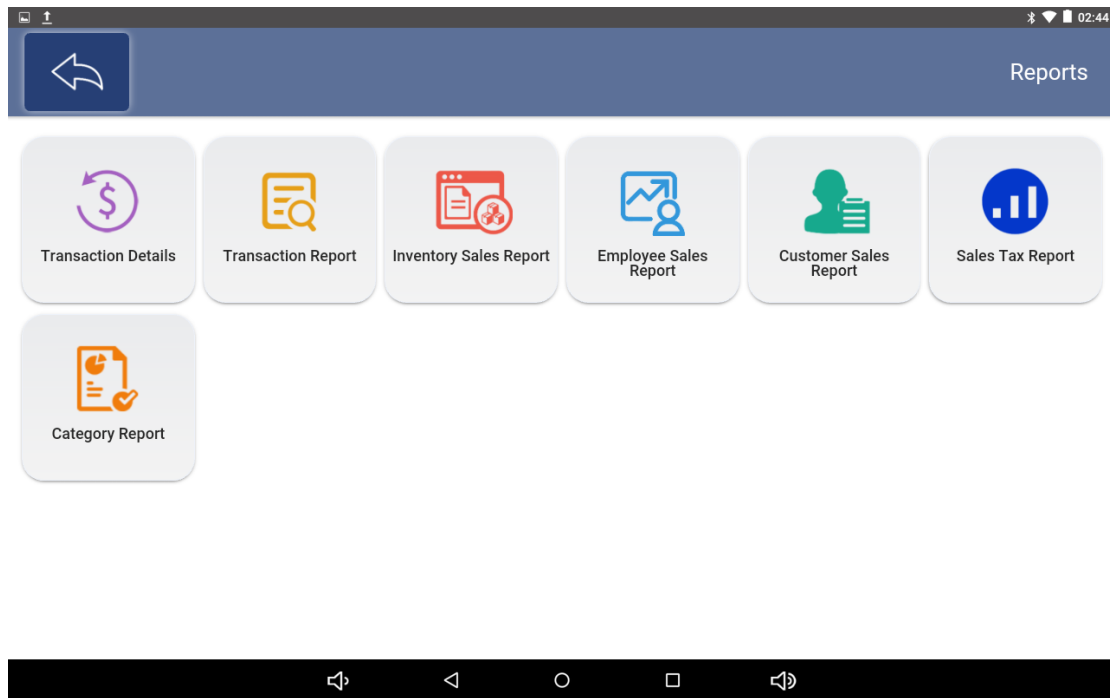


Then choose which tax is exempt to current order.



8 Reports

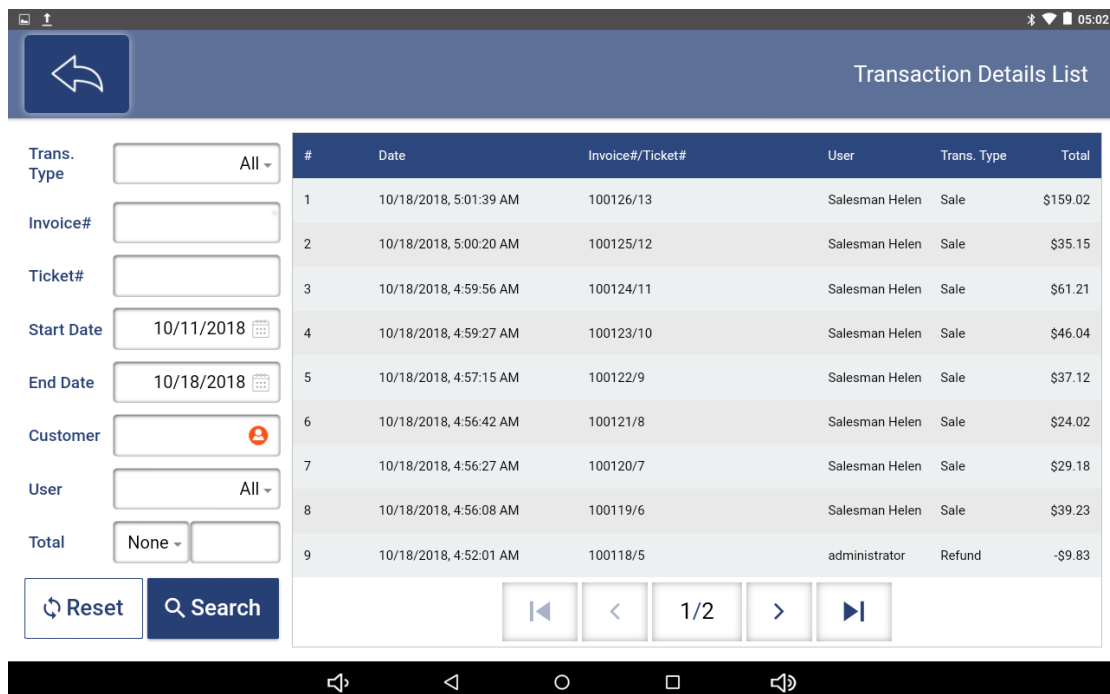
In this module, view all the reports of the store, including transaction details report, inventory change report, employee sales report, customer purchase report, sales tax report.



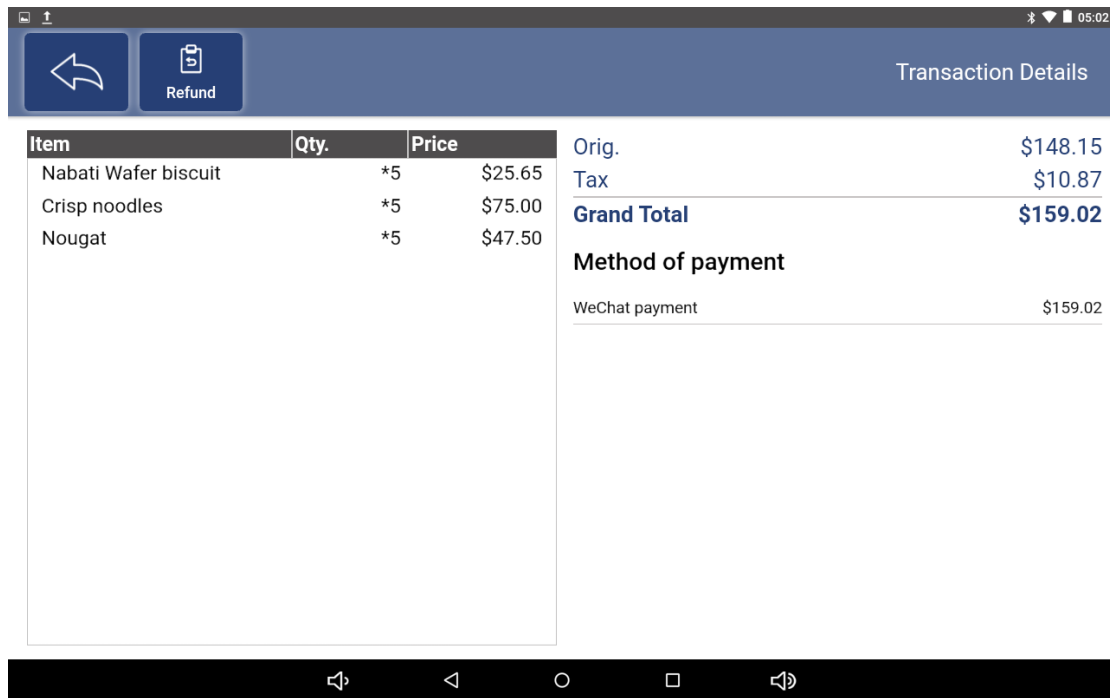
8.1 Transaction Details

Transaction Details: This page displays the Transaction details record of the store.

