



*Delivering the true till experience*

Providing an affordable iPad POS system with a variety of add ons & professional services.



POS Made Easy with TruePOS  
User Manual

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# 1. Introduction

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# REGISTER

This document is an end user manual for the Register Solution. For further help and instructions, please visit the [Knowledge Base](#) where you will find several detailed videos and FAQ's.

For additional support, please contact your Solution Provider.

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## **2. Register Client**

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### **Overview**

The Register Client or Register, is the Android based application that is run on your tablet and can be used in both Landscape or Portrait mode.

In this manual, the workflows for both modes of the various Functions and Modules will be detailed together. However, where there is a difference, these will be shown separately as indicated in the workflow heading.

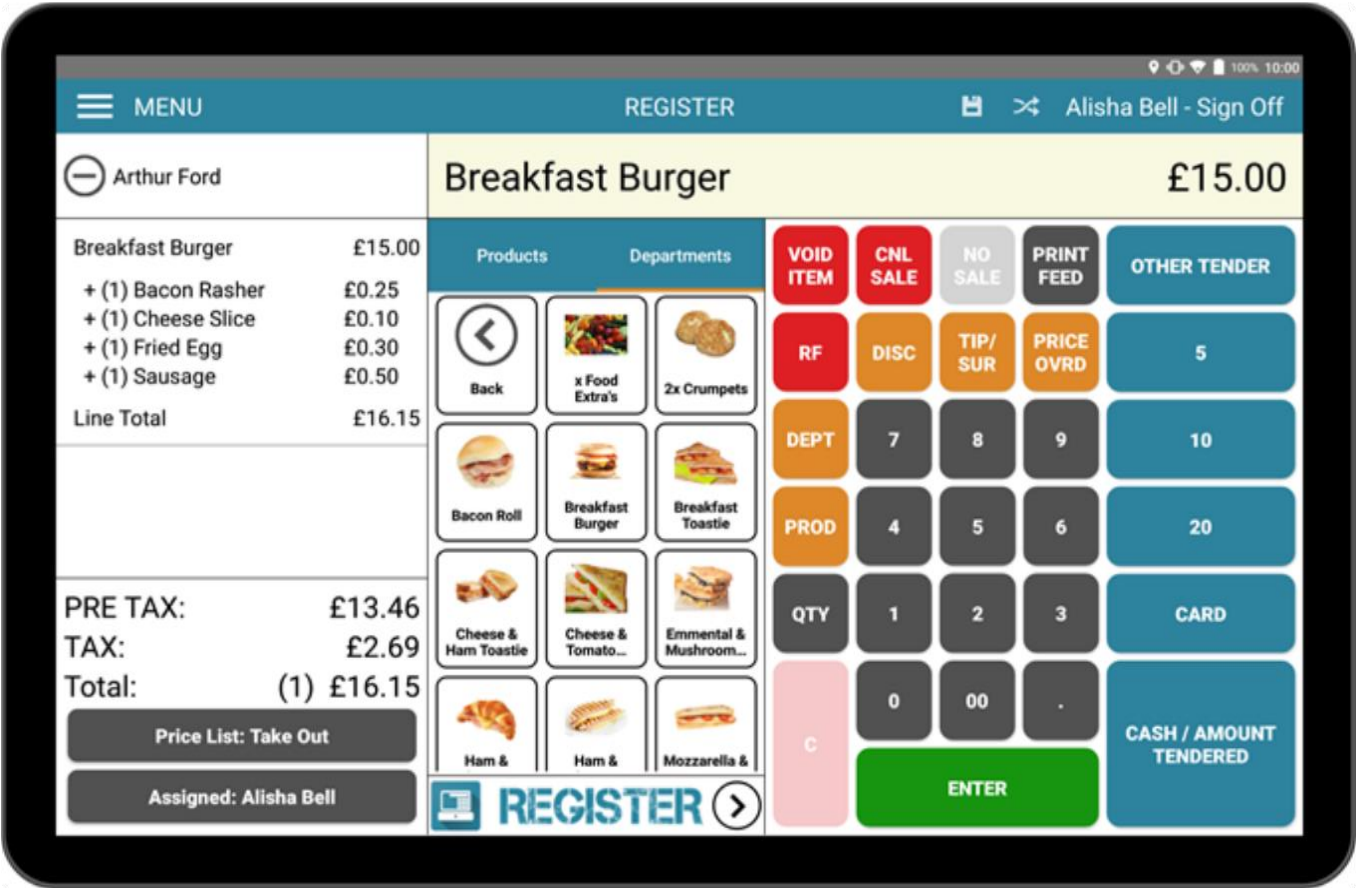
#### **For example:**

- Start Day (Both Modes)
- Start Day (Landscape Mode)
- Start Day (Portrait Mode)

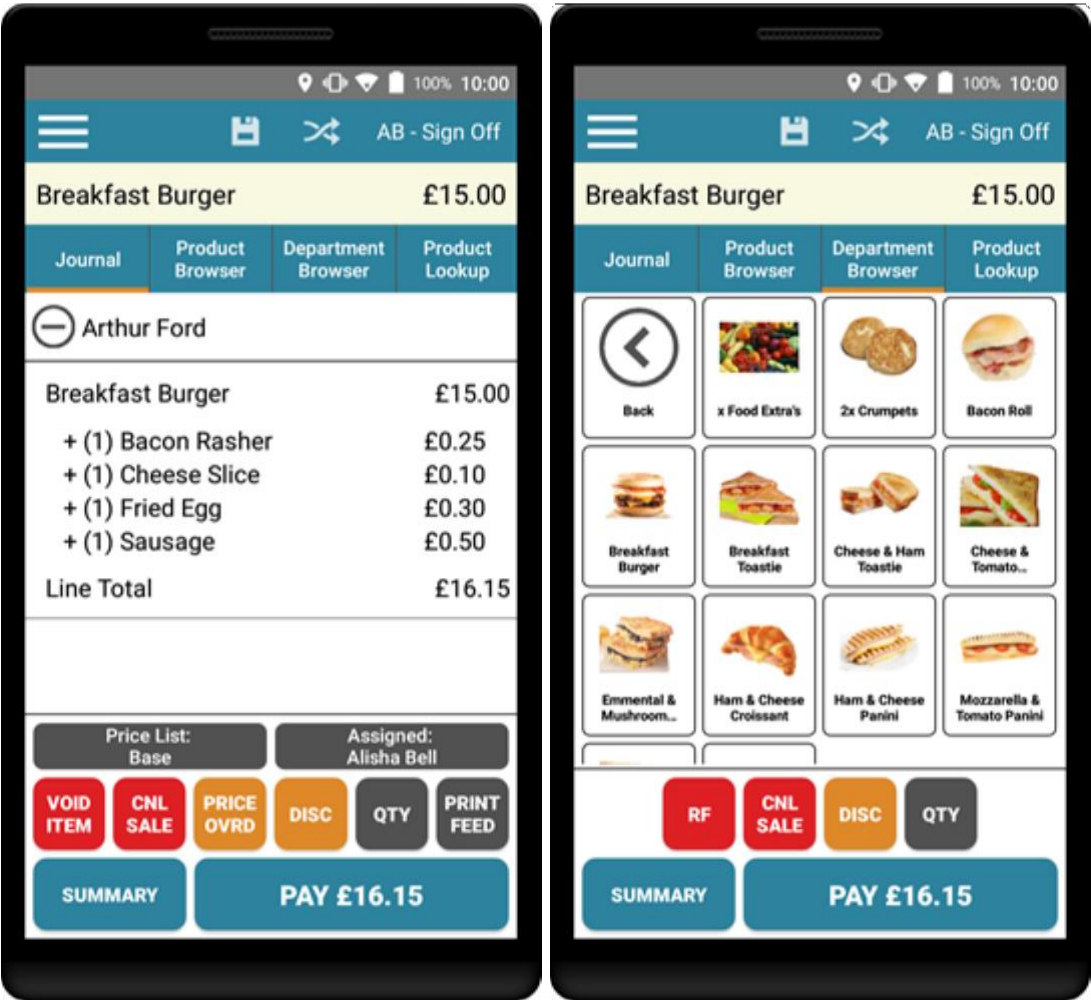


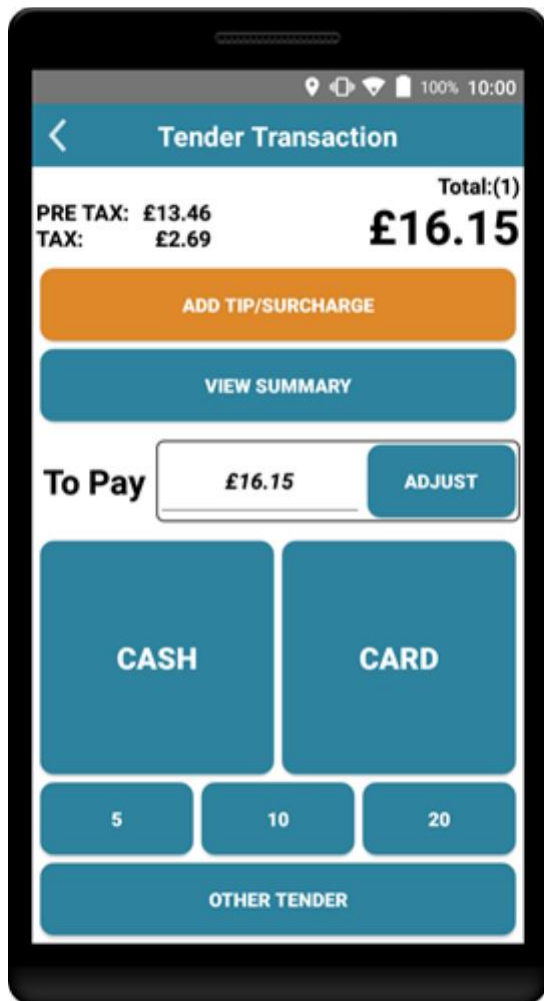
# The Client

## Register (Landscape Mode)



Register (Portrait Mode)





Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

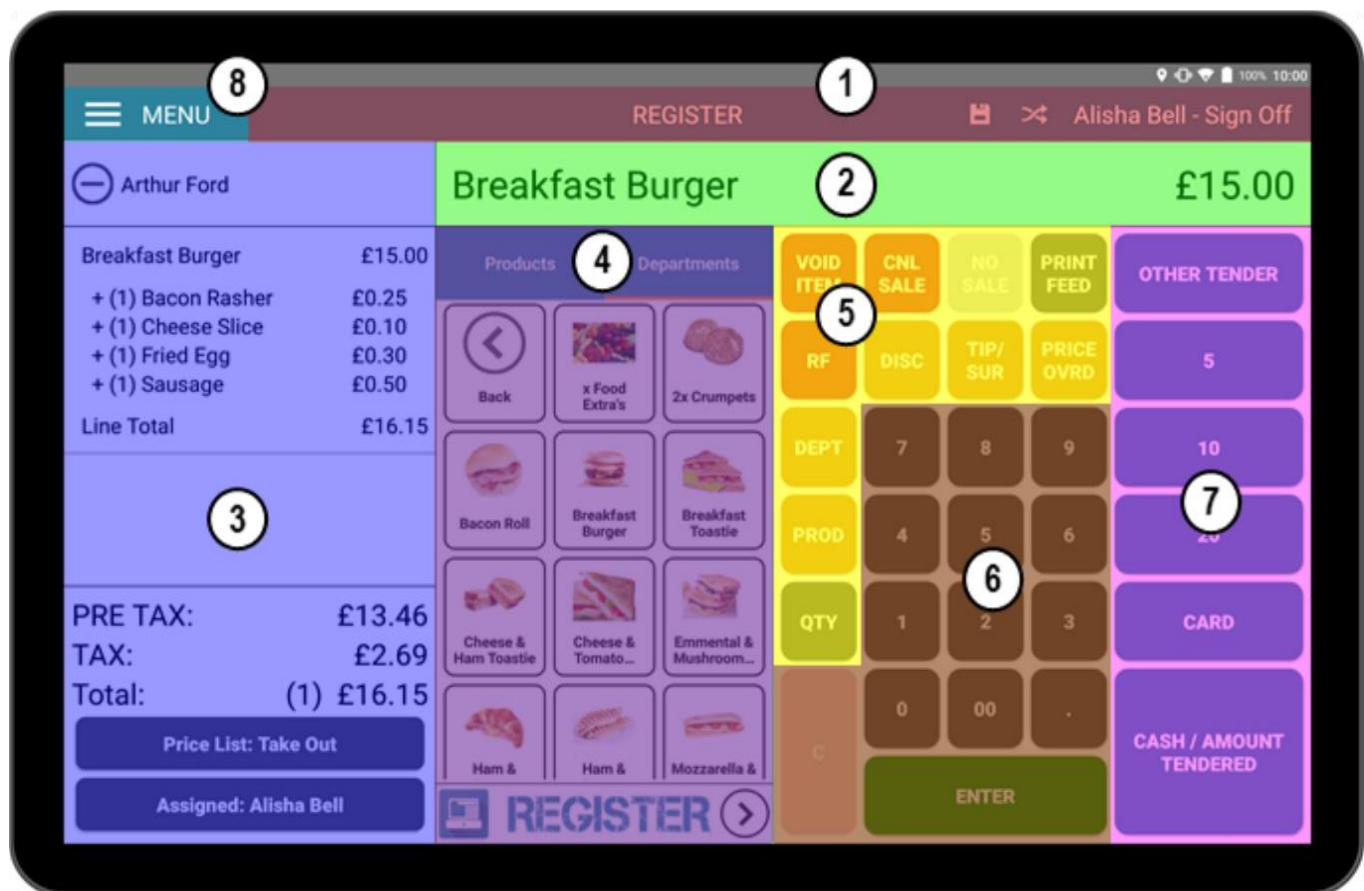
- [Register Layout](#)
- [General Processes](#)
- [Register Functions](#)
- [Register Modules](#)
- [Feature Permissions](#)
- [Training Mode](#)

## 2.1. Register Layout

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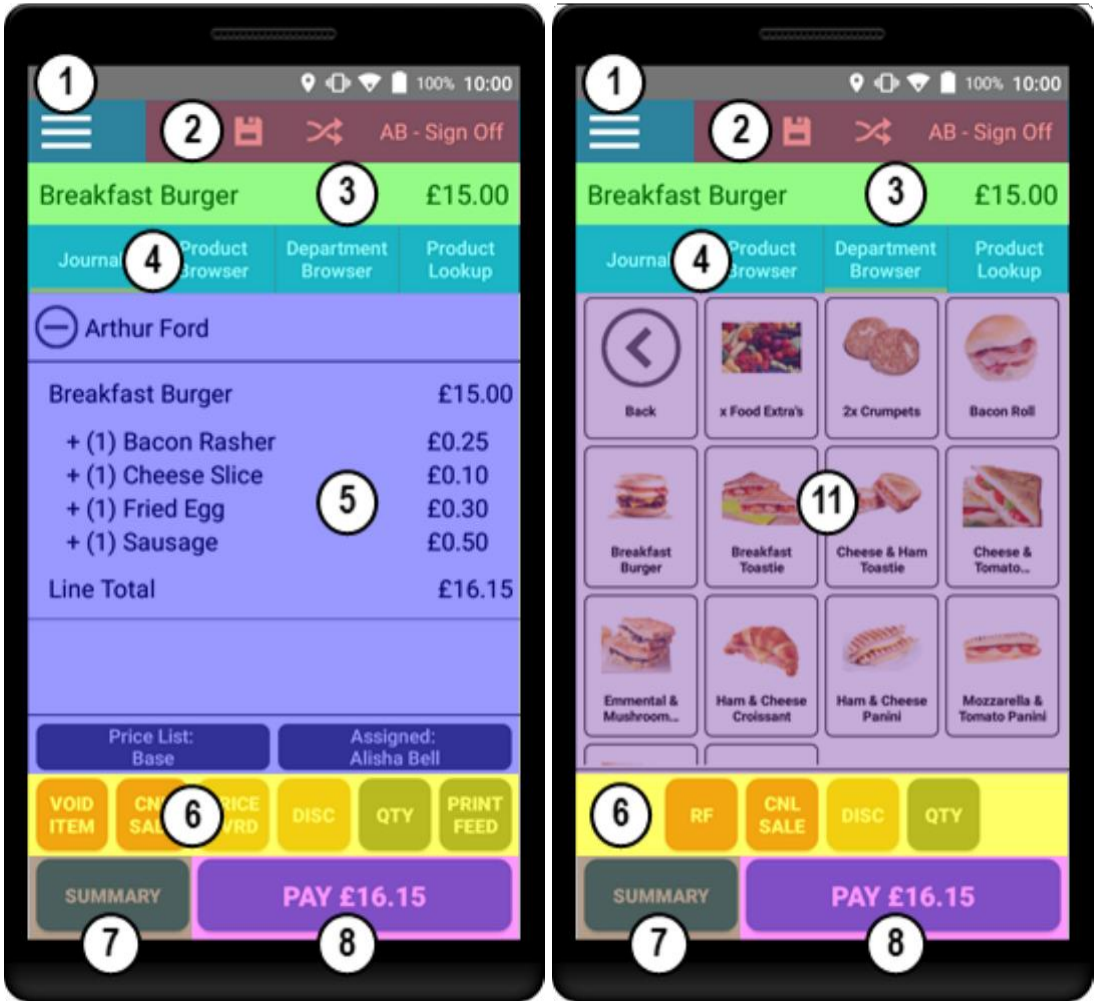
## Register Screen Layout (Landscape Mode)

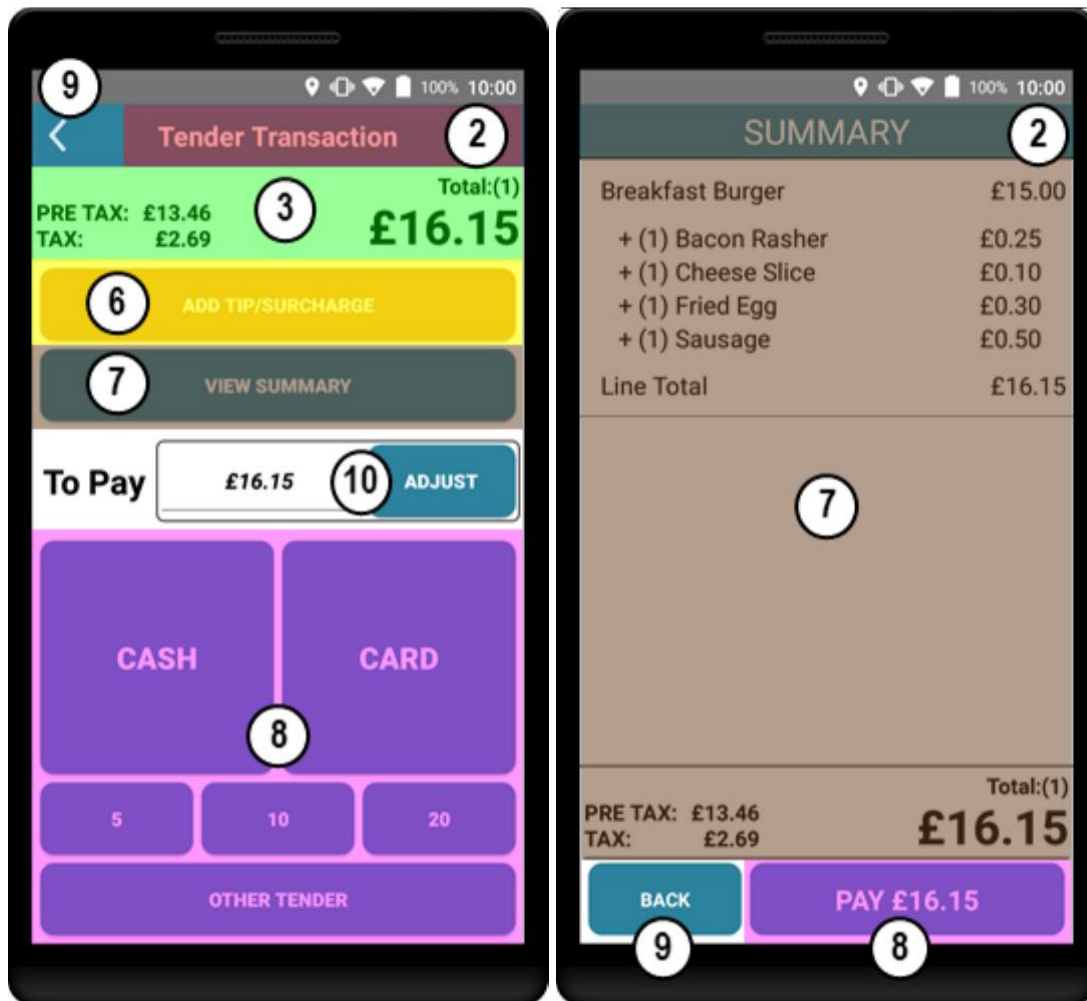


1. Top Bar
2. Display Window
3. Journal
4. Product and Department Browsers
5. Function Group
6. Keypad
7. Tender Group
8. Side Menu Button

## Register Screen Layout (Portrait Mode)







1. Side Menu Button
2. Top Bar
3. Display Window
4. Tabs
5. Journal
6. Function Keys
7. Summary Dialog
8. Tender Functions
9. Back Button
10. Tender Value Adjustment (Split Tender) Button
11. Product / Department Browser

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Display Window](#)
- [Function Group](#)
- [Keypad](#)

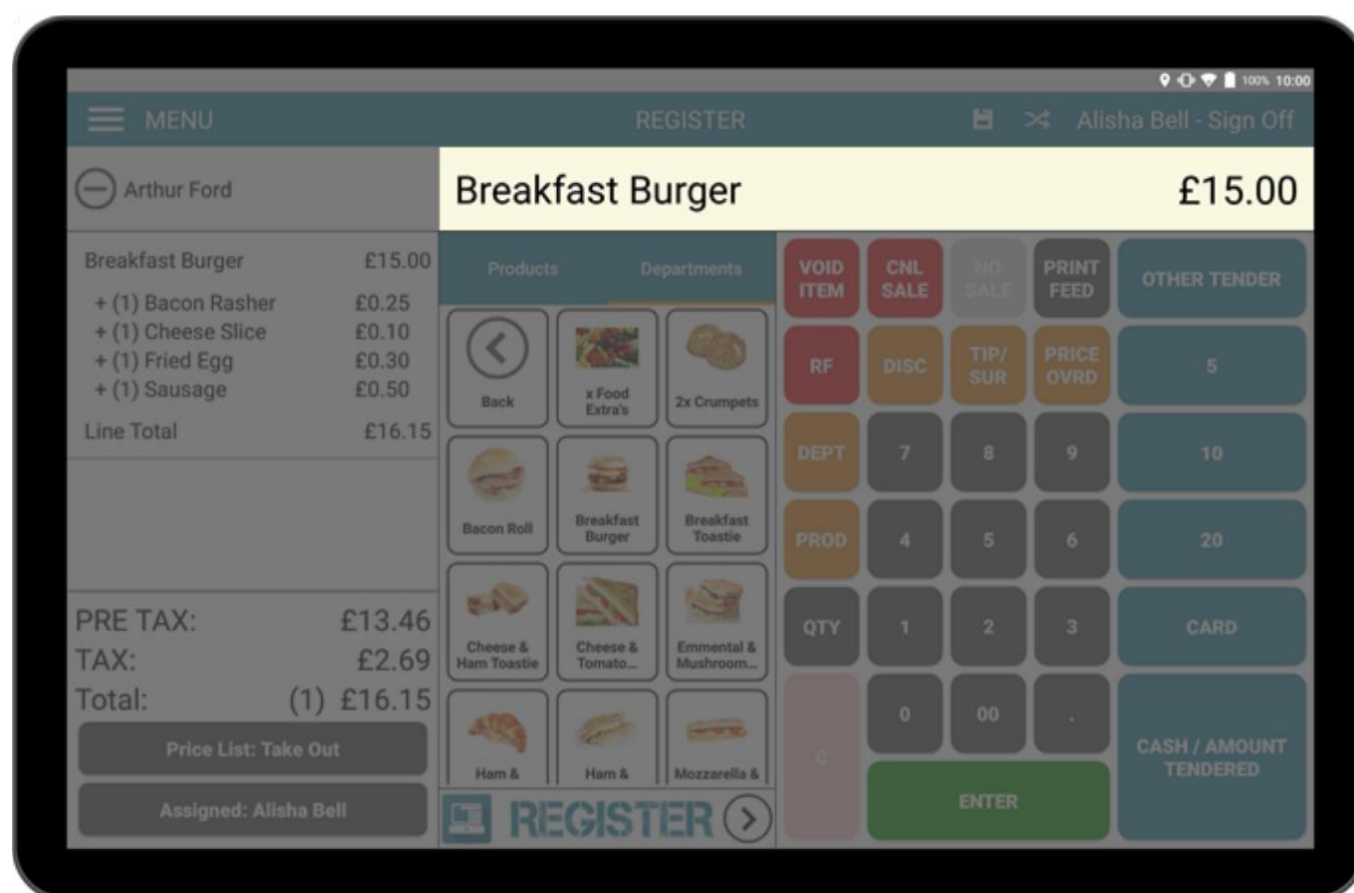
- [Product and Department Browser](#)
- [Side Menu](#)
- [Tender Group](#)
- [Top Bar](#)
- [Transaction Journal](#)

## 2.1.1. Display Window

### Overview

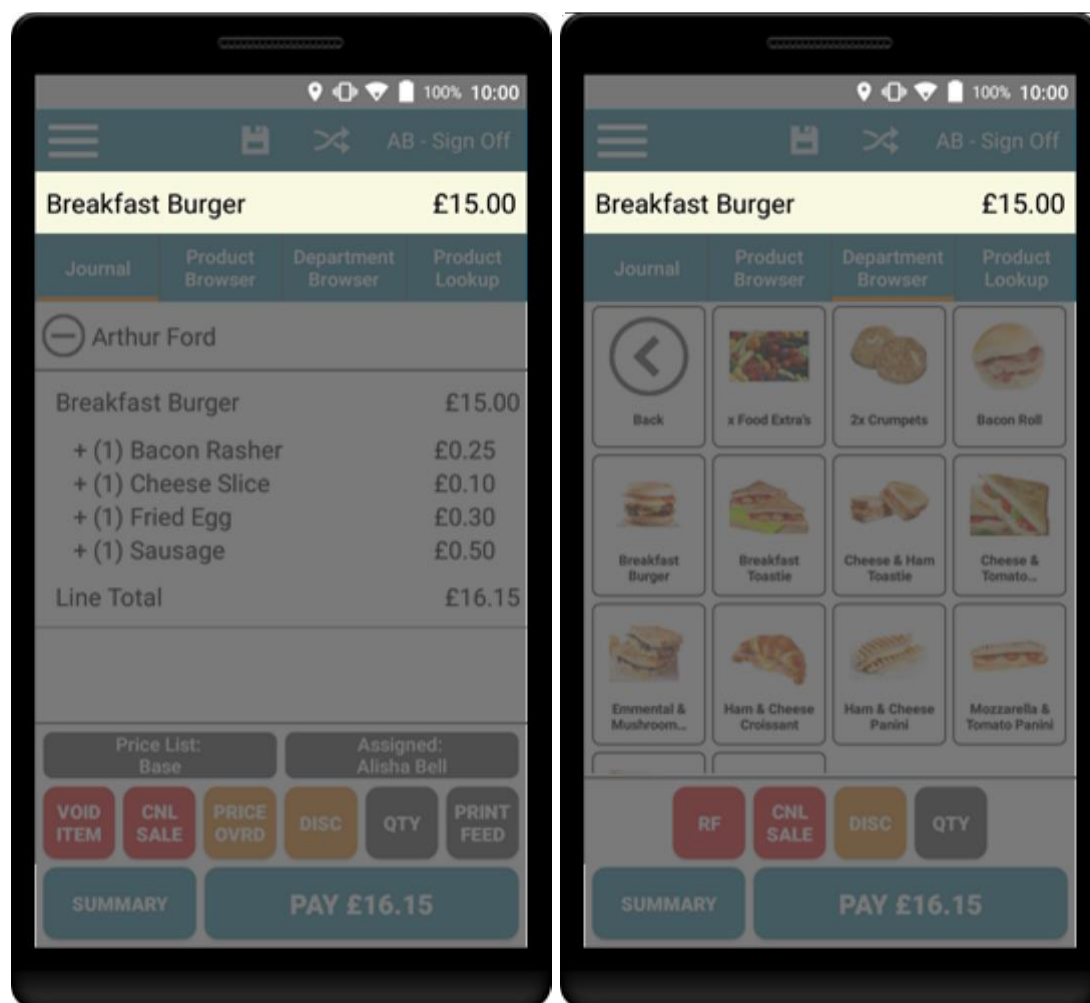
The Display window shows the last product added to the journal, or displays the currently selected function in operation, with prompts to guide the Staff Member.

### Display Window (Landscape Mode)





## Display Window (Portrait Mode)



## 2.1.2. Function Group

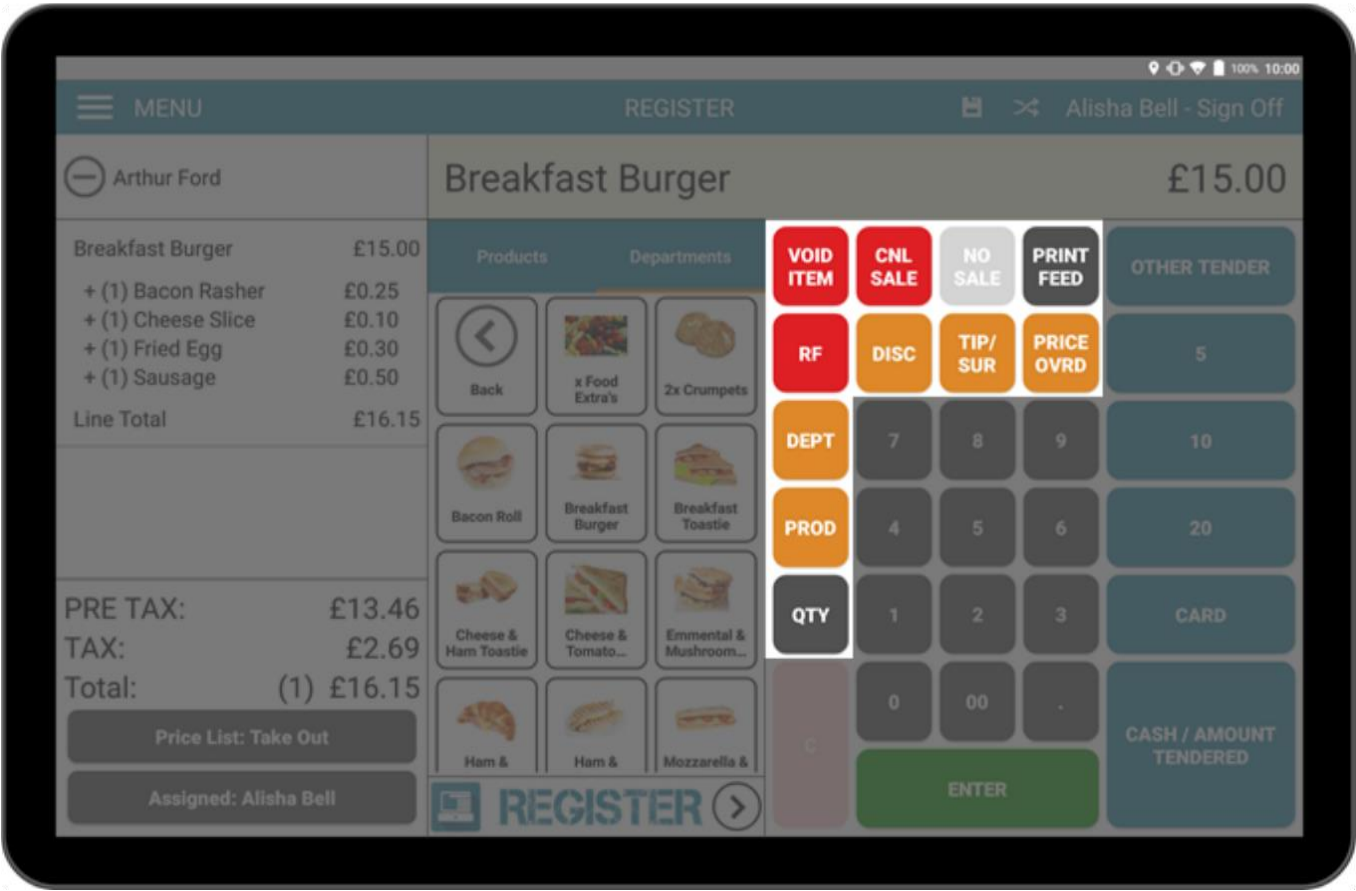
### Overview

The Function Group displays the available enabled functions that are available to use within the Register module.

- If a Function key has been disabled, this means that either;
  - It is not available to use because it has been deactivated in the Portal
  - The Staff Member does not have authority to use the Function
  - No Product has been selected in the Journal that can be controlled by the Function. (**For example, VOID**)

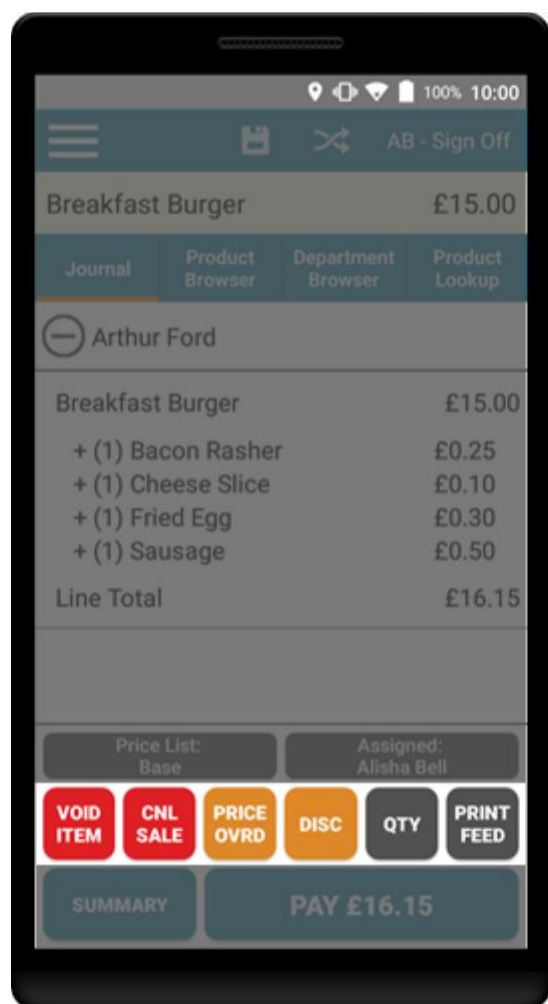


Function Group (Landscape Mode)



Function Group (Portrait Mode)

- In Portrait Mode, the Function Buttons will only display if they are relevant.



## The Function Buttons (Both Modes)

| Button                                                                              | Name                              | Description                                                                        |
|-------------------------------------------------------------------------------------|-----------------------------------|------------------------------------------------------------------------------------|
|  | <a href="#">Cancel Sale</a>       | Cancels the current transaction.                                                   |
|  | <a href="#">Department Search</a> | Search for and enter a department code.<br><b>(Not available in Portrait Mode)</b> |
|  | <a href="#">Discount</a>          | Add an Item or Transaction level discount.                                         |
|  | <a href="#">No Sale</a>           | Opens the Cash Drawer                                                              |
|  | <a href="#">Price Override</a>    | Apply a new price to an item in the journal                                        |
|  | <a href="#">Print Feed</a>        | Feeds some receipt paper through the Primary Receipt Printer.                      |

|                       |                                                       |                                                                |
|-----------------------|-------------------------------------------------------|----------------------------------------------------------------|
| <b>PROD</b>           | <a href="#">Product Search</a>                        | Search for Products<br><b>(Not available in Portrait Mode)</b> |
| <b>QTY</b>            | <a href="#">Quantity Adjustment</a>                   | Enter multiple quantities of the same product.                 |
| <b>RF</b>             | <a href="#">Refund Function</a>                       | Refund a Product or a Transaction.                             |
| <b>SURCH<br/>ARGE</b> | <a href="#">Surcharge</a>                             | Apply a Surcharge to the transaction                           |
| <b>TIP</b>            | <a href="#">Tipping</a>                               | Apply a Tip to the transaction                                 |
| <b>TIP/<br/>SUR</b>   | <a href="#">Surcharge</a> and <a href="#">Tipping</a> | Apply either a Tip or a Surcharge to the transaction           |
| <b>VOID<br/>ITEM</b>  | <a href="#">Void</a>                                  | Void item(s) from the current transaction.                     |

## 2.1.3. Keypad

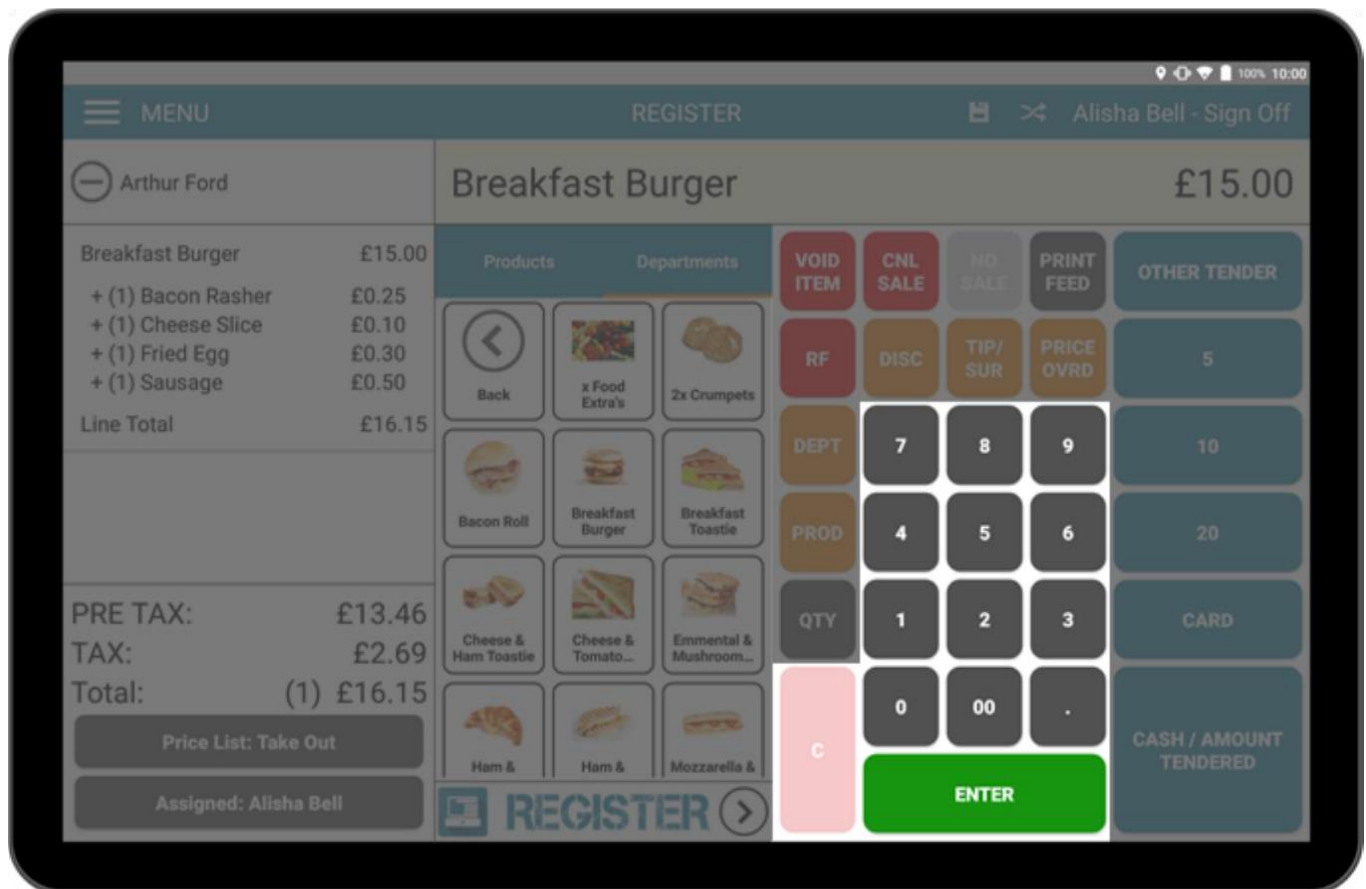
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### Overview

The keypad is used to enter numeric values such as quantity and prices.

- The **Cancel** button acts like a “Backspace” button on your keyboard, and will delete entries from right to left.
- The **Enter** confirms the entry made on the keypad.
- There is no fixed keypad in Portrait Mode, and will display as a separate dialog when required.

## The Keypad (Landscape Mode)



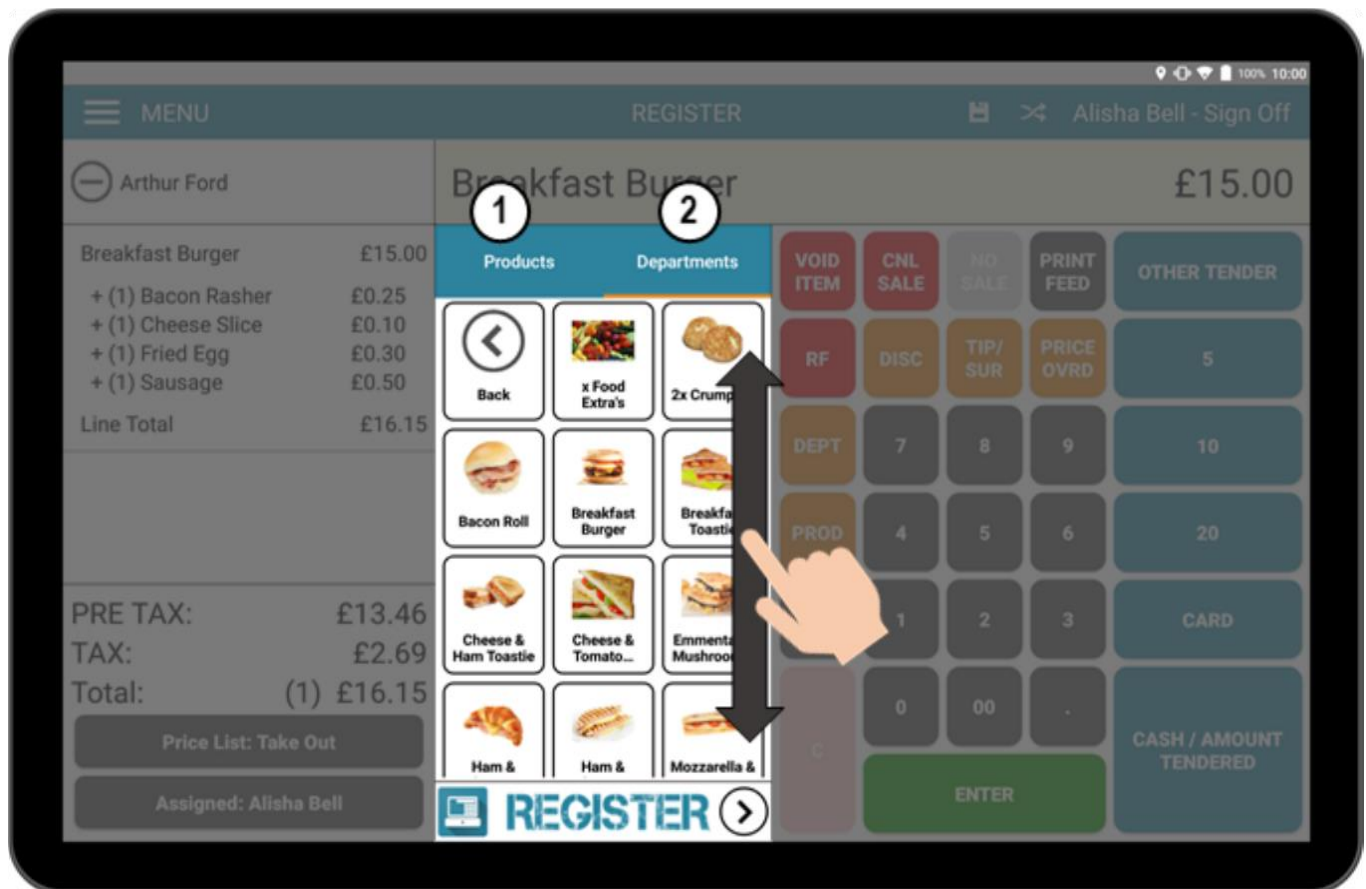
## 2.1.4. Product and Department Browser

### Overview

The Product and Department Browsers are used to search for products sold in the Store.

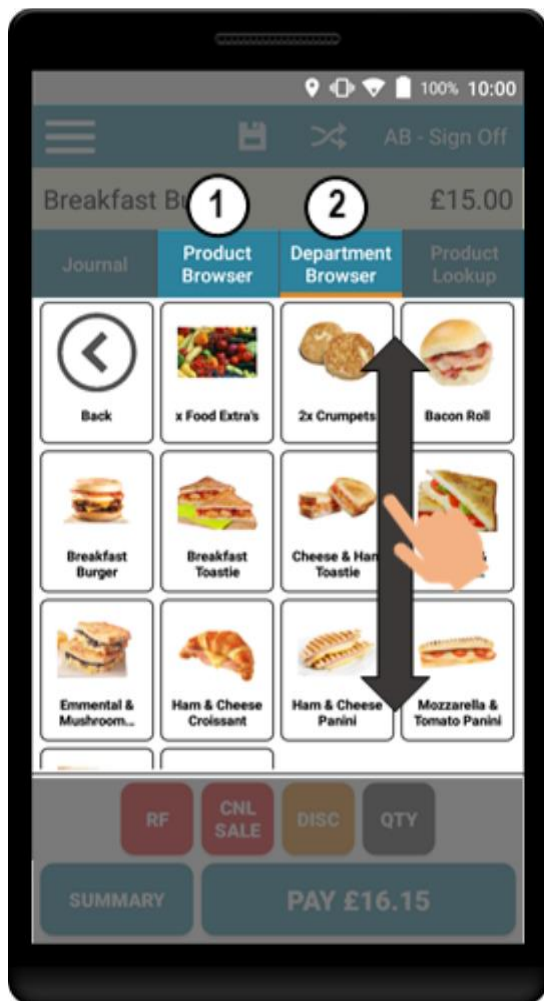
- Both the Product and Department Browsers can be scrolled vertically.
- The Product Browser is used to list hot selling products, and is customisable through the Portal.
  - For more information on this, see the section on the [Product Browser](#) in the Portal area of this manual.
- The Department Browser lists all the Sub-Departments and Products contained within the Departments.
  - The Department Browser is **not customisable** and lists all the products in alphabetical order.
  - Sub-Departments are listed first, followed by [Department Products](#), and then the [Products](#).

## The Product and Department Browsers (Landscape Mode)



1. Product Browser
2. Department Browser

## The Product and Department Browsers (Portrait Mode)



1. Product Browser
2. Department Browser

### 2.1.5. Side Menu

---

#### Overview

The Side Menu is where you navigate to the various Modules within Register.

- The Side Menu is only available once the Staff Member has successfully sign in.
- If a Link is showing as disabled, it means that the Staff Member does not have access to it. For more information, please see the section on [Module Permissions](#).

## Accessing the Side Menu (Both Modes)

| Step | Instruction                | Operation                                                                         |
|------|----------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap the <b>Menu</b> Button |  |

## The Module Buttons (Both Modes)

| Button                                                                                                  | Name                                | Description                                 |
|---------------------------------------------------------------------------------------------------------|-------------------------------------|---------------------------------------------|
|  Calendar              | <a href="#">Calendar</a>            | Create and manage customer appointments     |
|  Customers             | <a href="#">Customers</a>           | Create and manage your Customers            |
|  Smart Volution        | <a href="#">Custom URL</a>          | A Customisable Web Portal Link              |
|  End of Day            | <a href="#">End of Day</a>          | Close the days trading                      |
|  Guide               | <a href="#">Guide</a>               | Link to this Guide                          |
|  Paid In             | <a href="#">Paid In</a>             | Pay cash into the till drawer               |
|  Paid Out            | <a href="#">Paid Out</a>            | Pay cash out of the till drawer             |
|  Register            | <a href="#">Register</a>            | Record the Trading                          |
|  Reports             | <a href="#">Reports</a>             | A breakdown of the trading                  |
|  Stock               | <a href="#">Stock</a>               | Manage your Stock / Inventory               |
|  Transaction History | <a href="#">Transaction History</a> | All your historic transactions in one place |
|  Web Portal          | <a href="#">Web Portal</a>          | A link to your Register Portal              |

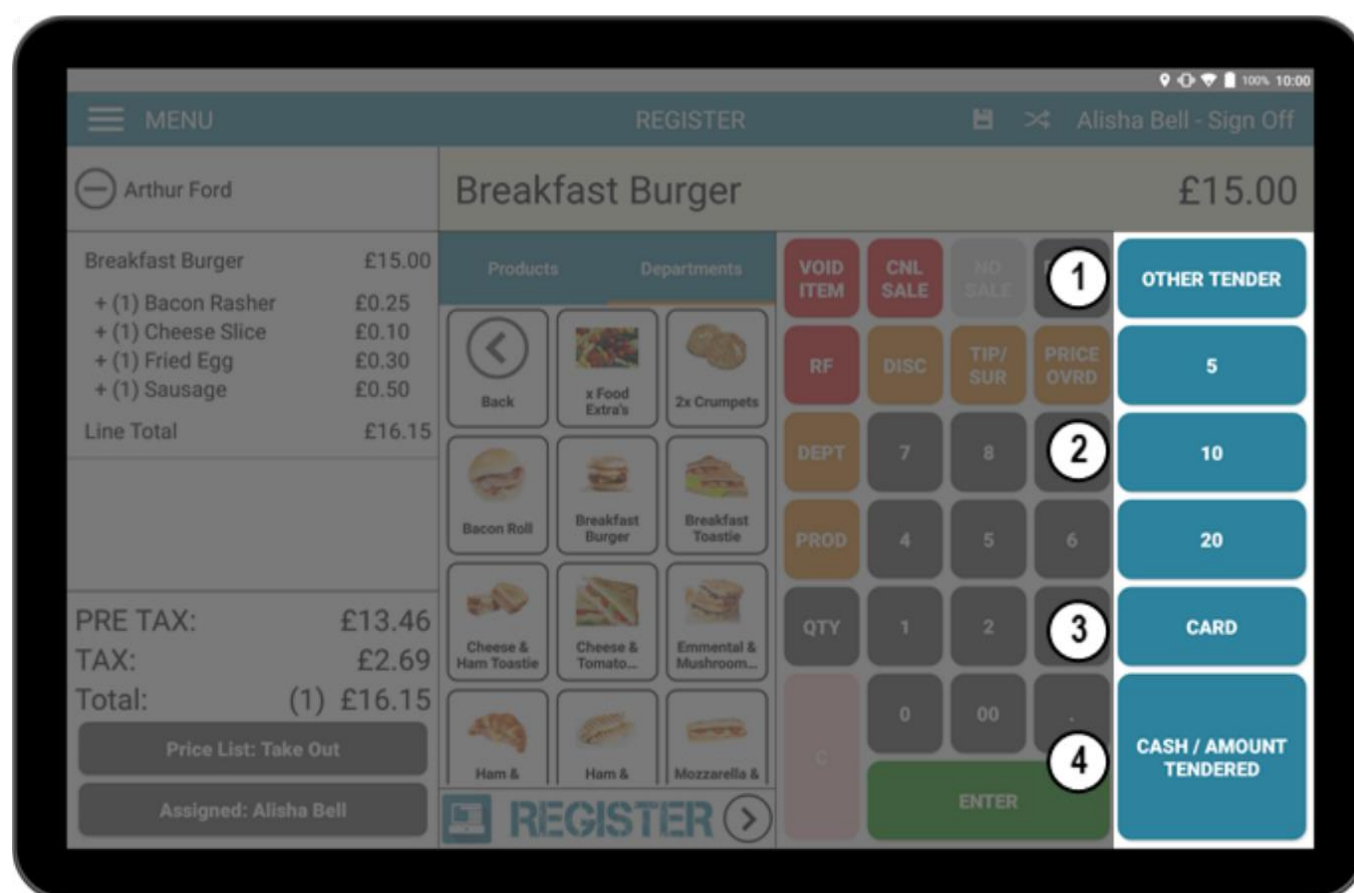
## 2.1.6. Tender Group

### Overview

The Tender Group initiates the final process in the transaction, which is the Tender.