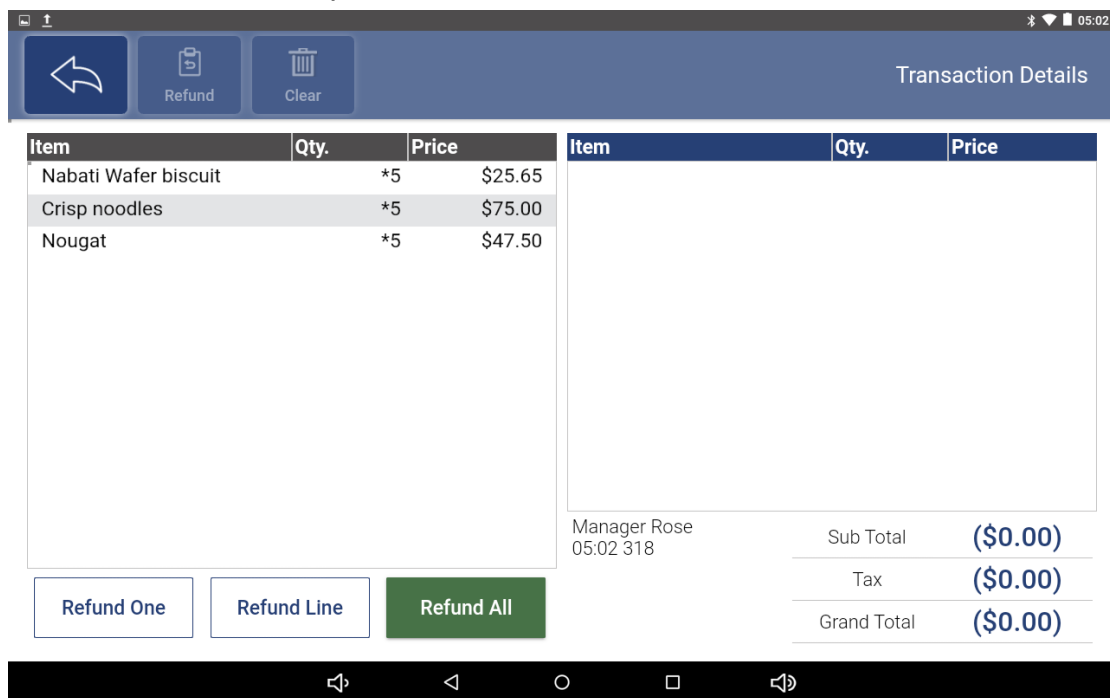
enter the filter information on the left side of the page to view the desired transaction history.



Click on a record in the list on the left to go to its details page, where click on the Refund button above to refund the items in the order.



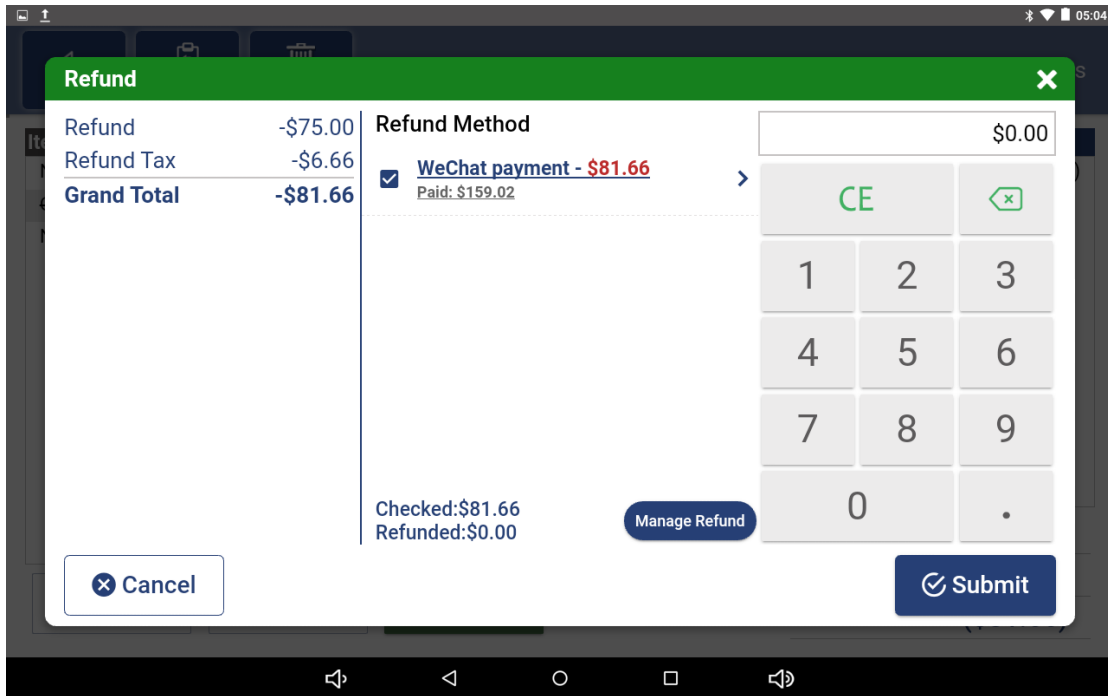
Select the item that requires a refund.



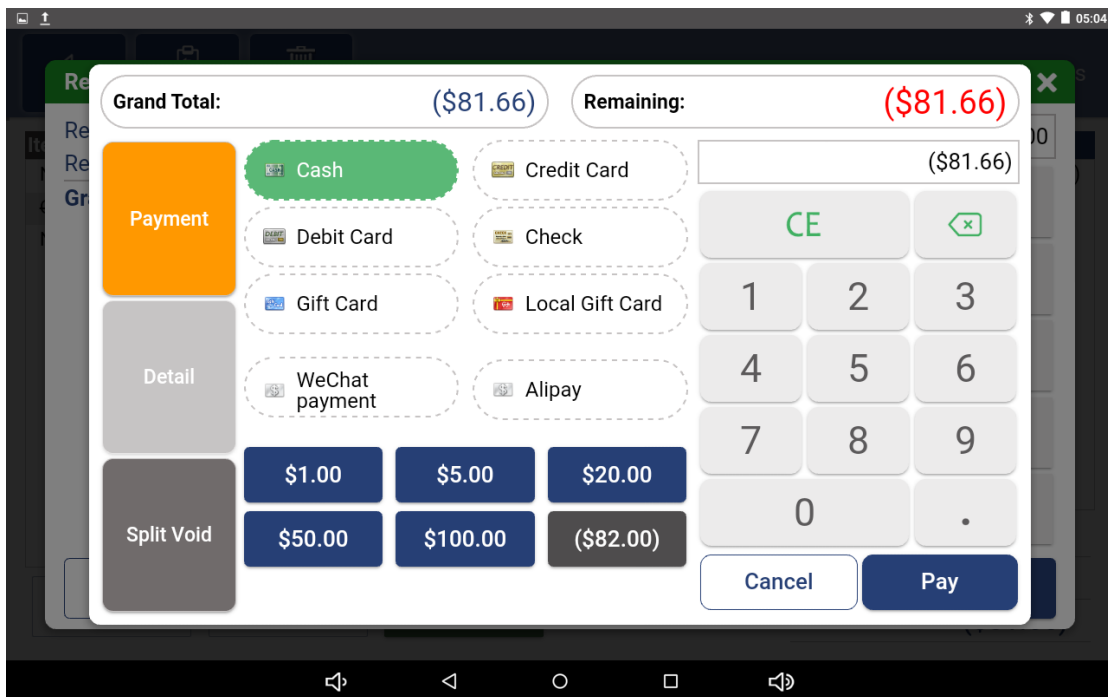
Notes:

- Refund One: Select one of the items in a row for a refund.
- Refund Line: Select all items in a row for a refund.
- Refund All: Select all items in the entire order for a refund.