- Register has three Tender options;
  - **Cash** Tendering
  - **Card** Tendering
  - **Other** Tendering
- The available tender buttons depends on how you have configured your settings in the Portal.
  - For more information on these settings, see the following sections in the Portal section of this manual;
    - [Cash](#)
    - [Card](#)
    - [Other Tenders](#)

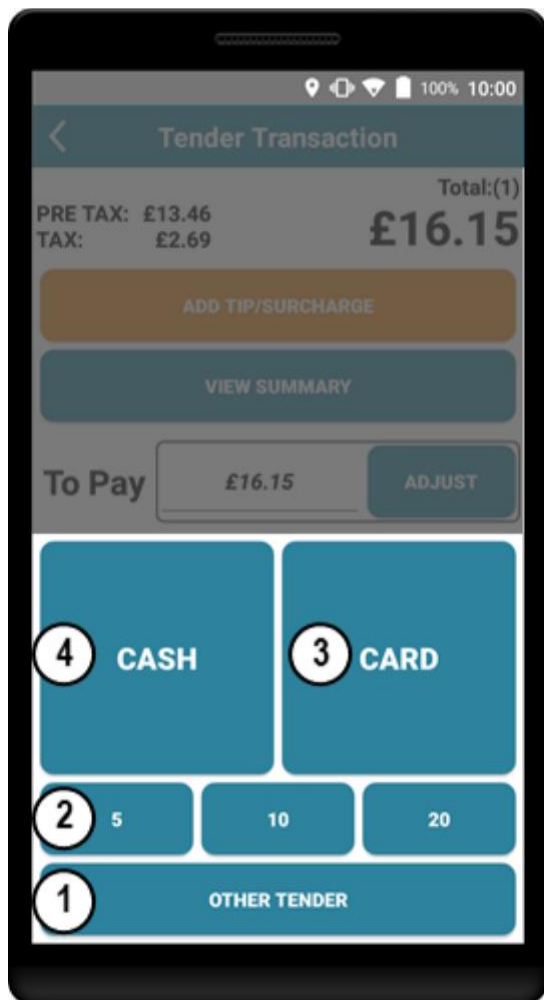
### Tender Group (Landscape Mode)





1. **Other Tender** Button
2. **Quick Tender** Buttons
3. **Card Tender** Button
4. **Exact Cash Tender** Button

### Tender Group (Portrait Mode)



1. **Other Tender** Button
2. **Quick Tender** Buttons
3. **Card Tender** Button
4. **Exact Cash Tender** Button

## 2.1.7. Top Bar

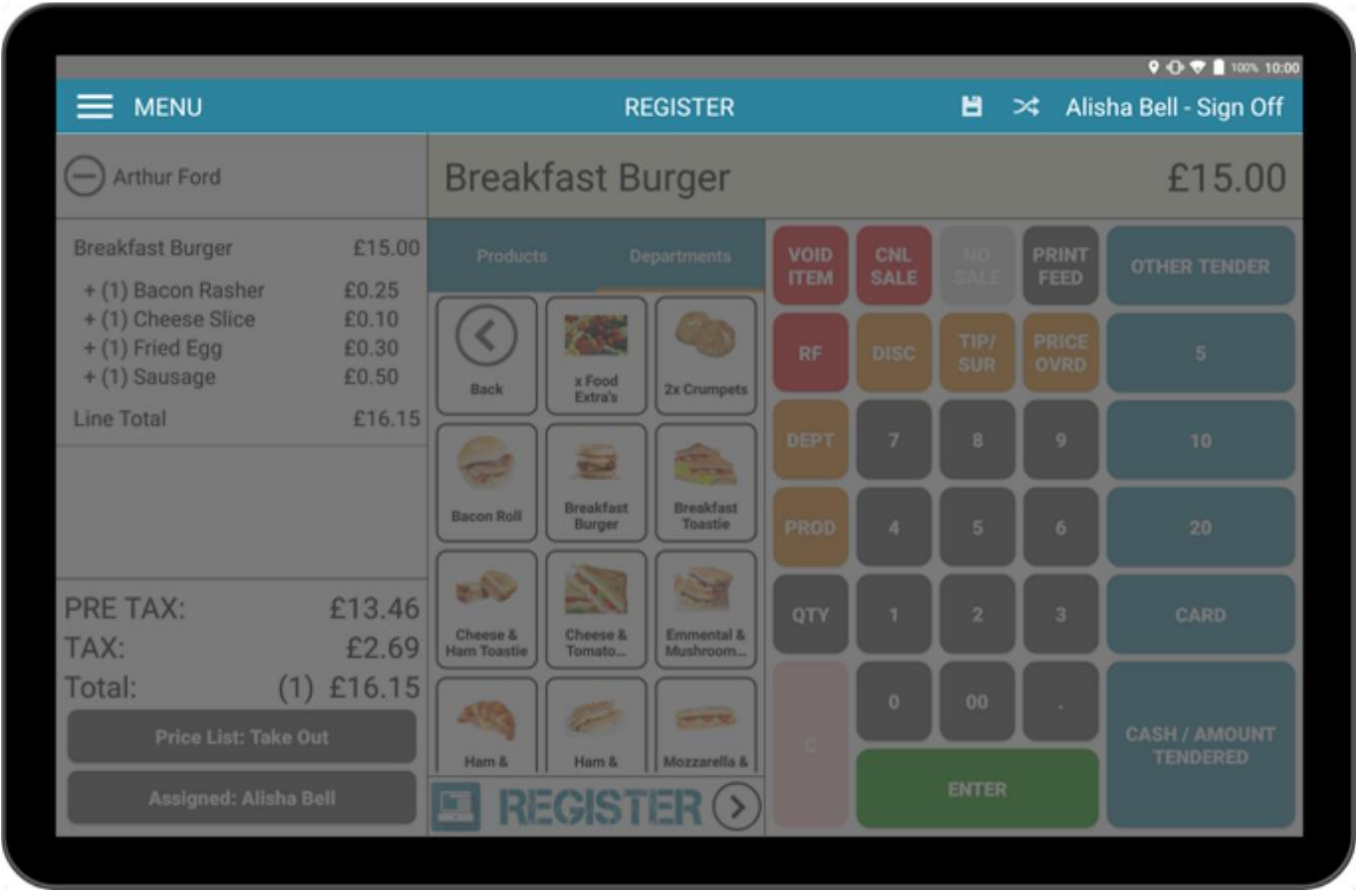
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### Overview

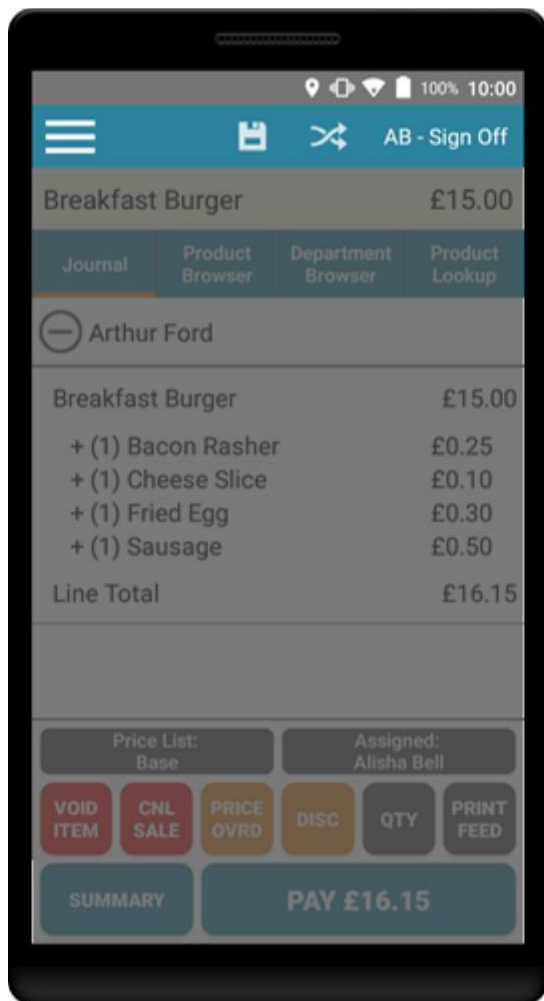
The Top Bar contains various information such as the currently signed in Staff Member, the name of

your Store or Till, and other Function Buttons that become available depending on which Module you are in, or which are available.

Top Bar (Landscape Mode)



## Top Bar (Portrait Mode)



## Top Bar Command / Button List (Both Modes)

| Button | Name                         | Description                                                 |
|--------|------------------------------|-------------------------------------------------------------|
|        | <b>Cancel</b>                | Cancels either the End of Day or the Staff Sign In          |
|        | <b>Disable Training Mode</b> | Disables the Training Mode and returns to the Live Register |
|        | <b>Done</b>                  | Returns to the previous page                                |
|        | <b>Enable Training Mode</b>  | Enters the Training Mode and disables the Live Register     |
|        | <b>Settings</b>              | Accesses the Settings Page                                  |
|        | <b>Side Menu</b>             | Launches the Side Menu                                      |

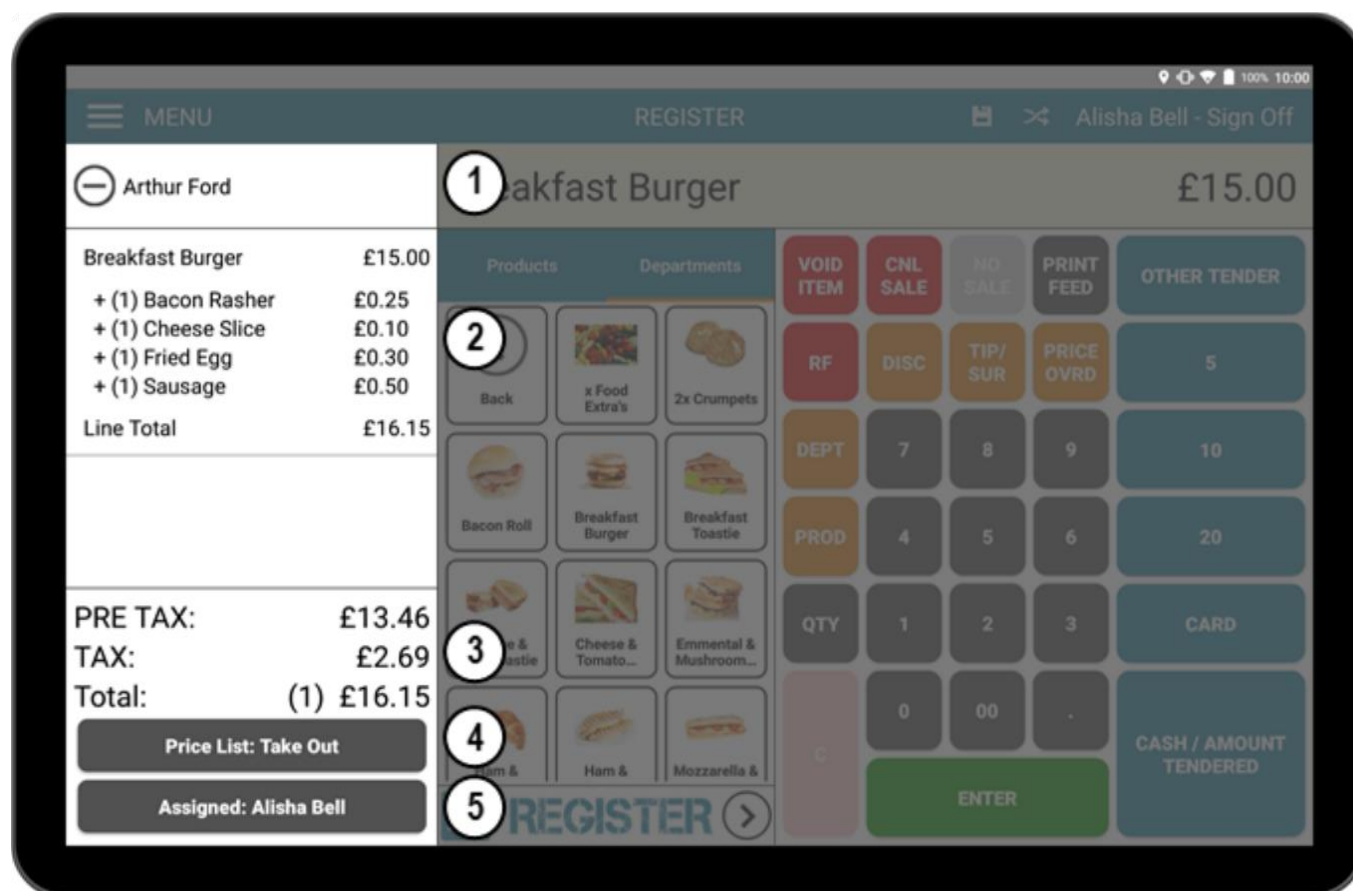
|                                                                                   |                                   |                                                                         |
|-----------------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------|
|  | <b>Sign Off</b>                   | Signs the Staff Member off the Register                                 |
|  | <b>Store or Till Name</b>         | Customisable in the Profile                                             |
|  | <b>Sub Menu</b>                   | Access the Sub Menu                                                     |
|  | <b>Suspend Transaction</b>        | Save the current transaction                                            |
|  | <b>Suspended Transaction List</b> | Lists the currently Suspended Transactions                              |
|  | <b>Switch Staff Member</b>        | Change the currently Signed On Staff Member and suspend the Transaction |
|  | <b>Update Data</b>                | Two-Way Data transfer between the register and the Portal               |

## 2.1.8. Transaction Journal

### Overview

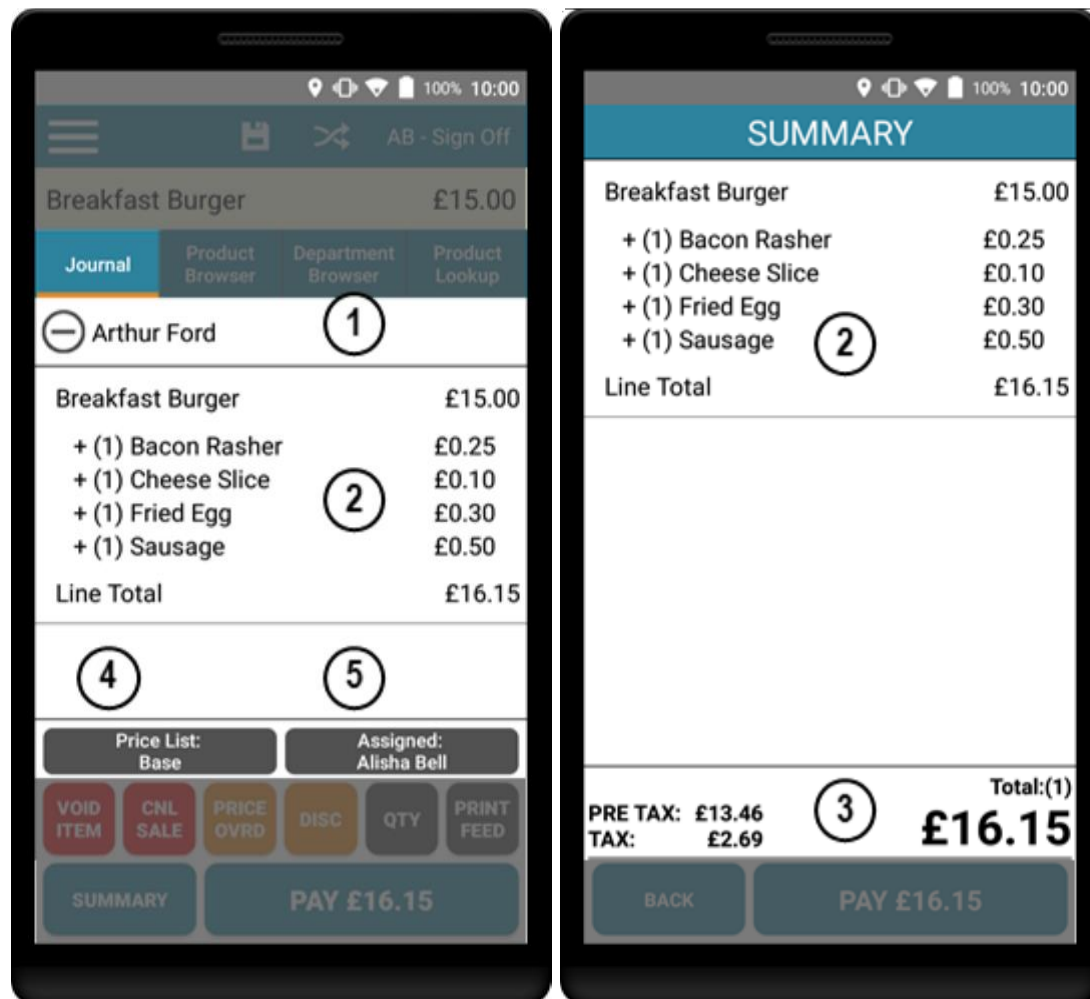
The Transaction Journal displays the products and adjustments currently on the transaction.

## Transaction Journal (Landscape Mode)



1. Assigned Customer
2. Example of Product in Journal
3. Taxation Summary
4. Current Price List in use
5. Current Assigned Staff Member

## Transaction Journal (Portrait Mode)



1. Assigned Customer
2. Example of Product in Journal
3. Taxation Summary
4. Current Price List in use
5. Current Assigned Staff Member

## 2.2. General Processes

### Overview

The following sections details how to complete common actions you will encounter within the Register.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Start Day](#)
- [Signing On](#)
- [Signing Off](#)
- [Timekeeping](#)
- [Updating Data](#)

## 2.2.1. Start Day

### Overview

The Start Day process allows a Staff Member to open the Register for the day's trading:

- The Staff Member has the option to either;
  - Enter the float amount for the Register, or
  - If you do not wish to add a float, leave the amount empty and tap **Start Day**. The Register will then display a **No Float Entered** dialog, and tapping the **YES** button here will allow the Staff Member to proceed to the Register.
- There is no need to carry out the Start Day process if you only need to access a Module within the Register such as the Stock Module. When prompted to Start Day, simply tap the side menu icon and select the required Module. If you skip the Start Day in this manner, you will not have access to the Register, or the Paid In and Paid Out modules.
- The Register can remember the last float entered and automatically populate the Float Value on the Start Day process. For more information, see the chapter on the [Start Day](#) configurations in the Portal section.



This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

### The Start Day Process – With Float (Both Modes)

| Step | Instruction                           | Operation                                                                           |
|------|---------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Staff Member <b>Sign On</b> as normal | See <a href="#">Staff Member Sign On</a>                                            |
| 2    | Select <b>Start Day</b>               |  |
| 3    | <b>Enter Float</b> (50.00)            |  |

|   |                                 |                                                                                   |
|---|---------------------------------|-----------------------------------------------------------------------------------|
| 4 | Tap <b>Start Day</b> to Confirm |  |
|---|---------------------------------|-----------------------------------------------------------------------------------|

### The Start Day Process – Without Float (Both Modes)

| Step | Instruction                           | Operation                                                                         |
|------|---------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Staff Member <b>Sign On</b> as normal | See <a href="#">Staff Member Sign On</a>                                          |
| 2    | Select <b>Start Day</b>               |  |
| 3    | Tap <b>Start Day</b>                  |  |
| 4    | Tap <b>YES</b>                        |  |

## 2.2.2. Signing On



### Overview

Your data is securely stored on the Register Device and requires a Staff Member to Sign On before granting access to the Functions, Modules and Data within the Register.

It is good practise to always Sign Off when the Register will not be in use for a period of time, or when it will be left unattended at any point.

### Signing On

There are two methods that can be utilised to sign a Staff Member into the Register.

- Signing in by **Name and PIN**
  - This method requires the Staff Member to first select their name from the Staff List, and then enter their four-digit PIN number.
- Signing in by **Staff Code Only**

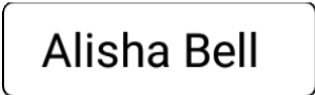


- This method only requires the Staff Member to tap in their four to eight-digit Staff Code.



The Staff Member PIN is not the same as the Staff Member Code.

### Signing On – Name and PIN Method (Both Modes)

| Step | Instruction                            | Operation                                                                          |
|------|----------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Staff Members Name</b>   |  |
| 2    | Enter the four-digit <b>PIN</b> number |  |

### Signing On – Staff Code Method (Both Modes)

| Step | Instruction                                     | Operation                                                                           |
|------|-------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Enter the four to eight-digit <b>Staff Code</b> |  |
| 2    | Tap the <b>Continue</b> Button                  |  |

## 2.2.3. Signing Off



## Overview

Your data is securely stored on the Register Device and requires a Staff Member to Sign On before granting access to the Functions, Modules and Data within the Register.

It is good practise to always Sign Off when the Register will not be in use for a period of time, or when it will be left unattended at any point.

- Unless either the [Switch Staff](#) or [Suspend Transaction](#) functionality is switched **ON** in the Web

Portal, the Signed On Staff Member will not be able to Sign Off while there is a transaction in progress.

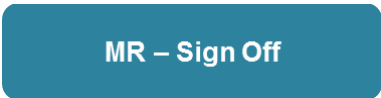
## Signing Off

This will log the current Staff Member off the Register and return to the Staff selection screen.

### Sign Off Process (Landscape Mode)

| Step | Instruction                                                       | Operation                                                                           |
|------|-------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Sign Off</b> located at the top right corner of the screen |   |
| 2    | Tap <b>Yes</b>                                                    |  |

### Sign Off Process (Portrait Mode)

| Step | Instruction                                                       | Operation                                                                             |
|------|-------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>Sign Off</b> located at the top right corner of the screen |   |
| 2    | Tap <b>Yes</b>                                                    |  |

## 2.2.4. Timekeeping

---



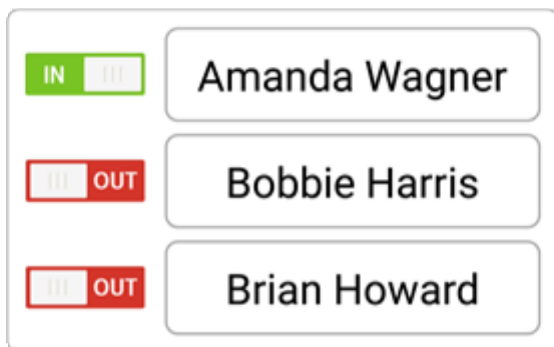
### Overview

- ✳ This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

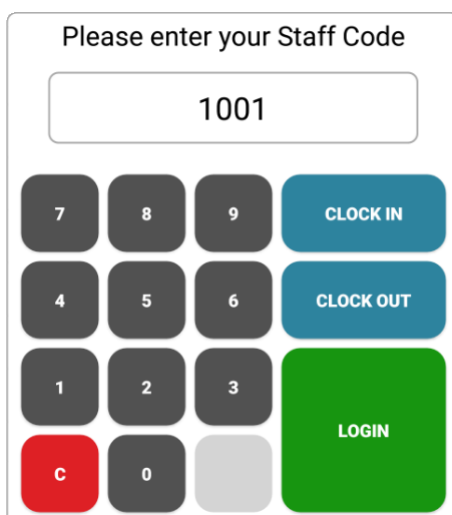
This feature allows Staff Members to record when they start and end work, by Clocking In and Out on the Register. This is recorded in the Portal and the data is accessible by running the [Time Keeping Report](#) under Operational Reports in the Portal.

- The Timekeeping function can be set to either be a mandatory or optional process, as well as allowing the Staff Member to either bypass the PIN entry screen after Clocking In for the first time, or to also require the Staff Member to Login after Clocking In. For more information on setting these configurations, see the chapter on [Timekeeping](#) in the Portal manual.
- If there is an issue with the Wi-Fi, the Register will store the Clocking In and Out transactions and on resuming a Wi-Fi connection, will send them to the Portal.

### Clocking In/Out when Login is set to Staff PIN (Both Modes)



### Clocking In/Out when Login is set to Staff Code (Both Modes)



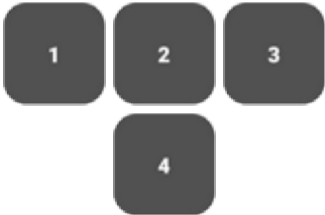
Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Clocking In & Out when Present](#)

- [Clocking In & Out when not Present](#)

## 2.2.4.1. Clocking In & Out when Present

### Clock In using the Staff PIN method. (Both Modes)

| Step | Instruction                                                                    | Operation                                                                           |
|------|--------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Red Clock In/Out</b> Icon next to the Staff Members Name         |  |
| 2    | Enter the <b>PIN</b> number                                                    |  |
| 3    | If Auto Login After Clock In is set to NO tap <b>YES</b> , else skip this step |  |
| 4    | Carry out the Start Day in not already done                                    |                                                                                     |

### Clock Out using the Staff PIN method. (Both Modes)

| Step | Instruction                                                              | Operation                                                                            |
|------|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Green Clock In/Out</b> Icon next to the Staff Members Name |  |
| 2    | Enter the <b>PIN</b> number                                              |  |
| 3    | Tap <b>OK</b>                                                            |  |

### Clock In using the Staff Code Method (Both Modes)

**!** The Staff Member must be present when using the Staff Code method, as the Code should only be know to them and not shared with other Staff Members.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                  |                                                                                    |
|---|--------------------------------------------------|------------------------------------------------------------------------------------|
| 1 | Tap in the four to eight-digit <b>Staff Code</b> |  |
| 2 | Tap <b>Clock In</b>                              |  |
| 3 | Tap <b>Yes</b> to confirm the Clock In           |  |
| 4 | Tap <b>Yes</b> to proceed to the Register Screen |  |
| 5 | Carry out the Start Day in not already done      |                                                                                    |

### Clock Out using the Staff Code Method (Both Modes)

| Step | Instruction                                      | Operation                                                                            |
|------|--------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap in the four to eight-digit <b>Staff Code</b> |   |
| 2    | Tap <b>Clock Out</b>                             |  |
| 3    | Tap <b>Yes</b>                                   |  |
| 4    | Tap <b>OK</b>                                    |  |

## 2.2.4.2. Clocking In & Out when not Present

### Overview

Follow these procedures to Clock In / Out if the Staff Member is not Present. In this instance a POS Supervisor will need to authorise the Clocking In by tapping in their PIN number. This will be recorded in the [Time Keeping Report](#) on the Portal.

**!** When using the Staff Code method, Clocking In/Out when the Staff Member is not present is not available, as the Code should only be know to that specific Staff Member and not shared with other Staff Members.

## Clock In using the Staff PIN method. (Both Modes)

| Step | Instruction                                                            | Operation                                                                           |
|------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Red Clock In/Out</b> Icon next to the Staff Members Name |  |
| 2    | Tap <b>Not Present</b>                                                 |  |
| 3    | Tap the <b>Authorising Supervisor</b> and Enter the <b>PIN</b> number  |   |

## Clock Out using the Staff PIN method. (Both Modes)

| Step | Instruction                                                              | Operation                                                                           |
|------|--------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Green Clock In/Out</b> Icon next to the Staff Members Name |  |
| 2    | Tap <b>Not Present</b>                                                   |  |
| 3    | Tap the <b>Authorising Supervisor</b> and Enter the <b>PIN</b> number    |  |

## 2.2.5. Updating Data



### Overview

**Updating the Data** or Syncing, is a two-way process where any unsent data on the Register is uploaded to the Portal and any new data on the Portal such as price changes or new products are imported into the Register. You can Update the Data at any time, but it is best practice to do this either at the start of each day or at the end of the day to ensure the data on the Register is always correct.

- You can set the Register to automatically perform a Sync on either the Start Day or End Day processes. For more information on this, see the [Automatically Update Register](#) section of this manual.

- From time to time an update will be made to the Register when new or updated features are added. You will usually be notified by email of the date this is to take place, and will occur out of hours so your normal trading will not be affected. Following the update, the Register will carry out an Automatic Update of the data.
- There are three types of Update Processes:
  - **A Manual Update Data Process** (From the Staff List Screen) which will collect new data such as price changes, new staff or new lists and discounts, and transmit any unsent data to the Portal.
  - **A Manual Full Update Process** (From the Settings Screen) where all data is refreshed on the Register.
  - **An Automatic Update Data Process** where on accessing either the Calendar, Customer or Reports (Store Reports) Modules, the Register will carry out an automatic update of the data.
- For both the Update Data and the Full Update processes to operate correctly, it is essential that you are connected to the Internet through your Wifi or LAN depending on how your Hardware communicates with the Internet.

**!** The **Update Data Process** needs to be done on each individual Register within each store.

## The Update Data Process (Both Modes)

| Step | Instruction                                                                                                   | Operation                                                                            |
|------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | If there is a Staff Member already Signed On, they will need to Sign Off and return to the Staff List Screen. | See – <a href="#">Signing Off</a>                                                    |
| 2    | Tap the <b>Update Data</b> button                                                                             |  |
| 3    | Wait for the Update process to complete                                                                       |                                                                                      |

**\*** You can stop the Update Data Process at anytime by tapping on the Cancel Button.

## The Full Update Process (Both Modes)

| Step | Instruction                                                                                                   | Operation                         |
|------|---------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 1    | If there is a Staff Member already Signed On, they will need to Sign Off and return to the Staff List Screen. | See – <a href="#">Signing Off</a> |

|   |                                         |                                                                                    |
|---|-----------------------------------------|------------------------------------------------------------------------------------|
| 2 | Tap the <b>Settings</b> button          |  |
| 3 | Tap <b>Settings</b>                     |  |
| 4 | Tap <b>FULL SYNC</b>                    |  |
| 5 | Wait for the Update process to complete |                                                                                    |

**!** You **cannot** stop the Full Update Process once it has begun as the data on the Register is essentially cleared out before downloading it again from the Portal.

## 2.3. Register Functions



### Overview

This section details all the Functions within the Register Module.

**Follow the links below to navigate to the sub topics, or scroll the topics to the left!**

- [Adding Products](#)
- [Assigning Staff Members to Transactions](#)
- [Adding Customers to a Transaction](#)
- [Cancel Entry](#)
- [Cancel Sale](#)
- [Discounting](#)
- [No Sale](#)
- [Price Lists](#)
- [Price Override](#)
- [Print Feed](#)
- [Printing Order Receipts](#)
- [Printing Receipts](#)
- [Product List Modifiers](#)



- [Product Price Modifiers](#)
- [Product Search](#)
- [Product Notes](#)
- [Quantity Adjustment](#)
- [Refunds](#)
- [Suspending \(Parking\) Transactions](#)
- [Surcharges](#)
- [Switching Staff](#)
- [Tabs](#)
- [Tendering Transactions](#)
- [Tipping](#)
- [The Department Browser](#)
- [The Plus Product Browser](#)
- [The Product Browser](#)
- [Transaction Voiding](#)
- [Void Item](#)
- [Void Multiple Products](#)

## 2.3.1. Adding Products

---



### Overview

There are different product types available in the Register, and different methods used to add them to a transaction. Although the methods are similar, there are some that require extra steps. The following sections describes these processes.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Regular Type Products](#)
- [Products with Price Modifiers](#)
- [Products with List Modifiers](#)
- [Measured or UOM Products](#)
- [Fixed Measure Products](#)
- [Manually Priced Products](#)

- [Department Products](#)
- [Repeat Last Product](#)

## 2.3.1.1. Regular Type Products

### Overview

Regular Products form the majority of products sold in most stores and are categorized as having a fixed or set price.

#### Adding Regular Type Products (Both Modes)

| Step | Instruction                         | Operation                                                                                                  |
|------|-------------------------------------|------------------------------------------------------------------------------------------------------------|
| 1    | Select or Scan the <b>Product</b>   |  <p>Chocolate Cookie</p> |
| 2    | The product will add to the Journal | <div>Chocolate Cookie £1.00</div>                                                                          |

## 2.3.1.2. Products with Price Modifiers

### Overview

Products that contain Price Modifiers are normally associated to products that have several products sold as a single product, and All the products are added together to form one single product.

- **For example**, in a Restaurant you would sell a Hamburger as a single product, but the Hamburger has several products associated with it.
  - The Bread Roll,
  - The Burger
  - The Sauces,
  - And the Additional Fillings.



For more detailed information on Products with Price Modifiers, see the section on [Price Modifiers](#).

## Adding Price Modified Type Products (Both Modes)

| Step             | Instruction                                                        | Operation                                                                                                                                                                                                                                                                                      |                  |        |              |       |              |       |           |       |         |       |            |        |
|------------------|--------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|--------|--------------|-------|--------------|-------|-----------|-------|---------|-------|------------|--------|
| 1                | Select or Scan the <b>Product</b>                                  | <div><p><b>Breakfast<br/>Burger</b></p></div>                                                                                                                                                                 |                  |        |              |       |              |       |           |       |         |       |            |        |
| 2                | Tap the <b>Products</b> tab                                        | <div>PRODUCTS</div>                                                                                                                                                                                                                                                                            |                  |        |              |       |              |       |           |       |         |       |            |        |
| 3                | Tap <b>Remove</b> to reduce the Quantity of the secondary product. | <div>-</div>                                                                                                                                                                                                                                                                                   |                  |        |              |       |              |       |           |       |         |       |            |        |
| 4                | Tap <b>Add</b> to increase the Quantity of the secondary product.  | <div>+</div>                                                                                                                                                                                                                                                                                   |                  |        |              |       |              |       |           |       |         |       |            |        |
| 5                | Tap <b>Add Item</b>                                                | <div>ADD ITEM</div>                                                                                                                                                                                                                                                                            |                  |        |              |       |              |       |           |       |         |       |            |        |
| 6                | The product will add to the Journal                                | <div><table><tr><td>Breakfast Burger</td><td>£15.00</td></tr><tr><td>Bacon Rasher</td><td>£0.00</td></tr><tr><td>Cheese Slice</td><td>£0.00</td></tr><tr><td>Fried Egg</td><td>£0.00</td></tr><tr><td>Sausage</td><td>£0.00</td></tr><tr><td>Line Total</td><td>£15.00</td></tr></table></div> | Breakfast Burger | £15.00 | Bacon Rasher | £0.00 | Cheese Slice | £0.00 | Fried Egg | £0.00 | Sausage | £0.00 | Line Total | £15.00 |
| Breakfast Burger | £15.00                                                             |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |
| Bacon Rasher     | £0.00                                                              |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |
| Cheese Slice     | £0.00                                                              |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |
| Fried Egg        | £0.00                                                              |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |
| Sausage          | £0.00                                                              |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |
| Line Total       | £15.00                                                             |                                                                                                                                                                                                                                                                                                |                  |        |              |       |              |       |           |       |         |       |            |        |

## Modifying Price Modified Type Products (Both Modes)

| Step | Instruction                                                        | Operation                                                                                                                                                                                                                                                                                                     |
|------|--------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>Product</b> in the Journal                              | <div><div>Breakfast Burger</div><div>£15.00</div></div> <div><div>Bacon Rasher</div><div>£0.00</div></div> <div><div>Cheese Slice</div><div>£0.00</div></div> <div><div>Fried Egg</div><div>£0.00</div></div> <div><div>Sausage</div><div>£0.00</div></div> <div><div>Line Total</div><div>£15.00</div></div> |
| 2    | Tap the <b>Modify</b> button                                       | <div>MODIFY</div>                                                                                                                                                                                                                                                                                             |
| 3    | Tap the <b>Products</b> tab                                        | <div>PRODUCTS</div>                                                                                                                                                                                                                                                                                           |
| 4    | Tap <b>Remove</b> to reduce the Quantity of the secondary product. | <div>-</div>                                                                                                                                                                                                                                                                                                  |
| 5    | Tap <b>Add</b> to increase the Quantity of the secondary product.  | <div>+</div>                                                                                                                                                                                                                                                                                                  |

|   |                                        |                                                                                                                                                                                                                                                                                                                                                   |
|---|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6 | Tap <b>Save</b>                        |                                                                                                                                                                                                                                                                 |
| 7 | The product is adjusted in the Journal | <div> <div>Breakfast Burger</div> <div>£15.00</div> </div> <div> <div>Bacon Rasher</div> <div>£0.00</div> </div> <div> <div>+ (1) Cheese Slice</div> <div>£0.10</div> </div> <div> <div>+ (1) Fried Egg</div> <div>£0.30</div> </div> <div> <div>+ (1) Sausage</div> <div>£0.50</div> </div> <div> <div>Line Total</div> <div>£15.90</div> </div> |

## 2.3.1.3. Products with List Modifiers

### Overview

Products with List Modifiers are products that can have variations that do not affect the price.

- **For example**, in a Restaurant selling Hamburgers, you can add a List Modifier to change the type of Sauce added.
  - Ketchup
  - BBQ Sauce
  - Mayo
  - House Sauce



For more detailed information on Products with List Modifiers, see the section on [List Modifiers](#).

### Adding List Modified Type Products (Both Modes)

| Step | Instruction                          | Operation                                                                                                       |
|------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| 1    | Select or Scan the <b>Product</b>    |  <div>Breakfast Burger</div> |
| 2    | Tap the <b>Lists &amp; Notes</b> tab |                              |
| 3    | Tap the Required List Modifier Name  | <div>Modifier Lists</div> <div> <div>Sauce</div> <div>Notes</div> </div>                                        |

|   |                                     |                                                                                                                                                                                                                                                                                                |
|---|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4 | Tap the Required List Modifier Item | <div>Sauce</div> <div> <input type="radio"/> No Sauce         </div> <div> <input type="radio"/> Ketchup         </div> <div> <input checked="" type="radio"/> BBQ Sauce         </div> <div> <input type="radio"/> Mayo         </div> <div> <input type="radio"/> House Sauce         </div> |
| 5 | Tap <b>Save</b>                     | <div>SAVE</div>                                                                                                                                                                                                                                                                                |
| 6 | Tap <b>Add Item</b>                 | <div>ADD ITEM</div>                                                                                                                                                                                                                                                                            |

## 2.3.1.4. Measured or UOM Products

### Overview

UOM or Measured Products will prompt the Staff Member to enter the weight, length or volume before the product is added to the journal.

- UOM products can be entered in their original or converted measurement
  - **For example**, when selling “Bananas” you might configure the product to be sold in grams, but the Register will allow you to enter a value in Kilograms or Imperial measurements such as Pounds and Ounces. The Register will automatically convert these measurements to the configured measurement and then add it to the journal.

### Adding Measured or UOM Products

| Step | Instruction                                                                                            | Operation                                                                            |
|------|--------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Select the or Scan the <b>UOM Type Product</b>                                                         |  |
| 2    | Tap on the <b>Measurement</b> button if you wish to change to an alternate value, or leave as default. | <div>KILOGRAMS</div>                                                                 |
| 3    | Enter the <b>Measurement</b> . For example, 1.2                                                        | <div>1 . 2</div>                                                                     |
| 4    | Tap <b>Apply</b>                                                                                       | <div>APPLY</div>                                                                     |

|   |                                                                     |                                                       |
|---|---------------------------------------------------------------------|-------------------------------------------------------|
| 5 | The price will be automatically calculated and added to the Journal | <div>Bananas</div> <div>x1.2kg Line Total £0.82</div> |
|---|---------------------------------------------------------------------|-------------------------------------------------------|

## 2.3.1.5. Fixed Measure Products

### Overview

Fixed Measure Products are those types of products that are sold as a fixed quantity derived from a larger quantity of that product.

- **For example,** A Bar or Public House will sell draft beer in fixed measurements from a container (barrel) of that beer.
  - The Barrel would be the container consisting of 40.91 Liters (UK)
  - The Fixed Measure Product would be the 72 pints of beer that would be individually sold from that barrel.

### Adding Fixed Measure Type Products (Both Modes)

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Select or Scan the <b>Product</b> |  |

## 2.3.1.6. Manually Priced Products

### Overview

Manually Priced Products are those products that you sell that does not have a fixed price or when the price of an item varies but not against a measurement or volume. They are typically used when providing services where the cost might vary depending on the time or effort involved. On adding the Product to the Journal, the Staff Member will be prompted to enter the Price manually.

- **For Example,** In your business, you could add a Manually Priced Product called **Labour** and charge accordingly.

## Adding Manually Priced Products (Both Modes)

| Step | Instruction                       | Operation                                                                                   |
|------|-----------------------------------|---------------------------------------------------------------------------------------------|
| 1    | Select or Scan the <b>Product</b> | <br>Labour |
| 2    | Enter the Price <b>(39.95)</b>    |           |
| 3    | Tap <b>Enter</b>                  |            |

## 2.3.1.7. Department Products

### Overview

Department Entry allows a Staff Member to record an amount sold against a Department. This is typically used if the product has not yet been loaded into the Register, or the Staff Member is unable to find the product using the [Product Search](#) method. A Department Entry is simply a miscellaneous department product.

- **For example**, you have a department for **Coffee** but no product for “**Loose Coffee Beans**”. You would complete a Department Entry against **Coffee** for the price of the “**Loose Coffee Beans**”.

\* Department Products are much like [Manually Priced Products](#).

## Adding Department Products (Landscape Mode)

| Step | Instruction                            | Operation                                                                           |
|------|----------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Department Entry</b> button |  |
| 2    | Enter the <b>Department Name</b>       | COFFEE                                                                              |
| 3    | Tap <b>Enter</b>                       |  |

|   |                                |                                                                                   |
|---|--------------------------------|-----------------------------------------------------------------------------------|
| 4 | Enter the price of <b>4.26</b> |  |
| 5 | Tap <b>Enter</b>               |  |

### Adding Department Products (Portrait Mode)

| Step | Instruction                          | Operation                                                                           |
|------|--------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Product Lookup</b> button |    |
| 2    | Enter the <b>Department Name</b>     | <b>COFFEE</b>                                                                       |
| 3    | Tap <b>Search</b> Button             |    |
| 4    | Tap <b>Add Item</b>                  |    |
| 5    | Enter the price of <b>4.26</b>       |  |
| 6    | Tap <b>Enter</b>                     |  |

## 2.3.1.8. Repeat Last Product

### Overview

In the Register, you can repeat the last item added to the transaction by pressing the enter button. This function is useful when entering several manually priced products at the same price.

- You can also use the [Quantity Adjustment](#) button to add multiple entries of the same product.

**!** The **Repeat Last Product** functionality is only available in **Landscape Mode**

### Repeating the last product added (Landscape Mode)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|



|   |                                                           |                                                                                                |
|---|-----------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 1 | Add a <b>Product</b>                                      | <div></div> |
| 2 | Tap <b>Enter</b> to Add the same Item again               | <div><div>ENTER</div></div>                                                                    |
| 3 | You will see the item in the Journal with a quantity of 2 | <div><div>Café Latte (Med)<br/>x2 Line Total</div><div>£2.45<br/>£4.90</div></div>             |

## 2.3.2. Assigning Staff Members to Transactions

### Overview

Register allows the Staff Member who is operating the till, to assign a different Staff Member to the transaction. The transaction is then recorded against the assigned Staff Member and will be visible in applicable reports.

- This assigned Staff Member will also have any [Tips](#) or [Commissions](#) linked to them.
- By default the assigned staff member will be the staff member who is logged into Register.
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

### Assigning Staff Members to Transactions

| Step | Instruction                               | Operation                                                                            |
|------|-------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the Currently Assigned Staff Member   |  |
| 2    | Tap the New Staff Member                  |  |
| 3    | Carry Out Supervisor Approval (If Active) |                                                                                      |

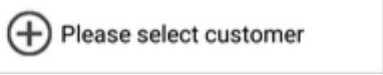
## 2.3.3. Adding Customers to a Transaction

### Overview

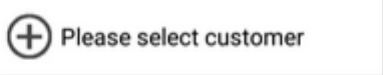
You can link a transaction to a customer using the **Add Customer** button.

- Linking a transaction can also be done from the [Transaction History](#) and the [Customer](#) modules.

### Adding a Customer to a Transaction (Landscape Mode)

| Step | Instruction                                                   | Operation                                                                          |
|------|---------------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap <b>Please select a customer</b> at the top of the Journal |  |
| 2    | Enter <b>Search Criteria</b> and tap <b>Search</b>            |   |
| 3    | Tap <b>Assign</b>                                             |   |
| 4    | Carry out your transaction as normal                          | The customer name will appear at the top of the Journal                            |

### Adding a Customer to a Transaction (Portrait Mode)

| Step | Instruction                                                   | Operation                                                                           |
|------|---------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Please select a customer</b> at the top of the Journal |  |
| 2    | Enter <b>Search Criteria</b> and tap <b>Search</b>            |  |
| 3    | Tap <b>Assign</b>                                             |  |
| 4    | Carry out your transaction as normal                          | The customer name will appear at the top of the Journal                             |

## 2.3.4. Cancel Entry



### Overview

Whilst in the Register, you can cancel the current action at any time by using the “C” button on the keypad. It can be used to cancel a workflow such as adding a Price Override or act like a backspace button to remove the last entered digit(s) when using the keypad.

- The Cancel Entry button cannot be used to cancel a product that has been added to the journal. In this instance, see the chapter on [Voiding](#) products.

## Cancel Entry (Both Modes)

In this example a product is added to the transaction when the Staff Member accidentally taps the Price Override button. Tapping the Cancel Button returns the clerk to the Register screen.

| Step | Instruction                                   | Operation                                                                          |
|------|-----------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap a <b>Product</b> to add it to the journal |   |
| 2    | Tap the <b>Product</b> in the journal         | <div>Café Latte (Med) £2.45</div>                                                  |
| 3    | Tap the <b>Price Override</b> button          |   |
| 4    | Tap the <b>C</b> button to cancel             |  |

## 2.3.5. Cancel Sale



### Overview

The Cancel Sale function will allow the Staff Member to cancel the current sale / transaction, and is available up to the point of entering the full tendered amount. This will remove all items from the Journal and the Staff Member will be ready to start the next transaction.

- In Portrait Mode, you can no longer cancel the sale once the Tendering Process has started.**
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

- The Register can be configured to prompt the Staff Member to add a reason for the use of the Cancel Sale function. For more information, see the the chapter on [Cancel Sale Reasons](#).

### Cancel Sale (Both Modes)

| Step | Instruction                                         | Operation                                                                          |
|------|-----------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap a <b>Product</b>                                |   |
| 2    | Tap the <b>Cancel Sale</b> button                   |   |
| 3    | Select the <b>Reason</b> (If Enabled)               |                                                                                    |
| 4    | Tap <b>Cancel Sale</b> to confirm                   |  |
| 5    | Process the <b>Supervisor Approval</b> (If Enabled) |                                                                                    |

**!** The Cancel Sale function cannot be used to cancel a transaction that has already been completed. In this case, you would need to **Refund** the transaction separately.

## 2.3.6. Discounting



### Overview

Discounting allows the Merchant to add either a Price or Percentage Discount to single or multiple products within the Transaction, or the entire Transaction itself.

- Discounting can either be by **Price** where a fixed price discount is applied, or by a **Percentage**.
- For the purposes of reporting, where a Price or Percentage discount is added to a Transaction, the value of the discount will be equally divided amongst all the the items in the Transactions.
- You can set predefined discounts or use the System Discounts. For more information, please see

the section on [Discounting](#) in the Portal area of this manual.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Item Discount](#)
- [Transaction Discount](#)

## 2.3.6.1. Item Discount

### Overview

Item Discounting can be applied to a single or multiple items in the Transaction. You can either choose to add a price or percentage discount to a single item, but selecting multiple items in the journal will only allow you to add a percentage discount. To select multiple items, simply tap on each item in the journal.

- The Discount applied to an item cannot exceed its original value, but can be equal to it.
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

**!** When adding an Item Discount, the Register will not allow you to add a discount to a product that will reduce the final cost below and Fixed Tax amount added to the product. **For example**, if the Product has a Post Tax cost of £1.00, but includes a Fixed Tax of £0.25, you cannot add a discount of more than £0.75

### Single Item Discounting (Both Modes)

| Step | Instruction                                          | Operation                                                                             |
|------|------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>The Product</b> in the Journal                |   |
| 2    | Tap the <b>Discount</b> button                       |  |
| 3    | Select <b>Item £ Discount</b> from the dropdown list |   |
| 4    | Tap in the <b>Discount</b> (1.00)                    |   |

|   |                     |                                                                                    |
|---|---------------------|------------------------------------------------------------------------------------|
| 5 | Tap <b>Enter</b>    |  |
| 6 | Tap <b>Discount</b> |  |

### Multiple Item Discounting (Both Modes)

| Step | Instruction                                          | Operation                                                                             |
|------|------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>The First Product</b> in the Journal          |     |
| 2    | Tap <b>The Second Product</b> in the Journal         |     |
| 3    | Tap the <b>Discount</b> button                       |    |
| 4    | Select <b>Item % Discount</b> from the dropdown list |     |
| 5    | Tap in the <b>Discount</b> (10)                      |   |
| 6    | Tap <b>Enter</b>                                     |   |
| 7    | Tap <b>Discount</b>                                  |  |

## 2.3.6.2. Transaction Discount

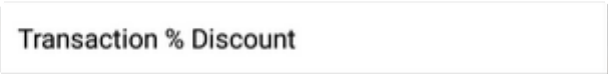
### Overview

Transaction Discounting varies from [Item Discounting](#) as it applies the discount to the whole transaction not just a single product. Transaction discounts can be applied as a price or percentage discount.

- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

### Transaction Discounting (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                             |                                                                                     |
|---|-------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Tap <b>Discount</b>                                         |  |
| 2 | Select <b>Transaction % Discount</b> from the dropdown list |   |
| 3 | Tap in the <b>Discount</b> (30%)                            |  |
| 4 | Tap <b>Enter</b>                                            |  |
| 5 | Tap <b>Apply</b>                                            |  |

## 2.3.7. Emailing Receipts

### Overview

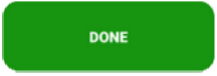


The Register can forward an electronic copy of the Customer Receipt by email after the Tendering process has been completed, and is carried out from the Tendering Summary Dialog.

- Emailing needs to be activated in the [Receipts](#) area of the Profile.
- If a customer is assigned to the transaction, the email address (if present) will automatically be populated in the email address dialog.

### Emailing Receipts when no customer is assigned (Both Modes)

| Step | Instruction                                  | Operation                                                                            |
|------|----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Complete the <b>Tender</b> as normal         |  |
| 2    | Tap the <b>Email Customer Receipt</b> button |  |
| 3    | Enter the Email Address                      | <b>For example;</b> customer@noemail.com                                             |

|   |                            |                                                                                    |
|---|----------------------------|------------------------------------------------------------------------------------|
| 4 | Tap the <b>Send</b> button |  |
| 5 | Tap <b>Done</b>            |  |

### Emailing Receipts when a customer is assigned (Both Modes)

| Step | Instruction                                  | Operation                                                                         |
|------|----------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Complete the <b>Tender</b> as normal         |  |
| 2    | Tap the <b>Email Customer Receipt</b> button |  |
| 3    | Tap the <b>Send</b> button                   |  |
| 4    | Tap <b>Done</b>                              |  |

## 2.3.8. No Sale

---



### Overview

The No Sale function allows the Staff Member to open the cash drawer if access is needed outside of a normal sale. Examples may include when the Staff Member has given the wrong change to a customer.

- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.
- The total number of No Sales each day is recorded in the [Daily Z Report](#) and recorded against the Staff Member in the [No Sale Report](#) found on the Web Portal.
- The Register can be configured to prompt the Staff Member to add a reason for the use of the No Sale function. For more information, see the the chapter on [No Sale Reasons](#)



- The top two No Sale reasons are [Paid In](#) and [Paid Out](#). Selecting either of these reasons, will take the Staff Member to the respective module. This will not be included in the [No Sale Report](#), but will be listed in the [Paid In Out Report](#).

**!** The No Sale function cannot be used once a transaction has been started.

### No Sale (Both Modes)

| Step | Instruction                                          | Operation                                                                         |
|------|------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap the <b>No Sale</b> button                        |  |
| 2    | Select the <b>No Sale Reason</b> (If Enabled)        |                                                                                   |
| 3    | Complete the <b>Supervisor Approval</b> (If Enabled) |                                                                                   |

## 2.3.9. Price Lists

### Overview

Register supports multiple price lists, allowing a single product to have multiple prices or taxes. Price lists can also be used to manage different prices across multiple stores, but still using the same base product data.

- You can set the Register to either use the previous Price List that was in operation, or to force the Staff Member to select a Price List on each new transaction. For more information on this, see the section on **Price Lists** in the Portal area of this manual.
- The price list is selected when starting a new transaction and is then used for all items added to that sale, or can be changed mid-transaction if needed.
- Price Lists can also be set to automatically change at specific times during the day. This is commonly known as “**Happy Hour**” For more information on this, see the section on setting up [Time Based Price Lists](#).

### Selecting a Price List (Both Modes)

| Step | Instruction                           | Operation                                                                            |
|------|---------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Please Select Price List</b>   |  |
| 2    | Tap on the required <b>Price List</b> | <b>For Example</b> , Christmas Price List                                            |

|   |                                                                                                               |  |
|---|---------------------------------------------------------------------------------------------------------------|--|
| 3 | During the Transaction, tap the <b>Price List</b> button again to change the selected Price List if required. |  |
|---|---------------------------------------------------------------------------------------------------------------|--|

## 2.3.10. Price Override

### Overview

Price Override is helpful when you want to change the cost of an item to offer a customer a set price on the item, or when the product has been incorrectly priced. This is not the same as Discounting, as it allows the Staff Member to to freely increase or decrease the price of a product, and does not have a limit on the amount. The product price could be set to 0.00 if needed.

- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

### Price Override (Both Modes)

| Step | Instruction                        | Operation                         |
|------|------------------------------------|-----------------------------------|
| 1    | Tap the <b>Item</b> in the Journal | <div>Café Latte (Med) £2.45</div> |
| 2    | Tap <b>Price Override</b>          | <div>PRICE OVRD</div>             |
| 3    | Tap in the <b>New Price</b> (1.99) | <div>1 9 9</div>                  |
| 4    | Tap <b>Enter</b>                   | <div>ENTER</div>                  |
| 5    | Tap <b>Override</b>                | <div>OVERRIDE</div>               |

## 2.3.11. Print Feed



## Overview

If the Staff Member requires some blank receipt paper for taking a note or to feed some paper after changing the till roll, they can use the Print Feed button to achieve this.

- Tap the button several times until the desired length of paper has been dispensed.

### Print Feed

| Step | Instruction                      | Operation                                                                         |
|------|----------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap the <b>Print Feed</b> button |  |

## 2.3.12. Printing Order Receipts

### Overview

Printing Order Receipts can be done in one of three ways;

1. [Suspending a Transaction](#)
  2. [Tendering a Transaction](#)
  3. Using the [Reprint Function](#) in the suspended transaction list.
- All products can be configured to use the Print Order Receipt Printer via the web portal. Only products set to either Primary or Secondary Printer will be sent to the Print Order Receipt Printer. For more information please refer to our [Portal Manual](#)
  - Once a product has been printed on the Print Order Receipt Printer, it will be highlighted in green in the journal.
  - Any notes you add to a product will be printed on the Print Order Receipt. See [Product Notes](#)

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Printing to the Order Receipt Printer](#)
- [Printing on Transaction Tendering](#)
- [Re-printing a Suspended Transaction](#)

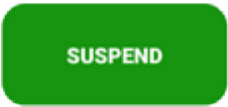
## 2.3.12.1. Printing to the Order Receipt Printer

### Overview

When you suspend a transaction, the Register will look for any products in the Journal that have been configured to print to an Order Receipt Printer, and ask if you want to print them at that point. If you select **NO** the transaction will be suspended without printing. If you select **PRINT**, these products will be printed on the selected Order Receipt Printer and the transaction will then be suspended.

- If you have resumed a Suspended Transaction which has already had the products printed on the Order Receipt Printer, the Register will ignore these and only look for any new products that need to be processed.

### Printing to the Order Receipt Printer (Both Modes)

| Step | Instruction                                                                  | Operation                                                                           |
|------|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Add some <b>Products</b> to the Journal                                      |  |
| 2    | Tap the <b>Suspend Transaction</b> icon                                      |  |
| 3    | Give the transaction a <b>Name</b> , or select from a <b>Predefined List</b> | <b>For example;</b> Table 1                                                         |
| 4    | Tap <b>Suspend</b>                                                           |  |
| 5    | Tap <b>Print</b>                                                             |  |

## 2.3.12.2. Printing on Transaction Tendering

### Overview

When you tender a transaction, the Register will look for any products in the Journal that have been configured to print to an Order Receipt Printer. If any products are found that have not already been printed, the Register will prompt you to add a Transaction Name (If not already named with [Suspend Transaction](#)) and then print those products. The normal tendering process will then resume.

## Printing on Transaction Tendering (Both Modes)

| Step | Instruction                                                               | Operation                                                                         |
|------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Add some <b>Products</b> to the Journal                                   |  |
| 2    | <b>Tender</b> the transaction                                             |  |
| 3    | Enter a <b>Transaction Name</b> , or select from a <b>Predefined List</b> | <b>For example;</b> Table 1                                                       |
| 4    | Tap <b>OK</b>                                                             |  |
| 5    | Tap <b>Done</b>                                                           |  |

## 2.3.12.3. Re-printing a Suspended Transaction

### Overview

Re-printing a Suspended Transaction is available in the case where for example, the Order Receipt Printer ran out of paper mid-print.

- Only items that have already been printed on the Order Receipt Printer will be re-printed. Any new items will be printed only if you Tender or [Suspend](#) the transaction again.

### Re-printing a Suspended Transaction (Both Modes)

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended List</b> Icon         |  |
| 2    | Locate the transaction you want to reprint | <b>For example;</b> Table 1                                                         |
| 3    | Tap <b>Re-Print</b>                        |  |

## 2.3.13. Printing Receipts

### Overview

Register can print out a hard copy of the various transactions available in the form of a printed receipt. Reprinting of the Receipt is also available.

- Examples of where Receipts can be printed and reprinted are:
  - After a transaction has been successfully tendered in the Register.
    - **Print Gift Receipt:** This will reprint the transaction receipt but will not contain any of the price values. Used for customers who purchase items as gifts.
  - Paid In Transactions
  - Paid Out Transactions
  - Store Sales Reports (Reports Module)
  - Till Sales Reports (Reports Module)
  - Product Sales (Reports Module)
  - End Day Process
  - Transaction History

### Printing Receipts (Both Modes)

| Step | Instruction              | Operation                                                                           |
|------|--------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Print Receipt</b> |  |

### Reprinting Receipts (Both Modes)

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Reprint Receipt</b> |  |

## 2.3.14. Product List Modifiers

### Overview

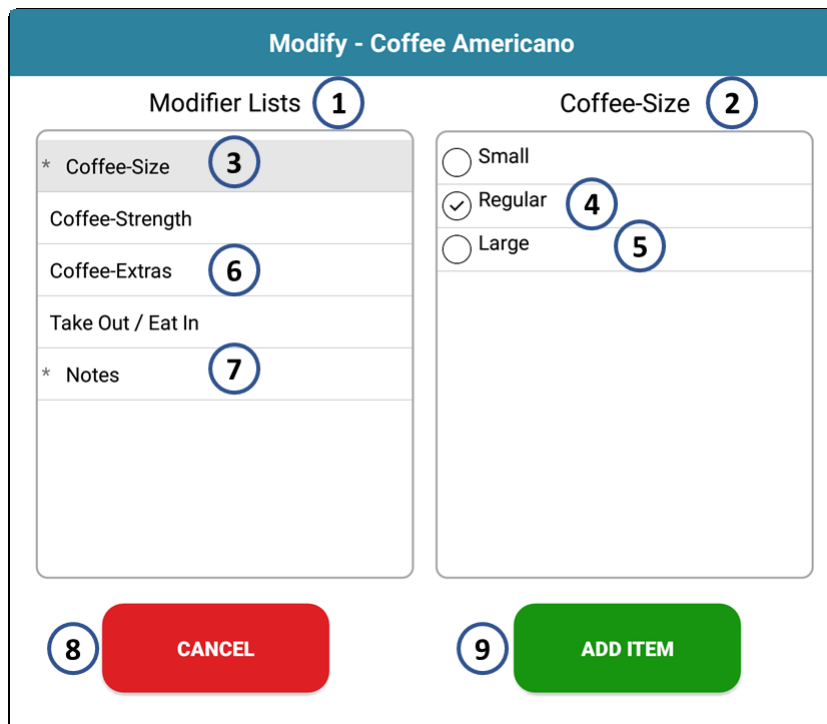
Merchants are able to add preset modifiers/comments to products, to easily apply changes to the customers' item. This is in addition to the existing [Products Notes](#) option. Each [Modifier List](#) is created on the Portal and assigned to the required products.

- From the modifier window the Staff Member can select multiple pre-set modifiers, including adding

a 'free' text note when a modifier is not listed or the customer has special instructions.

- For more information on creating List Modifiers, see the section on [Product List Modifiers](#) in the Portal area of this manual.

 Dependent on the Product List Modifier settings in the Portal, on adding the product to the Journal, the Modifier dialog will either automatically display, or will need to be manually called for, by tapping on the product in the Journal.



- Modifier List:** The list of available Product List Modifiers that have been assigned to the Product in the Portal.
- Selected Modifier List:** This will display the available Modifiers from the selected Product List Modifier.
- Selected Modifier:** This is the currently selected Modifier, that is being displayed in the **Selected Modifier List**. The "\*" to the left of the Modifier name indicates that a Product List Modifier has been selected for the Product.
- Selected List Modifier:** This is the currently selected Modifier on the Product from the currently selected **Modifier List**.
- Un-selected List Modifier**
- Modifier** that has no Modifier List Items selected.
- Notes Entry Field:** This allows you to add **Free text** notes to the Product. The "\*" to the left of Notes indicates that a note has been added to the Product.
- Cancel Button:** Tapping this will close the dialog and the product **will not** be added to the Journal.

9. **Add Item:** Tapping the Add Item button will add the product to the Journal and include all selected Product List Modifiers and Notes.

## Adding products with List Modifiers (Both Modes)

(If the Product List Modifier is set to automatically display, skip step 2)

| Step | Instruction                                               | Operation                                                                            |
|------|-----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Add the <b>Product</b> to the Journal                     |    |
| 2    | In the Journal, tap on the <b>Product</b>                 |    |
| 3    | Select the <b>Modifier Name</b> from the left hand column | <b>For example,</b> Coffee-Size                                                      |
| 4    | Select the <b>Modifier(s)</b> from the right hand column  | <b>For example,</b> Regular                                                          |
| 5    | To add additional Modifiers, repeat steps 3&4             |                                                                                      |
| 6    | Add <b>Notes</b> if required                              |                                                                                      |
| 7    | Tap <b>Add Item</b>                                       |  |

## 2.3.15. Product Price Modifiers



### Overview

Merchants are able to add products that have predefined Product Price Modifiers to the journal.

✳ For more information on creating Product Price Modifiers, see the chapter in the [Portal Register](#).

Products that contain product price modifiers are considered to be **Primary Products**, while the



modifiers are **Secondary Products**. These are normally used to **Up-Sell** a product by adding prompts to the Staff Member when a certain product is added to the Journal. For example, when adding a **Camera** to the journal, the Product Modifier dialog can be set to display additional products that may be of interest to the customer for example, a **Camera Bag**.

Product Modifiers can also be used to create a **Complete** product. For example, in a Pizzeria the **Pizza** would be the primary product, while the **Ingredients** would be the secondary products.

In the image below, the Product Price Modifier Dialog is being displayed to the Staff Member. The **Primary Product** (Chicken Feast) and the **Secondary Products** below, with the quantity adjustment buttons.

| Modify - 3 Chicken Feast (LRG) |       |                     |   |   |
|--------------------------------|-------|---------------------|---|---|
| PRODUCTS                       |       | LISTS & NOTES       |   |   |
| Snappy Cheese                  | £1.20 | -                   | 2 | + |
| Snappy Tomato Sauce            | £0.00 | -                   | 1 | + |
| Cajun Spiced Chicken           | £0.00 | -                   | 0 | + |
| Chicken                        | £0.00 | -                   | 1 | + |
| Mexican Spiced Chicken         | £0.00 | -                   | 0 | + |
| <div>CANCEL</div>              |       | <div>ADD ITEM</div> |   |   |

### Adding a product with Price Modifiers (Both Modes)

| Step | Instruction                                                  | Operation                              |
|------|--------------------------------------------------------------|----------------------------------------|
| 1    | Select the <b>Primary Product</b> to be added to the journal |                                        |
| 2    | Adjust the Quantities as needed                              | <div>-</div> <div>2</div> <div>+</div> |

|   |                     |                                                                                     |
|---|---------------------|-------------------------------------------------------------------------------------|
| 3 | Tap <b>Add Item</b> |  |
|---|---------------------|-------------------------------------------------------------------------------------|

\* While adjusting the quantities of the secondary products, if the **minimum or maximum** values are reached, the respective button will deactivate.

\* To edit a **Primary Product** that has been added to the journal, simply tap on the product in the journal and then tap **Modify**

## 2.3.16. Product Search

### Overview

**Product Search** allows the Staff Member to manually search for products. This is typically done when a product is not found or to complete a price check. This is also useful if the barcode does not scan and the Staff Member needs to add the product to the journal manually.

- Valid search criteria for manual lookup are the Barcode, Product Name and SKU. You can also scan the barcode once the Product Lookup Dialog is displayed.
- If an exact match cannot be found, the Register will display a list of products that contain the same search criteria. For example; if you entered 10, all products that contain 10 as part of the Product Name or SKU will be displayed (100, 101, 1002 and so on).

### Product Search (Landscape Mode)

| Step | Instruction                                                     | Operation                                                                            |
|------|-----------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Product Entry</b> button                             |   |
| 2    | Tap into the <b>Search Box</b> , and enter your search criteria |  |
| 3    | Tap <b>Search</b>                                               |   |
| 4    | Tap <b>Add Item</b>                                             |   |

## Product Search (Portrait Mode)

| Step | Instruction                                                     | Operation                                                                          |
|------|-----------------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap the <b>Product Entry</b> button                             |   |
| 2    | Tap into the <b>Search Box</b> , and enter your search criteria |  |
| 3    | Tap <b>Search</b>                                               |   |
| 4    | Tap <b>Add Item</b>                                             |   |

## 2.3.17. Product Notes



### Overview

You can add, edit or remove notes to any product in the Journal, including Refunded and Voided items.

- You are limited to 160 characters in Product Notes but only the first line of the added notes will display in the journal.
- Selecting multiple items in the journal will add / edit / delete notes on all selected products.
- Product notes are stored in the Transaction and can be seen in the [Transaction Report](#).

✱ Product notes added to a product that has [Product List Modifiers](#) or [Product Price Modifiers](#) need to be added using a separate method.

## Adding a Product Note (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                   |                                                                                   |
|---|-----------------------------------|-----------------------------------------------------------------------------------|
| 1 | Tap on the product in the Journal |  |
| 2 | Tap Add Note                      |  |
| 3 | Add the notes in the dialog.      |                                                                                   |
| 4 | Tap Save                          |  |

### Editing a Product Note (Both Modes)

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the product in the Journal |    |
| 2    | Tap Edit Note                     |    |
| 3    | Edit the notes in the dialog.     |                                                                                     |
| 4    | Tap Save                          |  |

### Deleting a Product Note (Both Modes)

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the product in the Journal |  |
| 2    | Tap Edit Note                     |  |
| 3    | Delete the notes in the dialog.   |                                                                                     |
| 4    | Tap Save                          |  |

## 2.3.18. Quantity Adjustment

### Overview

The Quantity Adjustment function allows you to add multiple quantities of a single product, and can also be used when scanning products into the journal

### Using the Quantity Adjustment Function (Both Modes)

| Step | Instruction                                    | Operation                                                                          |
|------|------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap the <b>Quantities Adjustment</b> button    |   |
| 2    | Enter the <b>Quantity</b> required             |   |
| 3    | <b>Tap or Scan</b> the required <b>Product</b> |  |

## 2.3.19. Refunds

### Overview

Refunding allows the Staff Member to Refund either a single or multiple products from a transaction, or the entire transaction.

- There are two modules that can be used to carry out the refund.
  - The Register
  - The [Transaction History](#) module.
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.
- The Register can be configured to prompt the Staff Member to add a reason for the Refund. For more information, see the the chapters on [Refund Reasons \(Portal\)](#) and [Refund Reasons \(Register\)](#).

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Manual Refunds](#)
- [Linked Transaction Refund](#)
- [Refund Reasons](#)

## 2.3.19.1. Manual Refunds

### Overview

Manual Refunds can take place as either a single transaction or form part of a standard transaction. In this case, the value of the refund will be deducted from the total value of the whole transaction.

- The Refund can be added at any point during the transaction, except after the tendering process has begun.
- Some integrated payment solutions vary in how you can refund to a card. This will either be full refunds only, partial refunds or no refunds at all. This is not a limitation of Register but a restriction set by your card payments provider. For more information please speak to your Solution Provider.
- The Register can be setup to query if the refunded products should be returned to stock or not. For more information, see the section on [Refund Reasons](#)

### Manual Refunds

There are two methods to initiate a Manual Refund, depending when in the transaction you are adding the product to Manually Refund.

#### Manual Refunding at the beginning of the transaction. (Both Modes)

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Refund</b> button      |  |
| 2    | Tap <b>Manual Refund</b>          |  |
| 3    | Tap or scan the product to Refund |  |

## Manual Refunding during a transaction. (Both Modes)

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Add a <b>Product</b> to the Journal |  |
| 2    | Tap the <b>Refund</b> button        |  |
| 3    | Tap or scan the product to Refund   |  |

## 2.3.19.2. Linked Transaction Refund

### Overview

Unlike [Manual Refunds](#), Linked Transaction Refunds are carried out using the information from a previously tendered transaction and can be performed from either the Register or from the [Transaction History](#) module.

There are two types of Linked Transaction Refunds. The first is a Full Refund of the transaction, and the second is a Partial Refund of the transaction.

- Some integrated payment solutions vary in how you can refund to a card. This will either be full refunds only, partial refunds or no refunds at all. This is not a limitation of Register but a restriction set by your card payments provider. For more information please speak to your Solution Provider.
- Linked Transaction Refunds can only be started from an empty journal. For information on how to add a Refund during a transaction, see the chapter on [Manual Refunds](#).
- The Register can be setup to query if the refunded products should be returned to stock or not. For more information, see the section on [Refund Reasons](#)

In the Register when selecting a transaction to Refund, you can either initiate the transaction search using the Transaction ID or the last four digits of the Credit Card that was used to tender the transaction. (The latter will not be available if you use a Non-Integrated Card Terminal).

## Full Refunding

Full Refunding will not give you the option to select products from the original transaction, and will refund the entire transaction.

### From the Register (Landscape Mode)

| Step | Instruction                                     | Operation                                                                          |
|------|-------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap the <b>Refund</b> button                    |   |
| 2    | Select the <b>Search Mode</b> from the dropdown |  |
| 3    | Enter the <b>Search Criteria</b>                | <b>For example, 8008</b>                                                           |
| 4    | Tap on <b>Search</b>                            |   |
| 5    | Tap <b>Full Refund</b>                          |   |
| 6    | Complete the <b>Tender</b> as required          |                                                                                    |

### From the Register (Portrait Mode)

| Step | Instruction                                     | Operation                                                                            |
|------|-------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Refund</b> button                    |   |
| 2    | Select the <b>Search Mode</b> from the dropdown |  |
| 3    | Enter the <b>Search Criteria</b>                | <b>For example, 8008</b>                                                             |
| 4    | Tap on <b>Search</b>                            |   |
| 5    | Tap <b>Full Refund</b>                          |   |
| 6    | Complete the <b>Tender</b> as required          |                                                                                      |

### From the Transaction History Module (Landscape Mode)

| Step | Instruction            | Operation                                                                            |
|------|------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap Lookup Transaction |  |



|   |                                           |                                                                                    |
|---|-------------------------------------------|------------------------------------------------------------------------------------|
| 2 | Enter the Transaction ID from the receipt |                                                                                    |
| 3 | Tap Search                                |  |
| 4 | Tap Refund                                |  |
| 5 | Tap Full                                  |   |
| 6 | Complete the Tender as required           |                                                                                    |

### From the Transaction History Module (Portrait Mode)

| Step | Instruction                               | Operation                                                                            |
|------|-------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap Lookup Transaction                    |    |
| 2    | Enter the Transaction ID from the receipt |                                                                                      |
| 3    | Tap Search                                |   |
| 4    | Tap <b>View</b>                           |   |
| 5    | Tap Refund                                |  |
| 6    | Tap Full                                  |   |
| 7    | Complete the Tender as required           |                                                                                      |

## Partial Refunding

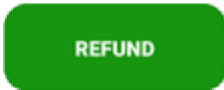
Partial Refunding will give you the option to select one or more products from the original transaction, and will refund only these selected products.

### Partial Refund in Register (Landscape Mode)

| Step | Instruction                  | Operation                                                                            |
|------|------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Refund</b> button |  |

|                                 |                                                                               |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
|---------------------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------|---------------------------------|--------|---------------------------------|--------|
| 2                               | Select the <b>Search Mode</b> from the dropdown                               | <div>Transaction ID ▾</div>                                                                                                                                                                   |                |       |                                 |        |                                 |        |
| 3                               | Enter the <b>Search Criteria</b>                                              | For example, 8008                                                                                                                                                                             |                |       |                                 |        |                                 |        |
| 4                               | Tap on <b>Search</b>                                                          | <div>SEARCH</div>                                                                                                                                                                             |                |       |                                 |        |                                 |        |
| 5                               | Tap <b>Partial Refund</b>                                                     | <div>PARTIAL</div>                                                                                                                                                                            |                |       |                                 |        |                                 |        |
| 6                               | Select the required <b>Products</b> to refund by tapping on them individually | <table><tr><td>Mr Potato Head</td><td>£7.50</td></tr><tr><td>Minecraft 12cm Action Figure...</td><td>£14.00</td></tr><tr><td>Teenage Mutant Ninja Turtles...</td><td>£10.00</td></tr></table> | Mr Potato Head | £7.50 | Minecraft 12cm Action Figure... | £14.00 | Teenage Mutant Ninja Turtles... | £10.00 |
| Mr Potato Head                  | £7.50                                                                         |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Minecraft 12cm Action Figure... | £14.00                                                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Teenage Mutant Ninja Turtles... | £10.00                                                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| 7                               | Tap <b>Refund</b>                                                             | <div>REFUND</div>                                                                                                                                                                             |                |       |                                 |        |                                 |        |
| 8                               | Complete the <b>Tender</b> as required                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |

### Partial Refund in Register (Portrait Mode)

| Step                            | Instruction                                                                   | Operation                                                                                                                                                                                     |                |       |                                 |        |                                 |        |
|---------------------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------|---------------------------------|--------|---------------------------------|--------|
| 1                               | Tap the <b>Refund</b> button                                                  |                                                                                                           |                |       |                                 |        |                                 |        |
| 2                               | Select the <b>Search Mode</b> from the dropdown                               |                                                                                                           |                |       |                                 |        |                                 |        |
| 3                               | Enter the <b>Search Criteria</b>                                              | <b>For example, 8008</b>                                                                                                                                                                      |                |       |                                 |        |                                 |        |
| 4                               | Tap on <b>Search</b>                                                          |                                                                                                           |                |       |                                 |        |                                 |        |
| 5                               | Tap <b>Partial Refund</b>                                                     |                                                                                                           |                |       |                                 |        |                                 |        |
| 6                               | Select the required <b>Products</b> to refund by tapping on them individually | <table><tr><td>Mr Potato Head</td><td>£7.50</td></tr><tr><td>Minecraft 12cm Action Figure...</td><td>£14.00</td></tr><tr><td>Teenage Mutant Ninja Turtles...</td><td>£10.00</td></tr></table> | Mr Potato Head | £7.50 | Minecraft 12cm Action Figure... | £14.00 | Teenage Mutant Ninja Turtles... | £10.00 |
| Mr Potato Head                  | £7.50                                                                         |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Minecraft 12cm Action Figure... | £14.00                                                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Teenage Mutant Ninja Turtles... | £10.00                                                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| 7                               | Tap <b>Refund</b>                                                             |                                                                                                           |                |       |                                 |        |                                 |        |
| 8                               | Complete the <b>Tender</b> as required                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |

## Partial Refund from the Transaction History Module (Landscape Mode)

| Step | Instruction                                                            | Operation                                                                                                                                 |
|------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap Lookup Transaction                                                 | <div>LOOKUP TRANSACTION</div>                                                                                                             |
| 2    | Enter the Transaction ID from the receipt                              |                                                                                                                                           |
| 3    | Tap Search                                                             | <div>SEARCH</div>                                                                                                                         |
| 4    | Tap Refund                                                             | <div>REFUND</div>                                                                                                                         |
| 5    | Tap Partial                                                            | <div>PARTIAL</div>                                                                                                                        |
| 6    | Select the required products to refund by tapping on them individually | <div><div>Mr Potato Head£7.50</div><div>Minecraft 12cm Action Figure...£14.00</div><div>Teenage Mutant Ninja Turtles...£10.00</div></div> |
| 7    | Tap Refund                                                             | <div>REFUND</div>                                                                                                                         |
| 8    | Complete the Tender as required                                        |                                                                                                                                           |

## Partial Refund from the Transaction History Module (Portrait Mode)

| Step | Instruction                               | Operation                                                                            |
|------|-------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap Lookup Transaction                    |  |
| 2    | Enter the Transaction ID from the receipt |                                                                                      |
| 3    | Tap Search                                |  |
| 4    | Tap <b>View</b>                           |  |
| 5    | Tap Refund                                |  |
| 6    | Tap Partial                               |  |

|                                 |                                                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
|---------------------------------|------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------|---------------------------------|--------|---------------------------------|--------|
| 7                               | Select the required products to refund by tapping on them individually | <table><tr><td>Mr Potato Head</td><td>£7.50</td></tr><tr><td>Minecraft 12cm Action Figure...</td><td>£14.00</td></tr><tr><td>Teenage Mutant Ninja Turtles...</td><td>£10.00</td></tr></table> | Mr Potato Head | £7.50 | Minecraft 12cm Action Figure... | £14.00 | Teenage Mutant Ninja Turtles... | £10.00 |
| Mr Potato Head                  | £7.50                                                                  |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Minecraft 12cm Action Figure... | £14.00                                                                 |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| Teenage Mutant Ninja Turtles... | £10.00                                                                 |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |
| 8                               | Tap Refund                                                             | <div>REFUND</div>                                                                                                                                                                             |                |       |                                 |        |                                 |        |
| 9                               | Complete the Tender as required                                        |                                                                                                                                                                                               |                |       |                                 |        |                                 |        |

## 2.3.19.3. Refund Reasons

### Overview

When [Refund Reasons](#) are enabled on the Portal, you will be presented with the option to either return the refunded item(s) to your Stock or not.

| Refund Stock                          |          |                                                                     |
|---------------------------------------|----------|---------------------------------------------------------------------|
| Reason : No Longer Required           |          |                                                                     |
| PRODUCT                               | QUANTITY | RETURN TO USEABLE STOCK                                             |
| Whole Milk 1 pint                     | 1        | <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes |
| Semi-Skimmed 2 pint                   | 1        | <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes |
| Whole Milk 4 pint                     | 1        | <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes |
| White Rolls x4                        | 1        | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes |
| Brown Loaf                            | 1        | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes |
| White Loaf                            | 1        | <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes |
| <div>CANCEL</div> <div>CONTINUE</div> |          |                                                                     |

- Selecting **NO** will not return the refunded item(s) to the stock, which will remain at its current level.
- Selecting **YES** will return the refunded item(s) to your stock, and increase the stock level by the quantity of refunded items.

### Using Refund Reasons (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                                         |                                         |
|---|-------------------------------------------------------------------------|-----------------------------------------|
| 1 | Select <b>YES</b> if the item(s) are to be returned to the stock        | <input type="button" value="Yes"/>      |
| 2 | Select <b>NO</b> if the items(s) are <u>not</u> to be returned to stock | <input type="button" value="No"/>       |
| 3 | Tap <b>Continue</b>                                                     | <input type="button" value="CONTINUE"/> |

## 2.3.20. Suspending (Parking) Transactions



### Overview

There are two modes to suspending transactions while Hospitality is active. These modes are controlled from the Web Portal under [Transaction Suspension](#).

The modes are:

- **Local Suspend Only** – Suspended transactions will only be stored on the Register that suspended it. The transactions will not be accessible from any other Register except the Register that suspended it.
- **On** – Suspended transactions will be stored on the Portal and will be accessible by any Register within the store. This is dependent on a Wi-Fi connection.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Suspending a Transaction](#)
- [Resuming a Transaction](#)
- [Editing a Suspended Transaction Name](#)

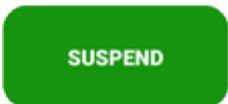
## 2.3.20.1. Suspending a Transaction

### Overview

The procedure for suspending a transaction is the same for both [Suspending Modes](#)

- You can add predefined suspension names in the Portal by configuring the [Suspend Transaction Name](#) in the Portal.
- If you do not give the suspended transaction a name, the Register will add the default name which is the Staff Member who is suspending the transaction, and the time and date of the first suspension of the transaction. For example; Alisha Bell 15:27 02/01/2019

### Suspending a Transaction (Both Modes)

| Step | Instruction                                                                  | Operation                                                                           |
|------|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Add some <b>Products</b> to the Journal                                      |   |
| 2    | Tap the <b>Suspend</b> icon                                                  |  |
| 3    | Give the transaction a <b>Name</b> , or select from a <b>Predefined List</b> | <b>For example; Table 1</b>                                                         |
| 4    | Tap <b>Suspend</b>                                                           |  |

## 2.3.20.2. Resuming a Transaction

### Overview

The procedure for resuming a transaction is the same for both [Suspending Modes](#).

- There is no limit on the number of times you can resume and suspend a transaction. Each time you resume, you can add new products to the transaction then suspend it again.

### Resume a suspended transaction (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                           |                                                                                   |
|---|-------------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Tap the <b>Suspended List</b> icon        |  |
| 2 | Locate the transaction you want to resume | <b>For example;</b> Table 1                                                       |
| 3 | Tap <b>Resume</b>                         |  |

## 2.3.20.3. Editing a Suspended Transaction Name

### Overview

The procedure for editing a transaction name is the same for both [Suspending Modes](#).

- You can add predefined suspension names in the Portal by configuring the [Suspend Transaction Name](#) in the Portal.

### Editing a Suspended Transaction Name (Both Modes)

| Step | Instruction                                                            | Operation                                                                            |
|------|------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended List</b> icon                                     |   |
| 2    | Locate the transaction you want to rename                              | <b>For example;</b> Table 1                                                          |
| 3    | Tap <b>Edit Name</b>                                                   |   |
| 4    | Change the name as required, or select from the <b>Predefined List</b> | <b>For example;</b> Table 2                                                          |
| 5    | Tap <b>Save</b>                                                        |  |

## 2.3.21. Surcharges



## Overview

Surcharges can be added to the current transaction by the Staff Member. Like Discounts, Surcharges can be added by the currently logged in Staff Member using either price or percentage values, or by using Fixed Surcharges.

- Surcharges created in the Register Portal can be Price or Percentage based and include assigned tax codes, or those that are not 'fixed' will be assigned a tax value based on the other taxes used in the transaction. You can create predefined Surcharge values that will display when tapping the Surcharge button. For more information, see the [Surcharge](#) chapter in the Portal Manual.
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.
- If you do not create any Fixed Surcharges, the default Price and Percentage Surcharges will still be available.

✱ Surcharges can be added at anytime before, during, or just before tendering in **Landscape Mode**, but in **Portrait Mode** can only be added once tendering has begun.

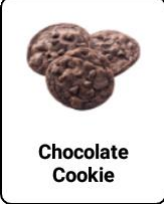
### Adding a Surcharge (Landscape Mode)

| Step | Instruction                                    | Operation                                                                                                                                                                                                                                                      |
|------|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Surcharge</b> Button             |  or                                                                                    |
| 2    | Select the <b>Surcharge</b> from the list      |                                                                                                                                                                            |
| 3    | Enter the <b>Surcharge Value</b>               |    |
| 4    | Tap <b>Enter</b>                               |                                                                                                                                                                            |
| 5    | Tap <b>Apply</b>                               |                                                                                                                                                                            |
| 6    | Complete <b>Supervisor Approval</b> if enabled |                                                                                                                                                                                                                                                                |

### Adding a Surcharge (Portrait Mode)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|



|   |                                                |                                                                                     |
|---|------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Add the products to the transaction            |   |
| 2 | Tap the <b>Pay</b> button                      |   |
| 3 | Tap on the <b>Surcharge</b> Button             |   |
| 4 | Select the <b>Surcharge</b> from the list      |   |
| 5 | Enter the <b>Surcharge Value</b>               |   |
| 6 | Tap <b>Enter</b>                               |   |
| 7 | Tap <b>Apply</b>                               |  |
| 8 | Complete <b>Supervisor Approval</b> if enabled |                                                                                     |

## 2.3.22. Switching Staff



### Overview

Switching Staff allows a logged-on Staff Member to suspend a transaction locally and resume it on next login.

- Only one transaction can be suspended per Staff Member when using the Switch Staff Function. When the Staff Member next logs in, the suspended transaction will automatically be resumed. If [Transaction Suspending](#) is being used, this will not apply.

### Switch Staff (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                         |                                                                                   |
|---|-----------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Add some <b>Products</b> to the Journal |  |
| 2 | Tap <b>Switch Staff</b>                 |  |
| 3 | Select <b>New Staff</b>                 | <input type="text" value="*Jane Doe"/>                                            |
| 4 | Enter the <b>Staff PIN</b>              | <div>1</div> <div>2</div> <div>3</div> <div>4</div>                               |

### Identifying a Staff Member who has a suspended transaction assigned through the Switch Staff Function.

A Suspended Transaction Icon will appear to the left of the Staff Members name on the Staff List Screen.



- Ben has a suspended transaction.
- Jane and Jason do not have a suspended transaction

## 2.3.23. Tabs

### Overview

Register supports the creation and management of Tabs, but this is dependent on the **Integrated Payment Solution** you have purchased. For more information, please speak to your Solution Provider.

- Merchants can create new Tab transactions, either before the transaction has been started, or during the transaction, and then continue to add products to the “Tab Account” until such time as the Tab is ready to be completed and closed.

- The Register will monitor the available funds in the Tab and display an alert as soon as the value of the Tab has been reached or exceeded. In this case, on completion or closing of the Tab, you might need the Customer's Card a second time.
- Both the [Pre-Authorisations](#) and the [Suspended Transaction](#) functionality must be enabled for **Tabs** to function correctly.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Adding Products to a Tab](#)
- [Cancelling a Tab](#)
- [Closing a Tab](#)
- [Opening a Tab](#)

## 2.3.23.1. Adding Products to a Tab

### Overview

Adding products to the Tab is the same process as that of normally adding products to the transaction. The only difference is that the Tab must have already been created, or resumed from a suspended transaction.

#### Adding Products to a newly created Tab (Both Modes)

| Step | Instruction                                         | Operation                                                                             |
|------|-----------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap the <b>Open TAB</b> button                      |   |
| 2    | Enter the <b>Value</b> of the Tab                   |   |
| 3    | Tap <b>Continue</b>                                 |   |
| 4    | Tap <b>Done</b>                                     |  |
| 5    | Tap <b>OK</b>                                       |   |
| 6    | Tap <b>Cancel</b> on the Suspend Transaction dialog |   |

|   |                                         |                                                                                    |
|---|-----------------------------------------|------------------------------------------------------------------------------------|
| 7 | Add some products to the <b>Journal</b> |  |
|---|-----------------------------------------|------------------------------------------------------------------------------------|

### Adding Products from a Suspended Transaction Tab (Both Modes)

| Step | Instruction                                 | Operation                                                                         |
|------|---------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap the <b>Resume Transaction</b> icon      |  |
| 2    | Find the transaction, and tap <b>Resume</b> |  |
| 3    | Add some products to the <b>Journal</b>     |  |

## 2.3.23.2. Cancelling a Tab

### Overview

If the need arises that an **Open Tab** has to be cancelled, the procedure for reversing the Card Pre-Authorisation is the same as a normal [Card Pre-Authorisation Reversal](#).

- If there are no products added to the Tab, once the Pre-Authorisation has been reversed, the Tab will be closed and removed from the Suspended Transaction list. If there are products, the Transaction can still be suspended in the normal manner, or tendered with another form of payment.

### Cancelling an Open Tab (Both Modes)

| Step | Instruction                                  | Operation                                                                           |
|------|----------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap on the <b>Suspended Transaction</b> icon |  |
| 2    | Locate the transaction and tap <b>Resume</b> |  |
| 3    | Tap <b>Reverse Authorisation</b>             |  |
| 4    | Tap <b>Reverse</b>                           |  |

|   |                                           |                                                                                   |
|---|-------------------------------------------|-----------------------------------------------------------------------------------|
| 5 | Tap <b>Done</b>                           |  |
| 6 | Tap <b>OK</b>                             |  |
| 7 | <b>Suspend</b> or <b>Tender</b> as needed |                                                                                   |

## 2.3.23.3. Closing a Tab

### Overview

When the Tab is ready to be closed, it is a simple operation of moving it from the Suspended Transaction List, to the Ready to Complete List.

#### Closing a Tab (Both Modes)

| Step | Instruction                                             | Operation                                                                            |
|------|---------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon               |  |
| 2    | Locate the transaction and tap <b>Ready to Complete</b> |  |
| 3    | Tap <b>YES</b>                                          |  |
| 4    | Tap <b>Done</b>                                         |  |

## 2.3.23.4. Opening a Tab

### Overview

Opening a Tab allows the customer to pre-authorise a certain amount from their credit card for use in the Tab. The Merchant can then suspend the transaction in order to add products at a later time, or as the customer places orders. (In the case of a Bar or Restaurant)

- A Tab can be opened either before or during a transaction.

#### Opening a Tab before a Transaction (Both Modes)

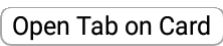
| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                               |                                                                                    |
|---|-----------------------------------------------|------------------------------------------------------------------------------------|
| 1 | Tap the <b>Open TAB</b> button                |  |
| 2 | Enter the <b>Value</b> of the Tab             |  |
| 3 | Tap <b>Continue</b>                           |  |
| 4 | Tap <b>Done</b>                               |  |
| 5 | Tap <b>OK</b>                                 |  |
| 6 | Follow the <b>Suspend Transaction</b> process |                                                                                    |

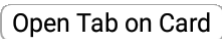
\* The **Suspended Transaction** process will be dependent on your configuration settings. For more information, refer to the [Suspending a Transaction](#) chapter in this manual.

## Opening a Tab during a Transaction (Landscape Mode)

During a transaction but before Suspending

| Step | Instruction                                   | Operation                                                                            |
|------|-----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Add some products to the <b>Journal</b>       |  |
| 2    | Tap the <b>Other Tender</b> button            |  |
| 3    | Tap <b>Open Tab on Card</b>                   |  |
| 4    | Enter the <b>Value</b> of the Tab             |  |
| 5    | Tap <b>Continue</b>                           |  |
| 6    | Tap <b>Done</b>                               |  |
| 7    | Tap <b>OK</b>                                 |  |
| 8    | Follow the <b>Suspend Transaction</b> process |                                                                                      |

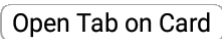
### From an already Suspended Transaction

| Step | Instruction                                   | Operation                                                                            |
|------|-----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Resume Transaction</b> icon        |    |
| 2    | Find the transaction, and tap <b>Resume</b>   |    |
| 3    | Tap the <b>Other Tender</b> button            |    |
| 4    | Tap <b>Open Tab on Card</b>                   |    |
| 5    | Enter the <b>Value</b> of the Tab             |    |
| 6    | Tap <b>Continue</b>                           |    |
| 7    | Tap <b>Done</b>                               |    |
| 8    | Tap <b>OK</b>                                 |  |
| 9    | Follow the <b>Suspend Transaction</b> process |                                                                                      |

\* The **Suspended Transaction** process will be dependent on your configuration settings. For more information, refer to the [Suspending a Transaction](#) chapter in this manual.

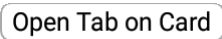
### Opening a Tab during a Transaction (Portrait Mode)

#### During a transaction but before Suspending

| Step | Instruction                             | Operation                                                                            |
|------|-----------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Add some products to the <b>Journal</b> |  |
| 2    | Tap the <b>Pay</b> Button               |  |
| 3    | Tap the <b>Other Tender</b> button      |  |
| 4    | Tap <b>Open Tab on Card</b>             |  |

|   |                                               |                                                                                    |
|---|-----------------------------------------------|------------------------------------------------------------------------------------|
| 5 | Enter the <b>Value</b> of the Tab             |  |
| 6 | Tap <b>Continue</b>                           |  |
| 7 | Tap <b>Done</b>                               |  |
| 8 | Tap <b>OK</b>                                 |  |
| 9 | Follow the <b>Suspend Transaction</b> process |                                                                                    |

### From an already Suspended Transaction

| Step | Instruction                                   | Operation                                                                            |
|------|-----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Resume Transaction</b> icon        |    |
| 2    | Find the transaction, and tap <b>Resume</b>   |    |
| 3    | Tap the <b>Pay</b> Button                     |  |
| 4    | Tap the <b>Other Tender</b> button            |  |
| 5    | Tap <b>Open Tab on Card</b>                   |  |
| 6    | Enter the <b>Value</b> of the Tab             |  |
| 7    | Tap <b>Continue</b>                           |  |
| 8    | Tap <b>Done</b>                               |  |
| 9    | Tap <b>OK</b>                                 |  |
| 10   | Follow the <b>Suspend Transaction</b> process |                                                                                      |



The **Suspended Transaction** process will be dependent on your configuration settings. For more information, refer to the [Suspending a Transaction](#) chapter in this manual.



## 2.3.24. Tendering Transactions



### Overview

Tendering the Transaction allows the Staff Member to take the payment that is due for products purchased, which then close the transaction off.

This section details the various tendering options that are available within Register.

\* Please note that not all the options listed will be available to you, as some are based on the type of card payment device you have purchased. For more information, please speak to your Solution Provider.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Additional Tender Types](#)
- [Cash Amount](#)
- [Electronic Benefits Transfer](#)
- [Exact Cash Tender](#)
- [Integrated Card Payment](#)
- [Manual or Key Entry](#)
- [Non-Integrated Card Payment](#)
- [Pre-Authorisations](#)
- [Quick Tender](#)
- [Split Tender Payments](#)

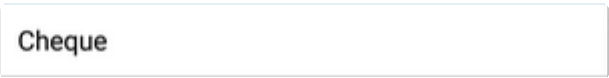
### 2.3.24.1. Additional Tender Types

#### Overview

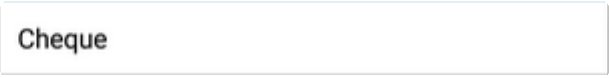
The Register has the ability to accept other Tender Types other than the standard Cash and Card methods.

- Additional Tender Types are Custom Tenders that the Merchant creates with the Portal. For more information on this, see the section on [Tender Types](#) in the Portal Manual.
- Depending on how the Additional Tender Type has been setup in the Portal, there are various directions or prompts that assist you in using the tender.

### Additional Tender Types (Landscape Mode)

| Step | Instruction                         | Operation                                                                          |
|------|-------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap <b>Other Tender</b>             |  |
| 2    | Tap the required <b>Tender Type</b> |  |
| 3    | If prompted, add the <b>Note</b>    | <b>For example,</b> Cheque Number                                                  |
| 4    | Tap <b>Save</b> on the note dialog  |  |
| 5    | Follow any <b>Onscreen Prompts</b>  |                                                                                    |

### Additional Tender Types (Portrait Mode)

| Step | Instruction                         | Operation                                                                            |
|------|-------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Pay</b> button           |  |
| 2    | Tap <b>Other Tender</b>             |  |
| 3    | Tap the required <b>Tender Type</b> |  |
| 4    | If prompted, add the <b>Note</b>    | <b>For example,</b> Cheque Number                                                    |
| 5    | Tap <b>Save</b> on the note dialog  |  |
| 6    | Follow any <b>Onscreen Prompts</b>  |                                                                                      |

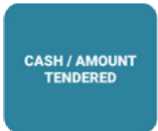
## 2.3.24.2. Cash Amount

### Overview

When completing the transaction by Cash Tender, if the customer provides a cash amount greater than the total but not a quick tender amount (£5, £10 or £20), the Staff Member can enter the amount given using the keypad and press the Cash / Amount tendered button. The Register will then calculate the change.

This example uses £14.00 as the given cash.

#### Cash Amount (Landscape Mode)

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap in £14.00                     |   |
| 2    | Tap <b>Cash / Amount Tendered</b> |   |
| 3    | Tap <b>Done</b>                   |  |

#### Cash Amount (Portrait Mode)

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Pay</b> button    |  |
| 2    | Tap the <b>Adjust</b> button |  |
| 3    | Tap in £14.00                |  |
| 4    | Tap <b>Enter</b>             |  |

|   |                 |                                                                                   |
|---|-----------------|-----------------------------------------------------------------------------------|
| 5 | Tap <b>Cash</b> |  |
| 6 | Tap <b>Done</b> |  |

## 2.3.24.3. Electronic Benefits Transfer (EBT)

### Overview

Register supports the use of Electronic Benefits Transfer or EBT payment cards in the United States.

 Products must be set to be payable with EBT cards. For more information, see the chapter on [Products](#) in the Portal section of this manual.

### Electronic Benefits Transfer (Landscape Mode)

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Other Tender</b>            |  |
| 2    | Tap <b>EBT</b>                     |  |
| 3    | Follow the <b>Onscreen Prompts</b> |                                                                                     |

### Electronic Benefits Transfer (Portrait Mode)

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Pay</b> button          |  |
| 2    | Tap <b>Other Tender</b>            |  |
| 3    | Tap <b>EBT</b>                     |  |
| 4    | Follow the <b>Onscreen Prompts</b> |                                                                                     |

## 2.3.24.4. Exact Cash Tender

### Overview

If the customer is paying for their purchase in cash, and has the exact amount, the Staff Member can press the Cash / Amount tendered button straight away. This button assumes the exact cash has been given and completes the transaction.

#### Exact Cash Tender (Landscape Mode)

| Step | Instruction                       | Operation                                                                         |
|------|-----------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap <b>Cash / Amount Tendered</b> |  |
| 2    | Tap <b>Done</b>                   |  |

#### Exact Cash Tender (Portrait Mode)

| Step | Instruction     | Operation                                                                           |
|------|-----------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Pay</b>  |  |
| 2    | Tap <b>Cash</b> |  |
| 3    | Tap <b>Done</b> |  |

## 2.3.24.5. Integrated Card Payment

### Overview

Integrated Card Payments allows the Staff Member to tender the Transaction using either a Credit or Debit Card.

- As Card Payment Terminals vary on their payment processes, this section will only explain the

the Register process used to initiate the Card Payment process.

- The Staff Member does not need to enter the amount into the Card Terminal, as the Register will do this automatically.

✱ In the case where the credit or debit card is declined or the Card Terminal times out, the Register will return control back to the Staff Member for an alternative payment method. The Card function can be used again if the customer presents another credit or debit card for payment.

### Integrated Card Payment Process (Landscape Mode)

| Step | Instruction                                  | Operation                                                                           |
|------|----------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Card</b>                              |   |
| 2    | Follow the instructions on the Card Terminal |                                                                                     |
| 3    | Tap <b>Done</b>                              |  |

### Integrated Card Payment Process (Portrait Mode)

| Step | Instruction                                  | Operation                                                                            |
|------|----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Pay</b>                               |  |
| 2    | Tap <b>Card</b>                              |  |
| 3    | Follow the instructions on the Card Terminal |                                                                                      |
| 4    | Tap <b>Done</b>                              |  |

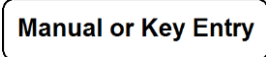
## 2.3.24.6. Manual or Key Entry

### Overview

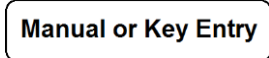
Manual or Key Entry type tendering allows the Merchant to process a Card Tender when the Customer is not present.

\* Manual or Key Entry tendering is only available on specific Card Payment Terminals. For more information, please speak to your Solution Provider.

### Manual or Key Entry. (Landscape Mode)

| Step | Instruction                                      | Operation                                                                           |
|------|--------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Other Tender</b>                          |   |
| 2    | Select <b>Manual or Key Entry</b>                |  |
| 3    | Follow the onscreen prompts on the Card Terminal |                                                                                     |

### Manual or Key Entry. (Portrait Mode)

| Step | Instruction                                      | Operation                                                                            |
|------|--------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Pay</b>                                   |  |
| 2    | Tap <b>Other Tender</b>                          |  |
| 3    | Select <b>Manual or Key Entry</b>                |  |
| 4    | Follow the onscreen prompts on the Card Terminal |                                                                                      |

## 2.3.24.7. Non-Integrated Card Payment

### Overview

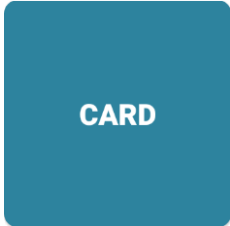
If using a Standalone Card Terminal, when the customer wishes to pay by Credit/Debit card the Staff Member creates the transaction as normal then presses the Card Tender button. The Staff Member will now need to enter the amount in the Card Terminal and inform the Register that the payment has been

made.

### Non-Integrated Card Payment (Landscape Mode)

| Step | Instruction                                                   | Operation                                                                           |
|------|---------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap <b>Card</b>                                               |  |
| 2    | Enter the amount in the Card Terminal and process the payment |                                                                                     |
| 3    | Tap <b>Payment Successful</b>                                 |  |
| 4    | Tap <b>Done</b>                                               |  |

### Non-Integrated Card Payment (Portrait Mode)

| Step | Instruction                                                   | Operation                                                                             |
|------|---------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>Pay</b>                                                |   |
| 2    | Tap <b>Card</b>                                               |  |
| 3    | Enter the amount in the Card Terminal and process the payment |                                                                                       |
| 4    | Tap <b>Payment Successful</b>                                 |  |
| 5    | Tap <b>Done</b>                                               |  |

## 2.3.24.8. Pre-Authorisations

### Overview

Pre-Authorisations on Credit Cards are taken to confirm that there are adequate funds on the payment card, before completing the transaction.

- Processing card Pre-Authorisations and Completions can only be performed on specific supported



card payment devices. For more information, please speak to your Solution Provider.

- Transaction with a pre-authorisation applied are not considered closed, and not included in any reports or sales data. Until the authorisation has been completed the Staff Member is still able to cancel the sale.

All Pre-Authorised transactions are stored in the **Ready To Complete** tab of the Suspended Transactions Dialog. From here the staff member is able to;

- Manage all authorised transactions,
- Add any Tip Adjustments,
- Resume the transaction, or
- Complete the Transaction.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Partial Pre-Authorisation](#)
- [Pre-Authourising a Card Payment](#)
- [Pre-Authorisation Completion](#)
- [Reversing a Pre-Authorisation](#)

## 2.3.24.8.1. Partial Pre-Authorisation

### Overview

A partial [pre-authorisation](#) of a card payment occurs when the Merchant requests a pre-authorisation on a customers credit or debit card for a specific value, but the card issuer will only authorise a lower amount due to insufficient funds in the account.

For example, the pre-authorisation request amount is £20.00 but the available balance on the account is £15.00 In this instance, the card issuer will authorise the £15.00 and not the £20.00

When this happens, the Register will display a dialog that will offer the Merchant three options;

1. Accept the partial pre-authorised amount
2. Process another card for pre-authorisation, or
3. Cancel the partial pre-authorised amount.

## Accept Amount

If the Merchant chooses to accept the partial pre-authorised amount, it will be added to the journal and the Register will then begin the [Split Tender](#) workflow to allow the remaining balance to be paid with another form of payment. From this point, the transaction will no longer be able to be Suspended.

## Authorise Another Card

This option will do the following;

- Reverse the partial pre-authorised value of the credit / debit card.
- Begin the pre-authorisation workflow to allow the Merchant to pre-authorise another card.

## Cancel Authorisation

This option will do the following;

- Reverse the partial pre-authorised value of the credit / debit card.
- Return the Merchant to the Register screen. From here, the Merchant can either attempt another tender process, suspend or cancel the transaction.

# 2.3.24.8.2. Pre-Authorising a Card Payment

## Overview

There are varied workflows to Pre-Authorise a card payment, depending on how your card terminal has been configured in the Portal. This chapter will detail each of these workflows.

## Pre-Authorising a Card Payment

For Portrait Mode, an extra step is required as the **First Step**. After that, the steps are the same.

| Step | Instruction               | Operation                                                                           |
|------|---------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Pay</b> button |  |

**When the *Authorisation Mode* has been set to *Ask Staff Member which action to Perform***

| Step | Instruction                                                              | Operation                                                                                                                                                                                                                                                                  |
|------|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2    | Tap <b>Authorise Card</b>                                                |                                                                                                                                                                                          |
| 3    | Select the <b>Pre-Authorisation Method</b>                               | <br>or<br><br>or<br> |
| 4    | Follow the Pre-Authorisation processes as listed in the below procedures |                                                                                                                                                                                                                                                                            |

**When the *Authorisation Mode* has been set to *Full Value of the Transaction***

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 2    | Tap <b>Authorise Card</b>                  |  |
| 3    | Wait for the Pre-Authorisation to complete |                                                                                     |
| 4    | Tap <b>Done</b>                            |  |
| 5    | Tap <b>OK</b>                              |  |
| 6    | Suspend the Transaction if necessary       |                                                                                     |

**When the *Authorisation Mode* has been set to *Staff Entered Fixed Amount***

| Step | Instruction                        | Operation                                                                            |
|------|------------------------------------|--------------------------------------------------------------------------------------|
| 2    | Tap <b>Authorise Card</b>          |  |
| 3    | Enter the Pre-Authorisation Amount |  |
| 4    | Tap <b>Continue</b>                |  |

|   |                                            |                                                                                    |
|---|--------------------------------------------|------------------------------------------------------------------------------------|
| 5 | Wait for the Pre-Authorisation to complete |                                                                                    |
| 6 | Tap <b>Done</b>                            |   |
| 7 | Tap <b>OK</b>                              |  |
| 8 | Suspend the Transaction if necessary       |                                                                                    |

**When the *Authorisation Mode* has been set to *Transaction Amount plus additional set Percentage***

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 2    | Tap <b>Authorise Card</b>                  |    |
| 3    | Wait for the Pre-Authorisation to complete |                                                                                     |
| 4    | Tap <b>Done</b>                            |   |
| 5    | Tap <b>OK</b>                              |  |
| 6    | Suspend the Transaction if necessary       |                                                                                     |

## **2.3.24.8.3. Pre-Authorisation Completion**

### **Overview**

Any transactions that have a pre-authorisation tender included will need to be Completed by the merchant.

There are three different ways to complete an authorisation:

- Using the Complete Authorisation button when the transaction is resumed in Register
- Tapping the 'Complete' button for the required transaction in the Ready To Complete tab of the Open Transactions dialog. This will perform a completion on the selected transaction only.
- Tapping the 'Complete All' button on the Ready To complete tab. This will complete all valid transactions for the logged in staff member, or the whole store, depending on the settings.

\* The Completion Process will close the transaction(s) within Register, which will then include them in the reports and sales figures.

## Pre-Authorisation Completion

### Single Transaction, resumed from the Ready to Complete Transaction List. (Landscape Mode)

| Step | Instruction                                                     | Operation                                                                                                                                                                          |
|------|-----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon                       |                                                                                                 |
| 2    | Tap <b>Ready to Complete</b>                                    |                                                                                                  |
| 3    | Locate the transaction and tap <b>Resume</b>                    |                                                                                                  |
| 4    | Tap <b>Complete Authorisation</b>                               |                                                                                                  |
| 5    | Select either <b>Transaction Amount</b> or <b>Manual Amount</b> | <br>or<br> |
| 6    | Confirm if a <b>Tip</b> needs to be added                       | <b>If Enabled</b>                                                                                                                                                                  |
| 7    | Wait for the <b>Completion</b> to finish                        |                                                                                                                                                                                    |
| 8    | Tap <b>Done</b>                                                 | <br>DONE                                                                                      |
| 9    | Tap <b>OK</b>                                                   |                                                                                                |
| 10   | Tap <b>Done</b>                                                 |                                                                                                |

\* Under step 5, if you select **Manual Amount** you will need to add the value in manually.