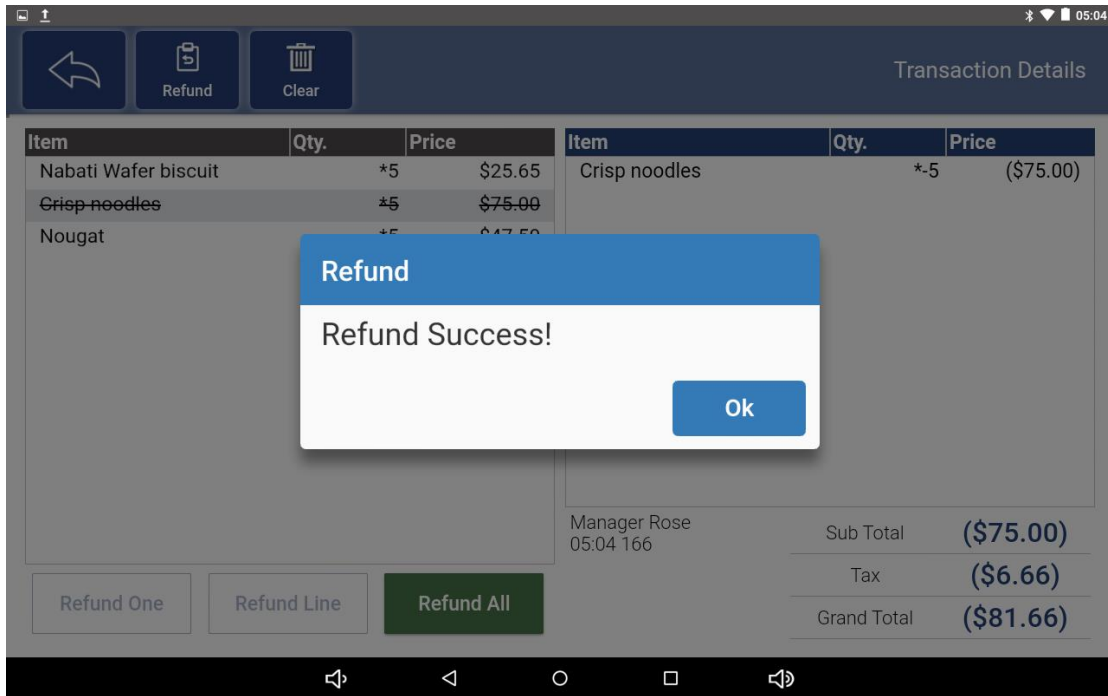
Go to the payment interface.



If you have Manage Refund privileges, you are free to choose a refund method.



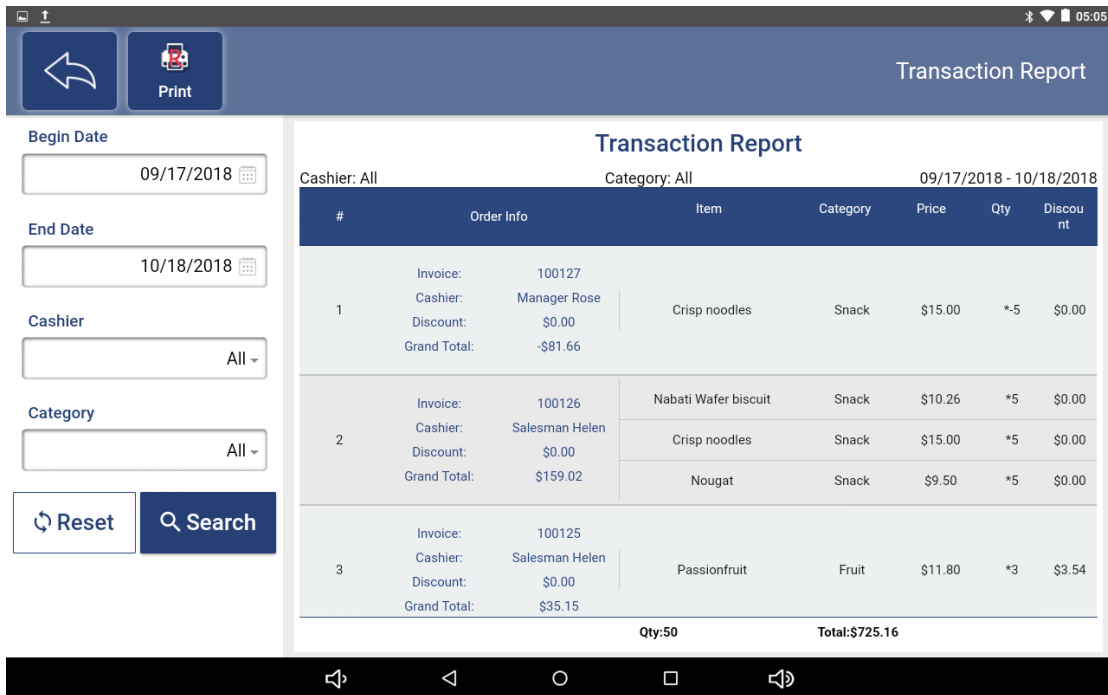
Refund successful interface.