## Single Transaction, resumed from the Ready to Complete Transaction List. (Portrait Mode)

| Step | Instruction                                                     | Operation                                                                                                                                                                       |
|------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon                       |                                                                                              |
| 2    | Tap <b>Ready to Complete</b>                                    |                                                                                               |
| 3    | Locate the transaction and tap <b>Resume</b>                    |                                                                                              |
| 4    | Tap the <b>Pay</b> button                                       |                                                                                               |
| 5    | Tap <b>Complete Authorisation</b>                               |                                                                                               |
| 6    | Select either <b>Transaction Amount</b> or <b>Manual Amount</b> | <br>or<br> |
| 7    | Confirm if a <b>Tip</b> needs to be added                       | <b>If Enabled</b>                                                                                                                                                               |
| 8    | Wait for the <b>Completion</b> to finish                        |                                                                                                                                                                                 |
| 9    | Tap <b>Done</b>                                                 | <br><small>DONE</small>                                                                    |
| 10   | Tap <b>OK</b>                                                   |                                                                                             |
| 11   | Tap <b>Done</b>                                                 |                                                                                             |



Under step 6, if you select **Manual Amount** you will need to add the value in manually.

## Single Transaction from the Ready to Complete Transaction List. (Both Modes)

| Step | Instruction                               | Operation                                                                           |
|------|-------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon |  |
| 2    | Tap <b>Ready to Complete</b>              |  |

|   |                                                |                                                                                   |
|---|------------------------------------------------|-----------------------------------------------------------------------------------|
| 3 | Locate the transaction and tap <b>Complete</b> |  |
| 4 | Tap <b>Complete</b>                            |  |
| 5 | Wait for the <b>Completion</b> to finish       |                                                                                   |
| 6 | Tap <b>Done</b>                                |  |
| 7 | Tap <b>OK</b>                                  |  |

### All Transactions from the Ready to Complete Transaction List. (Both Modes)

| Step | Instruction                                                   | Operation                                                                                                                                                                    |
|------|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon                     |                                                                                            |
| 2    | Tap <b>Ready to Complete</b>                                  |                                                                                            |
| 3    | Tap <b>Complete All</b>                                       |                                                                                           |
| 4    | Select <b>All Transactions</b> or <b>Only my Transactions</b> | <br> |
| 5    | Wait for the process to complete                              |                                                                                                                                                                              |
| 6    | Tap <b>Done</b>                                               |                                                                                          |
| 7    | Tap <b>Close</b>                                              |                                                                                          |

\* For step 4, selecting **All** will complete **ALL** transactions, and selecting **Only my Transactions** will only close those transaction listed under the currently logged in Staff Member

## 2.3.24.8.4. Reversing a Pre-Authorisation

### Overview

For any transaction that has a pre-authorisation item included, Staff Members have the ability to reverse / void the authorisation. This can be used for scenarios where the customer wishes to pay by a different card or tender type, or to cancel the transaction.

- The Reverse Authorisation button is available from the tender area when the transaction is resumed in Register.
- If there are two or more authorisations in the transaction the Staff Member will have the ability to choose which one to reverse.
- On return to Register a dialog will be displayed to let the Staff Member know if the reversal was successful or not.
- On resuming a transaction, if the Staff Member attempts to tender using another method such as Cash, the Register will automatically prompt for the reversal of the authorisation.

✱ The reversal of a Pre-Authorisation can only take place before the transaction is completed. If you need to reverse a pre-authorisation after it has been completed, please refer to the chapter on [Voiding a Transaction](#)

### Reversing a Pre-Authorisation (Landscape Mode)

| Step | Instruction                                  | Operation                                                                           |
|------|----------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon    |  |
| 2    | Tap <b>Ready to Complete</b>                 |  |
| 3    | Locate the transaction and tap <b>Resume</b> |  |
| 4    | Tap <b>Reverse Authorisation</b>             |  |
| 5    | Tap <b>Reverse</b>                           |  |
| 6    | Wait for process to complete                 |                                                                                     |



|   |                 |                                                                                   |
|---|-----------------|-----------------------------------------------------------------------------------|
| 7 | Tap <b>Done</b> |  |
| 8 | Tap <b>OK</b>   |  |

## Reversing a Pre-Authorisation (Portrait Mode)

| Step | Instruction                                  | Operation                                                                           |
|------|----------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon    |    |
| 2    | Tap <b>Ready to Complete</b>                 |   |
| 3    | Locate the transaction and tap <b>Resume</b> |    |
| 4    | Tap <b>Pay</b>                               |   |
| 5    | Tap <b>Reverse Authorisation</b>             |   |
| 6    | Tap <b>Reverse</b>                           |  |
| 7    | Wait for process to complete                 |                                                                                     |
| 8    | Tap <b>Done</b>                              |  |
| 9    | Tap <b>OK</b>                                |  |

## 2.3.24.9. Quick Tender

### Overview

When the customer is paying for the transaction using a note that is greater than the total owed, the Quick Tender buttons on the right of the keypad can be used.

- The use of the Quick Tender is not restricted to one use and can be used multiple times.
- The Quick Tender can be used in conjunction with the [Exact Cash Tendered](#) and [Cash Amount](#) functions.

### Quick Tender (Landscape Mode)

| Step | Instruction                               | Operation                                                                         |
|------|-------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap £20 on the <b>Quick Tender</b> column |  |
| 2    | Tap <b>Done</b>                           |  |

### Quick Tender (Portrait Mode)

| Step | Instruction                               | Operation                                                                          |
|------|-------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Tap <b>Pay</b>                            |  |
| 2    | Tap £20 on the <b>Quick Tender</b> column |   |
| 3    | Tap <b>Done</b>                           |  |

## 2.3.24.10. Split Tender Payments

### Overview

Split Tendering can be used when a customer needs to make payment by means of two or more separate tender methods.

- For example:
  - Payment by Cash and Card
  - Payment by two different Cards
  - Payment by Cash and two different Cards
- The Register will add up the various tendering methods and summarise them on the Journal and the receipt printout.

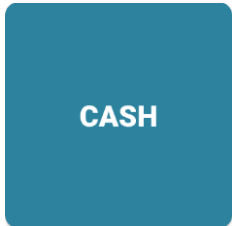
In this example an item is added to the Journal, and then both Cash and Card are used to make the payment.

### Split Tender Payments (Landscape Mode)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                                 |                                                                                     |
|---|-----------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Add a <b>Product</b> to the Journal                             |  |
| 2 | Enter the amount being paid by <b>Cash</b>                      |  |
| 3 | Tap <b>Cash / Amount Tendered</b>                               |  |
| 4 | Enter the amount being paid by <b>Card</b>                      |  |
| 5 | Tap <b>Card</b>                                                 |  |
| 6 | Follow the steps for the specific Card Payment Device you have. |                                                                                     |

### Split Tender Payments (Portrait Mode)

| Step | Instruction                                | Operation                                                                             |
|------|--------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Add a <b>Product</b> to the Journal        |  |
| 2    | Tap the <b>Pay</b> button                  |  |
| 3    | Tap the <b>Adjust</b> button               |  |
| 4    | Enter the amount being paid by <b>Cash</b> |  |
| 5    | Tap <b>Enter</b>                           |  |
| 6    | Tap <b>Cash</b>                            |  |
| 7    | Tap the <b>Adjust</b> button               |  |

|    |                                                                 |       |
|----|-----------------------------------------------------------------|-------|
| 8  | Enter the amount being paid by <b>Card</b>                      | 1 0 0 |
| 9  | Tap <b>Enter</b>                                                | ENTER |
| 10 | Tap <b>Card</b>                                                 | CARD  |
| 11 | Follow the steps for the specific Card Payment Device you have. |       |

## 2.3.25. Tipping



### Overview

This section details the different methods of adding one or more tip items to a transaction.

- No taxes are applied to tip items as they are voluntarily given by customers.
- Tips can be added as either a Fixed Value, or as a Percentage of the **Transaction Value** and can be assigned as Cash, Card or any other supporting Tender Type.
  - **Additional Tenders** can be configured to accept or reject tips via the Register Portal. For more information, see the chapter on [Additional Tender Types](#)
- Tips can be added to a transaction from several areas:
  - While the Staff Member is adding the items to the basket.
  - From the Ready to Complete tab of the Open Transactions dialog
  - From the Transaction Summary after tendering is complete
  - From the Transaction History screen once the transaction is complete
- Adding a tip from Register will prompt the Staff Member to enter the tip amount. At this point, Register does not know what tender method is being used for the tip. When the Staff Member begins tendering, they will have the option to include the tip in the selected tender type.



To view the accumulated Tips for Staff Members, please run the [Staff Report](#) on the Portal.



Some integrated payment solutions do not allow for tips to be entered by the customer during payment. For more information please speak to your Solution Provider.

Follow the links below to navigate to the sub topics, or scroll the topics to the left!

- [Add TIP before Tendering](#)
- [Add TIP after Tendering](#)

# 2.3.25.1. Add TIP before Tendering

## Overview

In landscape mode, adding a Tip before the Tendering process has begun can be done either at the beginning, during or as the last item added before the tendering process is started. In Portrait Mode, adding a Tip can only be done once the Tendering Process has started.

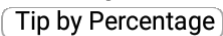
### Adding a Tip before Tendering (Landscape Mode)

Before any products are added to the basket.

| Step | Instruction                | Operation                                                                                                                                                                                                                                                   |
|------|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>TIP</b> button  |  or                                                                                   |
| 2    | Tap <b>Tip by Amount</b>   |                                                                                                                                                                          |
| 3    | Enter the Tip <b>Value</b> |    |
| 4    | Tap <b>Enter</b>           |                                                                                                                                                                          |
| 5    | Tap <b>Apply</b>           |                                                                                                                                                                          |

\* When no products have been added to the basket, only **Tipping by Amount** will be available.

When products have already been added to the basket, or as the last item added.

| Step | Instruction                                                    | Operation                                                                                                                                                                                                                                             |
|------|----------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Add a <b>Product</b> to the basket                             |                                                                                                                                                                      |
| 2    | Tap the <b>TIP</b> button                                      |  or                                                                                 |
| 3    | Tap <b>Tip by Amount</b><br>or<br>Tap <b>Tip by Percentage</b> | <br>or<br>                                                                          |
| 4    | Enter the Tip <b>Value</b>                                     |    |
| 5    | Tap <b>Enter</b>                                               |                                                                                                                                                                    |
| 6    | Tap <b>Apply</b>                                               |                                                                                                                                                                    |

\* When there are products in the basket, both **Tipping by Amount** and **Tipping by Percentage** will be available.

## 2.3.25.2. Add TIP after Tendering

### Overview

Adding a Tip to the transaction after the tendering process has been completed can be done in three ways;

- On the Tender Summary Dialog
- Through the Transaction History Module
- On the Ready to Complete Tab in the Suspended Transaction list.

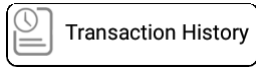
## Adding a Tip after Tendering (Both Modes)

### On Tender Summary

| Step | Instruction                                           | Operation                                                                               |
|------|-------------------------------------------------------|-----------------------------------------------------------------------------------------|
| 1    | Carryout the <b>Tender</b> as normal                  |                                                                                         |
| 2    | Tap <b>Add Tip</b>                                    |       |
| 3    | Select the <b>Tender Type</b> from the available list |                                                                                         |
| 4    | Enter the Tip <b>Value</b>                            |       |
| 5    | Tap <b>Continue</b>                                   |       |
| 6    | Tap <b>Apply</b>                                      |       |
| 7    | Tap <b>OK</b>                                         |      |
| 8    | Tap <b>Done</b>                                       |  =. |

\* With step 3, if the **Cash-Change from Transaction** option is selected, the value of the change will be applied as the Tip

### Through the Transaction History Module

| Step | Instruction                                          | Operation                                                                            |
|------|------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Menu</b> button                           |  |
| 2    | Tap <b>Transaction History</b>                       |  |
| 3    | Locate the transaction and tap <b>Tip Adjustment</b> |  |
| 4    | Select the <b>Tendering Method</b> from the list     |                                                                                      |
| 5    | Enter the Tip <b>Value</b>                           |  |
| 6    | Tap <b>Continue</b>                                  |  |

|   |                  |                                                                                    |
|---|------------------|------------------------------------------------------------------------------------|
| 7 | Tap <b>Apply</b> |  |
| 8 | Tap <b>OK</b>    |  |

### Through Ready to Complete Suspended Transactions

| Step | Instruction                                          | Operation                                                                            |
|------|------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap the <b>Suspended Transaction</b> icon            |     |
| 2    | Tap <b>Ready to Complete</b>                         |    |
| 3    | Locate the transaction and tap <b>Tip Adjustment</b> |    |
| 4    | Enter the Tip <b>Value</b>                           |    |
| 5    | Tap <b>Continue</b>                                  |   |
| 6    | Tap <b>Apply</b>                                     |  |
| 7    | Tap <b>OK</b>                                        |  |

## 2.3.26. The Department Browser

### Overview

The Department Browser allows Staff Members to navigate through Departments to easily find a specific product. Each department will contain an entry for miscellaneous products along with all products within that department. Miscellaneous products will prompt the Staff Member to manually enter the price into the Register.

 Miscellaneous Department Products will be displayed at the top of the list.

### Using the Department Browser (Both Modes)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|



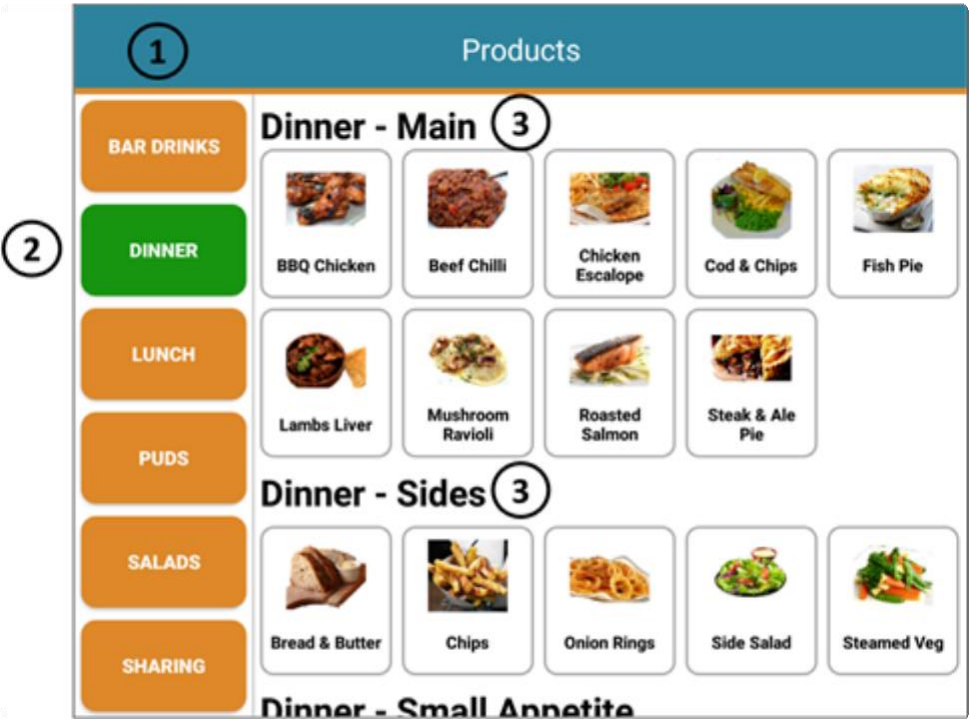
|   |                                                                                                                                                     |                                                                                                                                                                                      |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Tap the <b>Departments Tab</b>                                                                                                                      |                                                                                                   |
| 2 | Tap any <b>Department</b> in the list                                                                                                               |                                                                                                   |
| 3 | Tap any <b>Product</b> in the list                                                                                                                  |                                                                                                   |
| 4 | Product is added to the Journal                                                                                                                     | <div>Café Latte (Med) £2.45</div>                                                                                                                                                    |
| 5 | Tap the <b>Departments Tab</b> to return to the top level Departments or alternately tap the <b>Back Button</b> to navigate up the Department Tree. | <div>   </div> |

## 2.3.27. The Plus Product Browser

### Overview

The Plus Browser displays specifically configured Departments typically used by customers in the Hospitality Sector, as it displays products much like a menu.

- Products are added to the Journal in the same way as other browsers. Simply locate and tap on the product you wish to add.
- The Plus Browser can be configured to open immediately after a Staff Member has logged in. For more information on these configurations, see [Browser Setup](#) and [Department Setup](#) in the Portal Manual.
- Both the Department List and the Sub Departments can be scrolled up and down to quickly locate the specific product.



- 1. Department List in a vertical format.
- 2. Currently active department in the Plus Browser.
- 3. Sub Departments of the active department.

Opening and Closing the Plus Product Browser (Landscape Mode)

This feature is only available in Landscape Mode

| Step | Instruction                                    | Operation |
|------|------------------------------------------------|-----------|
| 1    | Tap the <b>Open</b> icon to Open the Browser   |           |
| 2    | Tap the <b>Close</b> icon to Close the Browser |           |

2.3.28. The Product Browser

Overview

The Registers Products Browser is used to quickly add common or ‘hot’ selling items to a transaction. The Staff Member can quickly tap a product to add it to the transaction, and not have to search or scan.

\* For more information on setting the products for the Product Browser, see the chapter on [Product Browsers](#).

## Using the Product Browser (Both Modes)

| Step | Instruction                 | Operation                                                                         |
|------|-----------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap the <b>Products Tab</b> |  |
| 2    | Tap desired <b>Product</b>  |  |
| 3    | Product appears in Journal  |  |

\* If configured, you can also extend the product browser. This will hide the keypad and function buttons and will display more products in its place. The extended product browser can be minimised back to its normal size at the tap of a button. **This is only available in Landscape Mode**

## Opening or Closing the extended product browser (Landscape Mode)

| Step | Instruction                                    | Operation                                                                           |
|------|------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap the <b>Open</b> Icon to Open the Browser   |  |
| 2    | Tap the <b>Close</b> Icon to Close the Browser |  |

## 2.3.29. Transaction Voiding

### Overview

The Register can Void entire transactions, but is dependent on the Card Terminal in use.

For more information, please see the chapter on [Transaction Voiding](#) in the Module section of this manual.

## 2.3.30. Void Item



### Overview

If the Staff Member needs to Void an item, the Void Item function on the Register screen will allow the product to be removed from the transaction. If an item is voided, the item will remain on the journal but will be clearly marked as void. The till receipt will also clearly display that the item has been voided, and will not be included in the transaction totals.

- Voiding in the Journal can be used on the following items
  - Products (Single and Multiple)
  - Discounts
  - Tips
  - Surcharges
- This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

### Voiding a Product in the Journal (Both Modes)

| Step | Instruction                                         | Operation                                                                            |
|------|-----------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap any <b>Product</b> from the Products Tab        |  |
| 2    | Tap the <b>Void</b> button                          |  |
| 3    | Tap the <b>Product</b> in the Journal               | <div>Café Latte (Med) £2.45</div>                                                    |
| 4    | Tap <b>Void</b> to confirm                          |  |
| 5    | Process the <b>Supervisor Approval</b> (If Enabled) |                                                                                      |
| 6    | Item is now showing as <b>VOID</b> in the Journal   | <div>Café Latte (Med) £2.45<br/>**VOID**</div>                                       |

\* Step 6 only applies to products in the Journal. All other items in the Journal will be removed.

### Voiding Products with a quantity of 2 or more in the Journal (Both Modes)

If a transaction line in the Journal has a quantity greater than 1, an extra step is needed to complete the Void. On tapping the product in the Journal, the Register will ask for the Quantity of items to be Voided. Select the quantity and tap the Void button.

The screenshot shows a screen titled "Select Quantity to Void". It has a numeric keypad with buttons for digits 0-9, a minus sign, and a plus sign. The number "2" is entered in the top display. At the bottom, there are "CANCEL" and "VOID" buttons.

## 2.3.31. Void Multiple Products



### Overview

The Staff Member may need to Void multiple items from the transaction. To save doing them one at a time the Void function allows the Staff Member to tap multiple items from the transaction Journal. If items are voided from the transaction, they will remain on the journal but will be clearly marked as being Voided. The till receipt will also clearly display that the items have been Voided, and will not be included in the transaction totals.

- This functionality can be set to specific users of the Register. See the chapter on [Functional](#)

[Permissions](#) for more information.

**!** Items in the Journal with quantities greater than 1 must be voided individually. They cannot be actioned using the Void Multiple Items process. See the [Void Item](#) chapter for more information.

## Voiding Multiple Products in the Journal (Both Modes)

| Step | Instruction                                                                      | Operation                                                                                                |
|------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| 1    | Tap the <b>First Product</b> in the journal                                      | Café Latte (Med) £2.45                                                                                   |
| 2    | Tap the <b>Second Product</b> in the Journal                                     | Café Latte (Med) £2.45                                                                                   |
| 3    | Tap the <b>Void</b> button                                                       |                        |
| 4    | Tap <b>Void</b> to confirm                                                       |                        |
| 5    | Process the <b>Supervisor Approval</b> (If Enabled)                              |                                                                                                          |
| 6    | You should now see the two items in the journal having <b>VOID</b> in the entry. | <div>Café Latte (Med) £2.45</div> <div>**VOID**</div> <div>Bottled Water £1.00</div> <div>**VOID**</div> |

## 2.4. Register Modules



### Overview

The Register has several modules that can be accessed from the side menu. These modules are divided into five categories:

1. Modules that affect the cash in the till drawer.
2. Modules that affect Stock.
3. Modules that affect Customers.
4. Modules for reporting on transactions carried out in the Register.

## 5. Modules for accessing the Web and Portal.

\* Modules can be User Level controlled via the configurations in the Portal. See the chapter on [Modular Permissions](#) for more information.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [CRM](#)
- [End Day](#)
- [Guide](#)
- [Paid In](#)
- [Paid Out](#)
- [Reports](#)
- [Stock](#)
- [Transaction History](#)
- [Web Portal](#)

## 2.4.1. CRM (Customer Relationship Manager)

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### Overview

\* This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

CRM (Customer Relationship Management) is a Module on the Register where you can create a list of customers and link transactions from the Register to them. CRM also allows you to manage appointments through the CRM Calendar for your customers.

- CRM is split into two sections, [Customers](#) and [Appointments](#) or [Calendar](#). On the Registers Side Menu, these are listed as Customers and Calendar.
- Activating CRM is done via the [Web Portal](#).

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Calendar](#)
- [Customers](#)
- [Custom URL](#)

## 2.4.1.1. Calendar (Appointments)

### Overview

The Calendar Module has two main functions;

- To display all the appointments scheduled for that day in a manner which allows the Staff Member to easily see each appointment and shows;
    - The Customers Name
    - The Start and End Time of the Appointment
    - The Type of appointment
    - Which Staff Member has been allocated the appointment.
    - If the appointment has any accompanying notes (Denoted with an “\*\*”)
    - Visually displays the Staff Members available appointment Time Slots
  - And to create, edit or delete Customer Appointments.
- You do not need to complete a Start Day to access the Calendar.
- When accessing the Calendar Module or changing the date in the Calendar, the Register will automatically perform a Sync. This is to ensure that any appointments that have been created, edited or deleted either on the Portal or on another Register are pulled down, and that specific Register remains up-to-date.

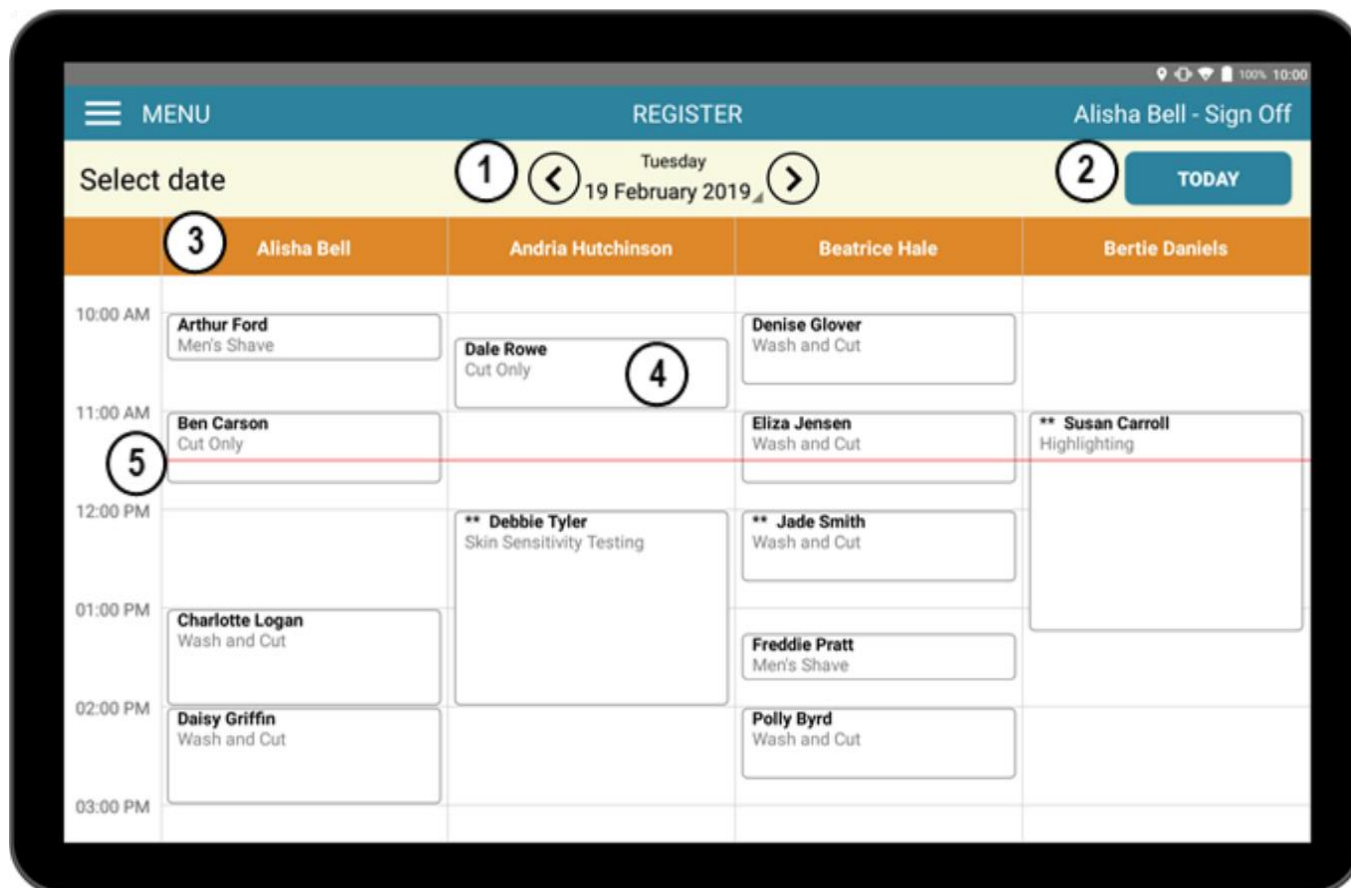
### Navigating to the Calendar (Both Modes)

| Step | Instruction                                              | Operation                                                                            |
|------|----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | From any page after Logging in, tap the <b>Menu</b> Icon |  |



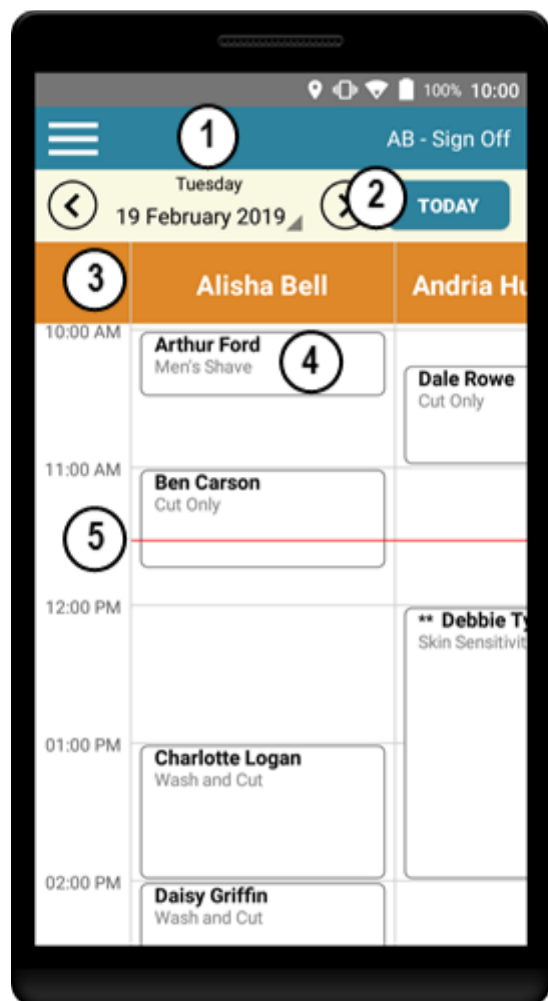
|   |                     |                                                                                            |
|---|---------------------|--------------------------------------------------------------------------------------------|
| 2 | Tap <b>Calendar</b> |  Calendar |
|---|---------------------|--------------------------------------------------------------------------------------------|

## Layout of the Calendar (Landscape Mode)



1. Date selection tool. Tap either the "<" or ">" to navigate backwards or forwards, or tap the date for a calendar widget to select a specific date.
2. Tapping "Today" will bring the calendar back to the current date and time.
3. List of your staff that appointments are scheduled against.
4. Customer's appointment
5. Red Line representing the current time.

## Layout of the Calendar (Portrait Mode)



1. Date selection tool. Tap either the “<” or “>” to navigate backwards or forwards, or tap the date for a calendar widget to select a specific date.
2. Tapping “Today” will bring the calendar back to the current date and time.
3. List of your staff that appointments are scheduled against.
4. Customer’s appointment
5. Red Line representing the current time.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Creating Calendar Appointment](#)
- [Deleting a Calendar Entry](#)
- [Editing a Calendar Entry](#)

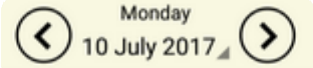
## 2.4.1.1.1. Creating Calendar Appointment

### Overview

Creating an appointment for a customer will allocate an appointment slot for that customer against a specific Member of Staff or Resource.

- If notes are added to the appointment, the customer's name will be preceded by a "\*\*\*" on the appointment calendar.
- Appointments can also be created from the Customer Module. For more information, see the chapter on [Creating Customer Appointments](#) in Customers.

### Creating Calendar Appointments (Both Modes)

| Step | Instruction                                                                                                                      | Operation                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Navigate to the required <b>Date</b>                                                                                             |   |
| 2    | Select a <b>Timeslot</b> from the calendar by tapping into it.                                                                   |                                                                                       |
| 3    | Tap the <b>Blue Highlighted Box</b>                                                                                              |  |
| 4    | Carry out a <b>Search</b> for the customer                                                                                       | See <a href="#">Searching Customers</a>                                               |
| 5    | Tap <b>Assign</b>                                                                                                                |  |
| 6    | Select the <b>Appointment Time</b> . (CRM will automatically select the next available appointment time in that appointment box) |                                                                                       |
| 7    | Select the <b>Duration</b> of the appointment                                                                                    |                                                                                       |
| 8    | Change the <b>Stylist / Resource</b> if Necessary                                                                                |                                                                                       |
| 9    | Select <b>Appointment Type</b>                                                                                                   |                                                                                       |
| 10   | Add any <b>Notes</b> you want to add                                                                                             |                                                                                       |
| 11   | Tap <b>Save</b>                                                                                                                  |  |

## 2.4.1.1.2. Deleting a Calendar Entry

### Overview

If the need arises that an appointment needs to be cancelled or deleted as in the case when a customer requests the cancellation, the process is very simple.

- **Deleting an appointment is a permanent action, and cannot be undone.**

### Deleting a Calendar Entry (Both Modes)

| Step | Instruction                                                                      | Operation                                                                          |
|------|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | When in the calendar, navigate to the required <b>Appointment</b> and tap on it. |  |
| 2    | Tap <b>Remove</b>                                                                |   |
| 3    | Tap <b>Remove</b> to confirm                                                     |  |

## 2.4.1.1.3. Editing a Calendar Entry

### Overview

If the need arises that an appointment must be rescheduled as in the case when a customer requests the change, editing the appointment is very simple.

### Editing a Calendar Entry (Both Modes)

| Step | Instruction                                                                      | Operation                                                                            |
|------|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | When in the calendar, navigate to the required <b>Appointment</b> and tap on it. |  |
| 2    | Make the necessary changes                                                       |                                                                                      |
| 3    | Tap on <b>Save</b>                                                               |   |

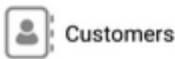
## 2.4.1.2. Customers

### Overview

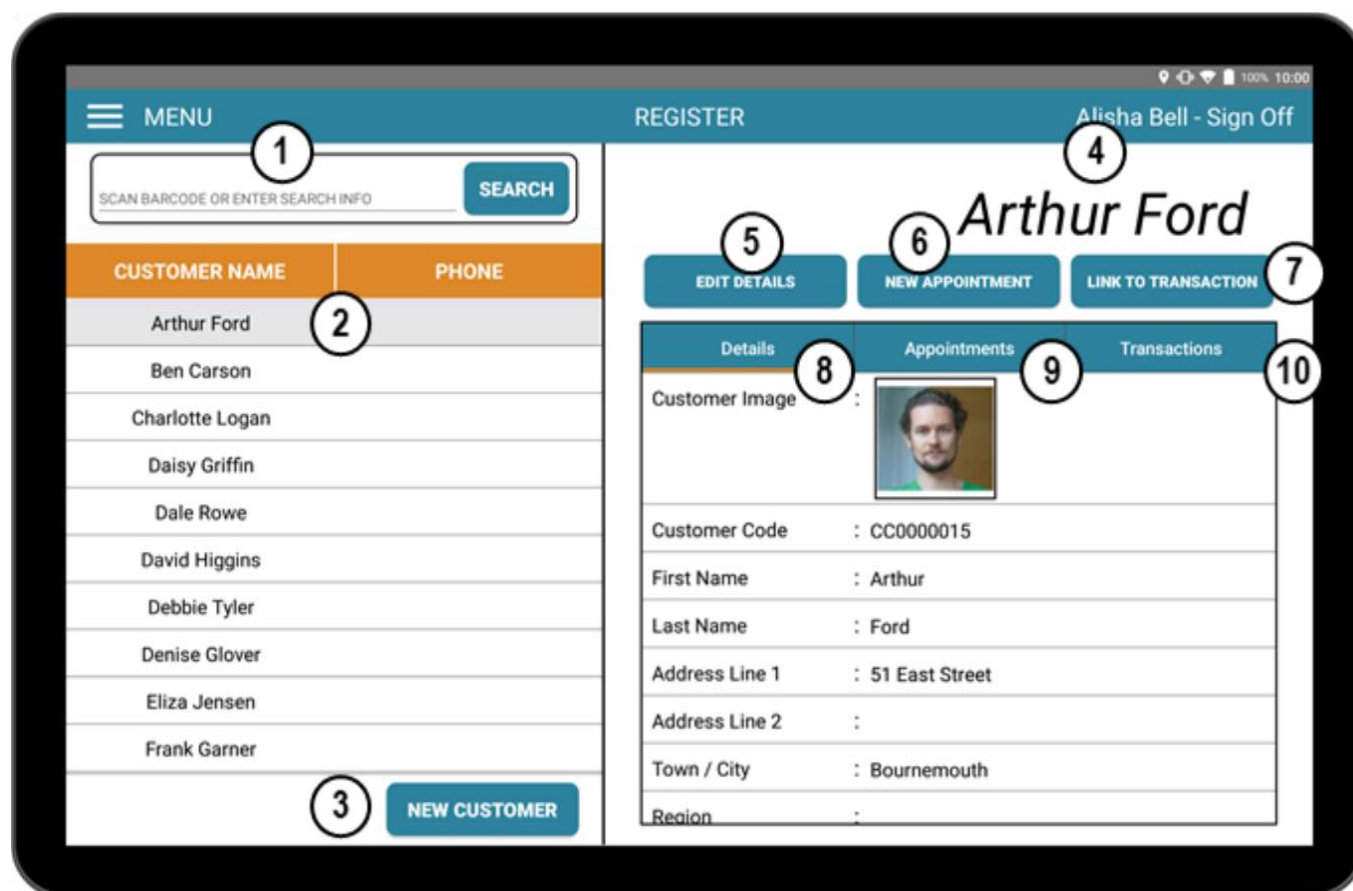
The Customers module is where you create, edit or delete your customer details, create and modify appointments, and link transactions to a customer.

- You do not need to complete a Start Day to access the Customer Database.
- When accessing the Customer Module, the Register will automatically perform a Sync. This is to ensure that any customers that have been created, edited or deleted either on the Portal or on another Register are pulled down, and that specific Register remains up-to-date.

### Navigating to the Customer Module (Both Modes)

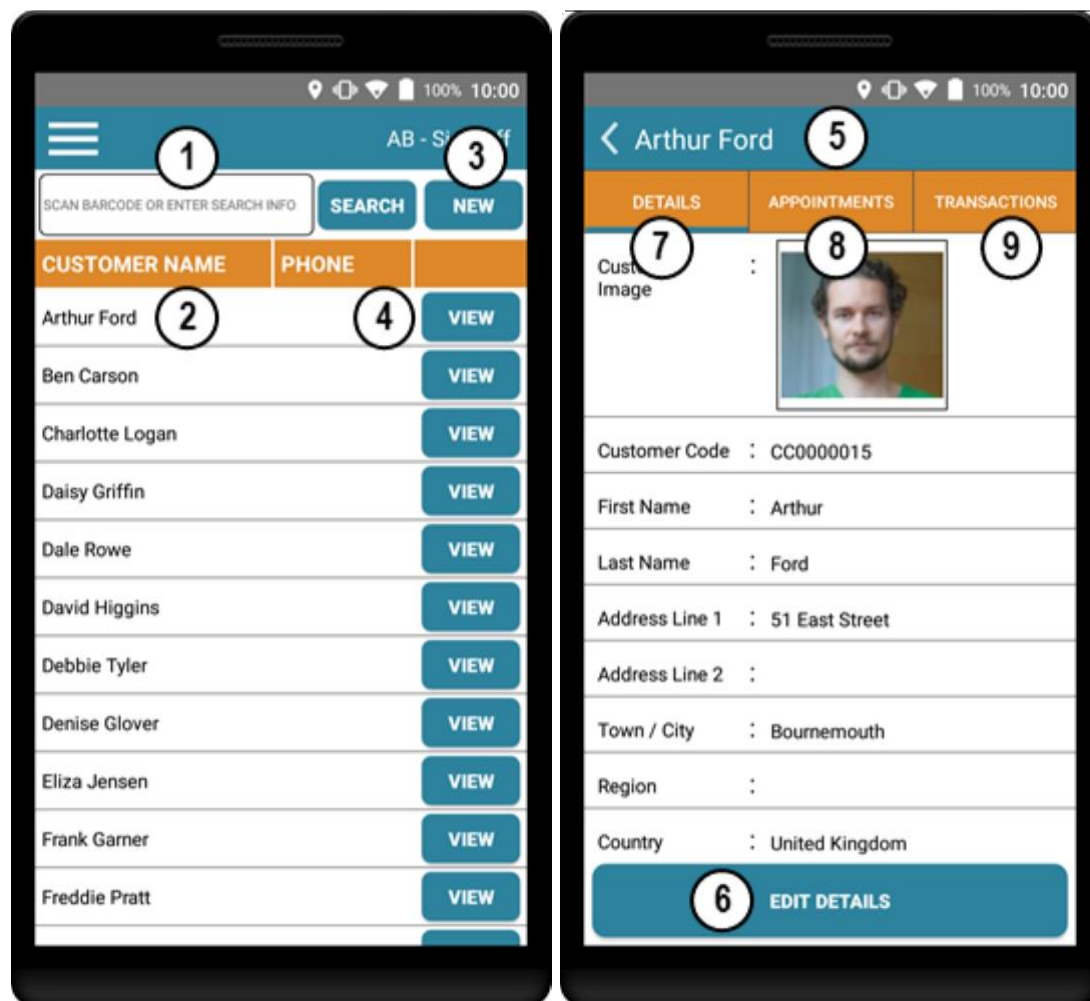
| Step | Instruction                                              | Operation                                                                            |
|------|----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | From any page after Logging in, tap the <b>Menu Icon</b> |    |
| 2    | Tap <b>Customers</b>                                     |  |

## Layout of the Customer Module (Landscape Mode)



1. Search function for quickly finding a specific customer.
2. List of customers currently in the database.
3. New Customer creation tool.
4. Name of customer currently selected.
5. Edit Customer Details tool.
6. New Customer Appointment tool.
7. Link a Transaction to a Customer tool.
8. Customer's data tab.
9. Customer's appointment tab.
10. Linked transactions tab.

## Layout of the Customer Module (Portrait Mode)



1. Search function for quickly finding a specific customer.
2. List of customers currently in the database.
3. New Customer creation tool.
4. View the Customer Information
5. Name of customer currently selected.
6. Edit Customer Details tool.
7. Customer's Data Tab.
8. Customer's Appointment Information Tab.
9. Customer's Transaction Data Tab.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Searching Customers](#)
- [Creating Customers](#)
- [Editing Customers](#)

- [Deleting a Customer](#)
- [Customer Appointments](#)
- [Customer Transactions](#)

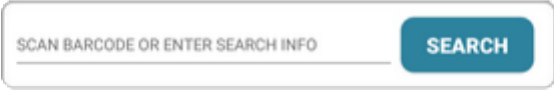
## 2.4.1.2.1. Searching Customers

### Overview

In the Customer Module, you can make use of the search function to search for customer.

- Entering no search criteria when performing the search, will display all customers in your database.
- Use the customer's name or surname as the search criteria when performing a search.

### Searching Customers (Both Modes)

| Step | Instruction                      | Operation                                                                            |
|------|----------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap into the <b>Search Field</b> |  |
| 2    | Enter your search criteria       |                                                                                      |
| 3    | Tap <b>Search</b>                |   |

## 2.4.1.2.2. Creating Customers

### Overview

Creating a New Customer will add their details to your current database.

- There are some fields that are required and are indicated by an “\*”.
- If the Customer Code field is left blank, an auto generated code will be assigned when the details of the new customer are sent to the sever.
- Customers can also be created from within the **Register Journal** or from the **Transaction History** module.



## Creating Customers (Both Modes)

| Step | Instruction                                                          | Operation                                                                         |
|------|----------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Tap <b>New Customer</b>                                              |  |
| 2    | Fill in all the <b>Required Fields</b> which are indicated by an “*” |                                                                                   |
| 3    | Fill in the remaining Fields as required                             |                                                                                   |
| 4    | Tap <b>Save</b>                                                      |  |

## 2.4.1.2.3. Editing Customers

### Overview

Editing the Customers details allows you to make changes to details you hold against the customer, for example change of address or telephone number.

### Editing Customer Details (Landscape Mode)

| Step | Instruction                                                         | Operation                                                                           |
|------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer                          | See <a href="#">Searching Customers</a>                                             |
| 2    | Tap <b>Edit Details</b>                                             |  |
| 3    | Tap into the field you wish to edit and make the necessary changes. |                                                                                     |
| 4    | Tap <b>Save</b>                                                     |  |

### Editing Customer Details (Portrait Mode)

| Step | Instruction                                                         | Operation                                                                           |
|------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer                          | See <a href="#">Searching Customers</a>                                             |
| 2    | Tap <b>View</b>                                                     |  |
| 3    | Tap <b>Edit Details</b>                                             |  |
| 4    | Tap into the field you wish to edit and make the necessary changes. |                                                                                     |

|   |                 |                                                                                   |
|---|-----------------|-----------------------------------------------------------------------------------|
| 5 | Tap <b>Save</b> |  |
|---|-----------------|-----------------------------------------------------------------------------------|

## 2.4.1.2.4. Deleting a Customer

### Overview

Deleting a Customer through the Register will also delete the Customer on all Registers within your Merchant, and on the Portal.

- Deleting a Customer will also delete all appointments created against that Customer, and these will be removed from the Calendar.
- Deleting a Customer is a permanent action, and cannot be undone.**

### Deleting a Customer (Landscape Mode)

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer | See <a href="#">Searching Customers</a>                                             |
| 2    | Tap <b>Edit Details</b>                    |  |
| 3    | Tap <b>Remove</b>                          |  |
| 4    | Tap <b>Remove</b> again to Confirm         |  |

### Deleting a Customer (Portrait Mode)

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer | See <a href="#">Searching Customers</a>                                             |
| 2    | Tap <b>View</b>                            |  |
| 3    | Tap <b>Edit Details</b>                    |  |
| 4    | Tap <b>Remove</b>                          |  |
| 5    | Tap <b>Remove</b> again to Confirm         |  |

## 2.4.1.2.5. Customer Appointments

### Overview

From the customer's data field, selecting the **Appointment Tab** will display the list of appointments linked with the selected customer.

| Details                                   | Appointments | Transactions |
|-------------------------------------------|--------------|--------------|
| Tue 19 Mar 2019 - 10:00 am - Men's Shave  |              |              |
| REMOVE                                    |              | VIEW         |
| Mon 11 Feb 2019 - 11:00 am - Wash and Cut |              |              |
| REMOVE                                    |              | VIEW         |
| Wed 16 Jan 2019 - 12:30 pm - Wash and Cut |              |              |
| REMOVE                                    |              | VIEW         |
| Wed 19 Dec 2018 - 04:00 pm - Wash and Cut |              |              |
| REMOVE                                    |              | VIEW         |

- Appointment shown in **Green** are appointments in the future.
- Appointment shown in **Grey** are appointments in the past.
- Appointment shown in **Orange** are appointments that have not been sent to the server.
- Appointment shown in **Red** represents a problematic appointment; normally signifying that the Staff Member this appointment is linked to is no longer available for the appointment.
- Tapping **View** will show the appointment in the Calendar.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Creating Customer Appointment](#)
- [Editing Customer Appointment](#)
- [Deleting an Appointment](#)

### 2.4.1.2.5.1. Creating Customer Appointment

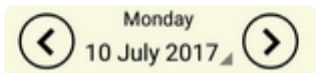
#### Overview

Creating an appointment for a customer will allocate an appointment slot for that customer against a

specific **Staff Member** or **Resource**.

- When the customer was created, if a Preferred Stylist (Staff Member) was selected, then on creating a new appointment, the calendar will highlight this preference in Green.
- If notes are added to the appointment, the customer's name will be preceded by a "\*\*\*" on the appointment calendar.
- Appointments can also be created directly from the Calendar. For more information, see the chapter on [Creating Calendar Appointments](#) in the Calendar.

## Creating a Customer Appointment (Landscape Mode)

| Step | Instruction                                                                                                                      | Operation                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer                                                                                       | See <a href="#">Searching Customers</a>                                               |
| 2    | Tap <b>New Appointment</b>                                                                                                       |    |
| 3    | Navigate to the required <b>Date</b> using the calendar                                                                          |   |
| 4    | Select a <b>Timeslot</b> from the calendar by tapping into it.                                                                   |                                                                                       |
| 5    | Tap the <b>Blue Highlighted Box</b>                                                                                              |  |
| 6    | Select the <b>Appointment Time</b> . (CRM will automatically select the next available appointment time in that appointment box) |                                                                                       |
| 7    | Select the <b>Duration</b> of the appointment                                                                                    |                                                                                       |
| 8    | Change the <b>Staff Member / Resource</b> if Necessary                                                                           |                                                                                       |
| 9    | Select <b>Appointment Type</b>                                                                                                   |                                                                                       |
| 10   | Add any <b>Notes</b> you want to add                                                                                             |                                                                                       |
| 11   | Tap <b>Save</b>                                                                                                                  |  |

## Creating a Customer Appointment (Portrait Mode)

| Step | Instruction                                | Operation                                                                             |
|------|--------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer | See <a href="#">Searching Customers</a>                                               |
| 2    | Tap <b>View</b>                            |  |

|    |                                                                                                                                  |                                                                                       |
|----|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 3  | Tap the <b>Appointment</b> Tab                                                                                                   |    |
| 4  | Tap <b>New Appointment</b>                                                                                                       |    |
| 5  | Navigate to the required <b>Date</b> using the calendar                                                                          |    |
| 6  | Select a <b>Timeslot</b> from the calendar by tapping into it.                                                                   |                                                                                       |
| 7  | Tap the <b>Blue Highlighted Box</b>                                                                                              |    |
| 8  | Select the <b>Appointment Time</b> . (CRM will automatically select the next available appointment time in that appointment box) |                                                                                       |
| 9  | Select the <b>Duration</b> of the appointment                                                                                    |                                                                                       |
| 10 | Change the <b>Staff Member / Resource</b> if Necessary                                                                           |                                                                                       |
| 11 | Select <b>Appointment Type</b>                                                                                                   |                                                                                       |
| 12 | Add any <b>Notes</b> you want to add                                                                                             |                                                                                       |
| 13 | Tap <b>Save</b>                                                                                                                  |  |

## 2.4.1.2.5.2. Editing Customer Appointment

### Overview

If the need arises that an appointment needs to be rescheduled as in the case when a customer requests the change, editing the appointment is very simple.

### Editing a Customer Appointment (Landscape Mode)

| Step | Instruction                                            | Operation                                                                            |
|------|--------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out <b>Search</b> for the customer               | See <a href="#">Searching Customers</a>                                              |
| 2    | Tap on the <b>Appointments Tab</b>                     |  |
| 3    | Locate the required appointment and tap on <b>View</b> |  |
| 4    | Make the necessary changes                             |                                                                                      |
| 5    | Tap on <b>Save</b>                                     |  |

## Editing a Customer Appointment (Portrait Mode)

| Step | Instruction                                            | Operation                                                                          |
|------|--------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Carry out <b>Search</b> for the customer               | See <a href="#">Searching Customers</a>                                            |
| 2    | Tap <b>View</b>                                        |  |
| 3    | Tap the <b>Appointment</b> Tab                         |  |
| 4    | Locate the required appointment and tap on <b>View</b> |  |
| 5    | Make the necessary changes                             |                                                                                    |
| 6    | Tap on <b>Save</b>                                     |  |

## 2.4.1.2.5.3. Deleting an Appointment

### Overview

Deleting an Appointment through the Register will also delete the Appointment on all Registers within your Merchant, and on the Portal.

- **Deleting an Appointment is a permanent action, and cannot be undone.**

## Deleting an Appointment (Landscape Mode)

| Step | Instruction                                            | Operation                                                                            |
|------|--------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer             | See <a href="#">Searching Customers</a>                                              |
| 2    | Tap on the <b>Appointments Tab</b>                     |  |
| 3    | Locate the required appointment and tap on <b>View</b> |  |
| 4    | Tap <b>Remove</b>                                      |  |
| 5    | Tap <b>Remove</b> again to Confirm                     |  |

## Deleting an Appointment (Portrait Mode)

| Step | Instruction                                            | Operation                                                                          |
|------|--------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer             | See <a href="#">Searching Customers</a>                                            |
| 2    | Tap <b>View</b>                                        |  |
| 3    | Tap the <b>Appointment</b> Tab                         |  |
| 4    | Locate the required appointment and tap on <b>View</b> |  |
| 5    | Tap <b>Remove</b>                                      |  |
| 6    | Tap <b>Remove</b> again to Confirm                     |  |

## 2.4.1.2.6. Customer Transactions

### Overview

From the customer's data field, selecting the Transactions Tab will display the list of transactions linked to the selected customer.

| Details                                   | Appointments | Transactions                                                                        |
|-------------------------------------------|--------------|-------------------------------------------------------------------------------------|
| Tue 19 Feb 2019 - 09:16 - Spill The Beans |              |  |
| Tue 19 Feb 2019 - 09:08 - Spill The Beans |              |  |
| Mon 11 Feb 2019 - 10:39 - Spill The Beans |              |  |
|                                           |              |                                                                                     |

- The transactions are listed per the date and time of the transaction, and the store the transaction took place in.
- Tap **View** to display the transaction in a bespoke journal.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Link a Transaction to a Customer](#)

## 2.4.1.2.6.1. Link a Transaction to a Customer



### Overview

You can link a transaction to a customer using the **Link to Transaction** button.

- Linking a transaction can also be done from the [Transaction History](#) module and directly from the [Register Journal](#).

### Linking a Transaction to a Customer (Landscape Mode)

On selecting the customer, you will be taken to the Register Screen

| Step | Instruction                                | Operation                                                                            |
|------|--------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer | See <a href="#">Searching Customers</a>                                              |
| 2    | Tap <b>Link to Transaction</b>             |  |
| 3    | Carry out your transaction as normal       | The customer name will appear at the top of the Journal                              |

### Linking a Transaction to a Customer (Portrait Mode)

On selecting the customer, you will be taken to the Register Screen

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer | See <a href="#">Searching Customers</a>                                             |
| 2    | Tap <b>View</b>                            |  |



|   |                                      |                                                                                    |
|---|--------------------------------------|------------------------------------------------------------------------------------|
| 3 | Tap the <b>Transactions</b> Tab      |   |
| 4 | Tap <b>Link to Transaction</b>       |  |
| 5 | Carry out your transaction as normal | The customer name will appear at the top of the Journal                            |

## 2.4.2. Custom URL

### Overview

The Custom URL is a web address that has been set through the Web Portal and can be used to access the Web. This is useful for directing Staff Members to the Company's Web Page for example.

- Accessing the Custom URL is done via the side menu of the Register.