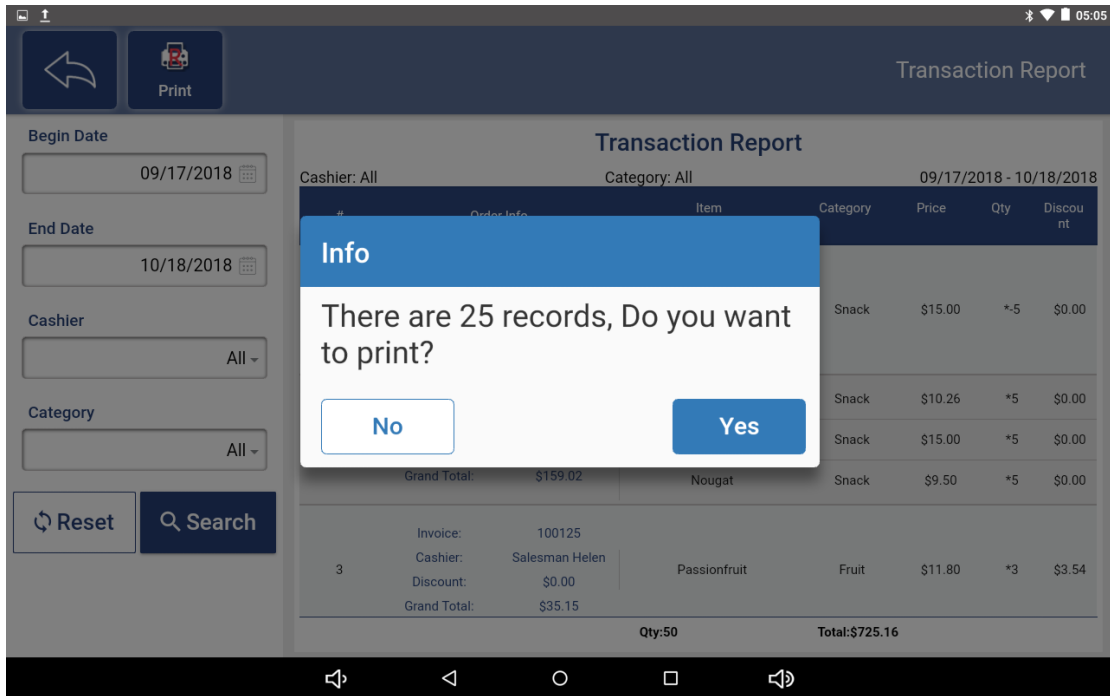
8.2 Transaction Report

Transaction Report: This page shows all the transaction records of the store, and visually see the Order Info, Item, Qty, Discount and other information of the order.

Filter the records in the list by selecting the appropriate criteria on the left side of the list.



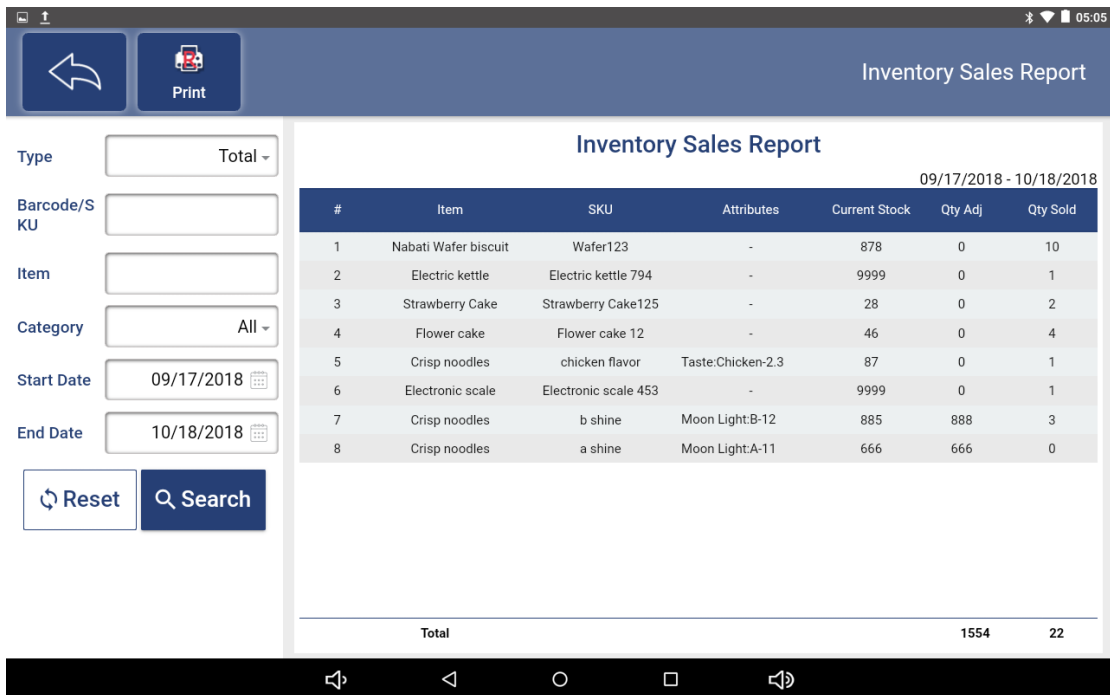
Print out these Transaction records by clicking the Print button above.



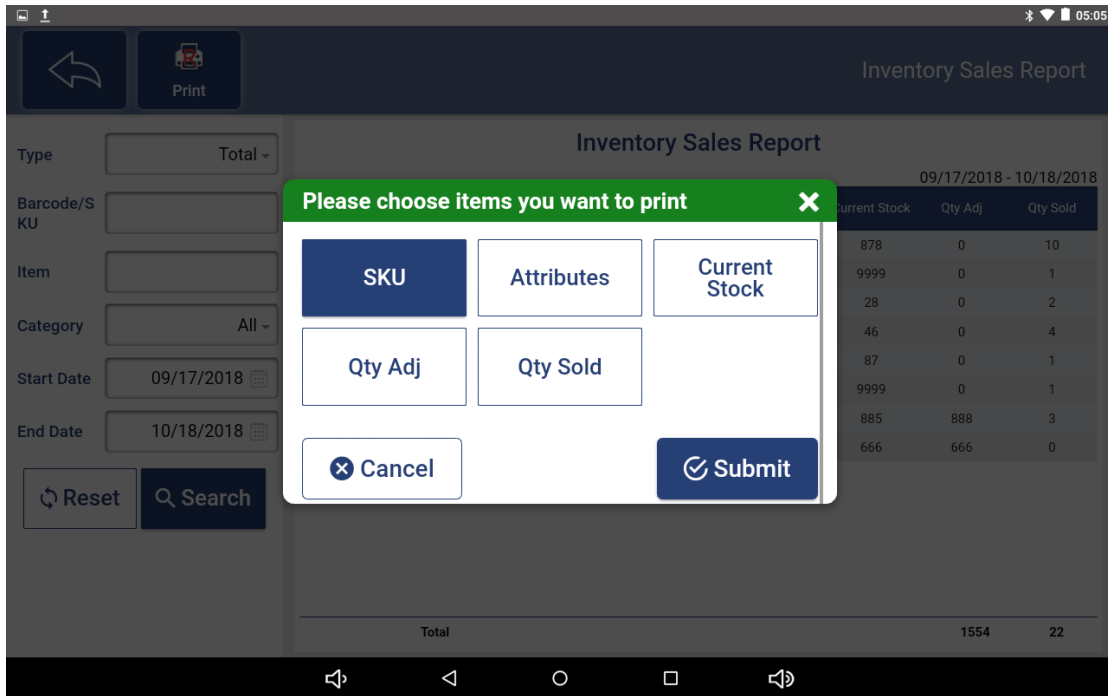
8.3 Inventory Sales Report

Inventory Sales Report: This page shows the inventory change records for items in the store.

Enter the filter information on the left side of the page to view the desired transaction history.



Print out these records by clicking the "Print" button above.



Notes: When printing, you need to choose which information to print, and choose up to three.

8.4 Employee Sales Report

Employee Sales Report: This page shows the employee sales record of the store.

Enter the filter information on the left side of the page to view the desired record. print out these records by clicking the "Print" button above.



8.5 Customer Sales Report

Customer Sales Report: This page shows the customer purchase record of the store.

Enter the filter information on the left side of the page to view the desired record.

#	Customer	Sale	Sale QTY.	Refund	Discount	Promotion
1	Don Bennett	\$37.12	2	\$0.00	\$0.67	\$0.00
2	Brian Horton	\$88.56	7	-\$9.83	\$4.24	\$0.00
3	Blink	\$61.21	3	\$0.00	\$0.00	\$0.00
4	Cheryl Blakely	\$78.17	4	\$0.00	\$0.00	\$0.00
5	Phillip Burks	\$59.17	5	\$0.00	\$0.00	\$0.00

print out these records by clicking the "Print" button above.

8.6 Sales Tax Report

Sales Tax Report: This page shows the tax records of the store.

Enter the filter information on the left side of the page to view the desired record. print out these records by clicking the "Print" button above.

←
Print
Sales Tax Report

Type:

Begin Date:

End Date:

Category:

Reset Search

Sales Tax Report

09/17/2018 - 10/18/2018

#	Category	Standard Tax	Freshly	Local tax	Tax Total	Total Sales	Taxable Sales	Non Taxable Sales
1	Snack	\$19.83	\$3.92	\$6.08	\$29.83	\$263.46	\$97.79	\$382.88
2	Fruit	\$7.45	-	\$1.21	\$8.66	\$83.82	-	\$92.47
3	Delicious cake	\$8.73	\$2.40	-	\$11.13	\$98.35	-	\$109.49
4	Household goods	\$7.22	-	-	\$7.22	\$81.34	-	\$88.56
5	Baby Products	-	-	-	-	-	-	-
6	NONE	-	-	-	-	-	\$51.39	\$51.39
Total		\$43.23	\$6.32	\$7.29	\$56.84	\$526.98	\$149.18	\$724.78

8.7 Category Report

Category Report: This page shows the sales reports for each category of the store.

Enter the filter information on the left side of the page to view the desired record.

←
Print
Category Report

Type:

Begin Date:

End Date:

Category:

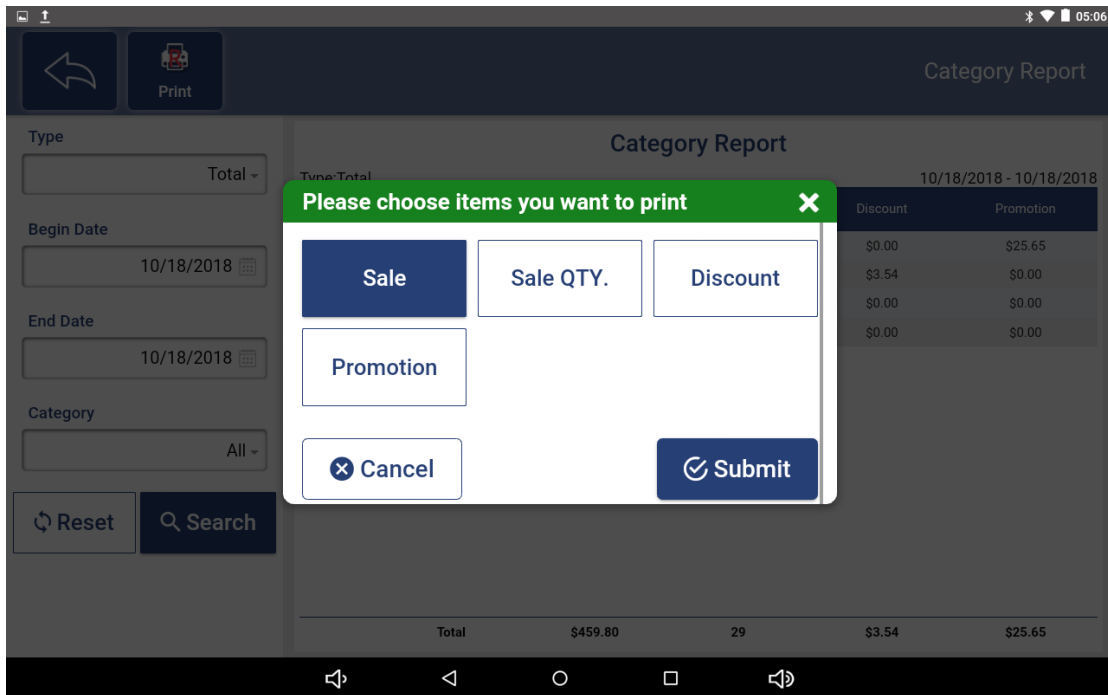
Reset Search

Category Report

Type:Total 10/18/2018 - 10/18/2018

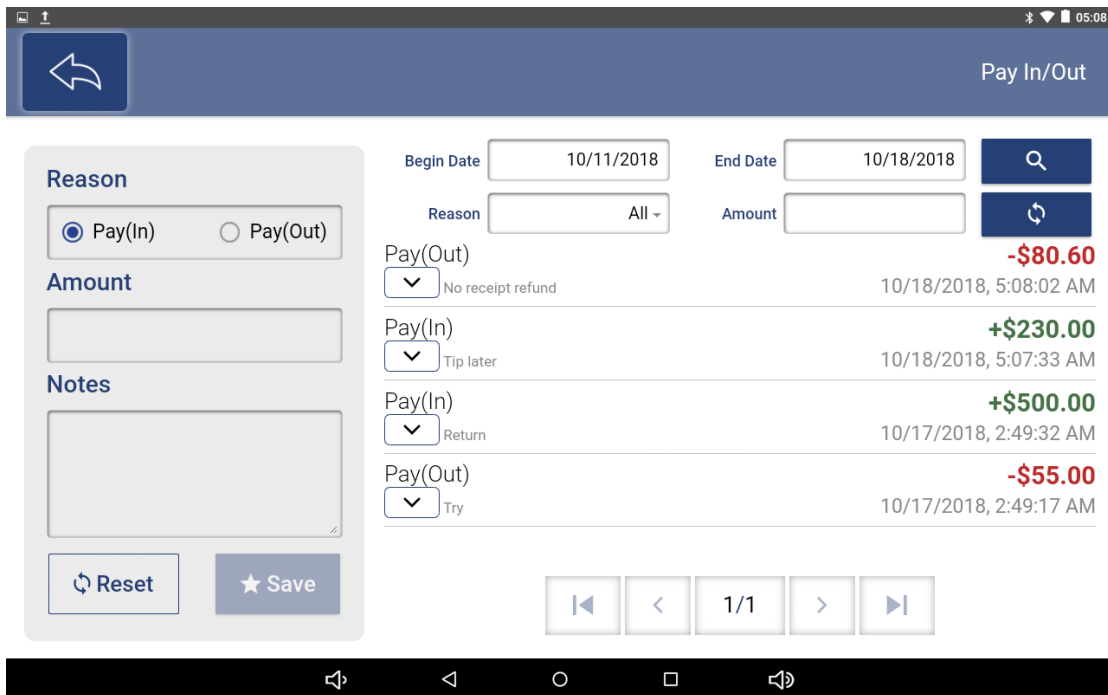
#	Category	Sale	Sale QTY.	Discount	Promotion
1	Snack	\$169.28	11	\$0.00	\$25.65
2	Fruit	\$92.47	8	\$3.54	\$0.00
3	Delicious cake	\$109.49	6	\$0.00	\$0.00
4	Household goods	\$88.56	4	\$0.00	\$0.00
Total		\$459.80	29	\$3.54	\$25.65

print out these records by clicking the "Print" button above.