### Custom URL (Both Modes)

| Step | Instruction                                               | Operation                                                                            |
|------|-----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | From any page after logging in, tap the <b>Menu</b> icon. |  |
| 2    | Tap <b>Custom URL</b> button                              |  |

\* The Custom URL will likely be renamed in the menu, in this example it has been named About Register

## 2.4.3. End Day

### Overview

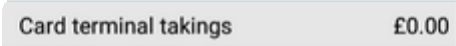
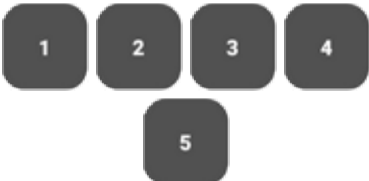
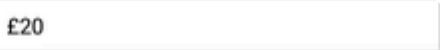
At the end of the trading day, the End Day needs to be completed. This is where the Staff Member will cash up the till by entering the total cash taken, reconciling the card terminal and entering any Additional Tender types.

- You will need to have totalled (Z Total) your Credit / Debit card machine prior to or during the End Day function. Follow your manufactures guide for this process.

- You do not need to enter Zero totals into fields. Simple select the next field you wish to change.
- You can also begin the End Day process from the [Reports](#) screen.
- When entering the denominations, you will need to press **ENTER** to commit the amount. If you enter a denomination amount and Tap “End Day” without pressing “Enter” first, the Register will display a message warning you that the value entered has not been committed.
- Depending on how the End Day configuration has been set in the Portal, you will not always need to enter the cash denominations, only the cash total. For more information see the chapter on [End Day](#) in the Configuration settings in the Portal manual.

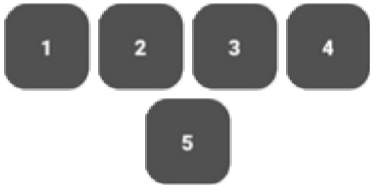
## End Day Process

### End Day (Landscape Mode)

| Step | Instruction                                                          | Operation                                                                             |
|------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>Menu</b>                                                      |    |
| 2    | Tap <b>End of Day</b>                                                |  |
| 3    | Tap <b>End Day</b> again to confirm                                  |  |
| 4    | For <b>Card Payments</b> , tap the Card Terminal Takings field       |  |
| 5    | Enter <b>Total Takings</b> from card terminal (For example, £123.45) |  |
| 6    | Tap <b>Enter</b>                                                     |  |
| 7    | Tap the next Field you wish to enter for example, £20 notes          |  |
| 8    | Tap in <b>Count</b> (15 × £20 notes)                                 |  |
| 9    | Tap <b>Enter</b>                                                     |  |
| 10   | Continue until all values are entered                                |                                                                                       |

|    |                                       |                                                                                     |
|----|---------------------------------------|-------------------------------------------------------------------------------------|
| 11 | Tap <b>END DAY</b>                    |  |
| 12 | Tap <b>END DAY</b> to confirm         |  |
| 13 | Enter the <b>End Day Reference</b>    | <b>For example, Deposit 003076</b>                                                  |
| 14 | Tap <b>End Day</b>                    |  |
| 15 | Tap <b>Done</b>                       |  |
| 16 | <b>Batch Closing</b> will now execute |                                                                                     |

## End Day (Portrait Mode)

| Step | Instruction                                                          | Operation                                                                                        |
|------|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| 1    | Tap <b>Menu</b>                                                      |              |
| 2    | Tap <b>End of Day</b>                                                |  End of Day |
| 3    | Tap <b>End Day</b> again to confirm                                  |             |
| 4    | Tap <b>Actual Values</b>                                             |             |
| 5    | For <b>Card Payments</b> , tap the Card Terminal Takings field       | Card terminal takings £0.00                                                                      |
| 6    | Enter <b>Total Takings</b> from card terminal (For example, £123.45) |             |
| 7    | Tap <b>Enter</b>                                                     |             |
| 8    | Tap the next Field you wish to enter for example, £20 notes          | £20                                                                                              |
| 9    | Tap in <b>Count</b> (15 × £20 notes)                                 |             |

|    |                                       |                                                                                     |
|----|---------------------------------------|-------------------------------------------------------------------------------------|
| 10 | Tap <b>Enter</b>                      |  |
| 11 | Continue until all values are entered |                                                                                     |
| 12 | Tap <b>END DAY</b>                    |  |
| 13 | Tap <b>END DAY</b> to confirm         |  |
| 14 | Enter the <b>End Day Reference</b>    | <b>For example,</b> Deposit 003076                                                  |
| 15 | Tap <b>End Day</b>                    |  |
| 16 | Tap <b>Done</b>                       |  |
| 17 | <b>Batch Closing</b> will now execute |                                                                                     |

## End Day Reference

The End Day Reference will only be prompted for if the function has been enabled in the Config on the Portal. For more information, see the [End Day](#) chapter in the Portal section of this manual.

End Day Reference

Please enter an End Day Reference

Deposit 003076

BACK

END DAY

## Batch Closing

This function is dependent on the type of Card Terminal hardware you are using. Batch Closing requires no user interaction, it automatically executes in the background once the End Day Process has been completed. It instructs the Card Service Provider to close all currently open Card Payment transactions.

## 2.4.4. Guide

### Overview

The Guide will allow any logged in Staff Member to quickly access the online guide where there are step-by-step walk-throughs to all the functions of the Register.

- The Guide is accessible through the Side Menu, but is dependent on an internet connection.
- A cash float does not need to be entered to access the Guide.

### Accessing the Guide (Both Modes)

| Step | Instruction                                               | Operation                                                                          |
|------|-----------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | From any page after logging in, tap the <b>Menu</b> icon. |  |
| 2    | Tap <b>Guide</b>                                          |  |

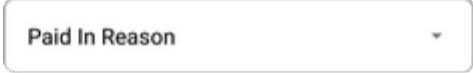
## 2.4.5. Paid In

### Overview

The Paid In module allows you to enter cash into your till that was not obtained through a normal transaction. This would be for reasons such as topping up the Float or returning change from an expense.

- The Register can print a record of this transaction if the function has been set in the Web Portal. For more information, see the chapter on [Receipt Settings](#) in the Portal Manual.

### Paid In (Both Modes)

| Step | Instruction                        | Operation                                                                            |
|------|------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Menu</b>                    |   |
| 2    | Tap <b>Paid In</b>                 |  |
| 3    | Select <b>Reason</b> for paying in |  |

|   |                                    |                                                                                   |
|---|------------------------------------|-----------------------------------------------------------------------------------|
| 4 | Tap in the change of £3.50         |  |
| 5 | Tap <b>PAY IN</b>                  |  |
| 6 | Tap <b>PAY IN</b> again to confirm |  |
| 7 | Tap <b>Done</b>                    |  |

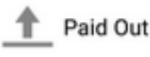
## 2.4.6. Paid Out

### Overview

The Paid Out module allows you to track all money removed from the till. For example, supplies or externally supplied services, using cash directly from your till.

- The Register can print a record of this transaction if the function has been set in the Web Portal. For more information, see the chapter on [Receipt Settings](#) in the Portal Manual.
- If the amount being Paid Out exceeds the amount of cash in the Cash Drawer, the Register will decline the transaction.

### Paid Out (Both Modes)

| Step | Instruction                              | Operation                                                                            |
|------|------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Menu</b>                          |  |
| 2    | Tap <b>Paid Out</b>                      |   |
| 3    | Select <b>Expenses</b> from the dropdown |  |
| 4    | Tap in the amount of £15.39              |  |
| 5    | Tap <b>Pay Out</b>                       |  |

|   |                               |                                                                                    |
|---|-------------------------------|------------------------------------------------------------------------------------|
| 6 | Tap <b>Pay Out</b> to confirm |  |
| 7 | Tap <b>Done</b>               |  |

## 2.4.7. Reports

### Overview

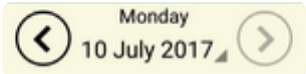
You can access the Daily Z report and Product (PLU) report at any time throughout the day without completing an [End Day](#). This allows you to check the takings and products sold at any time without having to cash up.

- The Reports can be printed on your hardware printer, and can be done at any time whilst a Staff Member is logged in
- Following the [End Day](#), the Register will automatically display the Reports page unless the Register has been instructed to automatically log out after the End of Day. For more information see the chapter on [End Day](#) in the Configuration settings in the Portal manual.

### Reports

#### Using the Reports (Both Modes)

| Step | Instruction                                                                                | Operation                                                                             |
|------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap <b>MENU</b>                                                                            |  |
| 2    | Tap <b>Reports</b> (Daily Z Report is defaulted)                                           |  |
| 3    | Tap <b>Product Report</b> to access the Product Report                                     |   |
| 4    | Tap <b>Column Header</b> to sort A-Z or Z-A                                                |  |
| 5    | Tap <b>Till Sales Report</b> to access the Daily Z Report for the current Register.        |   |
| 6    | Tap <b>Store Sales Report</b> to access the Daily Z Report for all Registers in the Store. |   |

|    |                                             |                                                                                     |
|----|---------------------------------------------|-------------------------------------------------------------------------------------|
| 7  | Tap <b>Next Day</b> to advance date forward |  |
| 8  | Tap <b>Previous Day</b> to move date back   |  |
| 9  | Tap the <b>Date</b> to select specific date |  |
| 10 | Tap <b>TODAY</b> to return to current date  |  |

## Printing the Reports

### Printing the Reports (Both Modes)

| Step | Instruction                                                  | Operation                                                                          |
|------|--------------------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | After selecting the specific report, tap <b>Print Report</b> |  |

## 2.4.8. Stock

### Overview

The Stock Module of the Register easily allows users to lookup product details and manage store stock quantities.

- A Staff Member can search for stock based on the Name, SKU or Barcode, adjust the levels of the stock when necessary or simply view the product details, for example the Price pre-tax, etc.
- If a stock quantity has been entered, the Register will automatically decrement the stock meaning as you sell an item its stock quantity will reduce by the number sold. This makes stock takes a far quicker exercise as the Register is displaying the amount expected. Staff Members will update this when completing stock checks to account for deliveries / goods in as well as natural wastage / shrinkage.
- You do not need to complete a [Start Day](#) to access the Stock Control Function.



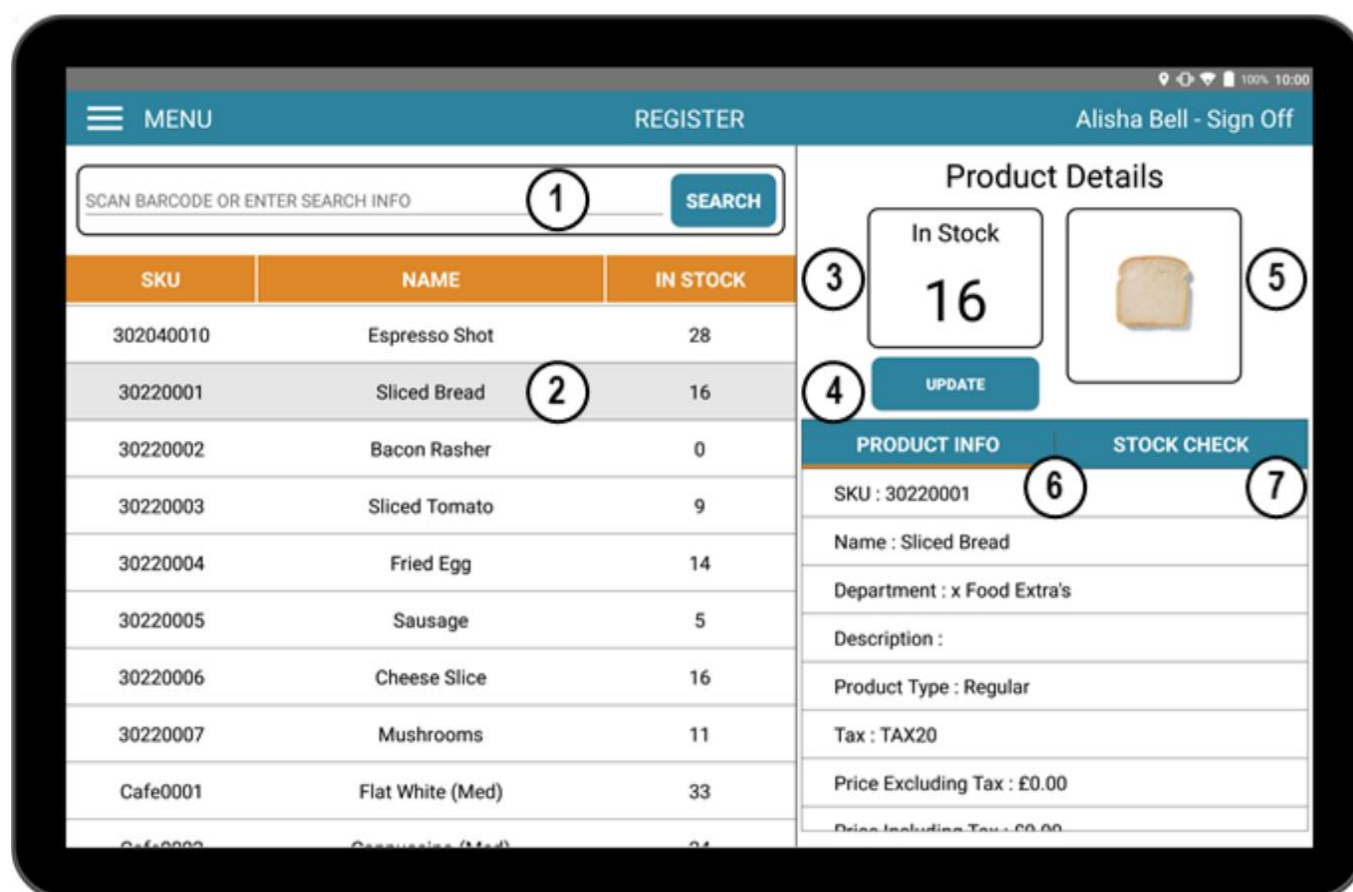
## Navigating to the Stock Module

### Navigating to the Stock Module (Both Modes)

| Step | Instruction                                              | Operation                                                                                |
|------|----------------------------------------------------------|------------------------------------------------------------------------------------------|
| 1    | From any page after Logging in, Tap the <b>Menu</b> icon |  MENU |
| 2    | Tap <b>Stock</b>                                         |  Stock  |

## Layout of the Stock Module

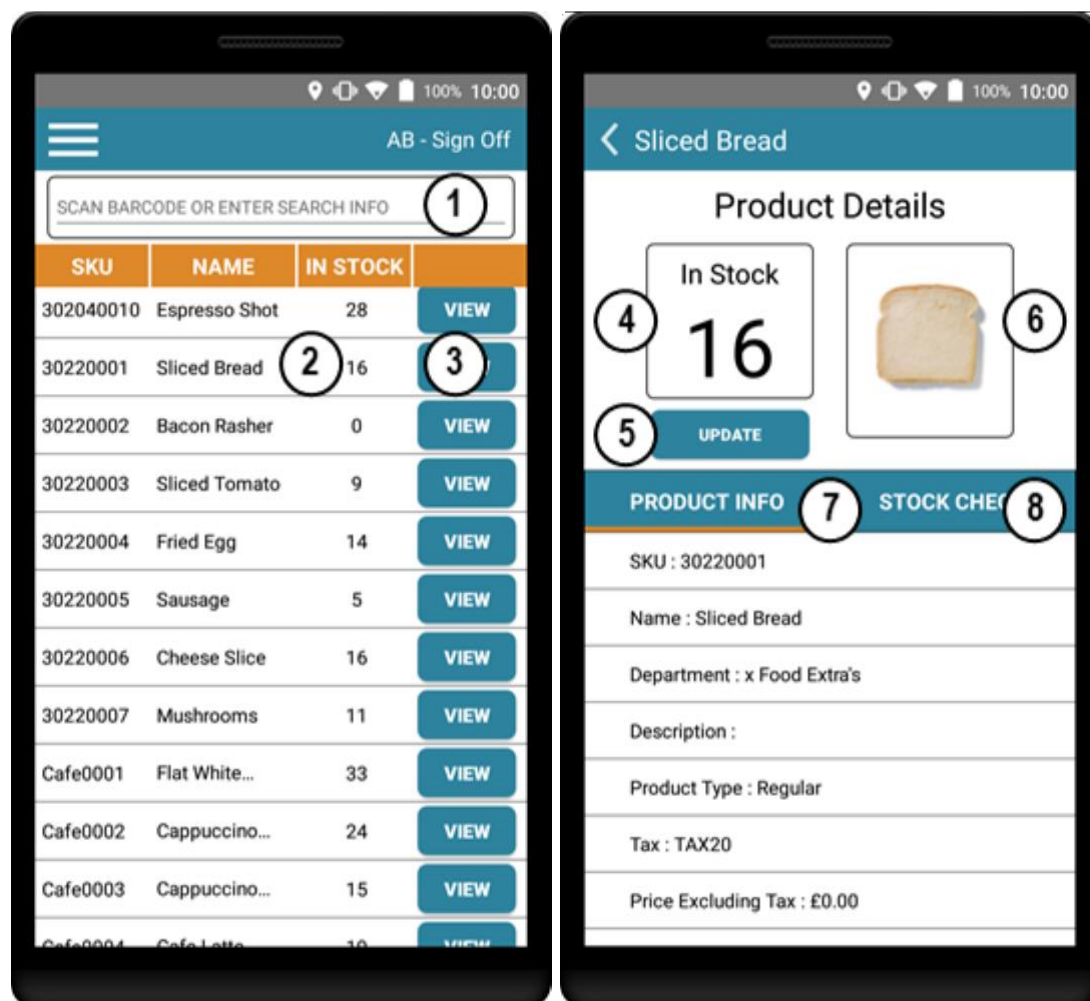
### Layout of the Stock Module (Landscape Mode)



1. Product Search tool.
2. List of products from the search entered. (Slide down or up for more results)
3. Stock Quantity of selected Product.
4. Update button to adjust the stock quantity
5. Product Image (if added on Web Portal).
6. Product Details associated with the selected product. (Slide down or up for more data)

7. Stock Check the quantities of the product across other stores in your business.

## Layout of the Stock Module (Portrait Mode)



1. Product Search tool.
2. List of products from the search entered. (Slide down or up for more results)
3. View button to access the Stock Data (4-8)
4. Stock Quantity of selected Product.
5. Update button to adjust the stock quantity
6. Product Image (if added on Web Portal).
7. Product Details associated with the selected product. (Slide down or up for more data)
8. Stock Check the quantities of the product across other stores in your business.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Entering a Product Search](#)
- [Entering a Product Search](#)

- [Searching Stock Across Stores](#)
- [Adjusting Stock Levels](#)

## 2.4.8.1. Entering a Product Search (Manual)

### Overview

Before the Staff member can adjust a stock level, or view the product details, a search for the product needs to be carried out.

- Not entering any search criteria into the search field will populate all products listed on the Register. Although the columns are sortable, this is not a recommended method as it is time consuming to the Staff Member when looking for a specific product especially for Merchants with a large product list.
- Partial search criteria will limit the returned results.
- Searches can be carried out using the Products Name, SKU or Barcode.

### Product Search (Both Modes)

| Step | Instruction                                                      | Operation                                                                             |
|------|------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Enter your <b>Search Criteria</b> into the search field          |  |
| 2    | Tap <b>Search</b>                                                |  |
| 3    | The search results will be displayed in the Search Results List. |                                                                                       |

## 2.4.8.2. Entering a Product Search (Barcode Scanning)

### Overview

Before the Staff Member can adjust a stock level, or view the product details, a search for the product needs to be carried out.

- Using the product's barcode and the Register's barcode scanner is the quickest method to find a specific item.

- In the case where two or more products have the same barcode, the Register will display all the products with that barcode in the Search Results list.
- When using the Barcode Scanner, there is no need to Tap “Search”. Once in the Stock section, any item that is scanned will automatically be populated into the Search Results List.

### Product Search with Scanner (Both Modes)

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Scan the Products Barcode with the Barcode Scanner. |           |

## 2.4.8.3. Searching Stock Across Stores

### Overview

The Stock Module in the Register can display the stock levels across all stores.

- This is for information only and you cannot adjust the levels of other stores with this module.

### Searching Stock Across Stores (Both Modes)

| Step | Instruction                                         | Operation                                                                                       |
|------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the specific product. | See <a href="#">Product Search (Manual)</a> or <a href="#">Product Search (Barcode Scanner)</a> |
| 2    | Tap <b>Stock Check</b>                              |             |

## 2.4.8.4. Adjusting Stock Levels

### Overview

The Register is designed to keep track of your Stock levels as you carry out various transactions. You as the End User will need to manually adjust the levels as you purchase new stock for your store. Stock can also be adjusted in the Web Portal under the [Stock Management](#) menu.

- If you have more than one Register in your store, you will only need to adjust the stock on one of the devices. The data is synced to the Server and then fed back down to your other devices. This is also true for any transactional changes in the stock level. As each device increases or decreases the stock level, all devices in the store receive the stock level change.

- If there is no internet connection, you still only update the stock level on one device. Once the internet connection has been restored, the stock levels between all the devices will be adjusted accordingly.
- Stock levels will never go into a negative balance. As you sell products across all devices, the product level will continue to reduce until it reaches Zero.
- Stock levels that show in “Orange” denote that no internet connection exists, and the stock levels have not been synced to the server.

## Adjusting Stock Levels (Both Modes)

| Step | Instruction                                                                                    | Operation                                                                                                                                                                    |
|------|------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the specific product                                             | See <a href="#">Product Search (Manual)</a> or <a href="#">Product Search (Barcode Scanner)</a>                                                                              |
| 2    | Tap on <b>Update</b>                                                                           |                                                                                           |
| 3    | Adjust the level <b>Down</b> or <b>Up</b> with the corresponding buttons                       |  or  |
| 4    | If you make use of the Keypad, tap the <b>Cancel</b> button first to clear the current amount. |                                                                                         |
| 5    | Tap the <b>Keys</b> on the keypad to enter the adjustment.                                     |                                                                                                                                                                              |
| 6    | Tap <b>Save</b>                                                                                |                                                                                         |

## 2.4.9. Transaction History

### Overview

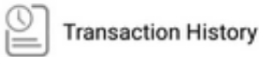
The Transaction History module allows you to find historic transactions, then either;

- View the Transaction
- Reprint the Transaction
- Add a [Tip](#) to the Transaction (If active)
- Link it to an existing customer if you are using the [CRM Module](#),
- Initiate a [Partial or Full Refund](#) of the transaction.
- Void the Transaction (Depending on which Card Terminal you have purchased)

\* Depending on the type of Card Payment facility you are using, the **Refund** button will be shown as **Void Transaction**. By tapping on this button, you can then access the Partial and Full refund functions.

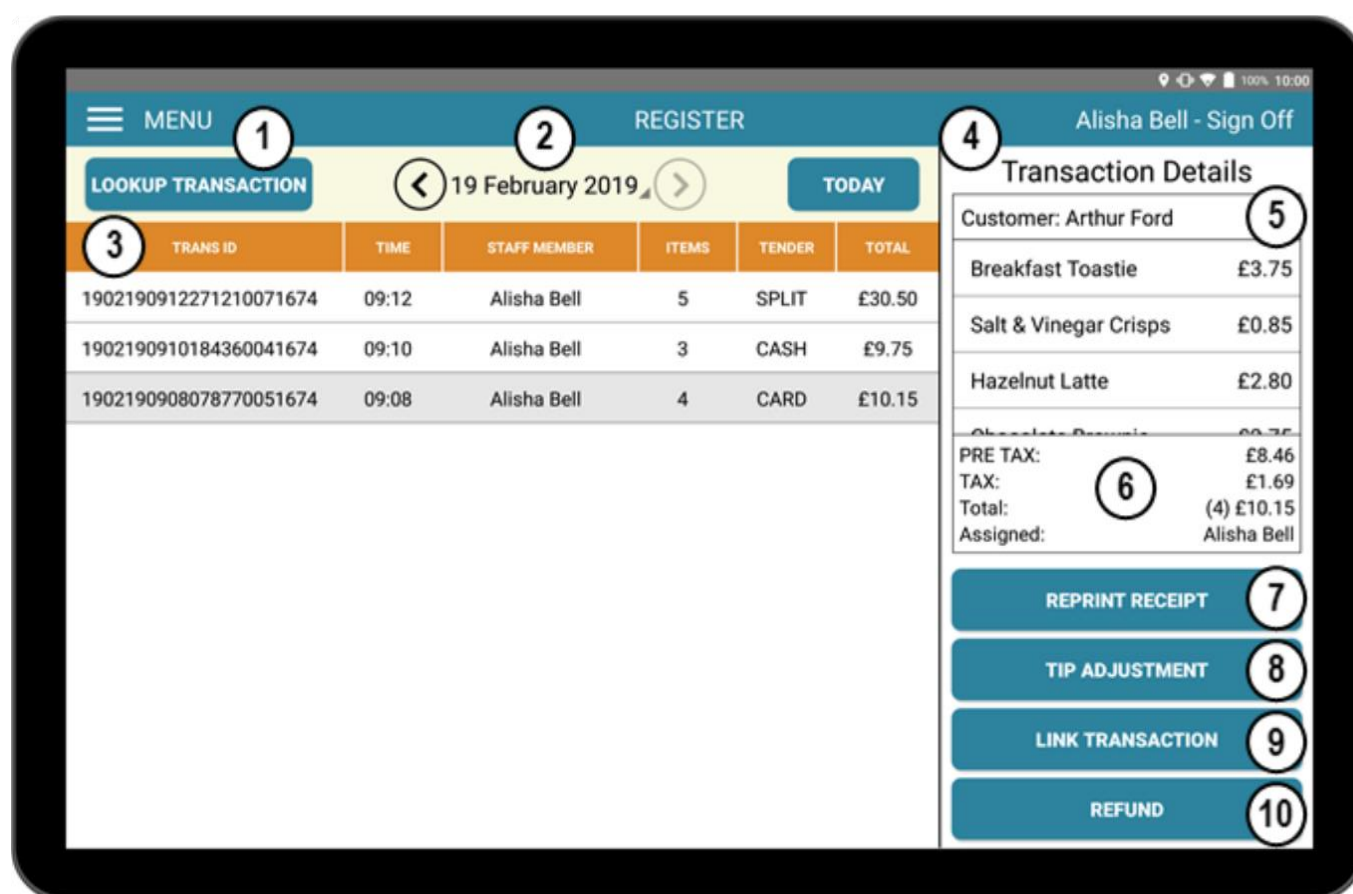
- There is no limit to how far back in history you can search Transactions. If the transaction you are looking for does not appear in the History, use the [Transaction Lookup](#) function which will query the Portal and retrieve the Transaction information.
- A transaction that is displayed in orange indicates that the transaction has not been sent to the server as yet. This happens when the Register could not communicate with the Portal such as when there is an issue with your Internet connection. But these transactions can still be managed with the Transaction History functions.

## Navigating to Transaction History (Both Modes)

| Step | Instruction                                               | Operation                                                                            |
|------|-----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | From any page after logging in, tap the <b>Menu</b> icon. |    |
| 2    | Tap <b>Transaction History</b>                            |  |

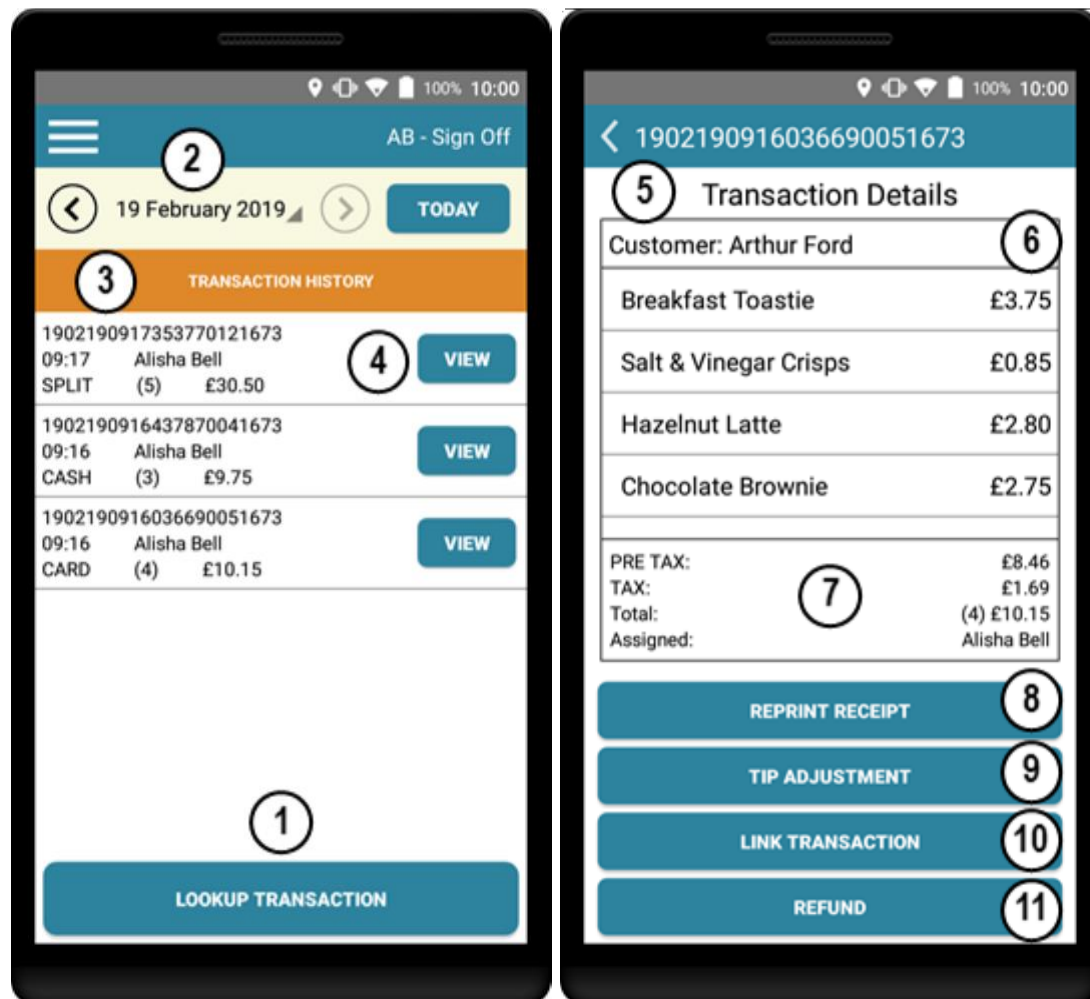
- From here you can then search for the required transaction by
  - Selecting the specific date and scrolling through the results, or
  - Using the [Lookup Transaction](#) Tool.
- Each column in the results is sortable by tapping on the column header. The sort orders are (A~Z and Z~A) or (1~9 and 9~1)

## Layout of the Transaction History Page (Landscape Mode)



1. Lookup Transaction tool. Used to search for a transaction using the transaction ID.
2. Date selection tool.
3. List of transactions made on the selected date.
4. Bespoke transaction journal.
5. Name of customer linked to the transaction. (Only available if [CRM](#) is active)
6. List of item in the transaction.
7. Reprint Receipt button. Tap this button to reprint the receipt.
8. Tip Adjustment button (If Tipping Active)
9. Link Transaction tool used to link a transaction to a customer. (Only available if [CRM](#) is active)
10. Refund tool. Used to carry out a full or partial refund on the transaction. For more information see the chapter on [Refunds](#)

## Layout of the Transaction History Page (Portrait Mode)



1. Lookup Transaction tool. Used to search for a transaction using the transaction ID.
2. Date selection tool.
3. List of transactions made on the selected date.
4. View Transaction Button
5. Bespoke transaction journal.
6. Name of customer linked to the transaction. (Only available if [CRM](#) is active)
7. List of item in the transaction.
8. Reprint Receipt button. Tap this button to reprint the receipt.
9. Tip Adjustment button (If Tipping Active)
10. Link Transaction tool used to link a transaction to a customer. (Only available if [CRM](#) is active)
11. Refund tool. Used to carry out a full or partial refund on the transaction. For more information see the chapter on [Refunds](#)

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!



- [Lookup Transaction](#)
- [Reprinting the Transaction](#)
- [Linking a Transaction to a Customer](#)
- [Removing a Linked Transaction from a Customer](#)
- [Replacing a Customer on a Linked Transaction](#)
- [Transaction Voiding](#)

## 2.4.9.1. Lookup Transaction

### Overview

The Lookup Transaction feature allows you to quickly locate a transaction by entering the Transaction ID printed on the till receipt.

- There is no limit on the age of the Transaction ID being searched, as the Register will query the Portal if the Transaction is not stored locally.
- The Lookup Transaction feature will allow Transaction ID's from other stores in your Merchant account.
  - **For example**, if the Transaction was created in your Poole branch, and the Lookup is being carried out in your Bournemouth branch.

### Lookup Transaction (Both Modes)

| Step | Instruction                            | Operation                                                                            |
|------|----------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Tap <b>Lookup Transaction</b>          |  |
| 2    | Enter the <b>Transaction ID Number</b> | Located on the transaction <b>Receipt</b>                                            |
| 3    | Tap <b>Search</b>                      |  |

## 2.4.9.2. Reprinting Receipts

### Overview

The Register has the functionality to reprint both the Customer and the Secondary or Kitchen Printer receipts.

- Any Customer Receipts that are reprinted will have a “\*\*\*\*REPRINT\*\*\*\*” tagged just below the receipt header and just above the receipt footer. This is done as a security precaution to prevent fraud from taking place.
- Secondary or Kitchen Printer Receipts will also have a “\*\*\*\*REPRINT\*\*\*\*” tagged at the top of the receipt.

## Reprinting Receipts (Landscape Mode)

| Step | Instruction                           | Operation                                                                                                                                                                    |
|------|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Locate the Transaction                | See <a href="#">Lookup Transaction</a>                                                                                                                                       |
| 2    | Tap the <b>Reprint Receipt</b> button |                                                                                             |
| 3    | Select the Receipt to Reprint         | <br>or<br> |

 Step 3 will only be necessary if the transaction contained products that were printed on the secondary or kitchen printer.

## Reprinting Receipts (Portrait Mode)

| Step | Instruction                           | Operation                                                                                                                                                                        |
|------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Locate the Transaction                | See <a href="#">Lookup Transaction</a>                                                                                                                                           |
| 2    | Tap <b>View</b>                       |                                                                                               |
| 3    | Tap the <b>Reprint Receipt</b> button |                                                                                               |
| 4    | Select the Receipt to Reprint         | <br>or<br> |

 Step 4 will only be necessary if the transaction contained products that were printed on the secondary or kitchen printer.

## 2.4.9.3. Linking a Transaction to a Customer

### Overview

The Transaction History module can be used to link a Customer to a historic transaction, if the Customer was not linked at the time of completing the transaction through the Register.

- Linking a customer to a transaction is only available if [CRM](#) is active)

### Linking a Customer (Landscape Mode)

| Step | Instruction                                        | Operation                                                                           |
|------|----------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction.     | See <a href="#">Lookup Transaction</a>                                              |
| 2    | Tap <b>Link Transaction</b>                        |   |
| 3    | Enter <b>Search Criteria</b> and tap <b>Search</b> |    |
| 4    | Tap <b>Assign</b>                                  |  |

### Linking a Customer (Portrait Mode)

| Step | Instruction                                        | Operation                                                                            |
|------|----------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction.     | See <a href="#">Lookup Transaction</a>                                               |
| 2    | Tap <b>View</b>                                    |   |
| 3    | Tap <b>Link Transaction</b>                        |  |
| 4    | Enter <b>Search Criteria</b> and tap <b>Search</b> |   |
| 5    | Tap <b>Assign</b>                                  |   |

## 2.4.9.4. Un-Linking a Transaction from a Customer

---

### Overview

As with [Linking](#) a Customer to a transaction using the Transaction History module, you can also un-link the Customer if needed.

- Un-linking a customer from a transaction is only available if [CRM](#) is active)

### Un-linking a Customer (Landscape Mode)

| Step | Instruction                                   | Operation                                                                          |
|------|-----------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction | See <a href="#">Lookup Transaction</a>                                             |
| 2    | Tap <b>Link Transaction</b>                   |  |
| 3    | Tap <b>Remove</b>                             |  |

### Un-linking a Customer (Portrait Mode)

| Step | Instruction                                   | Operation                                                                            |
|------|-----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction | See <a href="#">Lookup Transaction</a>                                               |
| 2    | Tap <b>View</b>                               |   |
| 3    | Tap <b>Link Transaction</b>                   |  |
| 4    | Tap <b>Remove</b>                             |   |

## 2.4.9.5. Replacing a Customer on a Linked Transaction

---

### Overview

As with [Linking](#) a Customer to a transaction using the Transaction History module, you can also replace

the linked Customer with another Customer if needed.

- Replacing a customer on a transaction is only available if [CRM](#) is active)

### Replacing a Customer (Landscape Mode)

| Step | Instruction                                        | Operation                                                                          |
|------|----------------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction      | See <a href="#">Lookup Transaction</a>                                             |
| 2    | Tap <b>Link Transaction</b>                        |  |
| 3    | Tap <b>Continue</b>                                |   |
| 4    | Enter <b>Search Criteria</b> and tap <b>Search</b> |   |
| 5    | Tap <b>Assign</b>                                  |   |

### Replacing a Customer (Portrait Mode)

| Step | Instruction                                        | Operation                                                                            |
|------|----------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction      | See <a href="#">Lookup Transaction</a>                                               |
| 2    | Tap <b>View</b>                                    |   |
| 3    | Tap <b>Link Transaction</b>                        |  |
| 4    | Tap <b>Continue</b>                                |   |
| 5    | Enter <b>Search Criteria</b> and tap <b>Search</b> |   |
| 6    | Tap <b>Assign</b>                                  |   |

## 2.4.9.6. Transaction Voiding

### Overview

Transaction Voiding is a function within the Transaction History Module that allows you to Void a

transaction that was tendered using a Credit or Debit card, as long as the selected transaction has not been closed.

- Transactions can only be Voided if the payment is still in “open” status with the Card Service Provider. Once the End Day process has been carried out and the the Batch Closure process executes, all “open” card transactions will be set to “closed” and Transaction Voiding will no longer be available for those Card Transactions.
- After the Transaction Void has been successfully carried out, the payment status of the Transaction will change from **CARD** to **VOID**
- This function is only available with certain Card Payment devices. For more information, please speak to your Solution Provider.

**!** If a Customer has been linked to the transaction, the customers name will remain in the bespoke journal, but the transaction will not appear in the **Customer Transaction Report** or the **Customer Transaction History** in the CRM module on the Portal.

### Voiding a Card Payment Transaction. (Landscape Mode)

| Step | Instruction                                                  | Operation                                                                             |
|------|--------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the transaction                | See <a href="#">Lookup Transaction</a>                                                |
| 2    | Tap <b>Refund/Void</b>                                       |   |
| 3    | Tap <b>Void Transaction</b>                                  |   |
| 4    | Select if the Stock is to be returned to <b>Usable Stock</b> | <input type="checkbox"/> No <input type="checkbox"/> Yes                              |
| 5    | Tap <b>Continue</b>                                          |   |
| 6    | Wait for the <b>Voiding Process</b> to complete              |                                                                                       |
| 7    | Tap <b>Done</b>                                              |  |
| 8    | Tap <b>Done</b>                                              |   |

### Voiding a Card Payment Transaction. (Portrait Mode)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                              |                                                                                     |
|---|--------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Carry out a <b>Search</b> for the transaction                | See <a href="#">Lookup Transaction</a>                                              |
| 2 | Tap <b>View</b>                                              |   |
| 3 | Tap <b>Refund/Void</b>                                       |   |
| 4 | Tap <b>Void Transaction</b>                                  |   |
| 5 | Select if the Stock is to be returned to <b>Usable Stock</b> | <div><input type="checkbox"/> No <input checked="" type="checkbox"/> Yes</div>      |
| 6 | Tap <b>Continue</b>                                          |   |
| 7 | Wait for the <b>Voiding Process</b> to complete              |                                                                                     |
| 8 | Tap <b>Done</b>                                              |  |
| 9 | Tap <b>Done</b>                                              |   |

## 2.4.10. Web Portal

### Overview

The Web Portal is accessible through the Side Menu, and is dependent on an internet connection.

- To prevent unauthorised access to the Portal, the Register will automatically sign the Staff Member out of the Web Portal on the Register if;
  - The Register times out
  - The Staff Member logs out of the Register
  - The Register Application is closed
- For a full explanation on the use of the Web Portal, please refer to the [Register Web Portal Guide](#)
- A cash float does not need to be entered to access the Web Portal.

### Accessing the Web Portal (Both Modes)

| Step | Instruction                                               | Operation                                                                            |
|------|-----------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | From any page after logging in, tap the <b>Menu</b> icon. |  |

|   |                       |                                                                                              |
|---|-----------------------|----------------------------------------------------------------------------------------------|
| 2 | Tap <b>Web Portal</b> |  Web Portal |
|---|-----------------------|----------------------------------------------------------------------------------------------|

## 2.5. Feature Permissions

### Overview

Feature Permissions allows you to restrict access to specific modules and functions within the Register. To edit these permissions, see the chapter on [Feature Permissions](#) in the Web Portal manual.

There are two types of feature permissions, Modular and Functional.

- [Module Permissions](#) restricts access to items on the Side Menu of the Register
- [Functional Permissions](#) restricts access to Function keys on the Register.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Functional Permissions](#)
- [Module Permissions](#)

### 2.5.1. Functional Permissions

#### Overview

The Table below outlines the Functional Permissions that can be restricted through the [Web Portal](#).

 There are four permissions available for functional options;

- Enable – Available for both POS Supervisors and POS Users
- Disable – Not available for any Staff Member
- Supervisors Only – Only POS Supervisors will have this functionality.
- Supervisor Approval – Will be available to both POS Supervisors and POS Users, but the latter will need to have a Supervisor approve the action by tapping in a PIN number.

 When set to Supervisor Approval, all transactions will record the name of the Approving Supervisor in the [Transaction Report](#) on the Portal.



| Function                                      | Description                                                          |
|-----------------------------------------------|----------------------------------------------------------------------|
| <a href="#">Percentage Discount</a>           | Apply a percentage discount to either a product or the transaction.  |
| <a href="#">Price Discount</a>                | Apply a price discount to either a product or the transaction.       |
| <a href="#">Cancel Sale</a>                   | Cancel the current transaction that is in progress.                  |
| <a href="#">No Sale</a>                       | Access the till drawer without completing a transaction.             |
| <a href="#">Price Override</a>                | Allows the modification of a Products price either up or down.       |
| <a href="#">Refund</a>                        | Completely or partially refund a Transaction                         |
| <a href="#">Manual Refunds</a>                | Refund an individual item or multiple items                          |
| <a href="#">Void Item</a>                     | Void a product / discount / surcharge / TIP in the Journal.          |
| <a href="#">Staff Can Delete Appointments</a> | If CRM is active, will set the permission for deleting appointments. |
| <a href="#">Surcharge</a>                     | Add, edit or remove a Surcharge on a Transaction                     |
| <a href="#">TIP</a>                           | Add a TIP to a Transaction or in the Transaction History module      |
| <a href="#">TIP Adjustment</a>                | Edit or Remove a TIP on a Transaction                                |
| <a href="#">Assign Staff To Transaction</a>   | Sets who can edit the assigned Staff Member on a transaction.        |

**!** The Cancel Sale function only has the options of All POS Users and Supervisor Approval.

## 2.5.2. Module Permissions

### Overview

The Table below outlines the Modular Permissions that can be restricted through the [Web Portal](#)

**\*** There are two permissions available for Modular options;

- All POS Users – Available to both POS Supervisors and POS Users
- Supervisors Only – Only POS Supervisors have access to this module.

| Module                            | Description                                                                       |
|-----------------------------------|-----------------------------------------------------------------------------------|
| <a href="#">Custom URL Access</a> | Used to access any Web Address you specify, typically your Companies Web Address. |
| <a href="#">End Day</a>           | Complete the End of Day cashing up and close the Register.                        |
| <a href="#">History</a>           | Show and reprint all previous transactions carried out on the Register            |

|                           |                                                                     |
|---------------------------|---------------------------------------------------------------------|
| <a href="#">Paid In</a>   | Any money paid into the Register outside of a normal transaction.   |
| <a href="#">Paid Out</a>  | Any money paid out of the Register outside of a normal transaction. |
| <a href="#">Portal</a>    | Access to the Web Portal from the Tablet.                           |
| <a href="#">Reports</a>   | The Daily Z and Product Reports.                                    |
| <a href="#">Start Day</a> | Register the float and begin the day's trading.                     |
| <a href="#">Stock</a>     | View and modify stock quantities                                    |

## 2.6. Training Mode



### Overview

Training mode is a built-in function of the Register that allows the Staff Member to freely make transactions under a training scenario, but does not record or upload any of the transactions made whilst in this mode.

This is essentially a training facility for new users of the Register.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Activating / Deactivating Training Mode](#)
- [Training Mode Recognition](#)
- [General Notes](#)

### 2.6.1. Activating / Deactivating Training Mode

#### Overview

To activate or deactivate the Training Mode, you will need to be logged off the Register and on the Staff List Screen.

## Activate the Training Function. (Both Modes)

| Step | Instruction                                                                | Operation                                                                           |
|------|----------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | From the Staff List Screen, tap the <b>Settings</b> icon in the top right. |  |
| 2    | Tap <b>Enable Training Mode</b>                                            |  |

## Deactivate the Training Function. (Both Modes)

| Step | Instruction                                                                | Operation                                                                           |
|------|----------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | From the Staff List Screen, tap the <b>Settings</b> icon in the top right. |  |
| 2    | Tap <b>Disable Training Mode</b>                                           |  |

## 2.6.2. Training Mode Recognition

When in Training Mode, the Staff Member is constantly reminded of this fact by the following:

### Visual Identifications

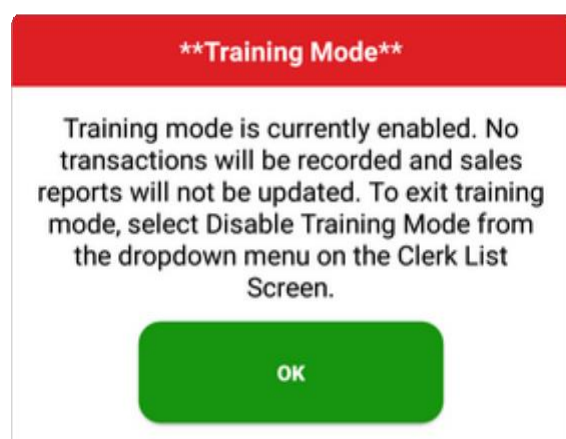
The following Identifications remind the Staff Member they are in Training Mode.

### Description

All Headers are changed to Red and contain the Words **\*\*\*TRAINING MODE\*\*\***



A Warning Message is displayed each time you change a page



All Printed Receipts will have the Header and Footer appended to include the line;

\*\*\*TRAINING MODE\*\*\*

## 2.6.3. General Notes

---

General notes for Training Mode:

- No transactions will be recorded on the Register, and no transactions will be uploaded to the Server, so your data will remain uncorrupted by any transactions carried out whilst in Training Mode.
- When entering Training Mode, the Register will act as if it is a new business day, so the Staff Member will need to register a new float (for training). Keep in mind that this will not affect your actual float already entered.
- As no transactions are recorded, no data will carry through to the Reports Page, Stock Page, Transaction History or End of Day function.
- The Web Portal & CRM functions from the side menu are not available whilst in Training Mode.
- All other features, controls and actions are available whilst in Training Mode.

**!** There is no way to recover a sale that has been processed in Training Mode so please ensure you exit this mode to make a live customer sale.

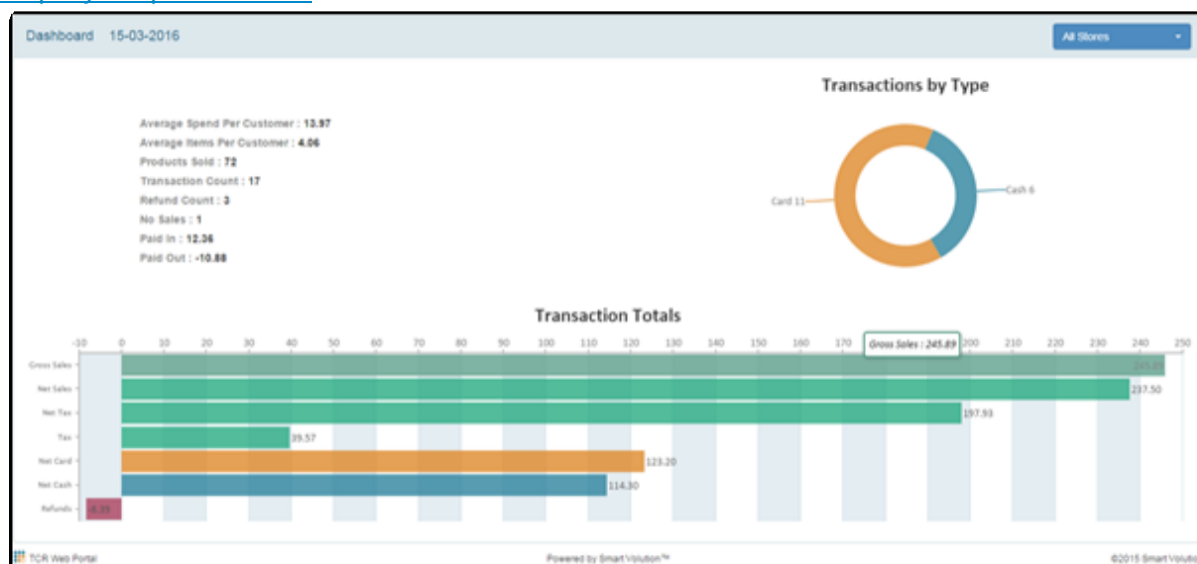
### 3. Register Web Portal



The Register Web Portal or Web Portal, is the website used to manage and configure your Register EPOS solution! It is also where you can find more detailed reports.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Login & Logout Process](#)
- [Admin](#)
- [Register Configuration](#)
- [Customer Relationship Management](#)
- [Reports](#)
- [Stock](#)
- [Devices](#)
- [Step-By-Step Processes](#)



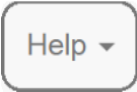
## 3.1. General Help

---

### Overview

The **Help** menu on the Portal will link you to various areas where you can obtain information on how to work with both the Portal and the Register Client.

- **Note:** You must be logged into the Portal to access these help areas.

| Step | Instruction                          | Operation                                                                         |
|------|--------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Help</b> in the Menu Bar    |  |
| 2    | Select the required <b>Help</b> Area |                                                                                   |

### Notes – (Will open in a new Tab on your browser)

- **Online Manual:** Displays this User Manual
- **Video Tutorials:** Shows various how-to videos located on our Youtube channel.
- **Release Notes:** Displays the Release Notes section of this Manual, so you can quickly see what is new whenever a **New Version of the Portal or Register Client** has been released.
- **Latest Release Video:** Will show you the Latest Release video found on our Youtube channel.

## 3.2. Login & Logout Process

---

### Overview

When you purchased your license(s) for the Register from your Reseller, you would have received the Register Equipment and Software, along with a Web Address, a User Name and a Password to access the Portal.

In order to keep your data secure, the Portal can only be accessed once you have successfully entered your Username and the Password.

- Additional Usernames and Passwords can be created from within the Portal under the [Administration](#) Section.

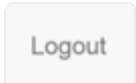
## Logging into the Web Portal.

**!** Both the **Username** and **Password** are case sensitive.

| Step | Instruction                                                                                                 | Operation                                                                                   |
|------|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| 1    | In the Internet Browser Address bar, type in the Web Portal address.<br>(Or select it from your Favourites) | <a href="https://portal.smartvolution.com/login">https://portal.smartvolution.com/login</a> |
| 2    | Enter your <b>Username</b>                                                                                  | USERNAME                                                                                    |
| 3    | Enter your <b>Password</b>                                                                                  | PASSWORD                                                                                    |
| 4    | Click on "Submit"                                                                                           |           |

## Logging out of the Web Portal.

You can Logout of the Web Portal at any time by clicking on the **Logout** command button located at the top right-hand corner of the web page.

| Step | Instruction         | Operation                                                                           |
|------|---------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Logout</b> |  |

**\*** It is a good idea to always logout of the Web Portal at the end of your session or when you are going to be away from your terminal for any length of time.

## 3.3. Admin



### Overview

The Admin functionality allows you to view or edit your Tenant or Merchant details, and to control users of your Portal.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

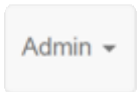
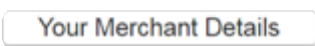
- [Your Tenant Details](#)
- [Portal Users](#)

## 3.3.1. Your Tenant Details

### Overview

This allows you amend your own user details.

- The number of licences is not editable by you and can only be changed by an Administrator on a level higher than you.
- The remaining licences are not editable by you and are managed by the system.

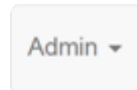
| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Admin</b> in the Menu Bar |  |
| 2    | Click <b>Your Merchant Details</b> |  |
| 3    | Make the necessary changes         |                                                                                     |
| 4    | Click <b>Save</b>                  |  |

## 3.3.2. Portal Users

### Overview

This allows you to create, edit and delete Portal users for the Web Portal.

### Accessing Portal Users

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Admin</b> on the Menu Bar |  |



|   |                           |                                                                                   |
|---|---------------------------|-----------------------------------------------------------------------------------|
| 2 | Click <b>Portal Users</b> |  |
|---|---------------------------|-----------------------------------------------------------------------------------|

## Creating Portal Users

This allows you to create a new Portal User.

| Step | Instruction                                               | Operation                                                                           |
|------|-----------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>New Portal User</b>                              |   |
| 2    | Fill in the <b>First Name</b> (Required)                  | <b>For Example,</b> “John”                                                          |
| 3    | Fill in the <b>Last Name</b> (Required)                   | <b>For Example,</b> “Smith”                                                         |
| 4    | Fill in the <b>User Name</b> (Required)                   | <b>For Example,</b> “JSmith29”                                                      |
| 5    | Fill in the <b>Password</b> (Required)                    | Use Alphanumeric characters                                                         |
| 6    | Confirm the <b>Password</b> (Required)                    |                                                                                     |
| 7    | Select the <b>Role</b> from the dropdown list. (Required) | Choose Administrator or User                                                        |
| 8    | Click <b>Save</b>                                         |  |

- **User Name:** When creating the user name, it is a good idea to make use of an “Email” type format as the System will validate the name entered against all other names, and if the name has already been used by another Merchant, will reject the entry. For example;
  - **johnsmith** is not recommended
  - **johnsmith@mystorename** is recommended
- **User Roles:**
  - **Administrator:** An Administrator will have full access to the functions of the Web Portal.
  - **User:** A User will only have access to the reports that are generated by the Web Portal.