9 Pay In/Out

On this page, view the Pay in and Pay Out records of the store, or add a record.

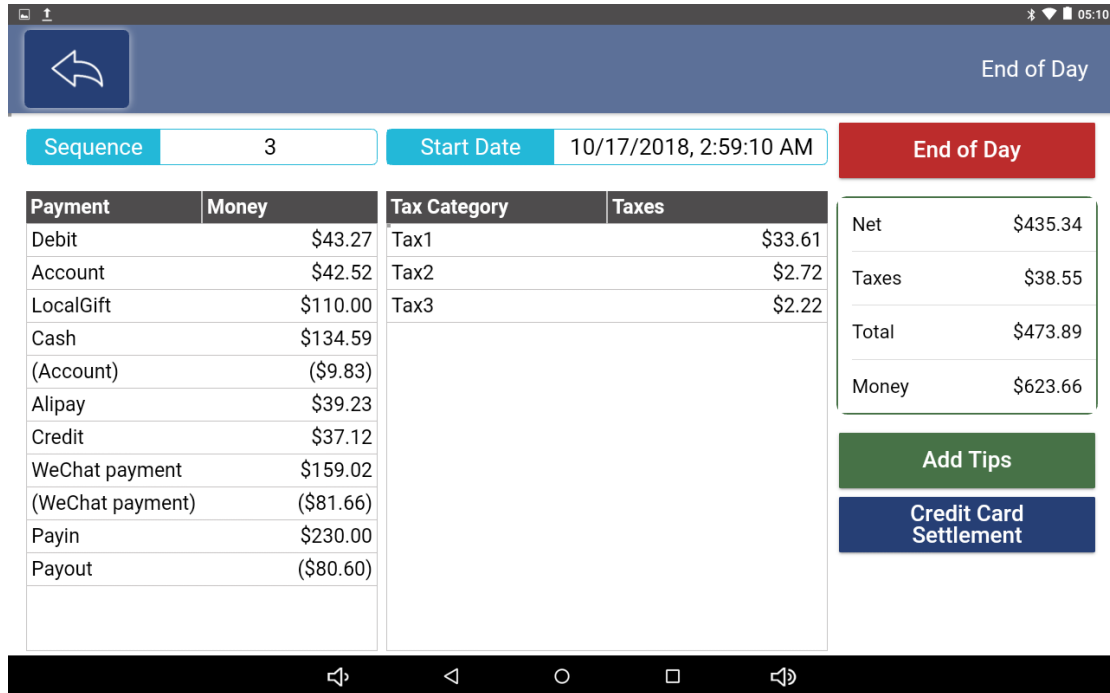


At the top of the right side, enter specific conditions to query the required revenue and expenditure records.

On the left side of the page, first select the reason for the income and expenditure, then enter the amount, and then optionally fill in the notes, and finally click the Save button to add a store's income and expenditure record.

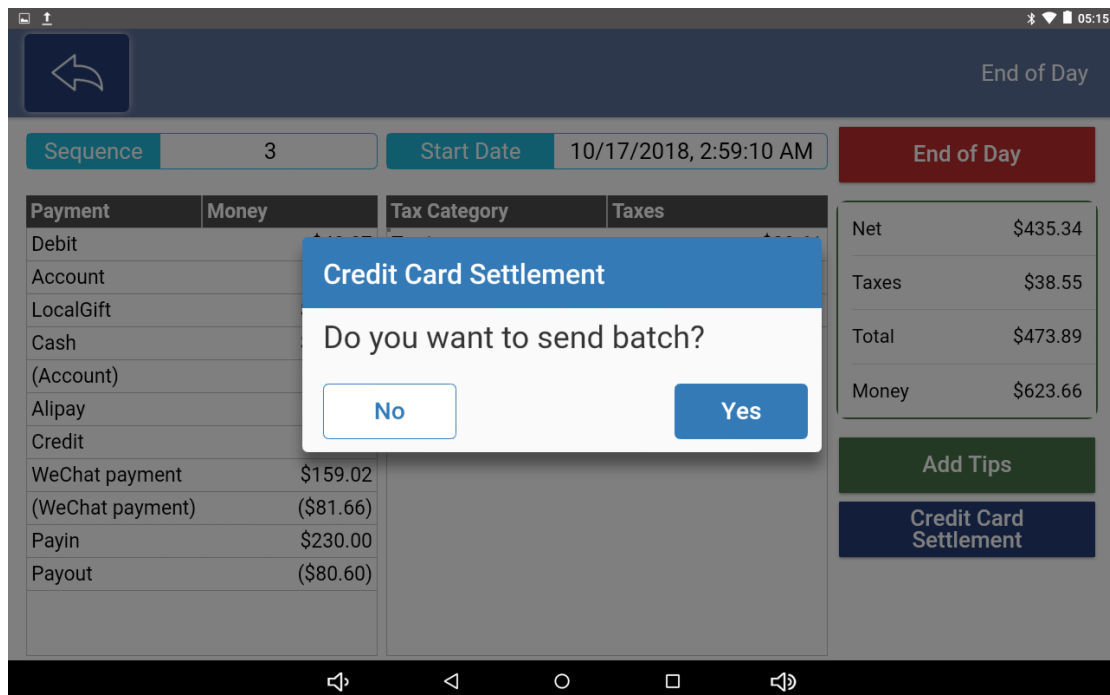
10 End of Day

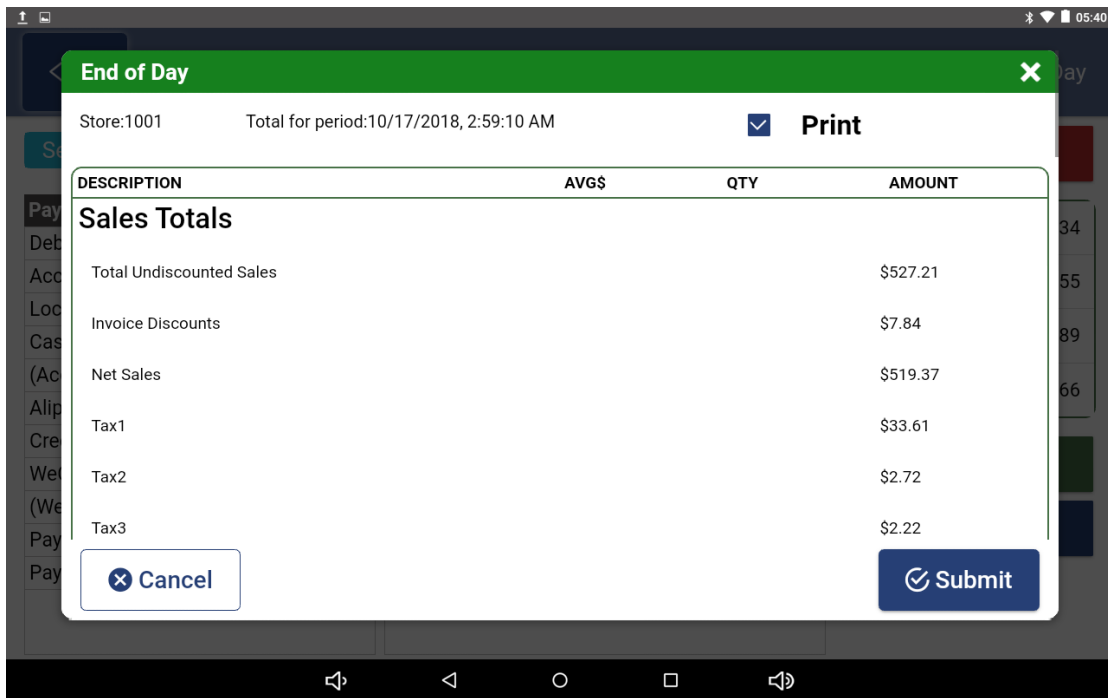
On this page, make an End of Day, add a tip for an order paid by a credit card, or send a credit card settlement to the bank.



End of Day: After clicking this button, it will prompt you if you need to perform a Clock Out for the user on the POS, and then it will display the sales details from the last End of Day to the present.

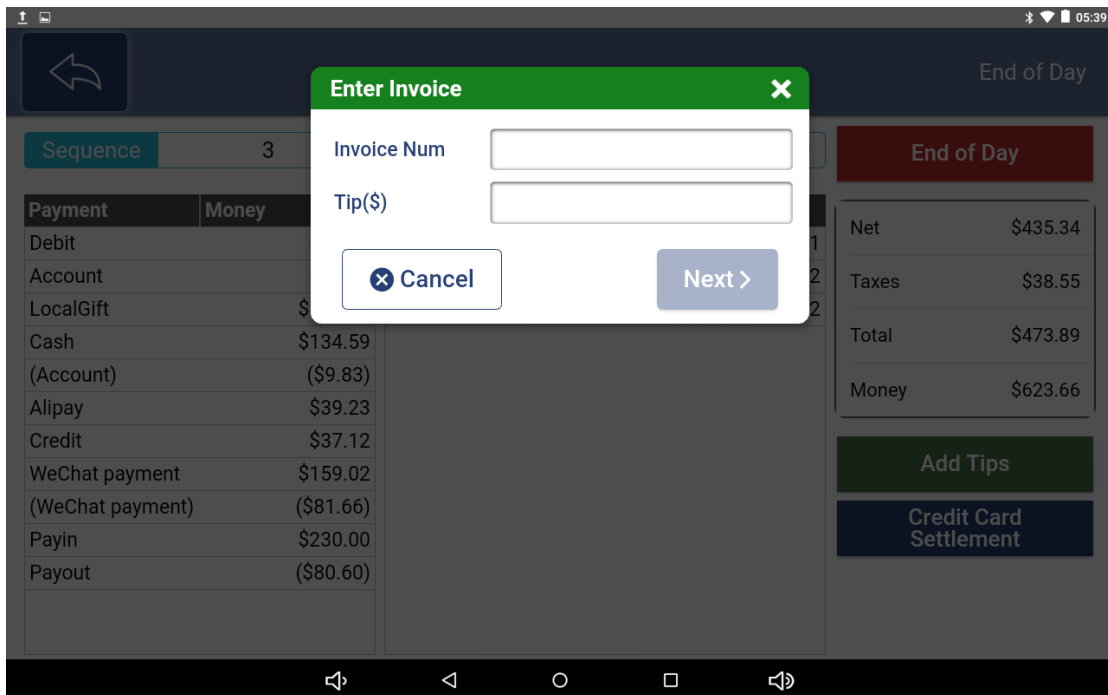
Prompt whether you want to clear all Hold on records, whether you want to Clock out all users.