## Editing Portal Users

This will allow you to edit the details of a Portal User, for example changing the user’s role from that of a User to that of an Administrator.

 Only an Administrator can make these changes.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                            |                                                                                   |
|---|----------------------------|-----------------------------------------------------------------------------------|
| 1 | Click the <b>Edit</b> Icon |  |
| 2 | Make the necessary changes |                                                                                   |
| 3 | Click <b>Save</b>          |  |

## Enabling and Disabling Portal Users

This will disable a Portal User making the account inaccessible or re-enable a Portal User, allowing access to the account again.

| Step | Instruction                                          | Operation                                                                         |
|------|------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Disable</b> Icon                        |  |
| 2    | The Portal User will now be disabled and greyed out. |                                                                                   |
| 3    | Click the <b>Enable</b> Icon                         |  |
| 4    | The Portal User will now be re-enabled.              |                                                                                   |

## Deleting Portal Users

This will delete a Portal User.

**!** Deleting a Portal User is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.4. Register Configuration



## Overview

The Configuration data held within the Merchants level is the backbone of the whole Register application. The data here is essential to the overall operating of the Register.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Cash Denominations](#)
- [Discounts](#)
- [Lists and List Items](#)
- [Price Lists](#)
- [Printers](#)
- [Product Browser](#)
- [Profiles](#)
- [Staff Members](#)
- [Stores](#)
- [Surcharges](#)
- [Taxes](#)
- [Tender Types](#)

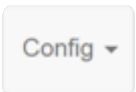
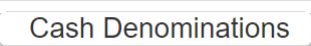
## 3.4.1. Cash Denominations

### Overview

Cash Denominations are primarily used in the End Day process when carrying out the cashing up of your cash drawer, when you have set the Cashing Up Type to Denominations in the Profile. See the chapter on [End Day](#)

A predefined set of denominations are automatically added when you create your Merchant, but this functionality allows you to make adjustments to them to suit your needs.

### Accessing Denominations

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Cash Denominations</b>     |  |

## Creating Denominations

| Step | Instruction                            | Operation                                                                          |
|------|----------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>New Cash Denomination</b>     |  |
| 2    | Enter the <b>Cash Value</b> (Required) | <b>For example</b> , "100.00"                                                      |
| 3    | Enter the <b>Cash Label</b> (Required) | <b>For example</b> , "£100"                                                        |
| 4    | Click <b>Save</b>                      |   |

- **Cash Value:** The Cash Value field is restricted to numerical values only, and may only contain a maximum of two decimal places. For example, "0.50"
- **Cash Label:** The Cash Label field is a free text field and may contain Currency Symbols. For example, "£10" or "50p"

## Editing Denominations

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Click <b>Save</b>          |  |

## Deleting Denominations

 Deleting a Cash Denomination is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

 Deleting the Cash Denomination in the configuration setup will not delete the

denomination in the reports if it has been used previously in an **End Day** process.

## Changing the Denomination Display Order

The setting of the Denomination Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order is automatically saved.

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Use Drag and Drop to order the entries as required. |           |

## 3.4.2. Discounts

### Overview

The Discount functionality allows you to use predefined system discounts, or to create and control your own custom discounts.

- **System Discount** values are not fixed and will need to be entered by the Staff Member.
- **Custom Discounts** can either be set as a fixed value, or like system discounts, created so the Staff member will need to add the value.

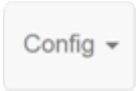
 Discounts can be added to either a specific product in the journal, or to the entire transaction.

Discounts can either be set as a **Percentage** or a **Price** Discount.

- **Percentage** discounts will calculate a percentage of the product or transaction total.
  - For example, adding a 10% discount to the product / transaction costing £5.00, will reduce the cost by £0.50
- **Price** discounts will add a specific price value discount to the product or the transaction.
  - For example, adding a £1.00 discount to the product / transaction costing £5.00, will reduce the cost by £1.00

 If you do not create any Custom Discounts the System Price and Percentage Discounts will still be available.

## Accessing Discounts

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Discounts</b>              |  |

## Creating Discounts

| Step | Instruction                                                     | Operation                                                                             |
|------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>New Discount</b>                                       |     |
| 2    | Enter the <b>Discount Name</b> (Required)                       | <b>For Example</b> , "Staff Discount"                                                 |
| 3    | Select <b>Price</b> or <b>Percentage</b> from the dropdown menu | <b>For Example</b> , "Percentage"                                                     |
| 4    | Enter the <b>Discount Value</b>                                 | <b>For Example</b> , "10"                                                             |
| 5    | Enter The <b>Barcode</b> (Optional)                             | <b>For Example</b> , "12345678"                                                       |
| 6    | Tap <b>Save</b>                                                 |  |

- **For step 4**, if you leave this field blank, when selected in the Register the Staff Member must manually enter the Discount amount.
- **For step 5**, if you leave this field blank, the system will automatically generate a barcode for the Discount.

## Editing Discounts

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Tap <b>Save</b>            |  |

## Disabling and Enabling Discounts

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                          |                                                                                   |
|---|------------------------------------------|-----------------------------------------------------------------------------------|
| 1 | To Disable click the <b>Disable</b> Icon |  |
| 2 | To Enable click the <b>Enable</b> Icon   |  |

## Deleting Discounts

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

**!** Deleting a Fixed Discount is a permanent action, and cannot be undone.

**\*** The Default Price and Percentage Discounts are system Discounts, and cannot be deleted. If you need to disable all Discounting in your Store, see the section on [User Permissions](#).

## Changing the Discount Display Order

The setting of the Discount Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order is automatically saved.

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Use Drag and Drop to order the entries as required. |           |

## 3.4.3. Lists and List Items

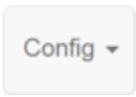
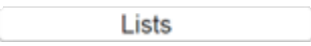
### Overview

Lists are a group of entries that are used in various areas of both the Web Portal and the Register. They are used to explain certain actions, like Paid Out reasons, or to indicate Customer Needs, like appointment types in the [Customer Relationship Management](#) module.

There are two types of lists:

- **System Lists**, where only the List Items can be edited and deleted but not the List itself, and
- **Custom Lists**, where all aspects of the list can be edited and deleted including the List itself.

## Accessing Lists

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Lists</b>                  |  |

## Creating Lists

| Step | Instruction                           | Operation                                                                           |
|------|---------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>New List</b>                 |    |
| 2    | Enter the <b>List Name</b> (Required) | <b>For Example</b> , "Master List"                                                  |
| 3    | Enter the <b>List Code</b> (Required) | <b>For Example</b> , "MASTER"                                                       |
| 4    | Click <b>Save</b>                     |  |

- **The List Code:** The List Code must be unique, and is used to identify the List to you in other parts of the Portal.
  - As an example, when creating a List for use in [List Modifiers](#), you could create several Lists that pertain to the same Product.
  - Product being a cup of coffee
    - Product Modifier 1 would be **Size**
      - List Name is Coffee (With items Small, Regular, Large)
      - List Code is Coffee-Size
    - Product Modifier 2 would be **Strength**
      - List name is Coffee (With items Normal, Double Shot, Triple Shot)
      - List Code is Coffee-Strength

## Editing Lists

Editing a List will only allow you to edit the Name or Code (Custom Lists only) of the List. If you need to edit the items within the List, see the below topics on Adding, Editing and Deleting List Items



 A disabled edit icon means that the List is a System List and cannot be edited.

| Step | Instruction                | Operation                                                                         |
|------|----------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                   |
| 3    | Click <b>Save</b>          |  |

## Deleting Lists

 Deleting a List is a permanent action, and cannot be undone.

 A disabled Delete icon means that this is a System List and cannot be deleted.

 When deleting a List, ensure that it is no longer needed elsewhere. For example in the [Customer Relationship Management](#) module.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## Accessing List Items

| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>List Items</b> icon |  |

## Adding List Items

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                        |                                                                                   |
|---|--------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Click <b>New Item</b>                                  |  |
| 2 | Enter the <b>Item Name</b> <b>For Example, "Wages"</b> |                                                                                   |
| 3 | Click <b>Save</b>                                      |  |

## Deleting List Items

**!** Deleting a List Item is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## Changing the List Item Order

The setting of the List Item Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order is automatically saved.

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Use Drag and Drop to order the entries as required. |           |

## 3.4.4. Price Lists



### Overview

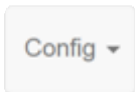
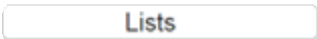
The Register is capable of using multiple Price Lists or Price Books, which allows the Merchant to have either several prices or taxes for the same product, depending on the needs and circumstances.

- **For example**, the Merchant might have a Price List for specific Holiday Seasons in the year, (Easter and Christmas), and for the remainder of the year, use the Default or Base Price list.
- On creation of the Merchant, the Default or Base Price List is automatically created, whereas any additional Price Lists needed or wanted must be created individually.
- The Portal has a function to allow for **Time Scheduled Price Lists** also know as “Happy Hour!” For more information please see this section in the [Step-By-Step Guide](#).

## Creating a Price List

The creation of a new Price List is carried out through the Lists function under Config.

 Once the new Price List has been added, the Price List will automatically be visible in your Products, and will have the same values as your Default or Base Price List. See below for modifying these values using either with the **Manual** or **Import** methods.

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Lists</b>                  |  |
| 3    | Locate the <b>Price Lists</b> entry |                                                                                     |
| 4    | Click the <b>Edit Items</b> icon    |  |
| 5    | Click <b>New Item</b>               |  |
| 6    | Enter the <b>Item Name</b>          | <b>For example</b> , “Christmas Price List”                                         |
| 7    | Click <b>Save</b>                   |  |

## Editing a Price List

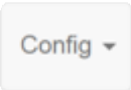
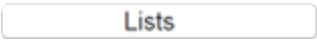
There are two subjects regarding the Editing of the Price List, namely

- Editing the Name, and
- Editing the Values of the Price List, which can be done either manually or by importing the values.

## Editing the Name

Editing the Name of the Price List is done through the [Lists](#) function of the Portal.

**!** The Default or Base Price List name cannot be renamed as this is a system value.

| Step | Instruction                             | Operation                                                                           |
|------|-----------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar     |    |
| 2    | Click <b>Lists</b>                      |   |
| 3    | Locate the <b>Price Lists</b> entry     |                                                                                     |
| 4    | Click the <b>Edit Items</b> icon        |    |
| 5    | Locate the entry you wish to rename     |                                                                                     |
| 6    | Click the <b>Edit</b> Icon              |   |
| 7    | Change the <b>Item Name</b> as required |                                                                                     |
| 8    | Click <b>Save</b>                       |  |

## Editing the Values (Importing)

Importing the values of a Price List is normally used when you want to edit the values of several or all your products, and is carried out through the [Stock/Products](#) function of the Portal.

When editing the Price List, you have the options to;

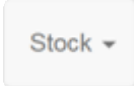
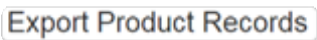
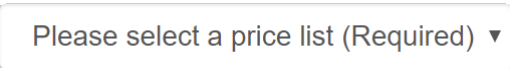
- Edit the Selling Price
- Edit the Taxes on the Product
- Edit both the Selling Price and the Taxes

There are three steps needed to edit the values of a Price List when using the Importing method. They are;

- **Step 1:** Export the Product list you want to adjust.
- **Step 2:** Make the adjustments in the XLS file.
- **Step 3:** Import the Product list back into the Portal.

Follow these procedures to change the values of a Price List. This will assume you are making adjustments to all of your products.

### Step 1: Export the Product List.

| Step | Instruction                                         | Operation                                                                           |
|------|-----------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                  |   |
| 2    | Click <b>Products</b>                               |   |
| 3    | Click <b>Export Records</b>                         |   |
| 4    | Click <b>Export Product Records</b>                 |   |
| 5    | Select the <b>Price List</b> from the dropdown list |   |
| 6    | Click <b>Export</b>                                 |   |
| 7    | Click <b>Download XLS File</b>                      |  |

### Step 2: Make the adjustments in the XLS file.

Using an XLS editor like Microsoft Excel, open the file which will be located in your computers Download directory. The file will be named as follows;

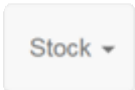
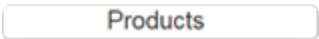
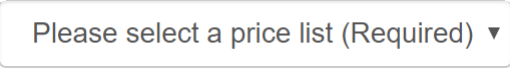
- Products followed by the name of the Price List, followed by the date and time the file was downloaded.
- For example, **Products\_Christmas\_2018-02-04\_15-31-10.xls**

Make the following changes to the file:

- Set the Import Record on each item to **Yes** (Column A)
- Adjust the Sell Price records according to your requirements. (Column K)
- Adjust the Tax Code records according to your requirements. You can set multiple Tax Codes by separating each code with a space. (Column M)
- Save the File

### Step 3: Import the Product list back into the Portal.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                               |                                                                                     |
|---|---------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Click <b>Stock</b> in the Menu Bar                            |  |
| 2 | Click <b>Products</b>                                         |   |
| 3 | Click <b>Import Records</b>                                   |  |
| 4 | Click <b>Import Product Records</b>                           |   |
| 5 | Select the <b>Price List</b> to import from the dropdown list |   |
| 6 | Click <b>Import Records</b>                                   |  |
| 7 | Click <b>Close</b>                                            |  |

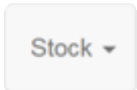
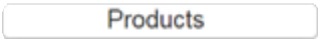
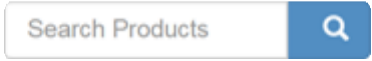
**!** When selecting the **Price List** on the import procedure, it is important to select the correct list, or the prices and taxes will be adjusted on the wrong Price List.

## Editing the Values (Manually)

Manually editing the values of a Price List is normally used when you only need to change the values on a few products, and is carried out through the [Stock/Products](#) function of the Portal.

When editing the Price List, you have the options to;

- Edit the Selling Price
- Edit the Taxes on the Product
- Edit both the Selling Price and the Taxes

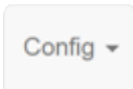
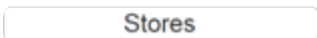
| Step | Instruction                                          | Operation                                                                            |
|------|------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                   |  |
| 2    | Click <b>Products</b>                                |  |
| 3    | Use the <b>Search Function</b> to locate the Product |  |
| 4    | Click the <b>Edit</b> Icon                           |  |
| 5    | Locate the <b>Price List</b> you want to edit        | <b>Selling Price - Christmas Prices</b>                                              |

|   |                                     |                                                                                    |
|---|-------------------------------------|------------------------------------------------------------------------------------|
| 6 | Adjust the <b>Price</b> as required |                                                                                    |
| 7 | Adjust the <b>Tax</b> as required   |                                                                                    |
| 8 | Click “Save”                        |  |

## Activating and Deactivating Price Lists

Activating and Deactivating a Price List is done through the [Stores](#) function. This allows you to have separate Price Lists for your various Stores. You can also allocate more than one Price List to each Store according to your needs.

|                                                                                                   |                                     |
|---------------------------------------------------------------------------------------------------|-------------------------------------|
| To Activate the Price List in the Store,<br>click the Check Box to the Right of the Price List.   | <input checked="" type="checkbox"/> |
| To Deactivate the Price List in the Store,<br>click the Check Box to the Right of the Price List. | <input type="checkbox"/>            |

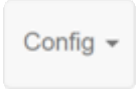
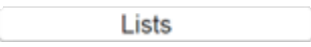
| Step                 | Instruction                                                                       | Operation                                                                                                                                                                                                                                  |         |                                     |                      |                                     |                   |                          |
|----------------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|-------------------------------------|----------------------|-------------------------------------|-------------------|--------------------------|
| 1                    | Click <b>Config</b> in the Menu Bar                                               |                                                                                                                                                         |         |                                     |                      |                                     |                   |                          |
| 2                    | Click <b>Stores</b>                                                               |                                                                                                                                                        |         |                                     |                      |                                     |                   |                          |
| 3                    | Click the <b>Edit</b> Icon                                                        |                                                                                                                                                        |         |                                     |                      |                                     |                   |                          |
| 4                    | Select or Deselect the required Price Lists from the <b>Available Price Lists</b> | <table><tr><td>Default</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Christmas Price List</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Easter Price List</td><td><input type="checkbox"/></td></tr></table> | Default | <input checked="" type="checkbox"/> | Christmas Price List | <input checked="" type="checkbox"/> | Easter Price List | <input type="checkbox"/> |
| Default              | <input checked="" type="checkbox"/>                                               |                                                                                                                                                                                                                                            |         |                                     |                      |                                     |                   |                          |
| Christmas Price List | <input checked="" type="checkbox"/>                                               |                                                                                                                                                                                                                                            |         |                                     |                      |                                     |                   |                          |
| Easter Price List    | <input type="checkbox"/>                                                          |                                                                                                                                                                                                                                            |         |                                     |                      |                                     |                   |                          |
| 5                    | Click <b>Save</b>                                                                 |                                                                                                                                                        |         |                                     |                      |                                     |                   |                          |

## Deleting a Price List

Deleting a Price List is done through the [Lists](#) function of the Portal.

**!** Deleting a Price List is a permanent action, and cannot be undone.

There is no need to first delete the Prices and Taxes in the Product associated with the Price List you need to delete. On deletion of the Price List entry, the Portal will automatically delete the prices and taxes for that Price List from all Products.

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Lists</b>                  |  |
| 3    | Locate the <b>Price Lists</b> entry |                                                                                   |
| 4    | Click the <b>Edit Items</b> icon    |  |
| 5    | Click the <b>Delete</b> Icon        |  |
| 6    | Click <b>Yes</b>                    |  |

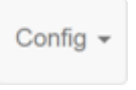
## 3.4.5. Printers

### Overview

The Printer configuration allows you to create multiple printers that can be used throughout your Store(s) and gives you the ability to assign one printer to several Registers, or to assign one Register to several Printers.

- These printers are primarily used when creating Print Groups for products that you want printed elsewhere within your Store. For Example,
  - In a Restaurant you would create a Printer for
    - Printing the Customer Receipt (Primary Printer)
    - Printing to the Bar (Secondary Printer)
    - Printing to the Kitchen (Secondary Printer)

### Accessing Printers

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Printers</b>               |  |



## Creating Printers

| Step | Instruction                                              | Operation                                                                           |
|------|----------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>New Printer</b>                                 |   |
| 2    | Enter the <b>Printer Name</b> (Required)                 | <b>For Example</b> , "Kitchen Printer"                                              |
| 3    | Select the <b>Receipt Printer</b> from the dropdown menu | <b>For Example</b> , "EscPOS"                                                       |
| 4    | Enter the <b>Default Line Width</b>                      | <b>For Example</b> , "48"                                                           |
| 5    | Enter the <b>Feed Length</b>                             | <b>For Example</b> , "10"                                                           |
| 6    | Select the <b>Printer Group</b> from the dropdown menu   | <b>See Notes Below</b>                                                              |
| 7    | Enter the remaining fields as required                   |                                                                                     |
| 8    | Tap <b>Save</b>                                          |  |

**Notes:** For Step 6, a [Printer Group](#) must already have been created.

## Editing Printers

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Click <b>Save</b>          |  |

## Deleting Printers

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

**!** Deleting a Printer is a permanent action, and cannot be undone.

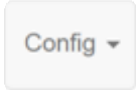
## 3.4.6. Product Browser

### Overview

The Products Browser is used to quickly add common or 'hot' selling items to a transaction in the Register and can be setup to suit the needs for your Store, or for each individual Register within your Store.

There is no limit to the number of Product Browsers you can create, but the Register can only use one Product Browser at a time.

### Accessing the Product Browser function

| Step | Instruction                         | Operation                                                                          |
|------|-------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |   |
| 2    | Click <b>Product Browsers</b>       |  |

### Creating a Product Browser

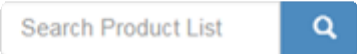
| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>New Product Browser</b> |  |
| 2    | Enter the Name of the Browser    |                                                                                     |
| 3    | Click <b>Save</b>                |  |

### Adding products to the Product Browser

Adding Products to the Browser is a simple drag and drop operation. Enter your search criteria into the search bar and then drag and drop the product into the Product Browser.

 There is no limit to the number of items in your Product Browser. When adding items, you can either add them to the Product Browser or you can replace an existing product by dropping the new product on top of the old one.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                                                                                                     |                                                                                     |
|---|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Click the <b>Edit</b> Icon                                                                                                          |  |
| 2 | Click in the Product search box                                                                                                     |  |
| 3 | Enter your search parameters and click the magnifying glass to search, or press <b>Enter</b>                                        | <b>For example, "Grapes"</b>                                                        |
| 4 | Click on the product in the search results                                                                                          |  |
| 5 | Drag and drop the product onto the <b>Add</b> Product Icon to add the item, or drag it onto an existing item to replace the product |  |
| 6 | Click <b>Save</b>                                                                                                                   |  |

## Deleting a product from the Product Browser

| Step | Instruction                                                         | Operation                                                                             |
|------|---------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon                                          |   |
| 2    | Find the product you are looking to delete in the left-hand column. |                                                                                       |
| 3    | Click the <b>Delete</b> Icon to the left of the product             |  |
| 4    | Click <b>Save</b>                                                   |  |

## Editing the products in the Product Browser

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Click <b>Save</b>          |  |

## Duplicating a Product Browser

This function allows you to duplicate a Product Browser when you want to make a few changes but also want to keep the original browser intact. This can also be used to create a completely different browser

for another department within your store. For example, Butchery and Bakery!

| Step | Instruction                     | Operation                                                                         |
|------|---------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Duplicate</b> Icon |  |
| 2    | Rename the Browser if necessary |                                                                                   |
| 3    | Click <b>Save</b>               |  |

## Deleting a Product Browser

**!** Deleting a Product Browser is a permanent action, and cannot be undone.

**\*** If you delete a Product Browser, make sure you update a new Product Browser in [Devices](#), as you must have at least one Product Browser active. This is essential to correct operation of the Register.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

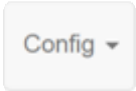
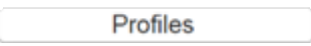
## 3.4.7. Profiles

### Overview

Profiles are used within the Register to control and manage certain aspects of the Register, such as Receipt Header and Footer, Tendering options, and what Hardware is being used for example.

**\*** To make the Profile Menus simple and easier to navigate, various settings will either be hidden or shown based on certain selections you make, and the type of license you have purchased.

## Accessing Profiles

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Profiles</b>               |  |

## Creating a Profile

 When creating a Profile, the system will automatically save it. So, each time you click on **Create Profile** or **Duplicate Profile**, a new profile will be created and saved automatically.

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>New Profile</b>            |   |
| 2    | Enter a <b>Name</b> for the Profile | <b>For example</b> , "Main Profile"                                                 |
| 3    | Click <b>Create</b>                 |  |

## Editing a Profile

Once a profile has been created, editing the profile to suit your needs is simple and allows you to tailor the Register to how you want it to handle certain situations and scenarios.

 Any changes you make in the Profile must be saved.

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |

## Duplicating a Profile

This allows you to duplicate a Profile without having to re-enter all the details. By duplicating a Profile, you can simply edit the few details that need to change.

| Step | Instruction                            | Operation                                                                         |
|------|----------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Duplicate</b> Icon        |  |
| 2    | The new profile is automatically saved |                                                                                   |

## Deleting a Profile

This function is used to delete a Profile.

**!** Deleting a Profile is a permanent action, and cannot be undone.

**\*** If you delete a Profile, you must ensure that all references to this Profile are updated. See chapter on [Devices](#)

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

### 3.4.7.1. Profile Contents

## Overview

Each Profile uses an “Accordion” style menu, which groups similar options together in expanding menus. By clicking on the various headers, the menu will expand to display all configuration options that are available within that category. All individual options can then be set to match your requirements.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [General](#)
- [Functions](#)
- [User Permissions](#)
- [Tendering](#)
- [Receipts](#)
- [Tax & Commissions](#)

- [Hardware](#)
- [Branding](#)
- [Logging](#)

## 3.4.7.1.1. General

General



The **General** Settings adjusts the day-to-day configurations of the Register.

### General Settings

#### Automatically Update Register

This will instruct the Register to either switch the automatic update feature On or Off. There are three settings you can use;

- **Switch off Automatic Updates** will disable the automatic update feature.
- **Update on End Day** will update the Register after the End of Day process has been carried out.
- **Update on Start Day** will update the Register after the Cash Float has been entered into the Register

#### Keep Local Data for X Days

This instructs the Register application to keep its Sales and Appointment data (Plus version) for a certain amount of days and then delete it. The data will still be on the server and will always be available for your reports.



If for any reason your tablet does not have access to the internet, it will not delete the data until a connection is established and the data has been successfully transmitted.

#### Store and Device Name on Login Screen

When set to YES, the Store Name and Device Name will be shown at the top of the login screen.

### Start Day

The Start Day options controls how the Start Day is processed.

## Remember Last Float

- When set to **YES**, the Register will automatically populate the float that was last entered each time the Start Day is carried out. (This will still be editable by the Staff Member if necessary!)
- When set to **NO**, the Register will prompt the Staff Member to enter the float on each Start Day.

## End Day

The End Day options controls how the End Day is processed.

### Automatically End Day

This config key sets the Register to either Automatically force the End Day process to take place, or sets the End Day to be manually initiated.

- Setting this to **NO** will cause the Register to wait for the End Day process to be manually initiated by a Staff Member.
- Setting this to **YES** will set the Register to force the End Day process at the time specified in the Auto End Day Time.

### Auto End Day Time

(Only becomes available when **Automatically End Day** is set to **YES**)

This sets the time when the Register will automatically close and force the End Day process to take place. For example, if set at 22:00:00, the Register will stop all trading for the day at 10pm and instruct the Staff Member to complete the End of Day cash up. The Register will then remain closed until midnight.

**!** Setting this value to 00:00:00 will cause the Register to permanently remain closed.

### Blind Declaration

This sets whether the Staff Member can see the expected End of Day values or not, and if the Shortage / Overage message is displayed on completion of the End Day process.

- When set to **NO**, the Staff Member will be presented with the expected totals for Cash, Card and Other Tender types.
- When set to **YES**, the Staff Member will be unable to see the expected totals for the Cash, Card and Other Tender Types during the End Day process.



## Cashing Up Type

Instructs the Register to either only request the Cash Total or Cash Denominations when carrying out the End Day Process.

- Setting to **Cash Total** will only ask for the Cash Total to be Entered.
- Setting to **Denominations** will ask for the individual cash denomination totals to be entered.

## Logout User After End Day

This sets whether the Staff Member is automatically logged out of the Register on completion of the End Day process or not.

- Setting this to **NO** will display the Daily Z Report on the Reports module once the End Day process has been complete.
- Setting this to **YES** will log the current Staff Member out of the Register once the End Day process has been completed, and return to the Staff Member Login Screen.

## End Day Reference

This option will allow the Merchant to Enter a Reference for the End Day cashing up. For example, the Reference could be a Bank Deposit Number

- Setting this to **Off** will not prompt the Merchant to enter a Reference at the completion of the End Day process
- Setting this to **Optional** will display the Reference dialog, but the Merchant will not need to add a reference.
- Setting this to **Required** will display the Reference dialog, and the Merchant will need to add a reference before completing the End Day process.

# Logging In

## Staff Login Screen

This feature will instruct the Register how to list the Staff Members on the Staff Login Screen.

- **Double Staff Member Column**, will list all staff members in two columns.
- **Single Staff Member Column**, will list the staff members in a single column.

## Staff Login Method

There are two options available to gain access to the Register from the Staff Login page;

- **Name and PIN:** This option will require the Staff Member to first select their name from the list, then tap their PIN in.
- **Staff Code Only:** This option will only require the Staff Member to tap their Staff Code in, to access the Register.



Please note that allowing Staff Members to login by Staff Code only, will reduce the security of the Register.

## Display Staff Code

(Only becomes available when the **Staff Login Method** is set to **Staff Code Only**.)

- When set to **YES**, the entered code character will be visible on screen.
- When set to **NO**, the code character will be replaced with a “\*”.

## Logging Out

### Logout user after each transaction

Setting this to **YES** will instruct the Register to automatically log the Staff Member out of the Register on completion of every transaction in the Register, or from the Paid In and Paid Out modules.

### Logout user after X seconds

This is a timing feature that will force the Register to log the current Staff Member out after a certain period of inactivity has elapsed. Setting this value to “0” will disable this feature. In the case where a transaction is in progress, the feature will be disabled unless the “Switch Staff” or “Suspend Transaction” functions have been enabled.

## Register Settings Access

### Enable Settings Password

Once the Register has been enrolled onto the Portal, the settings page on the Register can be protected from unauthorised changes by enabling the Password function.

- When set to **NO**, the settings page on the Register can be freely accessed from the Staff Member Login screen.
- When set to **YES**, a password will be required to access the Registers settings page.

## Settings Password

(Only becomes available when **Enable Settings Password** is set to **YES**)

This is the required password when attempting to access the Registers Settings page.

## Side Menu URL's

### Custom URL Label

This will set the description of the Custom URL module label on the side menu of the Register.

### Custom URL Address

This is the Web Address that the Register will access when using this Module from the side menu.

### Register User Guide

This is the URL that points to a web based user guide for the Register. You shouldn't normally need to change this value.

### Web Portal URL

This is the URL that points to the Portal on the Web and is used for the Side Menu access on the Register. You shouldn't normally need to change this value.

## Reasons

\* The following configurations will set prompts to the Staff Member when certain functions are utilised on the Register. The Reasons / Prompts can be configured in the [Lists](#) section.

\* When Reasons are set to **YES**, the reason will be logged in the [Transaction Report](#), and will be reported in various other reports.

## Enable No Sales Reasons

- When set to **YES**, will prompt the Staff Member to add a reason when using the No Sale Button, and then open the Cash Drawer.
- When set to **NO**, will open the Cash Drawer without prompting for a reason

## Enable Cancel Sale Reasons

- When set to **YES**, will prompt the Staff Member to add a reason when using the Cancel Sale function, and then Cancel the Sale.
- When set to **NO**, will Cancel the Sale without prompting for a reason.

## Enable Refund Reasons

- When set to **YES**, will prompt the Staff Member to add a reason when using the Refund function, and then execute the Refund.
- When set to **NO**, will execute the refund without prompting for a reason.

## Dialog Text

### Up-sell Dialog Title

This will be the text displayed at the top of the Up-sell Dialog.

## 3.4.7.1.2. Functions

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The **Functions** configurations controls how certain Modules, Functions and actions are controlled in the Register.

## Product & Department Browsers

### Browser View Layout

The Browser Views can be set to either Grid or List View and applies to both the Product and Department browser tabs in the Register.

- **Grid (With Images)** will display the products and departments in a 3 × 4 layout, and display their associated image.
- **Grid (Without Images)** will display the products and departments in a 3 × 4 layout, but not display

their associated image.

- **List** will display the products and departments in a line by line layout which allows more information on the product to be displayed.

## Enable Department Browser

Instructs the Register to either display the Department Browser or not.

- If set to **NO**, the Register will not display the Department Browser Tab and only the Product Browser will be visible.
- If set to **YES**, both the Product and the Department browsers will be displayed.

## Reset Department Browser

(Only becomes available when **Enable Department Browser** is set to **YES**)

Instructs the Register whether to return to the top level of the Department Browser after adding a product to the journal or not.

- If set to **NO** the Department Browser will remain at the same level it was when the product was added to the journal.
- If set to **YES** the Department Browser will automatically return the top level of the browser after adding a product.

## Extended Browser Enabled

The Register can extend the Product Browser over the keypad, allowing more products to be displayed.

- When set to **YES**, the Staff Member will have the option to extend the Product Browser if the Extend Browser on Login is set to **OFF**.
- When set to **NO**, the Extended Browser will not be available.

## Plus Browser Layout

(Only becomes available when **Extended Browser Enabled** is set to **YES**)

(Only becomes available when the license type is **Plus**)

This is a Plus License option, and displays a more comprehensive Extended Browser where the Staff Member can select which Departments are to be displayed in the Extended Browser.

- When set to **OFF** will disable the Plus Browser and only use the Extended Browser if enabled.
- When set to **ON (Images)** will display the Plus Browser and each product will have its associated image displayed.
- When set to **ON (No Images)** will display the Plus Browser, but no product images will be displayed. This option allows more product to be displayed in the browser.

## Extend Browser on Login

(Only becomes available when **Extended Browser Enabled** is set to **YES**)

Instructs the Register whether to automatically extend the Browser each time a Staff Member Logs into the Register or not.

- When set to **NO**, the Browser will need to be manually extended by the Staff Member when the extended browser is needed.
- When set to **YES**, the Browser will automatically extend each time a Staff Member is logged in.

## Collapse Browser on Add Item

(Only becomes available when **Extended Browser Enabled** is set to **YES**)

This config key works similar to the Reset Department Browser in that it will automatically collapse the Extended Browser each time a product is added to the Journal when set to **YES**.

## Transaction Suspension

Transaction Suspension allows any logged in Staff Member to suspend the current transaction and resume it at another time.

### Allow Switch Staff

This function will allow a logged in Staff Member to suspend a single transaction, and then resume it on the next Login.

- If set to **NO**, the Staff Member will not be allowed to logout until the current transaction has been completed or cancelled.
- If set to **YES**, the Staff Member will be able to logout during a transaction, which will be resumed as soon as the Staff Member logs back in.

## Suspend Transaction

(Only becomes available when the Licence Type is **Plus**)

This is used to Enable or Disable multiple suspended transactions on the Register.

- Setting to **OFF** will disable multiple suspended transactions.
- Setting to **LOCAL**, will suspend the transactions to the Register only, and will only be accessible from the Register that suspended the transaction.
- Setting to **ON** will suspend the transactions to the Portal, and will be accessible by all Registers within the Store.

**!** “On” is subject to a Wi-Fi connection. If Wi-Fi is interrupted, all suspended transactions will become unavailable.

## Staff Member Access To Suspended Transactions

(Only becomes available when **Suspend Transaction** is set to **Local** or **On**)

This will set which Staff Members will have access to a Suspended Transaction. (Does not apply to Switch Staff!)

- Setting to **All POS Users** will allow access to all Staff Members.
- Setting to **Assigned Staff Member**, will only allow access to the Suspended Transaction by the Staff Member assigned to it.
- Setting to **Assigned Staff Member and Supervisors** will only allow access to the Suspended Transaction by the Staff Member assigned to it, and all Supervisors.

## Transaction Reference

### Suspend Transaction Name

**(This feature is available in Core, and does not require Suspend Transaction to be set.)**

This option allows you to predefine the name of the Suspended Transaction that is displayed on the Register.

- **Auto-Generated 4-Digit Number** will print a four digit number on the Secondary Receipt. The first 2 digits represent the Register ID, and the last two are an auto-incremented number. This number increases by 1 for each new transaction.

- **Customer Name** will populate the assigned Customer's Name on the Transaction, to the Suspended Transaction.
- **Free Text** will allow the Staff Member to freely name the Suspended Transaction.
- **List** will display the Items given in a predefined list created in [Lists](#)
- **Prefix Text** will display a predefined Text line that the Staff Member can add to when Suspending a Transaction.

## Suspended Transaction List

(This feature is available in Core, and does not require Suspend Transaction to be set.)

Select the List that will be displayed when selecting List in the Suspended Transaction name. This list must have already been created under [Lists](#).

## Prefix Text when Suspending Transactions

(This feature is available in Core, and does not require Suspend Transaction to be set.)

The Text that will be displayed when Prefix Text is selected in the Suspend Transaction Name. For example, "Table –"

# Customer Relationship Management

## Enable CRM

(Only becomes available when the license type is **Plus**)

When set to **YES**, will enable the CRM functionality of the Register. (Plus License Only)

## CRM Conflict Warnings

(Only becomes available when the license type is **Plus**)

When using the Plus version of the Register, if there are any created appointments that have a conflict such as if an appointment has been made on the Register that conflicts with an appointment made on the Portal, this will instruct the Register to whom the conflict needs to be reported to.

- **All POS Users** will alert all Staff Members who log on to the Register.
- **Impacted POS User and All Supervisors** will alert all Supervisors and the POS User who has the appointment conflict.
- **Only Impacted POS User** will alert only the Staff Member who has the appointment conflict.



## Show Notification on Login Screen

(Only becomes available when the license type is **Plus**)

When using PAYG Text Messages, if the available text messages falls below the Text Re-order limit, this config will determine if a message is displayed on the Staff Login Screen or not.

- Setting this to **NO** will not display the message.
- Setting this to **YES** will display the message.

## Force Customer Assignment to Transaction

(Only becomes available when the license type is **Plus**)

- When set to **YES**, will force the Staff Member to add a customer to the transaction before allowing the tendering process to take place.
- When set to **NO**, the Register will allow the tendering process to take place without having to add a customer to the transaction.

## Discounting

### Enable Decimal Percentage Discounts

Enables or Disables the use of manually entered decimal percentage discounts in the Register.

- When set to **NO** the Discount function on the Register will only allow whole numbers as Percentage Discounts, for example 10% or 20%.
- When set to **YES** then the Register will allow decimal percentages as discounts, for example 10.5% or 20.5%

### Enable Discount Limits

Enables or Disables the discount limits imposed on POS User Staff Members when applying either Percentage or Price discounts to items in the journal or transaction discounts. This does not affect POS Supervisors.

- When set to **YES**, enables the Price and Percentage discount limits placed on POS User Staff Members.
- When set to **NO**, disables the limits.

## Percentage Discount Limit

(Only becomes available when **Enable Discount Limits** are set to **YES**)

The maximum Percentage Discount a POS User Staff Member can add to a transaction. Entered as a number without the “%” suffix. For example, 20 or 20.5

## Price Discount Limit

(Only becomes available when **Enable Discount Limits** are set to **YES**)

The maximum Price Discount a POS User Staff Member can add to a transaction. Entered as a number without a currency symbol. For example, 20.00



If Discounting has been set to **Supervisor Approval** in the [User Permissions](#) section, a POS User Staff Member will be able to add discounts higher than set in the above two configurations, pending a Supervisors Approval.

## Clock In and Out

(Only becomes available when the license type is **Plus**)

The Clock In Out configuration keys control how the Clock In Out feature is applied to the Register.

### Enable Time Keeping

- Setting this to **YES** will activate the Clocking In and Out feature on the Register
- Setting to **NO**, will deactivate the Clocking In and Out feature.

### Auto Login after Clock In

(Only becomes available when **Enable Time Keeping** is set to **YES**)

Instructs the Register to either let the Staff Member access the Register immediately after clocking in without the need to Login or not.

- Setting this to **NO** will force the Staff Member to also Login after Clocking In.
- Setting this to **YES** will immediately take the Staff Member to the Register screen after Clocking In. This is only when the Staff Member first clocks in. Any time the Staff member logs out after clocking in, they will be required to login before proceeding.

## Require Clock In Before Login

(Only becomes available when **Enable Time Keeping** is set to **YES**)

Will either allow or prevent a Staff Member to log into the Register without having to first Clock In.

## Price Lists

### Remember Last Price List

- When set to **NO**, the Staff Member will need to select the Price Book before starting a new Transaction.
- When set to **YES**, the last price book selected by the Staff Member will be used for all new transactions. (This will still be editable if necessary!)

### Price List Selection Message

When using multiple Price Books on the Register, this is the text that will be displayed on the Price Book selection button.

## Loyalty

### Enable Loyalzoo Integration

- When set to **NO**, the Loyalzoo integration will be deactivated and not be available.
- When set to **YES**, the Loyalzoo integration will be active.

 For more information on Loyalzoo, please speak to your Solution Provider.

## 3.4.7.1.3. User Permissions

User Permissions



The **User Permissions** menu controls which level of Staff Member has access to the Registers Functions and Modules.

## Function Access

Controls the access and use of the Registers Functions. Unless otherwise indicated, all functions have

the same access options;

- **All POS Users:** Both POS Users and POS Supervisors have access.
- **Disabled:** The function will be disabled and not be available in the Register.
- **Supervisor Approval:** Can be accessed by all Users, but POS Users will need to obtain a Supervisors approval before continuing, which is granted by the Supervisor tapping in his or her PIN when prompted.
- **Supervisors Only:** Only POS Supervisors will have access to the function.

## Percentage Discount

Controls access to the [Percentage Discount](#) function.

## Price Discount

Controls access to the [Price Discount](#) function.

## Cancel Sale

Controls access to the [Cancel Sale](#) function. (All POS Users and POS Supervisor Approval options only)

## No Sale

Controls access to the [No Sale](#) Function.

## Price Override

Controls access to the [Price Override](#) function.

## Refund

Controls access to the [Refund](#) function. (See also [Manual Refunds](#))

## Manual Refunds

(Only becomes available when **Refund** is not set to **Disabled**)

Controls access to the [Manual Refunds](#) function. (Disabled, Enabled, POS Supervisors Only – For POS Users. This is also affected by the Refunds Access function)

## Void Item

Controls access to the [Void Item](#) function.

## Staff Can Delete Appointments

(Only becomes available when the license type is **Plus**)

Controls which Users can [Delete Appointments](#) in the CRM module.

## Surcharge

Controls access to the [Surcharge](#) function.

## Tip

Controls access to the [Tipping](#) function.

## Tip Adjustment

(Only becomes available when **Tip** is not set to **Disabled**)

Controls which Users can make adjustments to Tipping.

## Assign Staff to Transaction

Controls which Users can change the assigned [Staff Member on a Transaction](#).

# Module Access

Controls the access and use of the Registers Modules. All Modules have the same access options.

- **All POS Users:** Both POS Users and POS Supervisors have access.
- **Supervisors Only:** Only POS Supervisors will have access to the function.

## Access Custom URL

Controls access to the [Custom URL](#) module.

## Access Paid In

Controls access to the [Paid In](#) module.

## Access Paid Out

Controls access to the [Paid Out](#) module.

## Access Reports

Controls access to the [Reports](#) module.

## Access Stock

Controls access to the [Stock](#) module.

## Access Transaction History

Controls access to the [Transaction History](#) module.

## Access Web Portal

Controls access to the [Web Portal](#) module.

## Perform Start Day

Controls which User level can carry out the [Start Day](#) process.

## Perform End Day

Controls which User level can carry out the [End Day](#) process.

# 3.4.7.1.4. Tendering

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Tendering



The **Tendering** menu controls Tendering rules and the Quick Tender buttons on the Register.

## General Tendering

### Allow Split Payment

This configuration instructs the Register whether to allow split type tendering for a transaction or not.

- When set to **YES**, the Register will allow multiple tendering combinations, such as paying with both Cash and Card for a single transaction.
- When set to **NO**, only one tender type will be accepted per transaction.

## Open Cash Drawer for Receipt Reprint

The Register has the option to reprint the transaction receipt after the tendering has been completed. This will not open the cash drawer if Reprint Receipt is tapped in Transaction History.

- If set to **YES**, will open the cash drawer on tap of reprint receipt.
- If set to **NO**, the cash drawer will not open on tap of reprint receipt.

## Card Button Name

The Text that is displayed on the Card Tender Button.

## Allow Cash Transactions

Controls whether the Register will accept cash transactions or not.

- When set to **NO**, no cash transactions will be possible through the Register, and the Paid In and Paid Out modules will be disabled. This option is used for hand held POS devices that do not have a cash drawer.
- When set to **YES**, all cash transactions will be available in the Register.

## Quick Tender Buttons

The Quick Tender buttons allows the Staff Member to enter fixed cash denominations at time of tendering and can be set to the merchant's needs.

### Top Button Name

The text displayed by the Register to show the value of the top quick tender button. Can be prefixed or suffixed with a monetary symbol such as "£" or letters.

### Top Button Value

The value associated with the top quick tender button displayed on the Register. Can be set to any whole number value, such as 5, 10, 20, 50

### Middle Button Name

The text displayed by the Register to show the value of the middle quick tender button. Can be prefixed or suffixed with a monetary symbol such as "£" or letters.

## Middle Button Value

The value associated with the middle quick tender button displayed on the Register. Can be set to any whole number value, such as 5, 10, 20, 50

## Bottom Button Name

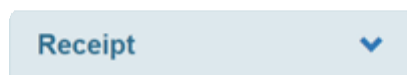
The text displayed by the Register to show the value of the bottom quick tender button. Can be prefixed or suffixed with a monetary symbol such as “£” or letters.

## Bottom Button Value

The value associated with the bottom quick tender button displayed on the Register. Can be set to any whole number value, such as 5, 10, 20, 50

# 3.4.7.1.5. Receipts

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The **Receipt** Menu controls the text and certain rules associated with the printing of the Primary Receipt Printer.

## Receipt Settings

### Print Price Overrides on Receipt

This will print an annotation on the receipt stating that the specific item's price was adjusted with a Price Override.

- When set to **YES**, the annotation will print on the Primary Receipt.
- When set to **NO**, the annotation will not print on the Primary Receipt.

### Print Daily Report on End Day

At completion of the End Day process, the Register can print out a copy of the End Day information on the Primary Printer.

- When set to **YES**, the Register will print a copy of the End Day information.
- When set to **NO**, no printout will take place.



## Print Paid In & Out Receipts

At completion of any Paid In or Paid Out transactions, the Register can print a copy of the information on the Primary printer.

- When set to **YES**, the Register will print a copy of the transaction.
- When set to **NO**, no printout will take place.

## Print No Sale Receipts

When the No Sale button is tapped, the Register can print a copy of the information on the Primary Printer.

- When set to **YES**, will print the No Sale receipt.
- When set to **NO**, no printout will take place.

## Print Customer Details on Receipt

(Only becomes available when the license type is **Plus**)

When adding a customer to a transaction, the Register can be set to print the customers details at the bottom of the receipt or not.

- When set to **YES**, the Register will print the customer's details.
- When set to **NO**, the details will not be printed.

## Default Receipt Behaviour

The Register can be instructed to either print the transaction receipt by default, or to ask if the receipt needs to be printed.

- **Always Print Receipt** will tell the Register to Print the receipt on completion of the transaction.
- **Optional Receipt** will give the Staff Member the option to print the receipt once the Transaction has been completed.

## Show Item Modifiers on Customer Receipts

When adding Item Modifiers to a product, these modifiers can be printed on the Primary Receipt Printer when printing the Customer Receipt.

- Setting this to **YES** will print the Item Modifiers.
- Setting this to **NO** will not print the Item Modifiers.

## Add Signature and Tip to Customer Bill

- Setting this to **YES**, will include an additional footer text for the tip amount, new total and signature to the printed customer bill receipt.
- Setting this to **NO**, will not print the additional information.

## Receipt Text

This is the text that will be printed on the Header and Footer of the Primary Receipt Printer on completion of a transaction, or a Paid In-Out transaction.

### Receipt Header Text

The text printed at the top of the receipt.

### Receipt Footer Text

The text printed at the bottom of the receipt.

To format the Header and Footer text use the following prefix codes on each line of your text;

 The 'xx' represents the number of characters a print line contains. This is normally 48 but refer to the manufacturers hand book for more information.

- Cxx: Will Centre the text on the receipt. – C48:TEXT
- Lxx: Will Left Justify the text on the receipt. – L48:TEXT
- Rxx: Will Right Justify the text on the receipt. – R48:TEXT
- Exx: Will force the Register to print a blank line. – E48:

## Email Customer Receipt

### Email Customer Receipt

When set to YES, the option to send an email receipt to the customer will be made available on the Transaction Summary dialog.

## SMTP Host

This will be the Host Name of the SMTP. For example, "smtp.gmail.com" For more information please refer to your email provider.

## SMTP Port

This will be the SMTP port number. For more information please refer to your email provider.

## SMTP Username

This will be the Username (if applicable). For more information please refer to your email provider.

## SMTP Password

This will be the Password (if applicable). For more information please refer to your email provider.

## Email From

This will be the name that will appear in the "From" information of the email. For example "My Store".

## Email Subject

This will be text that will appear as the Subject of the email. For example, "Your Email Receipt from My Store".

## Email Body

This will be the text that appears in the body of the email. The receipt Image will then be inserted underneath this text.

- The Email Subject and the Email Body is set to use the following Tokens;
  - **[customerFirstName]** – If a Customer is linked to the transaction, this token will insert the First Name of that Customer.
  - **[customerLastName]** – If a Customer is linked to the transaction, this token will insert the Surname of that Customer.
  - **[storeName]** – The Store name where the transaction took place.
  - **[staffFirstName]** – The First Name of the Staff Member who completed the transaction on the Register.
  - **[staffLastName]** – The Surname of the Staff Member who completed the transaction on the Register.

## 3.4.7.1.6. Tax & Commissions

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### Tax and Commissions ▼

The **Commission** configurations adjust how the commission calculations are carried out in the Register, and the **Tax** configurations controls how Tax is applied to products and transactions.

## Commission Settings

(Only becomes available when the license type is **Plus**)

### Commissions Calculated Inclusive of Tax

Will instruct the Register to either calculate the commission before or after the tax is added to the product.

- If set to **YES**, will calculate the commission based on the product cost inclusive of tax.
- If set to **NO** will calculate the commission based on the pre-tax cost of the product.

### Commissions Calculated After Discount Applied

Will instruct the Register to either calculate the commission before or after any discount is applied to the product.

- If set to **YES**, will calculate the commission after any discount has been applied.
- If set to **NO**, will calculate the commission before any discount is applied.

## Tax Settings

The Tax settings will instruct the Register how to handle Tax Rules.

### Display Prices Inclusive of Tax

This tells the Register whether to display the item in the journal with or without tax.

- When set to **YES** the journal will display the total cost of the item including tax.
- When set to **NO** the journal will display the item cost without tax.

## Price Override Inclusive of Tax

This tells the Register how to handle the tax when a Price override is issued against a product in the journal.

- When set to **YES** the Register will apply the price override to the item price after tax.
- When set to **NO** the Register will apply the price override of the item price before tax.

## Apply Discounts After Tax

This tells the Register when to apply the price or percentage discounts in relation to the tax.

- When set to **YES** the Register will calculate the total cost of the items purchased including the tax, and then apply the discount.
- When set to **NO** the Register will calculate the discount and then add the tax.

## Apply Surcharge After Tax

This tells the Register how to apply the taxation to the Surcharge.

- When set to **YES**, the Surcharge will be applied after the taxation has been applied.
- When set to **NO**, the Surcharge will be applied before the taxation has been applied.

## Manual Item Entry is Exclusive of Tax

This tells the Register how to handle the tax when a manual item entry is made on the journal.

- When set to **YES** the Register will treat the entered amount as being inclusive of tax.
- When set to **NO** the Register will take this as the before tax value, and add tax to the manually entered price.

## Apply Tip After Tax

This applies to Percentage tips only.

- When set to **YES**, the Tip will be calculated after the taxation has been applied to the transaction.
- When set to **NO**, the Tip will be calculated before the taxation has been applied to the transaction.

## Labelling

These configurations set the text that is displayed in the Journal Summary, Daily Z report, and the transaction Receipts.

### Before Tax Label

This is the text value that is displayed showing the value of the transaction before tax is added. For example, "Pre-Tax" or "Pre-VAT"

### Tax Label

This is the text value that is displayed showing the tax payable on the transaction. For example, "Tax" or "VAT"

### Net Tax Label

This is the text value that is displayed showing the Net value of the Transaction. For example, "Net Tax" or "Net VAT"

## 3.4.7.1.7. Hardware

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Hardware



The **Hardware** menu is where you would setup and control the various hardware appliances you have purchased from your re-seller. You would not normally need to make any changes here as this would be primarily controlled by the re-seller.

## Tablet Settings

### Hide Navigation Buttons

This configuration only effects certain tablets where the Toolbar is on the screen and not on the chassis. When set to **YES** the lower Android Navigation Bar will be hidden.

## Barcode Scanners

These configurations control the Barcode scanner if purchased.



For more information, see the chapter on [Barcode Scanner Defaults](#).

## Barcode Scanner

Select the type of barcode scanner from the dropdown list.

### Barcode Scanner Delay

Set this value per your manufacturer's specifications. Some barcode scanners read barcodes very quickly which can cause the item to be added to the transaction twice. This adds a delay to prevent this from happening.



The availability of the following configurations is dependent on the type of Scanner selected.

### Bluetooth SPP Barcode Scanner Name

If using a Generic Bluetooth Barcode Reader of type SPP, the name of the scanner needs to be entered here. This can be found on the Bluetooth Settings of the Tablet once it has paired with the scanner, and is the name displayed by the Tablet.

### iPOS Scanner URL

The iPOS Scanner URL

## Cash Drawer

These configurations control the Cash Drawer if purchased.

### Cash Drawer

Select the type of Cash Drawer from the dropdown list.

### Open Cash Drawer for Card Payments

This will instruct the Register whether to open the Cash Drawer when the transaction has been tendered with a card payment, or not.

- When set to **YES**, on completion of a card transaction the Register will open the Cash Drawer.
- When set to **NO**, the cash drawer will not open.

 The availability of the following configurations is dependent on the type of Cash Drawer selected.

## Prevent Transactions when the Cash Drawer is Open

This feature will instruct the Register to prevent any further transactions from taking place, if the Cash Drawer has been left open. At present, this feature is only available when the Cash Drawer is of type **Miura POSzle** or **ITP** or **Unique Secure MePOS**.