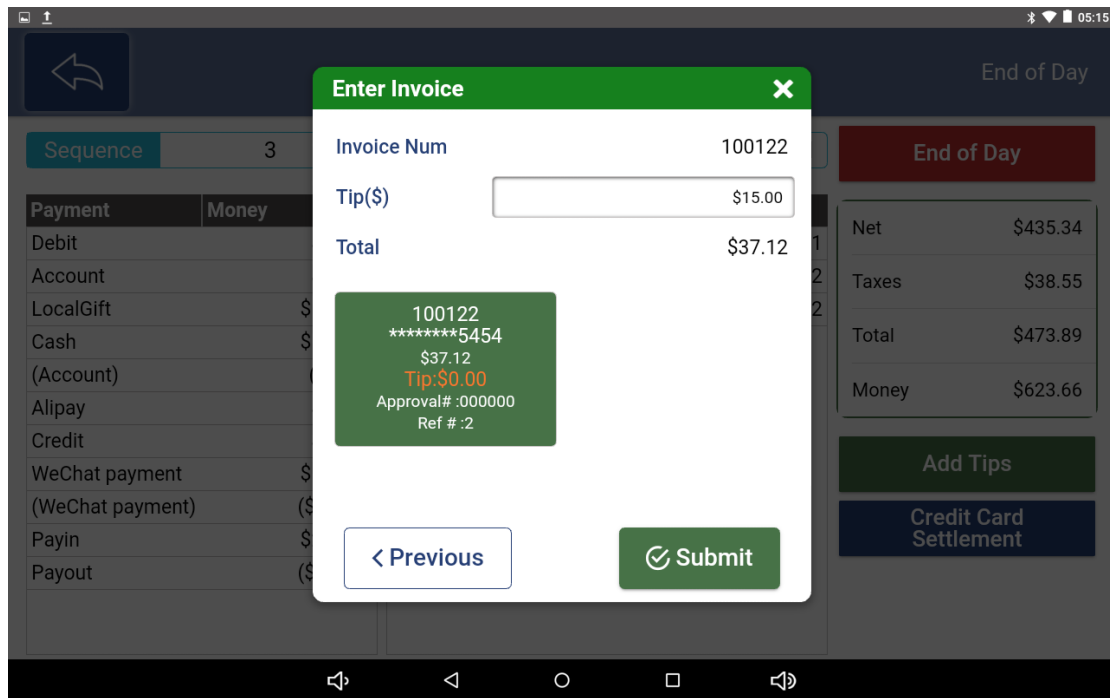




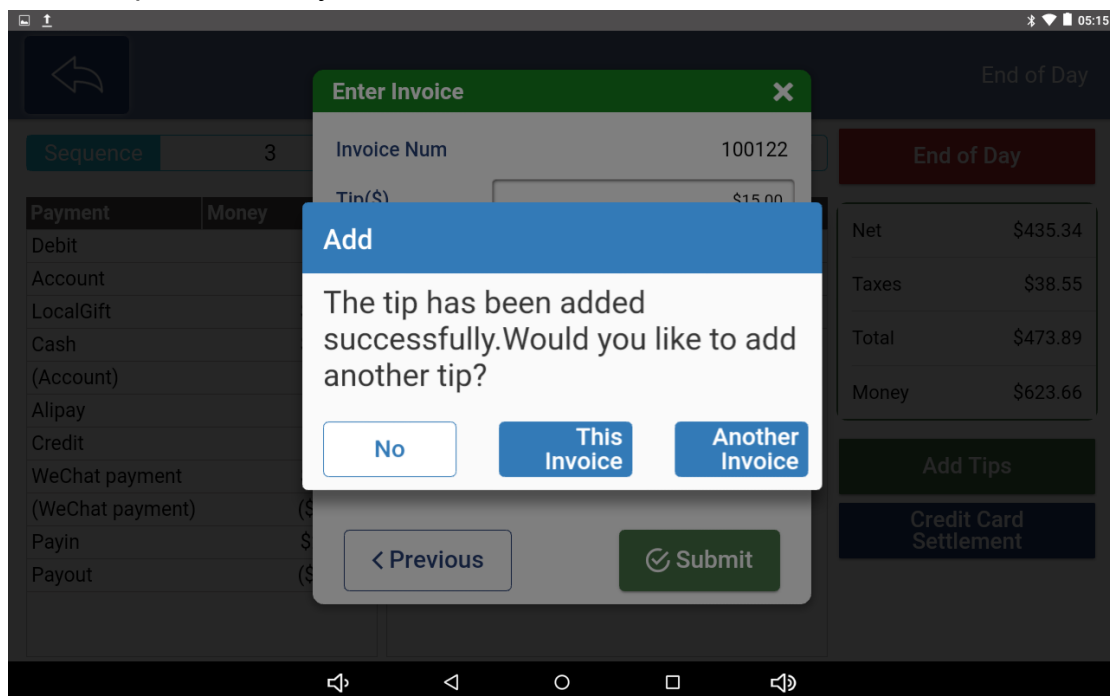
Notes: At the top of the sales details page, choose whether to print.

Add Tips: After clicking this button, you need to enter the correct invoice number and the amount of the tip to be added in the pop-up window, click the “Next” button after the input is completed. Then selecting the order on this page and click Submit to successfully add the tip.

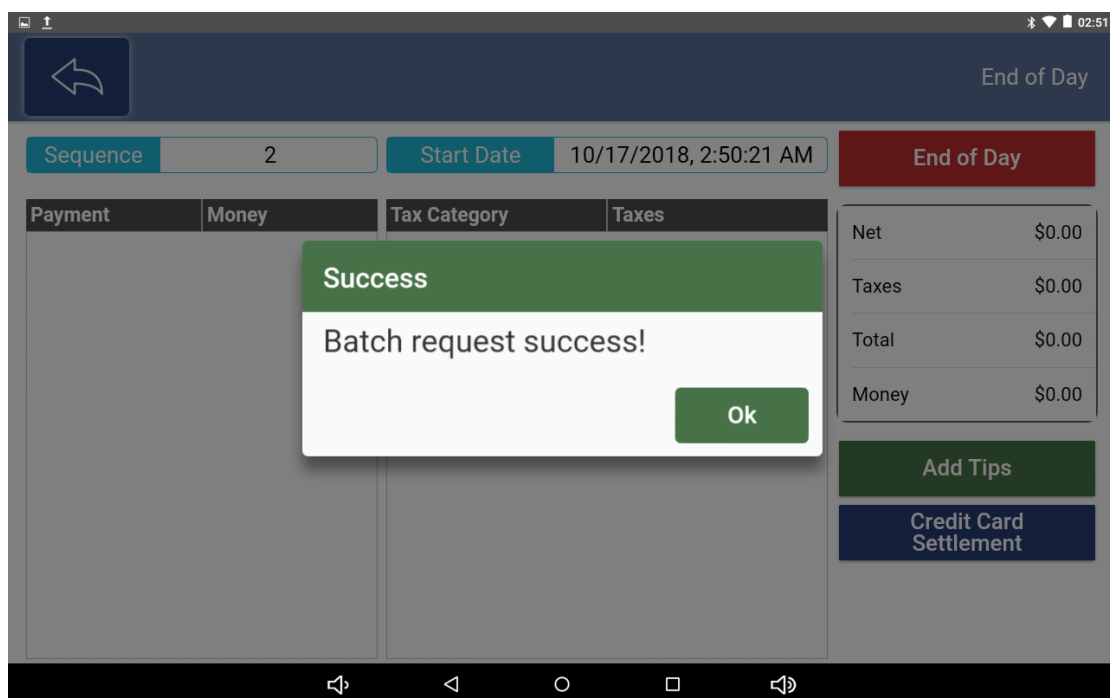
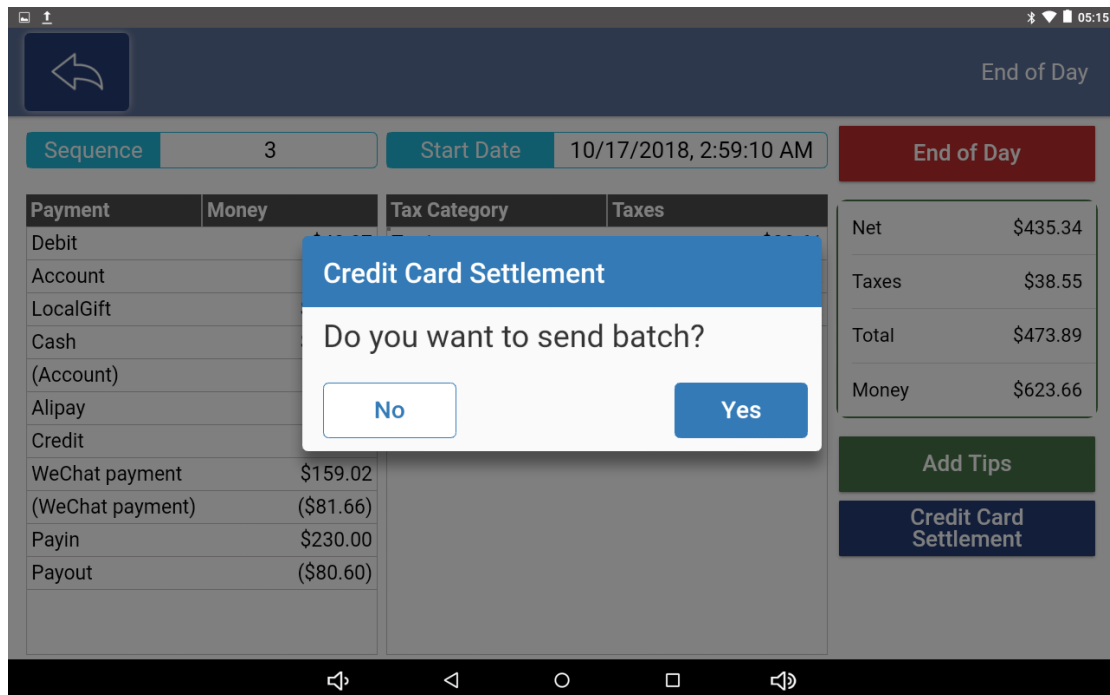




Added Tip successfully.



Credit Card Settlement: After clicking this button, you will be reminded if you want Send Batch. After confirmation, you will be prompted with Batch Request Success! At the same time, the details of the Batch Settlement will be printed.



11 Log Out

A Reminder will prompt "Do you want to exit?"

There are 2 possible scenarios

1. A selection of "Yes" will exit back to login screen immediately after confirmation.
2. If that user is configured to Clock in/Clock out.
Clock Out Screen will appear and display "You are still clocked in do you want to clock out?"
1. A selection of "Yes" will exit back to login screen immediately after

confirmation.

Note: Log Out does not Clock user out. Log Out simply just ends that session at the POS if that user is not required to clock out.