- When set to **YES**, no transactions will be allowed until the Cash Drawer has been closed.
- When set to **NO**, transaction will be allowed regardless if the Cash Drawer is open or not.

## MiniPOS Cash Drawer Type

Select the **PIN** type from the dropdown menu. For more information, refers to the Manufacturers handbook.

## ePOS Cash Drawer Type

Select the **PIN** type from the dropdown menu. For more information, refers to the Manufacturers handbook.

## Card Terminals

These configurations control the Card Reader if purchased. As there are numerous settings involved, this part of the manual will not go into detail on them.

 For more information, see the chapter on [Card Terminal Defaults](#).

## Primary Receipt Printer

These configurations control the Primary Receipt printer if purchased.

 For more information, see the chapter on [Primary Printer Defaults](#).



## Receipt Printer

Select the type of Primary Receipt Printer from the dropdown list.

## Receipt Line Width

This is the number of characters the Primary Receipt Printer can print per line. For more information, refer to the manufacturers guide.

## Print Feed Length

This sets the size of the paper (number of blank lines) dispensed from the Primary Printer when the Print Feed button is tapped.



The availability of the following configurations is dependent on the type of Primary Receipt Printer selected.

## ePOS / EscPOS Port

Enter the ePOS Port information.

## ePOS Printer Type

Select the ePOS Printer Type from the dropdown menu.

## Star Printer Port

The connection string for Star Printer. Typically this will be TCP: for TCP, BT:Star for Bluetooth connection or USB: for USB connection types.

## Star Printer Port Setting

Enter the Port settings of the Star Printer if being used over Bluetooth.

## Use Star Checked Block Mode

Improves Primary Receipt Printer stability in slow network environments, but can cause a noticeable delay in printing.

## Star Printer Using Raster

Set this to **YES** if your Star printer supports Raster mode.

## Use Direct Print with Carbon Printer

When using a Verifone Carbon Device, select Direct Print to send receipts directly to the printer without a preview.

## Secondary Receipt Printer

**(Only becomes available when the license type is Plus)**

These configurations control the Secondary Receipt printer if purchased.

 For more information, see the chapter on [Secondary Printer Defaults](#).

### Receipt Printer

Select the type of Secondary (Kitchen) Receipt printer from the dropdown list.

### Receipt Line Width

This is the number of characters the Secondary Receipt Printer can print per line. For more information, refer to the manufacturers guide.

 The availability of the following configurations is dependent on the type of Secondary Receipt Printer selected.

### Aevi Secondary Printer ID

The Printer ID that you wish to use as the Secondary Printer. This can be found in the Print Service Application.

### ePOS / EscPOS Port for Secondary Printer

ePOS Port for Secondary Printer

### Star Port for Secondary Printer

The connection string for Star Printer. Typically this will be TCP: for TCP, BT:Star for Bluetooth connection or USB: for USB connection types.

## Star Port Setting for Secondary Printer

Enter the Port settings of the Star Printer if being used over Bluetooth.

## Miscellaneous Hardware Settings

These settings will be controlled by your reseller.

## Customer Display Unit

The configurations control the Customer display Unit, if purchased or form part of the POS Unit purchased.

 For more information, see the chapter on [Customer Display Defaults](#).

### Customer Display Type

Select the type of display from the dropdown menu.

### Customer Display Idle Text

The text that is displayed on the device when no transaction is in progress.

### Customer Display Line Width

The display width of the device in characters.

## 3.4.7.1.8. Branding

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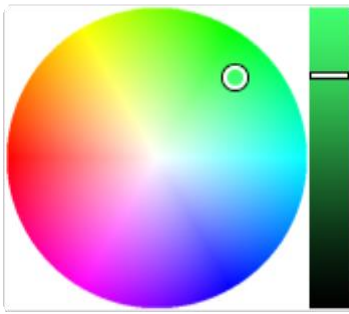
Branding



The Register can be Branded to suit your needs and to make your Register Device unique to your business.

 Each Profile is unique to the Register it is enrolled to, so you could have several Profiles which are branded differently.

## To set the Required Colour:



- Click into the selected field
- Select the required Colour from the colour selection wheel on the left.
- Select the required Hue from the colour slider on the right
- Press **ENTER**

**OR**

- Click into the selected field
- Type in the HEX code if known. (For example, #FFFFFF for White or #000000 for Black.)

## Register Title

### Register Title Bar Text

This is the text that appears on the top bar of the Register. This could be set to your Company name, or a Department within your company. For example, **Restaurant** or **Front Bar**

## Browser Image

### Product Browser Image

This sets the image displayed at the bottom of the product and department browsers. This image should be 100×600 pixels in size and of type PNG or JPG.

## Training Mode

### Training Mode Display Colour

When in Training Mode this colour will be used on the top toolbar and on top of all dialogs.

## Border Colours

### Border Colour

This sets the colour of all Borders within the Register (For example: The Border between the Journal and the Product Browser.)

## Background Colours

### Main Background

This sets the colour of the Main Background of the entire Register application.

### Table Background

This sets the colour of the Table Backgrounds for all tables in the Register application.

### Display Window Background

This sets the colour of the Display Window on the Register Module.

### Main Toolbar Background

This sets the colour of the Toolbar Backgrounds of the entire Register application.

### Secondary Toolbar Background

This sets the colour of all the Secondary Toolbar Backgrounds of the entire Register application.

### Tertiary Toolbar Background

This sets the colour of the Tertiary Toolbar Backgrounds of the entire Register application.

### Print Order Item Background

This sets the colour of any items in the Journal that have already been printed either on the Primary or Secondary Printers. This will only display if the products form part of a Resumed Suspended transaction.

## Button Colours

### Action Button

This sets the colour of all Action Buttons.

### Basic Button

This sets the colour of all Basic Buttons.

### Function Button

This sets the colour of all Function Buttons.

### Main Button

This sets the colour of all Main Buttons.

### Operation Button

This key the colour of all Operational Buttons.

## Font Colours

### Main Font

This sets the colour of the Main Font

### Action Button Font

This sets the colour of the Action Button Font

### Basic Button Font

This sets the colour of the Basic Button Font

### Display Window Font

This sets the colour of the Display Window Font

## **Function Button Font**

This sets the colour of the Function Button Font

## **Journal 'Discount' Font**

This sets the colour of the Journal Discount Font

## **Journal 'Payment' Font**

This sets the colour of the Journal Payment Font

## **Journal 'Void' Font**

This sets the colour of the Journal Void Font

## **Main Button Font**

This sets the colour of the Main Button Font

## **Main Toolbar Font**

This sets the colour of the Main Toolbar Font

## **Operation Button Font**

This sets the colour of the Operation Button Font

## **Table Font**

This sets the colour of the Table Font

## **Secondary Toolbar Font**

This sets the colour of the Secondary Toolbar Font

## **Tertiary Toolbar Font**

This sets the colour of the Tertiary Toolbar Font

## 3.4.7.1.9. Logging

---

Logging



The **Logging** Settings sets the Register to monitor certain features, and to report the logs to the Portal.

### Device Logging

#### Enable Device Logging

- When set to **YES**, the Register will log certain actions or events done on the Register
- When set to **NO**, the Register will not log any actions or events.

#### Device Log Interval

(Only becomes available when **Enable Device Logging** is set to **YES**)

This sets the time in minutes that the register will log the actions or events, before sending the logs to the Portal.

#### Log Cash Drawer Events

(Only becomes available when **Enable Device Logging** is set to **YES**)

- When set to **YES**, the Register will log each time the Cash Drawer is opened and the length of time it was open for.
- When set to **NO**, the Register will not monitor the activity of the Cash Drawer.

#### Log Intents

(Only becomes available when **Enable Device Logging** is set to **YES**)

When set to **YES**, any Intents used by a third-party application to communicates with the Register will be logged in the Transaction Report. When set to **NO**, the Intents will not be logged.

## 3.4.8. Staff Members

---

### Overview

Staff Members are the employees within your Merchant group, and are separated into three different

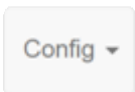


employment categories:

- **POS Supervisors** who have Supervisory Access to the Register and can use all modules and functions of the Register.
- **POS Users** who can be limited to certain modules and functions of the Register, and
- **Timekeeping Users.** These employees will not have any access to the Register, but will only be listed on the Staff Login screen for the purposes of Clocking in and Out. For more information on this, see the chapter on [Timekeeping](#). (This functionality and user option, is only available when purchasing a Plus license.)

\* Functional and Modular access permissions for both the POS Supervisor and POS User can be managed from the [User Permissions](#) tab in [Profiles](#).

## Accessing Staff Members

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |   |
| 2    | Click <b>Staff</b>                  |  |

## Creating Staff Members

This allows you to create a Staff Member for your store(s) and grants them access to the Register.

\* You must have already created a Store before creating a Staff Member.

\* For Core Licenses, skip step 4-5 as this is a Register Plus feature.

| Step | Instruction                                               | Operation                                                                             |
|------|-----------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>New Staff Member</b>                             |  |
| 2    | Fill in all <b>Required fields</b>                        |                                                                                       |
| 3    | Select the <b>Role</b> from the dropdown list             | POS Supervisor / POS User / Timekeeping User                                          |
| 4    | Select if the Staff Member is <b>Available in the CRM</b> |                                                                                       |

|   |                                                          |                                                             |
|---|----------------------------------------------------------|-------------------------------------------------------------|
|   | <b>Calendar</b>                                          |                                                             |
| 5 | Enter the <b>Commission Rate</b> for the Staff Member    | <b>For example, 1, 2, or 0.5</b>                            |
| 6 | Check the store boxes that the Staff Member is valid for | <div> <div>Bournemouth</div> <div>Christchurch</div> </div> |
| 7 | Click <b>Save</b>                                        | <div>Save</div>                                             |

## Explanation of various Staff Member Fields

### Staff Code

This is a unique identification number allocated to the Staff Member, and must be between four and eight digits in length.

### Pin and Confirm Pin

A four-digit PIN number used to log in into the Register. The entries in the PIN and Confirm PIN fields must match or the Portal will reject the creation of the Staff Member.

### Role

There are three options, POS Supervisor, POS User and Timekeeping User. The latter is a Register Plus feature and sets the User to only Clock In and Out and will not have access to any of the Register Features. This User can be available in the CRM Calendar by setting the **Available in the CRM Calendar** option to **YES**.

### Commission Rate

The Commission Rate is a multiplier used to work out each Staff Member's commission for applicable products. For example, when selling a product with a 10% Base Commission: If the Commission Rate is set to 1 they will receive the full 10%, a Commission Rate of 0.5 will give half of the Base Commission (5%) and a Commission Rate of 2 will give double (20%). Setting to 0 will not allocate a commission to the Staff Member.

## Editing Staff Members

This allows you to edit the various data about a Staff Member, including changing stores, change of role or change of PIN.

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |

|   |                             |                                                                                   |
|---|-----------------------------|-----------------------------------------------------------------------------------|
| 2 | Make your necessary changes |                                                                                   |
| 3 | Click <b>Save</b>           |  |

## Deleting Staff Members

This allows you to delete a Staff Member from your list.

**!** Deleting a Staff Member is a permanent action, and cannot be undone.

| Step | Instruction           | Operation                                                                         |
|------|-----------------------|-----------------------------------------------------------------------------------|
| 1    | Click the Delete Icon |  |
| 2    | Click <b>Yes</b>      |  |

## 3.4.9. Stores

### Overview

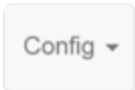
Stores are the places of the business where you would normally carryout day-to-day trading, or for the purposes of storing stock before dispatching it to the actual physical store.

You are not limited to the number of Stores you can have within your Merchant, but each 'Trading Store' would need to have a 'Device' or Register to carryout any Trading.

For example, you could have two Stores within your Merchant.

- Store 1: Where you only warehouse all your products, and do not carryout any trading. This store would not need a 'Device' or Register.
- Store 2: Where you physically sell your products. This store would need a 'Device' or Register

### Accessing Stores

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |

|   |                     |                                                                                   |
|---|---------------------|-----------------------------------------------------------------------------------|
| 2 | Click <b>Stores</b> |  |
|---|---------------------|-----------------------------------------------------------------------------------|

## Creating Stores

This allows you to create a Store.

 For Core licenses, skip step 8. Appointment Resource Type is a feature of Register Plus.

| Step | Instruction                                                                     | Operation                                                                             |
|------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>New Store</b>                                                          |    |
| 2    | Enter the <b>Store Name</b> (Required)                                          | <b>For Example</b> , “ABC Stores”                                                     |
| 3    | Enter the <b>Store Number</b> (Required)                                        | <b>For Example</b> “1001”                                                             |
| 4    | Enter <b>Address Line 1</b> (Required)                                          | <b>For Example</b> , “10 High Street”                                                 |
| 5    | Enter the <b>Town / City</b> (Required)                                         | <b>For Example</b> , “Ferndown”                                                       |
| 6    | Enter the <b>Post Code / Zip Code</b> (Required)                                | <b>For Example</b> , “BH22 1AA”                                                       |
| 7    | Select the <b>Time Zone</b> from the dropdown list                              | <b>For Example</b> , “GMT”                                                            |
| 8    | Select the <b>Appointment Resource Type</b> from the dropdown List              |                                                                                       |
| 9    | Select the <b>Price Lists</b> that will be available in the Store               |                                                                                       |
| 10   | Select the <b>Default Price List</b> if multiple price lists have been selected |                                                                                       |
| 11   | Click <b>Save</b>                                                               |  |

## Appointment Resource Type

The Appointment Resource Type will determine if appoints created in the [CRM Module](#), are created against your Staff Members, or a Resource in your Store for example, in a Restaurant you could have “Tables” or in a Tanning Salon, you can have “Rooms”

 When selecting Resource as the Appointment Resource Type, you must have already created a List for that Resource. For more information, see the chapter on [Lists](#)

## Price Lists

The Register has the ability to store several Price Lists that can used for trading within your Store. For

more information on this, see the chapter on [Price Lists](#).

## Time Scheduled Price Lists (Happy Hour)

The Register can be setup to automatically change the default Price List to another Price list, at a scheduled time and day, and then to revert back to the Default Price List. For More information, see the chapter on [Time Scheduled Price Lists](#)

## Editing Stores

This allows you to edit details about the Store.

| Step | Instruction                | Operation                                                                          |
|------|----------------------------|------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |   |
| 2    | Make the necessary changes |                                                                                    |
| 3    | Click <b>Save</b>          |  |

## Deleting Stores

This allows you to delete a Store from your Merchant.

**!** Deleting a Store is a permanent action, and cannot be undone.

**\*** If you delete a Store, make sure you update the information in the [Devices](#) and [Staff Member](#) functions, as you must have at least one Store. This is essential to correct operation of the Register.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.4.10. Surcharges

### Overview

Surcharges can be added to a transaction by the Staff Member. Like Discounts, Surcharges can be added using either price or percentage values, or by using Fixed Surcharges.

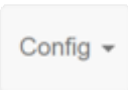
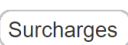
Created Surcharges can be Price or Percentage based and include assigned tax codes, or those that are not 'fixed' will be assigned a tax value based on the other taxes used in the transaction. You can create predefined Surcharge values that will display when tapping the Surcharge button.

\* This functionality can be set to specific users of the Register. See the chapter on [Functional Permissions](#) for more information.

\* If no Custom Surcharges are created on the Portal, the default **Percentage** and **Price** surcharges will still be available.

\* Surcharges can be completely disabled in the [Profile](#), which will then not give the option to add a Surcharge to a transaction in the Register.

### Accessing Surcharges

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Surcharge</b>              |  |

### Creating a Surcharge

#### Price type Surcharge

| Step | Instruction                                | Operation                                                                            |
|------|--------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>New Surcharge</b>                 |  |
| 2    | Enter the <b>Surcharge Name</b> (Required) | <b>For example</b> , Card Surcharge                                                  |

|   |                                                        |                                                                                     |
|---|--------------------------------------------------------|-------------------------------------------------------------------------------------|
| 3 | Select <b>Price</b> for Type                           |                                                                                     |
| 4 | Enter the <b>Price Excluding Tax</b> amount            | <b>For example</b> , 0.50                                                           |
| 5 | Select the <b>Tax(s)</b> associated with the Surcharge |  |
| 6 | All other fields are optional                          |                                                                                     |
| 7 | Click <b>Save</b>                                      |   |

## Percentage type Surcharge

| Step | Instruction                                            | Operation                                                                            |
|------|--------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>New Surcharge</b>                             |    |
| 2    | Enter the <b>Surcharge Name</b> (Required)             | <b>For example</b> , Card Surcharge                                                  |
| 3    | Select <b>Percentage</b> for Type                      |                                                                                      |
| 4    | Enter the <b>Percentage of Transaction</b> value       | <b>For example</b> , 1.25                                                            |
| 5    | Select the <b>Tax(s)</b> associated with the Surcharge |  |
| 6    | All other fields are optional                          |                                                                                      |
| 7    | Click <b>Save</b>                                      |  |

## Editing a Surcharge

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Click <b>Save</b>          |  |

## Disabling and Enabling a Surcharge

| Step | Instruction                              | Operation                                                                           |
|------|------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | To Disable click the <b>Disable</b> Icon |  |
| 2    | To Enable click the <b>Enable</b> Icon   |  |

## Deleting a Surcharge

\* The Default Price and Percentage Surcharges are system Surcharges, and cannot be deleted. If you need to disable all Surcharges in your Store, see the section on [User Permissions](#).

! Deleting a Surcharge is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.4.11. Taxes

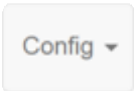
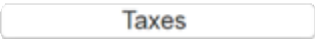
### Overview

The Taxes function allows you to enter the various tax values for the products that you sell. This is for taxes such as VAT (Value Added Tax), GST (Government Sales Tax) or just Sales Tax for example.

You can enter as many tax levels as you need and are entered as either a **Fixed Value** or a **Percentage**.

The different **Tax Types** will be explained in more detail further in this chapter.

### Accessing Taxes

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Taxes</b>                  |  |

### Creating a New Tax

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|



|   |                                       |                                                                                   |
|---|---------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Click <b>New Tax</b>                  |  |
| 2 | Enter the <b>Tax Name</b> (Required)  | <b>For Example</b> , "Standard Tax"                                               |
| 3 | Enter the <b>Tax Code</b> (Required)  | <b>For Example</b> , "TAX123"                                                     |
| 4 | Select the <b>Tax Type</b>            | Either <b>Fixed Value</b> or <b>Percentage</b>                                    |
| 5 | Enter the <b>Tax Value</b> (Required) | <b>For Example</b> , "1.50" or "20"<br>(Do not use a Currency or the % symbol)    |
| 6 | Enter the <b>Tax Identifier</b>       | <b>For Example</b> , "*" or "A"                                                   |
| 7 | Click <b>Save</b>                     |  |

- The **Name** field is a free text field, and you can enter any value you require.
- The **Code** field is restricted to **A~Z** and **0~9** and spaces are not allowed.
- The **Tax Type** field has two options to select from;
  - **Fixed Value** is for taxes that are Price Based where a product has a statutory fixed tax associated with it. For example, the Merchant might have a varied charge on parking, but regardless of the price, the Tax will always be the same.
    - 1 hour parking charge for £2.00 (Tax £0.50).
    - 2 hour parking charge for £3.50 (Tax £0.50)
  - **Percentage** is for normal Taxation methods where a Product is taxed at a Percentage of the selling price.
- The **Tax Value** is the value of the associated tax and is restricted as follows;
  - For **Fixed Value** tax types, the value must be in the range 0 to 999.99 and may not have more than 2 decimal places.
  - For **Percentage** tax types, the value must be in the range 0 to 99.9999 and may not have more than 4 decimal places.
- The **Tax Identifier** is a single character that can be entered to identify the Tax Code on the Printed Customer Receipt.
  - **For Example**, if you need to show products on the Customers Printed Receipt as having a different tax Code to normal products, you can add the identifier here.
  - Valid characters are **A~Z**, **a~z**, **0~9** and most special characters such as # or \*

## Editing Tax Levels

| Step | Instruction                          | Operation                                                                           |
|------|--------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the Edit Icon                  |  |
| 2    | Edit the field(s) you need to change |                                                                                     |

|   |                   |                                                                                   |
|---|-------------------|-----------------------------------------------------------------------------------|
| 3 | Click <b>Save</b> |  |
|---|-------------------|-----------------------------------------------------------------------------------|

## Deleting Tax Levels

 If you delete a Tax Level, please ensure you update any products that use that level with a new Tax Level.

 Deleting a Tax Level is a permanent action and cannot be undone. If you delete a Tax Level, the Tax Code cannot be reused for a new Tax Level.

| Step | Instruction           | Operation                                                                          |
|------|-----------------------|------------------------------------------------------------------------------------|
| 1    | Click the Delete Icon |   |
| 2    | Click <b>Yes</b>      |  |

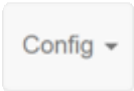
## 3.4.12. Tender Types

### Overview

The Register supports Other Tender types in addition to the standard Cash and Card tendering. This chapter will explain how to create these Tender Types to use in the Register. Additional Tender Types can be used to complete customer transactions, but not include them as cash or card sales.

 If no Tender Types are created on the Portal, the “Other Tender” button on the Register will be deactivated.

### Accessing Tender Types

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Tender Types</b>           |  |

## Creating Tender Types

| Step | Instruction                                  | Operation                                                                          |
|------|----------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>New Tender Type</b>                 |  |
| 2    | Enter the <b>Tender Type Name</b> (Required) | <b>For example</b> , "Cheque"                                                      |
| 3    | Select the <b>Note Mode</b> (Required)       |                                                                                    |
| 4    | Click <b>Save</b>                            |   |

### Open Cash Drawer

This will set if the cash drawer opens when completing the transaction using this tender type.

### Note Mode

The Note Mode will allow the Staff Member to enter a note regarding the Tender if needed.

- **Off**: The Register will not prompt the Staff Member to enter a note.
- **Optional**: The Register will display the Note dialog, but will not require an entry to be made.
- **Required**: The Register will display the Note dialog and will require an entry to be made before allowing the Staff Member to continue.

### Show Confirmation

When the Staff Member uses this Tender Type, the Register can display a dialog asking the Staff Member to confirm this Tender Type before allowing the tender to continue.

### Exclude from Cashing Up

This configuration will instruct the Register whether to include the Tender in the total of the End Day process or not.

- When set to **YES**, the Register will include the value of this tender in the total End Day amount, and will require the Tender to be added as part of the Cashing Up process.
- When set to **NO**, the Register will exclude the value of this tender from the total End Day amount, and will not require the Tender to be reconciled. The value will still be displayed as an informative figure, and will be included in the Cashing Up report, and Daily Z report.

## Allow Refunds to use this Tender

Certain tender types like **Cheques** cannot be used to carry out a refund, but others like **Store Accounts** can. This option instructs the Register whether to allow the Tender Type to be used when the Refund brings the Transaction Total to a negative amount or not.

## Editing Tender Types

| Step | Instruction                | Operation                                                                         |
|------|----------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                   |
| 3    | Click <b>Save</b>          |  |

## Disable / Enable Tender Types

| Step | Instruction                                     | Operation                                                                           |
|------|-------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Disable</b> to disable the Tender Type |  |
| 2    | Click <b>Enable</b> to enable the Tender Type   |  |

## Changing the Tender Type Display Order

The setting of the Tender Type Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order is automatically saved.

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Use Drag and Drop to order the entries as required. |           |

## Deleting Tender Types



If a Tender Type is deleted, it will remain on any reports where that Tender has already been used.

**!** Deleting a Tender Type is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.5. Customer Relationship Management



### Overview

**\*** This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

Customer Relationship Management or CRM is a Module on the Register where you can create a list of customers, link transactions and manage various aspects of their appointments.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Customer Transaction History](#)
- [Customers](#)
- [Custom Fields](#)
- [Appointments](#)

- [Text Reminders](#)

## 3.5.1. Customer Transaction History

### Overview

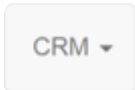
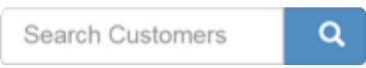
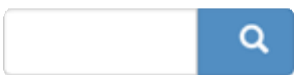
Transactions that have been carried out on the Register can be linked to specific customers. This is primarily done through the Register, but can be done through the Portal.

### Linking and Unlinking Transactions to a Customer

#### Linking Transactions

\* The transaction ID can be obtained from the Transaction Report or from the transaction receipt printed from the Register.

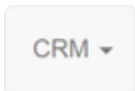
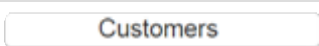
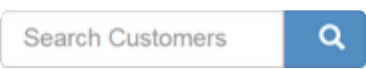
\* Only valid Cash, Card, Other Tenders or Split Tender transactions can be linked to a customer. The Portal will validate the transaction ID once entered and report on its validity.

| Step | Instruction                                | Operation                                                                            |
|------|--------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar           |   |
| 2    | Click <b>Customers</b>                     |  |
| 3    | Carry out a <b>Search</b> for the customer |  |
| 4    | Click the <b>Transaction History</b> icon  |   |
| 5    | Click the <b>Link Transaction</b> button   |   |
| 6    | Enter the <b>Transaction ID</b>            |  |
| 7    | Click the <b>Search</b> icon               |   |
| 8    | Click the <b>Link</b> button               |   |

## Un-Linking Transactions

At present un-linking a transaction from a customer can only be done on the Register, but is planned for a future version of the Portal. For more information on unlinking a transaction, see our [Register Manual](#)

## Accessing the Customer Transaction History

| Step | Instruction                                | Operation                                                                          |
|------|--------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar           |   |
| 2    | Click <b>Customers</b>                     |  |
| 3    | Carry out a <b>Search</b> for the customer |  |
| 4    | Click the <b>Transaction History</b> icon  |   |

## Searching the Customer Transaction History

Searching the transaction history is done by using filters once you have accessed the **Customer's History**

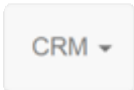
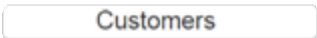
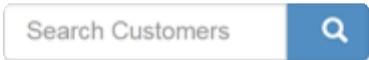
 When using the filters, click on the Reload button to implement the filters.

- **Date:** This allows you to select a specific date or a date range.
- **Time Zone:** You can change the Time Zone if required.
- **Stores:** Click on the stores dropdown to filter specific stores.

## Exporting the Customer transaction History

 The export will be downloaded to your computer's download folder, and will be named Transaction History followed by the customer's name, and the date and time of the download. For example, "Transaction\_History\_Arthur\_Ford\_2016\_12\_10\_13\_12-44" The export file is in XML format, and can be opened by a program like Excel.

 To export all data for all customers, see the [Customer Transaction Report](#) in the Reports chapter of this manual.

| Step | Instruction                                 | Operation                                                                          |
|------|---------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar            |   |
| 2    | Click <b>Customers</b>                      |  |
| 3    | Carry out a <b>Search</b> for the customer  |  |
| 4    | Click the <b>Transaction History</b> icon   |   |
| 5    | Click the <b>Export Transactions</b> button |  |
| 6    | Click <b>Download XLS File</b>              |  |

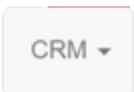
## 3.5.2. Customers

### Overview

The customer module allows you to create or edit the customer's details onto the Portal for use in Appointments or to add to Transactions.

- The Portal has a Import and Export function that will allow you to quickly Add, Edit or Delete your customers. For more information, see the [Import and Export](#) Section in this manual.

### Accessing Customers

| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |  |
| 2    | Click <b>Customers</b>           |  |

### Creating Customers



There are some fields that are required depending on the settings in the [Custom Fields](#) module.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|



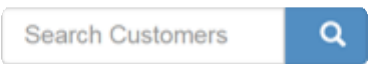
|   |                                             |                                                                                   |
|---|---------------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Click <b>New Customer</b>                   |  |
| 2 | Fill in all <b>Required</b> fields          |                                                                                   |
| 3 | Fill in any <b>Optional</b> field as needed |                                                                                   |
| 4 | Click <b>Save</b>                           |  |

## Searching for Customers

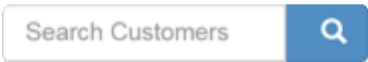
The search function will allow you to quickly locate a customer using search criteria.



The search criteria that can be used in the search function is the customers first name, customers last name, or email address.

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Type in the <b>Search</b> criteria |   |
| 2    | Click the <b>Search</b> button     |  |

## Editing Customer Details

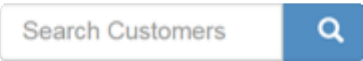
| Step | Instruction                                                | Operation                                                                            |
|------|------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> using the <b>Search Function</b> |  |
| 2    | Click the <b>Edit</b> icon                                 |  |
| 3    | Make the necessary changes                                 |                                                                                      |
| 4    | Click <b>Save</b>                                          |  |

## Deleting a Customer



Deleting a customer is a permanent action and cannot be undone.

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

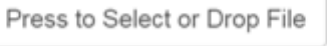
|   |                                                     |                                                                                    |
|---|-----------------------------------------------------|------------------------------------------------------------------------------------|
| 1 | Carry out a search using the <b>Search Function</b> |  |
| 2 | Click the <b>Delete</b> icon                        |  |
| 3 | Click <b>Yes</b>                                    |  |

## Adding and Removing Images

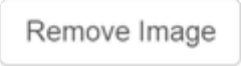
### Adding an Image to the Customer

\* Adding an image to the customer can only be done directly through the Portal either when **Creating** or **Editing** the customer. Adding an image cannot be done through the customer import function. Adding an image can also be done from the Register. For more information on this, see the Register manual.

\* By default, images are not a custom field and will need be to be created in the [Custom Fields](#) module.

| Step | Instruction                                                                | Operation                                                                            |
|------|----------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Drag and drop the image onto the button or click to select from a location |  |
| 2    | Click <b>Save</b>                                                          |   |

### Removing an Image from a Customer

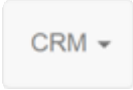
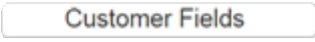
| Step | Instruction                          | Operation                                                                           |
|------|--------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Remove Image</b> button |  |
| 2    | Click <b>Save</b>                    |  |

## 3.5.3. Custom Fields

### Overview

CRM comes with a default list of data capture fields (First name, email etc.) Merchants are then able to add their own Custom Fields based on their requirements. These fields can be given any name and set to different data types (Text, Number, List, Date etc.) These are then used as part of the form when capturing customer information.

### Accessing the Custom Fields

| Step | Instruction                      | Operation                                                                         |
|------|----------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |  |
| 2    | Click <b>Customer Fields</b>     |  |

### Creating Custom Fields

\* For a detailed explanation of the various field types, see the section on **Custom Field Formats**.

\* If you select “List” as the format, you must already have created the list in the config function of the Portal. For more information on creating lists, see the chapter on [Lists](#).

| Step | Instruction                                                                | Operation                                                                             |
|------|----------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>New Customer Field</b>                                            |  |
| 2    | Fill in the <b>Name</b> (Required)                                         | <b>For example</b> , “Customer Photo”                                                 |
| 3    | Select the <b>Format</b> from the dropdown menu.                           | <b>For example</b> , “Image”                                                          |
| 4    | If you select “List” format, select <b>List</b> from the dropdown menu.    |                                                                                       |
| 5    | If you want the field to be a required field, tick the <b>Required</b> box |                                                                                       |
| 6    | Click <b>Save</b>                                                          |  |

- **Required:** If you select the Custom Field to be **Required**, the Portal will not Save any changes to

the Customer, until that specific field has been completed.

## Editing Custom Fields

 A disabled Edit icon means that the field is a System field and cannot be edited.

| Step | Instruction                | Operation                                                                         |
|------|----------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |
| 2    | Make the necessary changes |                                                                                   |
| 3    | Click <b>Save</b>          |  |

## Deleting a Custom Field

 Deleting a custom field is a permanent action and cannot be undone. All captured customer data for that field will be lost.

 A disabled Edit icon means that the field is a system field and cannot be edited.

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## Custom Field Order

Sorting the custom fields allows you to put them in order based on your needs.

The setting of the List Item Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order is automatically saved.



The display order you set will also display as such in the Customer Export File, the Template File and on the Register.

| Step | Instruction                                         | Operation |
|------|-----------------------------------------------------|-----------|
| 1    | Use Drag and Drop to order the entries as required. |           |

## Custom Field Formats

There are several custom field formats, and this section will explain these in more detail.

- **Text:** This will create an alphanumeric field which is good for creating fields like, Name, Surname or Address.
- **List:** This will make use of a predefined custom list that must already have been created under Config / Lists. For more information on this, see the chapter on Lists: [#portal-config-lists-and-list-items](#).
- **Decimal:** This will allow the use of decimal numbers, such as 1.23 and is used for setting data capture fields like height or weight.
- **Integer:** Will only allow whole numbers to be added into the custom field for example, 1, 2, 3
- **Yes/No:** This will add a **Yes** or **No** switch to the custom field and is useful when specific yes or no questions are asked. For example, Allow third party marketing?
- **Date:** Sets the custom field to date format which will be YY:MM:DD
- **Time:** Sets the custom field to time format which will be HH:MM
- **Date Time:** As with the above date and time formats, but requires the capture data to be entered into a single field. YY:MM:DD HH:MM
- **Image:** This will add an image field to the capture data.

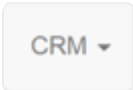
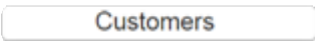
## 3.5.4. Appointments

### Overview

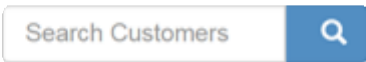
Appointments allows you to create, modify or delete customer appointments against your store Staff Members or Resources.

 Appointments created both on the Portal and the Client will automatically sync and can be viewed in real time.

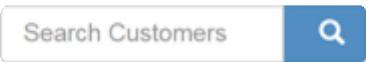
## Accessing Appointments

| Step | Instruction                      | Operation                                                                         |
|------|----------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |  |
| 2    | Click <b>Customers</b>           |  |

## Creating Appointments

| Step | Instruction                                                                                                                          | Operation                                                                             |
|------|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer                                                                                           |    |
| 2    | Click the <b>Appointments</b> icon                                                                                                   |   |
| 3    | Click <b>New Appointment</b>                                                                                                         |  |
| 4    | Enter the <b>Date</b>                                                                                                                |  |
| 5    | Enter the <b>Start Time</b>                                                                                                          |  |
| 6    | Select the <b>Duration, Store, Staff Member</b> or <b>Resource</b> , and <b>Appointment Type</b> from the dropdown menus. (Required) |                                                                                       |
| 7    | Add <b>Notes</b> if needed                                                                                                           |                                                                                       |
| 8    | Click <b>Save</b>                                                                                                                    |  |

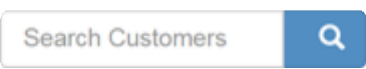
## Editing Appointments

| Step | Instruction                                | Operation                                                                            |
|------|--------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer |  |
| 2    | Click the <b>Appointments</b> icon         |   |
| 3    | Locate the required appointment            |                                                                                      |

|   |                            |                                                                                   |
|---|----------------------------|-----------------------------------------------------------------------------------|
| 4 | Click the <b>Edit</b> icon |  |
| 5 | Make the necessary changes |                                                                                   |
| 6 | Click <b>Save</b>          |  |

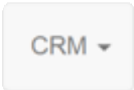
## Deleting Appointments

**!** Deleting an Appointment is a permanent action, and cannot be undone.

| Step | Instruction                                | Operation                                                                           |
|------|--------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Carry out a <b>Search</b> for the customer |   |
| 2    | Click the <b>Appointments</b> icon         |    |
| 3    | Locate the required appointment            |                                                                                     |
| 4    | Click the <b>Delete</b> icon               |  |
| 5    | Click <b>Yes</b>                           |  |

## Viewing Appointments

### All Customer Appointments

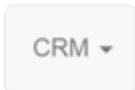
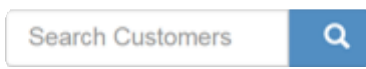
| Step | Instruction                                     | Operation                                                                            |
|------|-------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar                |  |
| 2    | Click <b>Appointments</b>                       |  |
| 3    | Use the various filters to drill down if needed |                                                                                      |

- **Date Function:** Click the date function to select specific dates or date ranges.
- **Store:** Click the Store dropdown to select a specific store.
- **Staff:** Click the Staff dropdown to select a specific Staff Member
- **Type:** Click the Type dropdown to select a specific appointment type.



When selecting either a new Date, Store, Staff, or Appointment Type, tap the **Reload** button to apply the filters.

## Specific Customer Appointments

| Step | Instruction                                | Operation                                                                          |
|------|--------------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar           |   |
| 2    | Click <b>Customers</b>                     |  |
| 3    | Carry out a <b>Search</b> for the customer |  |
| 4    | Click the <b>Appointments</b> icon         |   |

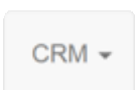
## 3.5.5. Text Reminders

### Overview

Text Messaging is a paid for element of the **CRM Module** and needs to be activated by your Solution Provider.

Text messaging can send a text message to your customer, either confirming a new appointment, a change in the appointment, or the cancellation of the appointment. These options can be activated or deactivated as needed, and are sent within 5 minutes of the appointment being created, amended or cancelled on the Portal or the Register.

### Accessing Text Reminders

| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |  |
| 2    | Click <b>Message Settings</b>    |  |

### Text Message Types

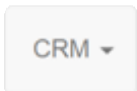
There are two types of Text Message bundles available, these being Monthly and Pay as You Go, both come in a variety of sizes. For more information on the various bundles and pricing, please speak to



your Solution Provider.

## Text Message Settings

- By default, on activation of text messaging, all settings are set to **Off** and need to be individually switched on and set to your requirements.
- The text message body is limited to 160 characters per message. Consequently, if the message body is greater than 160 characters, this will count as multiple messages.
- See the section on “**Message Tokens**” below for a detailed explanation of the available tokens that can be used within the body of the text message.

| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |    |
| 2    | Click <b>Message Settings</b>    |    |
| 3    | Set your message requirements    |                                                                                     |
| 4    | Click <b>Save</b>                |  |

- **From:** This will be the text message header and will display as “From” on the text message. This is typically your store name, and is limited to eleven (11) alphanumeric characters. Spaces are not supported. For example, if your store name is “Sandi’s Hair Salon” you could set this to “SandiSalon”
- **Send Appointment Confirmation:** Setting this to **Yes** will send a text message on creation of an appointment.
- **Send Appointment Change:** Setting this to **Yes** will send a message to the customer whenever a change is made to the appointment. Some of the options are optional and need to be activated by selecting the check box.
- **Send Appointment Reminder:** Setting this to **Yes** will send a reminder text message to the customer within the time frame selected from the dropdown.
- **Send Second Appointment Reminder:** Setting this to **Yes** will send a second reminder text message to the customer within the time frame selected from the dropdown.
- **Send Appointment Cancellations:** Setting this to **Yes** will send a text message on the cancellation of an appointment.

- **Send Birthday Greeting:** Setting this to **Yes** will send a text message to the customer on their birthday. Note, this will only occur if the customers date of birth is present in their details.

## Message Tokens

Message Tokens allows you to customise the text message to include information like the customer's name, etc.

\* Tokens are valid for all message types except for the Customer Birthday Greeting. In this instance, only the customer First name and Surname are valid.

\* The token must be enclosed in square brackets and are case sensitive.

- **First Name:** [customerFirstName]
- **Surname:** [customerLastName]
- **Date of Appointment:** [appointmentDate]
- **Time of Appointment:** [appointmentStartTime]
- **Appointment Duration:** [appointmentDuration]
- **Type of Appointment:** [appointmentType]
- **Store:** [storeName]
- **First Name of Staff Member:** [clerkFirstName]
- **Surname of Staff Member:** [clerkLastName]
- **Resource used for the Appointment:** [appointmentResource]

## Example Text Reminder

\* The example below contains 121 characters, so will only cost 1 text message from your available text message bundle.

An example of creating a Text message body is as follows:

Hello [customerFirstName]. Confirming your appointment at our [storeName] store on [appointmentDate] at [appointmentStartTime] with [clerkFirstName] for a [appointmentType].

When sent, the Text Message will read like this;

Hello Michelle. Confirming your appointment at our Poole store on 2016-12-10 at 10:00 with Julie for a Cut and Highlight.

## Viewing Text Message Usage

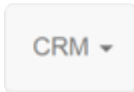
Viewing text message usage is done through Reports. For more information, see the chapter on [Merchant Text Statement Report](#).

## View Remaining Text Messages

Depending on the type of Text Message bundle you have purchased, these are billed on a month to month or ad-hoc basis. For more information, speak to your Solution Provider.

\* For Monthly Text Messages, those not used within a specific month cannot be carried over and will be lost.

\* If you find that the bundle that you have purchased is disproportionate to your needs, speak to your Solution Provider to make the necessary changes.

| Step | Instruction                            | Operation                                                                            |
|------|----------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar       |   |
| 2    | Click <b>Message Settings</b>          |  |
| 3    | Scroll down to the bottom of the page. |                                                                                      |

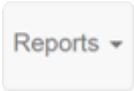
## 3.6. Reports



### Overview

The Reports function of the Web Portal gives you access to real time information pertaining to the activities of the Devices (Register's) and your Stock Movements. This function can filter between Dates, Stores, Departments, Devices and Suppliers. You can also can export this data to an Excel Sheet for emailing or sharing within your company.

## Accessing the Reports

| Step | Instruction                        | Operation                                                                         |
|------|------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click “Reports” on the menu bar    |  |
| 2    | Click on the required report group | <b>For example</b> , Operational                                                  |

From here you can select the type of report, and apply filters such as Dates, Stores, Departments, Devices or Suppliers.

|                               |                                                                                     |
|-------------------------------|-------------------------------------------------------------------------------------|
| Date Selection Dropdown       |    |
| Time Zone Selection Dropdown  |   |
| Store Selection Dropdown      |    |
| Department Selection Dropdown |  |
| Device Selection Dropdown     |  |
| Suppliers Selection Dropdown  |  |

## Date Ranges

The Date selections available to you are:

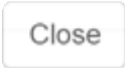
- **Today:** This will be today’s date.
- **Time Zone:** You can select a Time Zone for your store, if the Store is not in the same Time Zone as your Merchant.
- **Yesterday:** This will be yesterday’s date.
- **Daily:** This will activate a calendar from where you can select a specific date.
- **Weekly:** This will activate a calendar from where you can select a date from when you want the report to begin. The Portal will then add seven days which will be the end date of the report.
- **Monthly:** This will activate a calendar from where you can select an entire month.
- **Yearly:** This will activate a calendar from where you can select an entire year.
- **Range:** This will activate two calendars from where you can select both a date and time range.

## Report Filters

This allows you to individually select Stores, Devices, Departments or Suppliers.

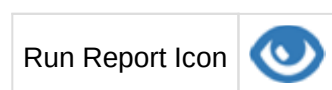
\* With the Department selection dropdown, if you select a top-level department, all departments associated with that top level will also be included in the report. This means that the report will “Drill Down” from whichever department level you select.

\* With the Device selection option, only one device or all devices can be selected. This version of the Portal does not allow the selection of multiple devices.

| Step | Instruction                                                       | Operation                                                                           |
|------|-------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Selected</b> .... (Store, Device, Department, Suppliers) |                                                                                     |
| 2    | Click the <b>Add</b> Icon next to the Item you wish to Add        |   |
| 3    | Click <b>Close</b>                                                |  |

## Running Reports

After you have applied your date and filters, select the type of report you wish to look at by clicking on the **Run** report icon. See [Available Reports](#)



## Exporting Reports

All reports can be exported to an XLS file that can be opened in Excel or any program capable of opening an XLS document.



### 3.6.1. Available Reports

There are four groups of reports that are available to select, each containing specific reports depending

on the area of information you are looking for;

\* The new style reports have the same information that the Legacy Reports have, but are structured in such a way as to allow better filtering of the information when exporting the data into an Excel spreadsheet.

- **Legacy Reports** – These are the old-style reports. *(Please only use the Legacy Reports for sales data up to 31st January 2017)*
- **Operational Reports** – These reports pertain the operational aspects of the business.
- **Sales Reports** – These are the reports that sales within your store affect.
- **Stock Reports** – Reports for the control of stock within your store.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Operational Reports](#)
- [Sales Reports](#)
- [Stock Reports](#)

## 3.6.1.1. Operational Reports

### Overview

This section details the reports found within the Operational Reports group.

- **Adjustment Report:** The Adjustment Report displays both a summary of all adjustments made to sales and a breakdown of those adjustments by transaction.
  - If the Departments Filter is used, then the report will exclude Transaction Discounts.
- **AIM Export Report:** The AIM Export Report is used to export the sales data from the portal so that it can be imported into an AIM System.
  - This report is only available on request. Please speak to your solution provider for more information.
- **Cancel / Void Sale Report:** The Cancel / Void Sale Report will list all transactions that were either cancelled or voided on the Register.
- **Cashing Up Report:** The Cashing Up report will give you all the End of Day transactions that have been carried out.
- **Customer Transaction Report:** The Customer Transaction Report will display all transaction information that has been linked to a customer through either the Portal or through transactions carried out on the Client. (Register)
- **Merchant Text Statement Report:** The Merchant Text Statement report will display information

on the text messages you have sent over the last six months.

- This report is used for customers who are using the Customer Relationship Management module and have purchased a text message bundle.
- **No Sale Report:** The No Sale Report will give you a list displaying each time the No Sale button on the Register was used by a Staff Member.
- **Paid In and Paid Out Report:** The Paid In-Out Report will list all the transactions that were carried out using the Paid In or Paid Out function of the Register. The report is split into a summary of the transactions, followed by a detailed list of the transactions.
- **Refund Report:** The Refund Report will list all refunds carried out from your selected stores.
- **Tax Report:** The Tax Report displays the value of the Net sales broken down into the various Tax levels registered in your store, and gives you a summary of the Net Sales by Card and Cash transactions on those Tax levels.
- **Tender Note Report:** The Tender Note Report is used to list all notes that were added to a Tender. These are from the notes added when Other Tenders require a note to be added.
- **Timekeeping Report:** The Timekeeping report displays the Clocking In and Out times of Staff Members.
- **Transaction Report:** The Transaction Report lists all the transactions carried out by the Register in the given period. This report is useful when searching for a specific transaction when a query arises or when you are looking for information that is not contained within any of the other reports.
  - Due to the amount of the data that is contained in this report, it might take a minute or two to run and display the results, and is limited to 10 000 lines of information.

## 3.6.1.2. Sales Reports

---

### Overview

This section details the reports found within the Sales Reports group.

- **Department Product Report:** This report is like the \*Department Report\* but will list the individual products sold within each selected department.
  - With the Department selection dropdown, if you select a top-level department, all departments associated with that top level will also be included in the report. This means that the report will “Drill Down” from whichever department level you select.
- **Department Report:** The Department report will give you the departmental totals of all products sold under that department.
  - With the Department selection dropdown, if you select a top-level department, all departments associated with that top level will also be included in the report. This means that the report will “Drill Down” from whichever department level you select.
- **Hourly Report:** The Hourly report will display the store's Net Sales and number of transactions per hour over a 24-hour period, and display that information as a percentage allowing you to easily determine the busiest trading times within your store.

- **Product Profitability Report:** The Product Profitability Report will give you a summary of the products that you have sold and their sales value. In addition, it will also give you the value of the blended markup and margin based on the current buy price value and net sales values.
- **Product Report:** The Product Report will give you a summary of the products that you have sold and their sales value. It includes additional information such as refund amounts and values, the reorder limit and the additional associated product data.
- **Sales Report:** The Sales Report will give you a breakdown of the Sales, Refund and Paid In-Out activities of your selected stores. When selecting a date range, the report will display the results on a day to day basis.
- **Shift Report:** The Shift Report will generate a synopsis of your sales transactions, much like the report generated on the Register itself.
- **Staff Department Report:** The Staff Department Report is like the **Department Report** except it displays the information on a Staff Member by Staff Member level.
  - With the Department selection dropdown, if you select a top-level department, all departments associated with that top level will also be include in the report. This means that the report will “Drill Down” from whichever department level you select.
- **Staff Product Report:** The Staff Product Report displays the Sales totals of the selected Staff Members and lists their total product sales and refunds individually.
- **Staff Report:** The Staff Report will give you both a summary and a breakdown of the Sales, Refund and Paid In/Out activities of the Staff Members within your stores.
- **Supplier Report:** The Supplier report will give you a breakdown of all sales by each supplier(s).
- **Supplier Product Report:** The Supplier Product Report will give you a break down of all products sold by supplier, listed in Date then Supplier order.
- **Top 20 Report:** The Top 20 Report will show a combined list of the top performing Stores, Products and Staff Members and are arranged with the best performing listed at the top.
  - This report will also include any Stores; Products or Staff Members that have either been deleted or removed from your Web Portal database. This insures the accuracy of the data being displayed.

### 3.6.1.3. Stock Reports

---

#### Overview

This section details the reports found within the Stock Reports group.

- **Low Level Stock Report:** The Low-Level Stock report will generate a list of products that have reached or gone below its reorder limit.
- **Stock Movement Report:** The Stock Movement Report will list all stock movements that were either carried on on the Portal or through the Register
  - The Report will not report on any stock movements done through normal transactions like Sales or Refunds.



- **Stock Report:** The Stock Report will give you a list of all products within your stores and display the associated data for those products.
  - Any product that has an available quantity of “0” will be **excluded** from the report.

## 3.6.2. Dashboard

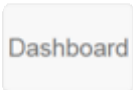


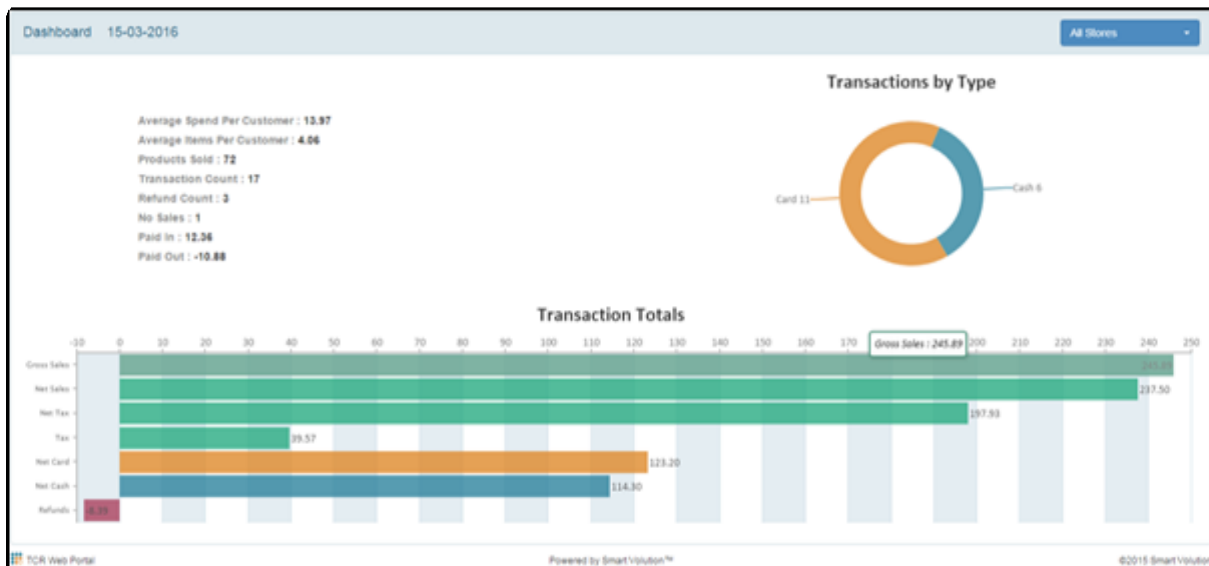
### Overview

The Dashboard is a visual report that gives you a snapshot of all the trading activities for all your stores, tills and departments in real time.

 You can view the dashboard information for all your stores, or for a specific store by clicking on the store selector dropdown menu and selecting the store.

### Accessing the Dashboard

| Step | Instruction                            | Operation                                                                           |
|------|----------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Dashboard</b> in the menu bar |  |
| 2    | Select All stores or specific store    |  |



## 3.7. Stock

### Overview

The Stock function of the Web Portal allows you add, edit or delete stock items that you sell within your stores. There are two categories: **Departments** and **Products**.

- **Departments** are categories used to group products together, and each department can have many sub departments.
- **Products** are the physical items that are sold in your store. For example, the Department **Dairy** contains the products **milk** and **cream**.

This chapter covers the Stock traded from the Stores within the Merchant.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Departments](#)
- [Products](#)
- [Product and Print Groups](#)
- [Suppliers](#)
- [Transfers](#)

## 3.7.1. Departments



### Overview

This chapter will cover the topics of creating, editing, deleting and viewing the products within the department.

- The Portal has a Import and Export function that will allow you to quickly Add, or Edit your departments. For more information, see the [Import and Export](#) Section in this manual.

### Accessing Departments

| Step | Instruction                        | Operation |
|------|------------------------------------|-----------|
| 1    | Click <b>Stock</b> in the Menu Bar |           |
| 2    | Click <b>Departments</b>           |           |

### Creating Departments

When you create a **Department**, the system will automatically create an associated **Department Product**. This allows you to have a miscellaneous sales ability when you need to manually enter a price for an item that has not yet been created on the Portal, letting you associate the sale to the correct Department.

For Core licenses, skip step 6. This is a Plus Register feature.

| Step | Instruction                                                                        | Operation                   |
|------|------------------------------------------------------------------------------------|-----------------------------|
| 1    | Click <b>New Department</b>                                                        |                             |
| 2    | Enter the <b>Department Name</b> (Required)                                        | <b>For Example, "Dairy"</b> |
| 3    | Select a <b>Parent Department</b> if required by clicking on the dropdown control. |                             |

|   |                                                                            |                                                                                         |
|---|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| 4 | Enter the <b>Department Code</b> (Required)                                | A number to identify the department to the Register.                                    |
| 5 | Enter the <b>Tax Code(s)</b> from the dropdown list. (Required)            | The tax code(s) will be used to create the associated Department Product.               |
| 6 | Select if the Department should be show in the <b>Plus Product Browser</b> | <div> <input type="checkbox"/> No           <input type="checkbox"/> Yes         </div> |
| 7 | Click <b>Save</b>                                                          | <div>Save</div>                                                                         |



You can select multiple tax codes for the Department Product if required, by selecting all that apply.

## Editing Departments

This is used to make changes within the **Department**, such as changing the name, the parent department, description, department code or image.

| Step | Instruction                | Operation       |
|------|----------------------------|-----------------|
| 1    | Click the <b>Edit</b> Icon |                 |
| 2    | Make the necessary changes |                 |
| 3    | Click <b>Save</b>          | <div>Save</div> |

## Viewing Department Products

This will list all the products associated to a specific Department.

| Step | Instruction                        | Operation |
|------|------------------------------------|-----------|
| 1    | Click the <b>Product List</b> Icon |           |

## Deleting a Department

This will allow you to delete a **Department**.



The Portal will not allow you to delete a Department if there are still **Child Departments**

or **Products** contained within the Department you are trying to delete. You will first need to either move or delete these Child Departments and Products.

**!** Deleting a Department is a permanent action, and cannot be undone.

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.7.2. Products



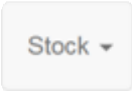
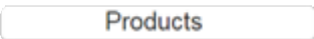
### Overview

The Products are the actual physical items that you sell within your store, and are created, edited and deleted with this function.

**\* When creating a department, the system would have automatically generated an associated product for the Department. This is to allow miscellaneous transactions to be carried out when a product has not been added to the product list yet, but still allows the product to be sold as a miscellaneous item.**

- The Portal has a Import and Export function that will allow you to quickly Add, Edit or Delete your products. For more information, see the [Import and Export](#) section in this manual.
- For information on how to create Products that have **List Modifiers** please see this section in the [Step-By-Step](#) guide.
- For information on how to create Products that have **Product Modifiers** please see this section in the [Step-By-Step](#) guide.

## Accessing Products

| Step | Instruction                        | Operation                                                                         |
|------|------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Products</b>              |  |

## Creating Products

| Step                           | Instruction                                                                                | Operation                                                                                                                                                                                                                                                             |                               |                                     |                                |                          |                         |                                     |
|--------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|-------------------------------------|--------------------------------|--------------------------|-------------------------|-------------------------------------|
| 1                              | Click <b>New Product</b>                                                                   | <div>New Product</div>                                                                                                                                                                                                                                                |                               |                                     |                                |                          |                         |                                     |
| 2                              | Enter the <b>Product Name</b> (Required)                                                   | <b>For Example</b> , “Full Cream Milk”                                                                                                                                                                                                                                |                               |                                     |                                |                          |                         |                                     |
| 3                              | Enter the <b>SKU Number</b> (Required)                                                     | <b>For Example</b> , “10001” or “A10001”                                                                                                                                                                                                                              |                               |                                     |                                |                          |                         |                                     |
| 4                              | Enter the <b>Barcode</b> (Optional)                                                        |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| 5                              | Select the <b>Department</b> from the dropdown list (Required)                             |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| 6                              | Select a <b>Price Type</b> from the dropdown list (Required)<br>See below for explanations |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| 7                              | Select if the Product will be allowed for <b>EBT</b> payment                               | <div>NoYes</div>                                                                                                                                                                                                                                                      |                               |                                     |                                |                          |                         |                                     |
| 8                              | Enter the <b>Price Excluding Tax</b> (Required)                                            | <b>For Example</b> “1.25”                                                                                                                                                                                                                                             |                               |                                     |                                |                          |                         |                                     |
| 9                              | Select the <b>Tax Level(s)</b> from the Options List (Required)                            | <table><tr><td>Reduced Rate (ReducedRate) 5%</td><td><input type="checkbox"/></td></tr><tr><td>Standard Tax (StandardTax) 20%</td><td><input type="checkbox"/></td></tr><tr><td>Zero Rate (ZeroRate) 0%</td><td><input type="checkbox"/></td></tr></table>            | Reduced Rate (ReducedRate) 5% | <input type="checkbox"/>            | Standard Tax (StandardTax) 20% | <input type="checkbox"/> | Zero Rate (ZeroRate) 0% | <input type="checkbox"/>            |
| Reduced Rate (ReducedRate) 5%  | <input type="checkbox"/>                                                                   |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| Standard Tax (StandardTax) 20% | <input type="checkbox"/>                                                                   |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| Zero Rate (ZeroRate) 0%        | <input type="checkbox"/>                                                                   |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| 10                             | Enter the <b>Base Commission</b> as a percentage. (Optional)                               | <b>For example</b> , 10 (Do not put the % suffix)                                                                                                                                                                                                                     |                               |                                     |                                |                          |                         |                                     |
| 11                             | Select an <b>Image</b> for the product (Optional)                                          | <div>Press to Select or Drop File</div>                                                                                                                                                                                                                               |                               |                                     |                                |                          |                         |                                     |
| 12                             | Chose the required <b>Item Modifiers</b>                                                   | <table><tr><td>Coffee-Size (COFFSIZE)</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Coffee-Strength (COFFSTRN)</td><td><input type="checkbox"/></td></tr><tr><td>Coffee-Extras (COFFEXT)</td><td><input checked="" type="checkbox"/></td></tr></table> | Coffee-Size (COFFSIZE)        | <input checked="" type="checkbox"/> | Coffee-Strength (COFFSTRN)     | <input type="checkbox"/> | Coffee-Extras (COFFEXT) | <input checked="" type="checkbox"/> |
| Coffee-Size (COFFSIZE)         | <input checked="" type="checkbox"/>                                                        |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| Coffee-Strength (COFFSTRN)     | <input type="checkbox"/>                                                                   |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| Coffee-Extras (COFFEXT)        | <input checked="" type="checkbox"/>                                                        |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |
| 13                             | Select if the Item Modifier will automatically <b>Launch</b> or not                        | <div>NoYes</div>                                                                                                                                                                                                                                                      |                               |                                     |                                |                          |                         |                                     |
| 14                             | Select whether the Product will earn <b>Loyalty Points</b>                                 | <div>NoYes</div>                                                                                                                                                                                                                                                      |                               |                                     |                                |                          |                         |                                     |
| 15                             | Fill in the rest of the fields as needed (Optional)                                        |                                                                                                                                                                                                                                                                       |                               |                                     |                                |                          |                         |                                     |

|    |                   |                                                                                     |
|----|-------------------|-------------------------------------------------------------------------------------|
| 16 | Click <b>Save</b> |  |
|----|-------------------|-------------------------------------------------------------------------------------|

\* If creating multiple price lists, on each price list dialog, repeat steps 8 and 9 for each list. For more information on this, see the chapter on [Creating Price Lists](#).

\* For more information on List Modifiers, see the chapter on [List Modifiers](#).

## Explanation to Product Types

- **Container:** Use this option if the Product is a “Container” of products to be sold as Fixed Measure Products (see below for explanation.) For example, The Container would be “Beer Barrel” and the Fixed Measure Product would be “Beer 1 Pint” or “Beer 1/2 Pint”.
- **Fixed Measure:** Use this option when creating products that are to be sold from a “Container” such as Beer from a Beer Barrel.
- **Manual:** Use this option if the price of the product needs to be entered manually on the Register, such as in the case of weighted items, or variable priced products.
- **Regular:** Use this option if the product has a specific price.
- **Department:** This option is auto generated by the system when it creates Products from the creation of Departments. It has the same effect as the Manual type.
- **Measured:** Use this option to setup a product that uses Units of Measure (OUM).

## Editing Products

This allows you make changes to the product, such as when a price change must be made.

\* The SKU number that was entered when the product was created cannot be edited as this is unique to the product.

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |
| 2    | Make the necessary changes |                                                                                     |

|   |                   |                                                                                   |
|---|-------------------|-----------------------------------------------------------------------------------|
| 3 | Click <b>Save</b> |  |
|---|-------------------|-----------------------------------------------------------------------------------|

## Duplicating Products

This allows you to Duplicate a product.

 When duplicating a product, certain data is not duplicated and needs to be manually entered. Such as the SKU number!

| Step | Instruction                     | Operation                                                                         |
|------|---------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Duplicate</b> Icon |  |
| 2    | Adjust the Required information |                                                                                   |
| 3    | Click <b>Save</b>               |  |

## Disable and Enable Products

This allows you either Deactivate a product which means it will no longer be available to sell on the Register, or to Reactivate it, bringing it back onto the sales list. This function is handy when certain products are only available at certain times of the year such as the Christmas Season.

 Deactivating does not delete the product.

| Step | Instruction                                                                 | Operation                                                                             |
|------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click the <b>Disable</b> Icon                                               |  |
| 2    | The product will now be greyed out and no longer available on the Register. |                                                                                       |
| 3    | Click the <b>Enable</b> Icon                                                |  |
| 4    | The product will now be re-enabled and available on the Register.           |                                                                                       |

 When Disabling or Enabling products, the Register must be updated to reflect these changes. For more information, see the chapter on [Updating the Register](#).



## Deleting a Product

This will allow you to permanently Delete a product from your product list.

**!** Deleting a product is a permanent action and cannot be reversed. If you wish to deactivate the product rather than deleting it, see the section above on **Enabling and Disabling Products**.

**\*** If the product forms part of a Suspended Transaction or is in a Transfer Container, the Portal will not allow you to make the deletion.

| Step | Instruction                  | Operation                                                                          |
|------|------------------------------|------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |   |
| 2    | Click <b>Yes</b>             |  |

### 3.7.2.1. Stock Levels

#### General

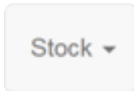
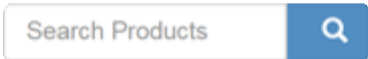
The Stock Adjustments function of the Web Portal allows you to change the stock quantities of the products you sell, either across all or selected stores. This information will automatically be carried down to the Register.

\*There are two types of adjustments,

- An Absolute Adjustment where you completely change the stock total, and
- An Increment / Decrement adjustment where you increase or decrease the stock total.
- The Increment / Decrement method can be used at any time during the day, whereas the Absolute Adjustment should not be used while any Registers are in use.
  - **Absolute:** Setting the stock level to a specific total. (Current Level to X)
  - **Increment:** Increasing the current stock level by a specific amount. (Current Level +X)
  - **Decrement:** Reducing the current stock level by a specific amount. (Current Level –X)

## Manually Adjusting the Stock Levels

Manually adjusting a stock level allows you to quickly change the stock level of a single product in a store or stores.

| Step | Instruction                                                                                | Operation                                                                             |
|------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                                                         |    |
| 2    | Click <b>Products</b>                                                                      |     |
| 3    | Enter the <b>Product Name</b> in the search box                                            |     |
| 4    | Click the <b>Search</b> button                                                             |    |
| 5    | Click the <b>Adjustments</b> Icon                                                          |    |
| 6    | Select the store where you wish to make the adjustment by clicking on the <b>Edit</b> Icon |                                                                                       |
| 7    | Enter the adjustment as;<br>Absolute:<br>Increment:<br>Decrement:                          | 5<br>+5<br>-5                                                                         |
| 8    | Click <b>Adjust</b>                                                                        |  |

### 3.7.3. Product and Print Groups

#### Overview

The Product and Print Groups allows you to group multiple Products under one **Group** for use in setting up your Secondary Printers. You can select any product from any department and group them together to form the Product and Print Group.

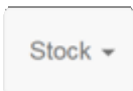
- **For example**, in a Restaurant environment you might have various stations where a Customer's Order needs to be printed;
  - Your first Print Group could be called **Main Bar** and include some or all of the products in the department called **Beer, Wine and Spirits**. So each time any of those products are ordered by a customer, they will automatically printout at the Bar printer.
  - Your Second Print Group could be called **Main Kitchen** and include some or all of your products in the department called **Lunch Time Menu Items**. So each time any of those

products are ordered by a customer, they will automatically printout at the Main Kitchen printer.

In the above example, if the Customer ordered a Beer and a Burger, the following receipts would then Print on either Tendering or Suspending the Transaction.

1. The **Customer Receipt** on the **Primary Printer** (If Tendered)
2. The **Bar Receipt** for the **Beer** (If Tendered or Suspended)
3. The **Kitchen Receipt** for the **Burger** (If Tendered or Suspended)

## Accessing Product and Print Groups

| Step | Instruction                            | Operation                                                                         |
|------|----------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar     |  |
| 2    | Click <b>Products and Print Groups</b> |  |

## Creating Product and Print Groups

| Step | Instruction                                           | Operation                                                                             |
|------|-------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>New Product or Print Group</b>               |   |
| 2    | Enter the * Product and Print Groups Name* (Required) | <b>For Example, "Bar Printer"</b>                                                     |
| 3    | Enter the Code* (Required)                            | <b>For Example, "BARPRT"</b>                                                          |
| 4    | Enter a <b>Description</b> (Optional)                 |                                                                                       |
| 5    | Select <b>YES</b> for Print Group                     |   |
| 6    | Click <b>Save</b>                                     |  |

- **Note:** Under Step 3, the Code must be unique for all Groups Created, and cannot be the same as an existing Department Code.

## Editing Product and Print Groups

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |

|   |                            |                                                                                   |
|---|----------------------------|-----------------------------------------------------------------------------------|
| 2 | Make the necessary changes |                                                                                   |
| 3 | Click <b>Save</b>          |  |

- **Note:** Once created, the Print Group cannot be changed to a Product Group and this control will be hidden in Edit Mode.

## Deleting a Product and Print Group

This will allow you to permanently Delete a Product and Print Group from your list.

- **Deleting a Product and Print Group is a permanent action and cannot be reversed.**
- **If the Product and Print Group forms part of a Printer Configuration or has Products associated to it, the Portal will not allow you to make the deletion.**

| Step | Instruction                  | Operation                                                                           |
|------|------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |   |
| 2    | Click <b>Yes</b>             |  |

### 3.7.3.1. Managing Products in a Group\_ (Manually)

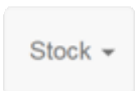
---

#### Overview

This section will explain how to Manually Add, Edit and Remove Products from a Product and Print Group.

- The Portal has a Import and Export function that will allow you to quickly Add, or Edit the Products in the Group. For more information, see the [Import and Export](#) Section in this manual.

#### Accessing Product and Print Groups

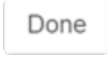
| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |

|   |                                        |                          |
|---|----------------------------------------|--------------------------|
| 2 | Click <b>Products and Print Groups</b> | Product and Print Groups |
|---|----------------------------------------|--------------------------|

## Accessing Products in the Product and Print Group

| Step | Instruction                         | Operation                                                                         |
|------|-------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Product Items</b> icon |  |

## Adding Products

| Step | Instruction                          | Operation                                                                           |
|------|--------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Add Products</b>            |    |
| 2    | Enter the <b>Search Criteria</b>     | <b>For Example;</b> Hamburger                                                       |
| 3    | Click <b>Search</b>                  |    |
| 4    | Click on the <b>Required Product</b> |                                                                                     |
| 5    | Click <b>Add</b>                     |  |
| 6    | Click <b>Done</b>                    |  |

- **To add more products, repeat steps 2-5 before using step 6**

## Editing Products in the Group

| Step | Instruction                | Operation                                                                           |
|------|----------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> icon |  |
| 2    | Make the necessary changes |                                                                                     |
| 3    | Click <b>Save</b>          |  |

## Removing Products from the Group

- **Removing a Product from the Group is a permanent action, and cannot be undone.**
- **Removing a Product from the Group only only removes it from the Group and does not delete the product from the Portal, .**

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Remove</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.7.4. Suppliers



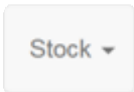
### General

From the Suppliers page, the full details for each supplier can be managed. It is possible to view all products provided by a specific supplier in one table. This allows for quicker access to a list of supplied products, especially if the products are listed under different departments.

When running reports this allows for a single supplier to be selected, but the report to contain all associated products. This is far quicker than selecting many departments to build a specific report.

- The Portal has a Import and Export function that will allow you to quickly Add, Edit or Delete your Suppliers. For more information, see the [Import and Export](#) Section in this manual.

### Accessing Suppliers

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click on <b>Suppliers</b>          |  |

### Creating Suppliers

| Step | Instruction                               | Operation                                                                            |
|------|-------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click on <b>New Supplier</b>              |  |
| 2    | Enter the <b>Supplier Name</b> (Required) | <b>For example, "SV Wholesalers"</b>                                                 |

|   |                                      |                                                                                   |
|---|--------------------------------------|-----------------------------------------------------------------------------------|
| 3 | Enter a unique <b>Supplier Code</b>  | For example, "AW01"                                                               |
| 4 | Complete the other fields as needed. |                                                                                   |
| 5 | Click on <b>Save</b>                 |  |

## Editing Suppliers

| Step | Instruction                   | Operation                                                                         |
|------|-------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click on the <b>Edit</b> icon |  |
| 2    | Make the necessary changes    |                                                                                   |
| 3    | Click on <b>Save</b>          |  |

## Viewing Supplier Products

| Step | Instruction                       | Operation                                                                           |
|------|-----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click on the <b>Products</b> icon |  |

## Deleting Suppliers

 If there are products already listed under the Supplier, you will not be able to delete the supplier until those products have been removed.

 Deleting a Supplier is a permanent action, and cannot be undone.

| Step | Instruction                     | Operation                                                                           |
|------|---------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click on the <b>Delete</b> icon |  |
| 2    | Click on <b>Yes</b>             |  |

## 3.7.5. Transfers



### General

The Stock Transfer function allows you to transfer stock from one store to another, and keeps track of the date and times stock containers are created, dispatched and received as well as any notes added to either the container or product itself.

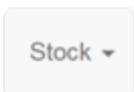
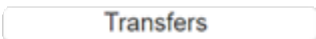
There are two methods available to facilitate the transfer of stock from one store to another.

- The first method is to create a stock transfer container which can include an unlimited number of products, and
- To transfer a stock item directly from the product list. This method allows products to be added to an already existing 'Open' container or to create a complete new container.

Each method will be explained in more detail in the subsequent sections.

The Stock Transfer page lists all existing Transfer Containers, including those that are Open, In Transit, Received, Completed and Lost.

### Accessing the Stock Transfer page

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Transfers</b>             |  |

### Creating a Transfer Container

#### From the Transfer Menu

| Step | Instruction                     | Operation                                                                            |
|------|---------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>New Stock Transfer</b> |  |



|   |                                                              |                                      |
|---|--------------------------------------------------------------|--------------------------------------|
| 2 | Change the <b>Transfer Identifier</b> if needed              |                                      |
| 3 | Select the <b>Transfer From Store</b> from the dropdown list | Please select an option (Required) ▼ |
| 4 | Select the <b>Transfer To Store</b> from the dropdown list   | Please select an option (Required) ▼ |
| 5 | Add Notes if needed                                          |                                      |
| 6 | Click <b>Next</b>                                            | Next                                 |

After the Transfer Container has been created, the Portal will display another dialog that will allow you to begin adding products to the Container. At this point, you can either begin to add the products, or click on the **Done** button.

## From the Products List

| Step | Instruction                                                  | Operation                            |
|------|--------------------------------------------------------------|--------------------------------------|
| 1    | Click <b>Stock</b> on the Menu Bar                           | Stock ▼                              |
| 2    | Click <b>Products</b>                                        | Products                             |
| 3    | Carry out a <b>Search</b> for the product                    | Search Products 🔍                    |
| 4    | Click on the <b>Transfer</b> Icon                            | ↔                                    |
| 5    | Select the <b>Transfer From Store</b> from the dropdown list | Please select an option (Required) ▼ |
| 6    | Select the <b>Transfer To Store</b> from the dropdown list   | Please select an option (Required) ▼ |
| 7    | Enter the <b>Quantity</b> to transfer                        | <b>For example, 20</b>               |
| 8    | Add Notes if needed                                          |                                      |
| 9    | Click <b>Add</b>                                             | Add                                  |

After you have clicked on the **Add** button, the portal will return you to the product list. You are still able to add or adjust products in this Transfer Container if required, or transfer the container at this point.

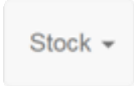
## Editing the Products in a Container

Editing the products in an existing container can only be carried out if the Transfer Container is in **Open** status. Once the container has been dispatched (In Transit), this option becomes unavailable.



On clicking on the Stock Transfer Details icon, the portal will display the list of all products within the transfer container.

## Adding Products to an Open Container

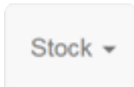
| Step | Instruction                                                                          | Operation                                                                             |
|------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                                 |    |
| 2    | Click on <b>Transfers</b>                                                            |    |
| 3    | Locate the transfer in the list and click on the <b>Stock Transfer Details</b> icon. |    |
| 4    | Click on <b>Add Products</b>                                                         |    |
| 5    | Carryout a <b>Search</b> for the product                                             |     |
| 6    | Select the product from the dropdown list                                            |    |
| 7    | Enter the transfer <b>Quantity</b>                                                   | <b>For example, 250</b>                                                               |
| 8    | Add any notes if needed                                                              |                                                                                       |
| 9    | Click <b>Add</b>                                                                     |  |

- The product will now be added to the selected open container.
- To add another product at this point, repeat from step 5.
- Once you have finished adding the required products, click on the **Done** button. The portal will close the dialog and will return you to the Stock Transfers page.

## Deleting Products from an Open Container

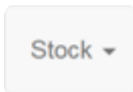
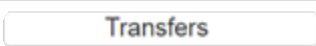
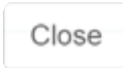


Deleting a product from an open container is a permanent action, and cannot be undone.

| Step | Instruction                          | Operation                                                                             |
|------|--------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b> |  |
| 2    | Click on <b>Transfers</b>            |  |

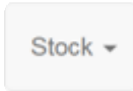
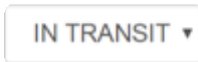
|   |                                                                                      |                                                                                     |
|---|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 3 | Locate the transfer in the list and click on the <b>Stock Transfer Details</b> icon. |  |
| 4 | Locate the stock item in the list and click on the <b>Delete</b> icon                |  |
| 5 | Click <b>Yes</b>                                                                     |  |

## Adjusting Products Quantities in an Open Container

| Step | Instruction                                                                         | Operation                                                                             |
|------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                                |    |
| 2    | Click on <b>Transfers</b>                                                           |    |
| 3    | Locate the transfer in the list and click on the <b>Stock Transfer Details</b> icon |    |
| 4    | Locate the stock item on the list and click on the <b>Edit</b> icon                 |   |
| 5    | Adjust the stock <b>Quantity</b> as needed                                          |                                                                                       |
| 6    | Click <b>Save</b>                                                                   |  |
| 7    | Click <b>Close</b>                                                                  |  |

## Dispatching the Container

Dispatching or changing to “In Transit” will decrement the stock from the sending store, and prevent any changes being made to either stock items or their quantities.

| Step | Instruction                                                             | Operation                                                                             |
|------|-------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                    |  |
| 2    | Click on <b>Transfers</b>                                               |   |
| 3    | Locate the transfer in the list and click on the <b>Edit</b> icon       |  |
| 4    | Select <b>In Transit</b> from the <b>Transfer Status</b> drop down menu |  |

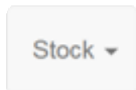
|   |                      |                                                                                     |
|---|----------------------|-------------------------------------------------------------------------------------|
| 5 | Click on <b>Save</b> |  |
|---|----------------------|-------------------------------------------------------------------------------------|

## Receiving the Container

When the transfer container arrives at the receiving store, the transfer should be set to a status of **Received**. This will denote that the container has been received, but not affect any stock levels yet. There are two methods to receiving the stock from a transfer container;

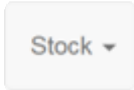
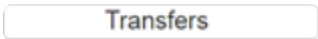
- Receive the stock directly after changing the transfer status to “**Received**” or
- Resuming a received container after saving and closing the transfer before (marking the transfer as completed).
- In both instances, the following rules apply;
  - After changing the status or resuming the received transfer, the portal will display the list of products in the container and their quantities.
  - You can scroll through the list and mark the quantities as Accepted, Rejected or Lost by clicking into the required cell and entering the value.
  - Pressing either **Enter** or **Tab** will move between the cells.
  - Clicking on **Save** at any point will save your changes, but will remain on the container product page.
  - Clicking on **Close** at any point will return you to the main stock transfers page.
  - While the transfer container is still in Received status, you can return to the container at any time and continue to adjust the receiving quantities as needed.

### Receiving the Container by changing the Transfer Status

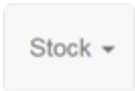
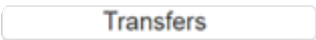
| Step | Instruction                                                           | Operation                                                                             |
|------|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                  |  |
| 2    | Click on <b>Transfers</b>                                             |   |
| 3    | Locate the transfer in the list and click on the <b>Edit</b> icon     |  |
| 4    | Select <b>Received</b> from the <b>Transfer Status</b> drop down menu |  |
| 5    | Click on <b>Next</b>                                                  |  |

## Resume Receiving the Container after clicking Close.

\* Using the Resume feature to receive the stock, can only be used once the Stock Transfer status has been changed to “Received”

| Step | Instruction                                                                         | Operation                                                                           |
|------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                                |  |
| 2    | Click on <b>Transfers</b>                                                           |  |
| 3    | Locate the transfer in the list and click on the <b>Stock Transfer Details</b> icon |  |

## Changing the Stock Transfer Status

| Step | Instruction                                                       | Operation                                                                             |
|------|-------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                              |    |
| 2    | Click on <b>Transfers</b>                                         |   |
| 3    | Locate the transfer in the list and click on the <b>Edit</b> icon |  |
| 4    | Select the new <b>Status</b> from the dropdown menu               | <b>For example, “In Transit”</b>                                                      |
| 5    | Click on <b>Save</b>                                              |  |

## Stock Transfer Status Types

There are various transfer statuses for the transferring of stock. Below is a brief explanation of those statuses.

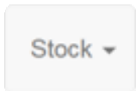
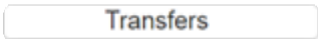
- **Open:** On creation of the Stock Transfer Container, the status will be set to “Open”. At this point, products can be added or deleted, and quantities are adjustable. While in this status, no stock will be decremented from the sending store.
- **Cancelled:** The transfer is cancelled but the stock items will remain in the container. The transfer can be changed back to “Open” and the transfer resumed from that point.
- **In Transit:** At this point, no changes can be made to either the products in the container or their

quantities. The stock from the dispatching store will now be decremented. The stock in the receiving store will be annotated with the quantities but will not count towards its total stock quantity. This is used in the Stock report to show that a certain store is expecting stock from a transfer. It will be marked in brackets as (+150)

- **Lost:** If the transfer container is marked as “Lost”, the stock levels in the receiving store will not increase and the annotation (+150) will be removed from the Stock report. To write the stock off as permanently lost, change the status to received but mark the receiving amounts as lost.
- **Received:** When the container arrives at the receiving store, marking the transfer as received will only indicate it as such. The stock quantities will not be incremented at this point. This allows the receiving store time to inspect the stock before finally accepting the transfer as completed.
- **Complete:** Marking the stock transfer as complete will close off the transfer and the stock levels of the receiving store will be incremented at this point. No changes can then be made to the transfer, except to add notes.

## Completing Stock Transfers

Changing the status of the stock transfer to **Completed** will close the transfer and editing will no longer be possible. The stock in the receiving store will be incremented at this point.

| Step | Instruction                                                                          | Operation                                                                             |
|------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | On the Main Menu, click <b>Stock</b>                                                 |  |
| 2    | Click on <b>Transfers</b>                                                            |  |
| 3    | Locate the transfer in the list and click on the <b>Stock Transfer Details</b> icon. |  |
| 4    | Click on the <b>Complete</b> button                                                  |  |
| 5    | Click <b>Yes</b>                                                                     |  |

## Using Transfer Filters

- **Date Selection:** Click on this to select certain dates or date ranges.
  - **Today:** This will be today's date.
  - **Yesterday:** This will be yesterday's date.
  - **Daily:** This will activate a calendar from where you can select a specific date.
  - **Weekly:** This will activate a calendar from where you can select a date from when you want

the report to begin. The Portal will then add seven days which will be the end date of the report.

- **Monthly:** This will activate a calendar from where you can select an entire month.
- **Yearly:** This will activate a calendar from where you can select an entire year.
- **Last 30 Days:** This is the default selection and will include all transactions from today and 30 days into the past.
- **Range:** This will activate two calendars from where you can select a date range.
- **Time Zone Selection:** Select the required Time Zone from the dropdown. You would not normally need to adjust this.
- **From Stores Filter:** This allows you to select all stores, or stores individually.
- **To Stores Filter:** This allows you to select all stores, or stores individually.
- **Status Filter:** This allows you to either select all available statuses or an individual status.
- **Reload:** Forces the results to reload once you have made any changes with the available filters.

| Filter                | Button                       | Usage                                        |
|-----------------------|------------------------------|----------------------------------------------|
| Date Selection Button | Last 30 Days ▾               | Select the Date                              |
| Time Zone Button      | GMT (Greenwich Mean Time) ▾  | Select the Time Zone                         |
| From Stores Filter    | From Stores (All Selected) ▾ | Select the From Store(s)                     |
| To Stores Filter      | To Stores (All Selected) ▾   | Select the To Store(s)                       |
| Status Filter         | Status (All Selected) ▾      | Select the Status                            |
| Reload Data Button    | Reload                       | Used after changing any of the above filters |

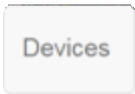
## 3.8. Devices



### General

The Devices are the actual Register Tablets that the Merchant will use within their store(s).

## Accessing Devices

| Step | Instruction                          | Operation                                                                         |
|------|--------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Devices</b> on the Menu Bar |  |
| 2    | Click <b>New Device</b>              |  |

## Creating Devices

This allows you to create a Device (Register) for use by a store.

 Before you can create a Device, you must have already created a Store, a Product Browser, and a Profile.

| Step   | Instruction                                                          | Operation                                                                                                                                                                                                                                                                                                                                                                                              |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
|--------|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|------------------------------------|---------------------------------------------|--------|-----------------------------------------------|----------------------------------|--------|-----------------------------------------------|----------------------------------|
| 1      | Click <b>New Device</b>                                              |                                                                                                                                                                                                                                                                                                                   |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 2      | Select the <b>Type of License</b>                                    | Core or Plus                                                                                                                                                                                                                                                                                                                                                                                           |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 3      | Enter the <b>Device Name</b> (Required)                              | <b>For example, "Till 1"</b>                                                                                                                                                                                                                                                                                                                                                                           |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 4      | Select the <b>Store</b> from the dropdown list. (Required)           |                                                                                                                                                                                                                                                                                                                                                                                                        |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 5      | Select the <b>Profile</b> from the dropdown list. (Required)         |                                                                                                                                                                                                                                                                                                                                                                                                        |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 6      | Select the <b>Product Browser</b> from the dropdown list. (Required) |                                                                                                                                                                                                                                                                                                                                                                                                        |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 7      | Select the <b>Assigned Printers</b> for the Device                   | <table border="1"> <tr> <td>EscPOS</td><td><input type="checkbox"/> Secondary</td><td><input checked="" type="checkbox"/> Primary</td></tr> <tr> <td>Star 1</td><td><input checked="" type="checkbox"/> Secondary</td><td><input type="checkbox"/> Primary</td></tr> <tr> <td>Star 2</td><td><input checked="" type="checkbox"/> Secondary</td><td><input type="checkbox"/> Primary</td></tr> </table> | EscPOS | <input type="checkbox"/> Secondary | <input checked="" type="checkbox"/> Primary | Star 1 | <input checked="" type="checkbox"/> Secondary | <input type="checkbox"/> Primary | Star 2 | <input checked="" type="checkbox"/> Secondary | <input type="checkbox"/> Primary |
| EscPOS | <input type="checkbox"/> Secondary                                   | <input checked="" type="checkbox"/> Primary                                                                                                                                                                                                                                                                                                                                                            |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| Star 1 | <input checked="" type="checkbox"/> Secondary                        | <input type="checkbox"/> Primary                                                                                                                                                                                                                                                                                                                                                                       |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| Star 2 | <input checked="" type="checkbox"/> Secondary                        | <input type="checkbox"/> Primary                                                                                                                                                                                                                                                                                                                                                                       |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |
| 8      | Click <b>Save</b>                                                    |                                                                                                                                                                                                                                                                                                                   |        |                                    |                                             |        |                                               |                                  |        |                                               |                                  |

- \*For Step 7, this option is only available if you are using [Multiple Printers](#).

## Editing a Device

This will allow you to make changes to your device such as changing the Product Browser.



\* The Enrolment Code is a system generated code and is not editable.

| Step | Instruction                | Operation                                                                         |
|------|----------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Edit</b> Icon |  |
| 2    | Make the necessary changes |                                                                                   |
| 3    | Click <b>Save</b>          |  |

## Duplicating a Device

This allows you to duplicate a Device.

| Step | Instruction                     | Operation                                                                           |
|------|---------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click the <b>Duplicate</b> Icon |   |
| 2    | Click <b>Save</b>               |  |

## Disabling and Enabling a Device

This allows you to disable or re-enable device. Disabling a device does not delete it, but temporarily prevents it from being used.

\* If you disable a device, the Register that is enrolled to it will be locked. On re-enabling a device, the Register will need to be Re-Enrolled following the procedure outlined in our Register Manual.

| Step | Instruction                                                    | Operation                                                                             |
|------|----------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click the <b>Disable</b> Icon                                  |  |
| 2    | The device will now be greyed out showing that it is disabled. |                                                                                       |
| 3    | Tab the <b>Enable</b> Icon                                     |  |
| 4    | The Device will now be re-enabled.                             |                                                                                       |

# Deleting a Device

This will allow you to delete a device from your list.

Deleting a device is a permanent action and cannot be undone.

| Step | Instruction                  | Operation                                                                         |
|------|------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>Delete</b> Icon |  |
| 2    | Click <b>Yes</b>             |  |

## 3.9. Step-By-Step Guide

### Overview

The section will set out the various steps needed to create and use the Features available to the Register that are not specifically mentioned in the Portal Manual.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Commissions](#)
- [Importing and Exporting](#)
- [Multiple Printers](#)
- [Product List Modifiers](#)
- [Product Price Modifiers](#)
- [Secondary Printer](#)
- [Timekeeping](#)
- [Transaction Suspending](#)
- [Time Scheduled Price Lists](#)

## 3.9.1. Commissions

### Overview

 This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

Commissions are calculated based on two criteria:

- The Product Base Commission (Percentage)
- The Staff Member Commission Rate (Modifier)

The Base Commission percentage is set within the product and can be any value between 0 and 100, and the Commission Rate is set within the Staff Member, and is used as a multiplier of the product commission.

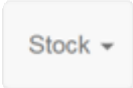
The calculation used for the commission is, Base Commission of product sold multiplied by the Commission rate.

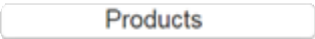
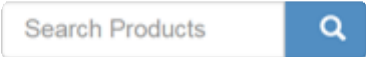
- **Example:** The selling price of the item is £5.00, the Base Commission is 10%, and the Commission rate is 2; Therefore, the calculation will be (10% of £5.00) × 2, giving a commission of £1.00
- **Example:** The selling price of the item is £5.00, the Base Commission is 10%, and the Commission rate is 0.5; Therefore, the calculation will be (10% of £5.00) × 0.5, giving a commission of £0.25

Setting either the Base Commission percentage or the Commission rate to 0 will disable the base commission either on the product or the Staff Member respectively.

### Setting the Base Commission Rate

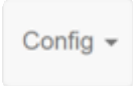
The Base Commission is set within the Product.

| Step | Instruction                        | Operation                                                                            |
|------|------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> on the Menu Bar |  |

|   |                                                     |                                                                                     |
|---|-----------------------------------------------------|-------------------------------------------------------------------------------------|
| 2 | Click <b>Products</b>                               |   |
| 3 | Locate the product using the <b>Search</b> function |   |
| 4 | Click the <b>Edit</b> icon                          |  |
| 5 | Enter the <b>Base Commission</b> rate               | <b>For example, 10</b> (Do not use the % suffix)                                    |
| 6 | Click <b>Save</b>                                   |   |

## Setting the Staff Commission Rate

The Commission Rate is set within the Staff Member

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> on the Menu Bar |    |
| 2    | Click <b>Staff</b>                  |  |
| 3    | Click the <b>Edit</b> Icon          |  |
| 4    | Enter the <b>Commission Rate</b>    | <b>For example, 0.5</b>                                                             |
| 5    | Click <b>Save</b>                   |  |

## Calculating / Obtaining the Commissions Payable

The commission values are obtained through various reports.

- The **Staff Department Report**
- The **Staff PLU Report**
- The **Staff Report**

 See the chapter on [Reports](#) for more information.

## 3.9.2. Importing and Exporting



### Overview

The Portal's export and import feature gives you the ability to rapidly add, edit or delete large amounts of data, saving you valuable time. The exporting and importing of data is done much the same way for all parts of the Portal, and this section will cover these areas in more details.

- The Portal will export the information in XLS format which can then be edited with any program that can open these types of files, such as Microsoft Excel.
  - All exported data can be found in your computers **Downloads** folder and will be named according to the data exported followed by the date and time of the export. More information on the file name will be given in each section.
- The Portal can import the information in two formats, namely XLS (used for exporting) and CSV or Comma Separated Values.
  - During the Import process, the Portal will validate the data in the file, and will display information on any invalid data or errors that are found. These issues will be displayed in Red and will need to be corrected before the import will take place.
    - To obtain more information on the error, simply hover your mouse over the **Red Highlighted** field, and the Portal will detail what the error is.
- Currently, data can be exported and imported in the following areas;
  - Department Information
  - Product Information
  - Product and Print Groups
  - Suppliers
  - Customers
- The data from your generated Reports, can also be exported.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Customers](#)
- [Departments](#)

- [Products](#)
- [Product and Print Groups](#)
- [Stock Quantities](#)
- [Suppliers](#)

## 3.9.2.1. Customers

### Overview

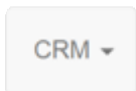
This section describes the processes of Importing and Exporting your Customers information.

- Exported files will download into your computer's Download Folder and will be named **Customers** followed by the date and time of the download.
  - **For example:** [Customers\\_2019-03-08\\_10-45-01.xls](#)

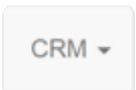
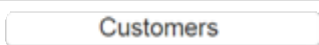
### Downloading a Blank Customer Template

This gives you the ability to **Create** or **Add** new Customers on mass.

- Any Custom Fields that you have created except for the customer image field will be included in the file. For more detailed information see the chapter on [Customer Fields](#)

| Step | Instruction                                  | Operation                                                                            |
|------|----------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar             |   |
| 2    | Click <b>Customers</b>                       |  |
| 3    | Click on the <b>Download Template</b> button |  |

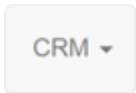
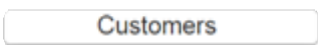
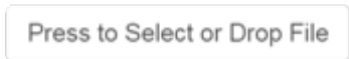
### Exporting your Current Customer List

| Step | Instruction                      | Operation                                                                           |
|------|----------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar |  |
| 2    | Click <b>Customers</b>           |  |
| 3    | Click the <b>Export</b> button   |  |

|   |                                |                                                                                   |
|---|--------------------------------|-----------------------------------------------------------------------------------|
| 4 | Click <b>Download XLS File</b> |  |
|---|--------------------------------|-----------------------------------------------------------------------------------|

## Importing Customers

- When the Current Customer List is exported, the **Import Records** field will default to **No**. To import any changes or deletions, this must first be changed to **Yes**.

| Step | Instruction                                                          | Operation                                                                             |
|------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>CRM</b> on the Menu Bar                                     |    |
| 2    | Click <b>Customers</b>                                               |    |
| 3    | Click the <b>Import Records</b> button                               |    |
| 4    | Drag and drop the file onto the button, or click to select the file. |    |
| 5    | Click <b>Import Customers</b>                                        |   |
| 6    | Click <b>Close</b>                                                   |  |

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Customers** followed by the date and time of the download.
  - For example:** **Customers\_2019-03-08\_10-45-01.xls**
- The following are explanations on how to complete the various fields in the file:
  - These are the default fields found on the Portal. If you have deactivated any of the fields, they will not appear in the file.
  - The sort order of the fields is also linked to the sort order on the Portal.

### Default

| Field                  | Format           | Example       |
|------------------------|------------------|---------------|
| <b>Import Record :</b> | <b>Yes or No</b> | <b>Yes</b>    |
| <b>Customer Code :</b> | Alphanumeric     | <b>ABC123</b> |
| <b>First Name :</b>    | Alphanumeric     | <b>ABC123</b> |
| <b>Last Name :</b>     | Alphanumeric     | <b>ABC123</b> |

|                                     |                                  |                             |
|-------------------------------------|----------------------------------|-----------------------------|
| <b>Address Line 1 :</b>             | Alphanumeric                     | <b>ABC123</b>               |
| <b>Address Line 2 :</b>             | Alphanumeric                     | <b>ABC123</b>               |
| <b>Town / City :</b>                | Alphanumeric                     | <b>ABC123</b>               |
| <b>Region :</b>                     | Alphanumeric                     | <b>ABC123</b>               |
| <b>Country :</b>                    | <b>See Notes Below</b>           | <b>United Kingdom</b>       |
| <b>Post Code / ZIP Code :</b>       | Alphanumeric                     | <b>ABC123</b>               |
| <b>Primary Phone :</b>              | Numeric                          | <b>123</b>                  |
| <b>Secondary Phone :</b>            | Numeric                          | <b>123</b>                  |
| <b>Email :</b>                      | <b>See Notes Below</b>           | <b>customer@noemail.com</b> |
| <b>Gender Identity :</b>            | <b>See Notes Below</b>           | <b>Male</b>                 |
| <b>Preferred Store :</b>            | <b>See Notes Below</b>           | <b>1234</b>                 |
| <b>Preferred Staff Member :</b>     | <b>See Notes Below</b>           | <b>12345678</b>             |
| <b>Date of Birth :</b>              | YYYY-MM-DD                       | <b>2019-03-11</b>           |
| <b>Accept Reminders :</b>           | <b>Yes or No : True or False</b> | <b>Yes</b>                  |
| <b>Accept Marketing :</b>           | <b>Yes or No : True or False</b> | <b>No</b>                   |
| <b>Accept 3rd Party Marketing :</b> | <b>Yes or No : True or False</b> | <b>True</b>                 |
| <b>Delete :</b>                     | <b>See Notes Below</b>           | <b>Delete</b>               |

## Notes

- **Country** : The Country must be a Country that is registered on the Portal.
- **Email** : The email must follow the correct email address formatting.
- **Gender Identity** : This is from a System List called "Gender Identity" under Lists. The entered value must equal an entry in that System List. (Default: Male, Female, Prefer not to say)
- **Preferred Store** : Set as a 4 digit number of your store. This can be found in the menu item Config / Stores and under the Store Number Column.
- **Preferred Staff Member** : Set as a 4-8 digit number of your Staff member. This can be found in the menu item Config / Staff and under the Staff Code Column. The Staff Member must be linked to the Preferred Store.
- **Delete** : Entering the word **Delete** in this column will delete the customer from your database. Leave this field blank if you do not want to delete the customer.

## Custom Fields

- If you have created any [Custom Fields](#) in the Portal the following section explains their use and format.

| Field | Format | Example |
|-------|--------|---------|
|-------|--------|---------|



|                  |                                  |                         |
|------------------|----------------------------------|-------------------------|
| <b>Date</b>      | YYYY-MM-DD                       | <b>2019-03-11</b>       |
| <b>Date Time</b> | YYYY-MM-DD HH:MM                 | <b>2019-03-11 10:15</b> |
| <b>Decimal</b>   | '##.##                           | <b>12.34</b>            |
| <b>Integer</b>   | '##                              | <b>1234</b>             |
| <b>List</b>      | <b>See Notes Below</b>           | <b>Allergic to Nuts</b> |
| <b>Text</b>      | Alphanumeric                     | <b>ABC123</b>           |
| <b>Time</b>      | HH:MM                            | <b>10:15</b>            |
| <b>Yes/No</b>    | <b>Yes or No : True or False</b> | <b>Yes</b>              |

## Notes

- **List** : You must have already created a set of List Items and the value in this field must match one of those List Items. For more information see the section on creating [Lists and List Items](#).

## Limitations

The number of characters allowed in each field for the importation file is limited to the following:

| <b>Field</b> | <b>Character Limit</b> |
|--------------|------------------------|
| First Name   | 100                    |
| Last Name    | 100                    |
| Address 1-2  | 200                    |
| City         | 200                    |
| Region       | 200                    |
| Country      | 200                    |
| Postcode     | 200                    |
| Phone 1-2    | 50                     |
| Email        | 200                    |

## 3.9.2.2. Departments

### Overview

This section describes the processes of Importing and Exporting your Department information.

- Exported files will download into your computer's Download Folder and will be named

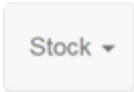
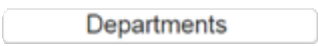
**Departments** followed by the date and time of the download.

- **For example:** `Departments_2019-03-08_10-45-01.xls`

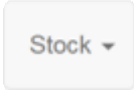
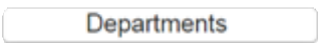
- **Due to the complex rules associated with deleting a department, deletion can only be done manually and not through the Import functionality.**

## Exporting a Blank Department Template

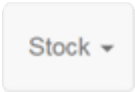
This gives you the ability to **Create** or **Edit** new Departments on mass.

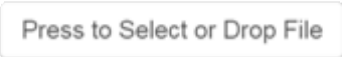
| Step | Instruction                        | Operation                                                                          |
|------|------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |   |
| 2    | Click <b>Departments</b>           |   |
| 3    | Click <b>Download Template</b>     |   |
| 4    | Click <b>Download XLS File</b>     |  |

## Exporting the Current Department List

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Departments</b>           |  |
| 3    | Click <b>Export Records</b>        |  |
| 4    | Click <b>Download XLS File</b>     |  |

## Importing Departments

| Step | Instruction                        | Operation                                                                            |
|------|------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Departments</b>           |  |

|   |                                                                                                    |                                                                                    |
|---|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 3 | Click <b>Import Records</b>                                                                        |  |
| 4 | Drag and drop the file onto the File Import button, or click the button to select the import file. |  |
| 5 | Click on <b>Import Departments</b>                                                                 |  |

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Departments** followed by the date and time of the download.
  - For example:** Departments\_2019-03-08\_10-45-01.xls

### Default

| Field                                 | Format                 | Example       |
|---------------------------------------|------------------------|---------------|
| <b>Import Record :</b>                | <b>Yes or No</b>       | <b>Yes</b>    |
| <b>Depart Code :</b>                  | Alphanumeric           | <b>ABC123</b> |
| <b>Parent Dept Code :</b>             | Alphanumeric           | <b>ABC123</b> |
| <b>Dept Name :</b>                    | Alphanumeric           | <b>ABC123</b> |
| <b>Dept Path :</b>                    | <b>See Notes Below</b> |               |
| <b>Dept Product Tax Code :</b>        | <b>See Notes Below</b> | <b>TAX01</b>  |
| <b>Description :</b>                  | Alphanumeric           | <b>ABC123</b> |
| <b>Show in Plus Product Browser :</b> | <b>Yes or No</b>       | <b>Yes</b>    |

### Notes

- Dept Path :** This is for information only and can be left blank. **Note:** This column will not be present in the Template file.
- Dept Product Tax Code:** The Tax Code for the associated Department Product that will be created when the Import is executed. The Tax Code must be valid.

### Field Explanations

- Import Record:** This column instructs the import function to either import the row entry when set to **YES**, or to ignore the row entry when to **NO**. When downloading the Department list, all row entries will be recorded as NO. You will need to change this to YES if you are editing any information regarding the department listed in the row.
- Department Code:** This is a required field and each code must be unique.

- **Parent Department Code:** This is an optional field. If the Department you are creating is a child or sub department, enter the code of the parent department here.
  - For example, the parent department is Aquatics with the code of AQU01; you add a sub department of Fish with the code of AQU01-11. In this field, you will add the code AQU011.
- **Department Name:** This is a required field and is the name of the Department you are creating.
- **Department Path:** This is an information only field and can be left blank when you are creating or editing departments. When you export the department list, the system will insert the path information. It allows you to follow the Department tree that the sub-department is allocated to. For example, "Aquatics | Fish"
- **Department Product Tax Code:** This is the Tax Code(s) for the associated Department Product that will be created when the department is created. This value is only needed when creating departments and can be left blank if you are editing the department. You can add multiple codes here by separating each code with a space. For example, TAX1 TAX2 TAX3
- **Description:** This is an optional field and you can enter a description of the Department if you require it.
- **Show in Plus Product Browser:** Enter **YES** if the Department is to be shown in the Plus Product Browser, or **NO** or leave blank if not. (Plus Register license only)

| Import Record | Dept Code | Parent Dept Code | Dept Name        | Dept Product Tax Code (Create Only) | Dept Path (Information Only) | Description | Show In Plus Product Browser |
|---------------|-----------|------------------|------------------|-------------------------------------|------------------------------|-------------|------------------------------|
| Yes           | AQU01     |                  | Aquatics         | Tax1                                |                              |             | Yes                          |
| Yes           | AQU01-11  | AQU01            | Fish             | Tax1 Tax2                           | Aquatics                     |             | No                           |
| Yes           | AQU01-12  | AQU01            | Fish Accessories | Tax1 Tax2 Tax3                      | Aquatics                     |             | No                           |
| No            | AQU01-13  | AQU01            | Fish Food        | Tax1                                | Aquatics                     |             |                              |

- Row 1: Import this record, with code AQU01, is a parent department with the name Aquatics.
- Row 2: Import this record, with code AQU01-11, is a sub department (child) of Aquatics.
- Row 3: Import this record, with code AQU01-12, is a sub department (child) of Aquatics.
- Row 4: Don't import this record.

## Limitations

The number of characters allowed in each field for the importation file is limited to the following:

| Field | Character Limit |
|-------|-----------------|
|-------|-----------------|

|             |     |
|-------------|-----|
| Name        | 200 |
| Description | 500 |
| Code        | 50  |

## 3.9.2.3. Products

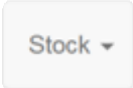
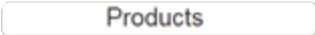
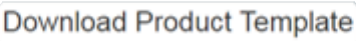
### Overview

This section describes the processes of Importing and Exporting your Product information.

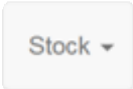
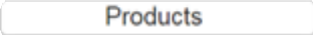
- Exported files will download into your computer's Download Folder and will be named **Products**, followed by the **Price Book Name**, then by the date and time of the download.
  - For example: **Products\_Base\_2019-03-08\_10-45-01.xls**

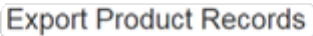
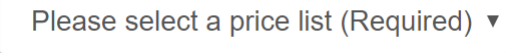
### Exporting a Blank Product Template

This gives you the ability to **Create**, **Edit** or **Delete** Products on mass.

| Step | Instruction                            | Operation                                                                            |
|------|----------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar     |   |
| 2    | Click <b>Products</b>                  |  |
| 3    | Click <b>Download Template</b>         |  |
| 4    | Click <b>Download Product Template</b> |  |
| 5    | Click <b>Download XLS File</b>         |   |

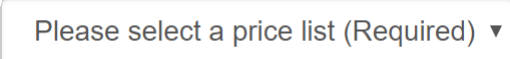
### Exporting the Current Product List

| Step | Instruction                        | Operation                                                                             |
|------|------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Products</b>              |   |
| 3    | Click <b>Export Records</b>        |   |

|   |                                                     |                                                                                     |
|---|-----------------------------------------------------|-------------------------------------------------------------------------------------|
| 4 | Click <b>Export Product Records</b>                 |   |
| 5 | Select the <b>Price List</b> from the dropdown menu |   |
| 6 | Click <b>Export</b>                                 |  |
| 7 | Wait for Progress Dialog to complete                |                                                                                     |
| 8 | Click "Download XLS File"                           |   |

- If you are not using multiple [Price Lists](#), skip steps **5** and **6**.

## Importing Products

| Step | Instruction                                          | Operation                                                                            |
|------|------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Import Records</b>                          |    |
| 2    | Click <b>Import Product Records</b>                  |   |
| 3    | Select the <b>Price List</b> from the dropdown menu. |  |
| 4    | Click <b>Press to Select or Drop File</b>            |  |
| 5    | Choose the CSV or XML file and click <b>Open</b>     |                                                                                      |
| 6    | Click <b>Import Products</b>                         |  |

- If you are not making use of [Price Books](#), skip step **3**.

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Products**, followed by the **Price Book Name**, then by the date and time of the download.
  - For example: **Products\_Base\_2019-03-08\_10-45-01.xls**

### Default

| Field                  | Format           | Example       |
|------------------------|------------------|---------------|
| <b>Import Record :</b> | <b>Yes or No</b> | <b>Yes</b>    |
| <b>Product Name :</b>  | Alphanumeric     | <b>ABC123</b> |
| <b>SKU :</b>           | Alphanumeric     | <b>ABC123</b> |

|                                           |                        |                  |
|-------------------------------------------|------------------------|------------------|
| <b>Barcode :</b>                          | Numeric                | <b>123456789</b> |
| <b>Dept Code :</b>                        | Alphanumeric           | <b>ABC123</b>    |
| <b>Product Group Codes :</b>              | <b>See Notes Below</b> | <b>KITCHEN</b>   |
| <b>Product Type :</b>                     | <b>See Notes Below</b> | <b>Regular</b>   |
| <b>Container SKU :</b>                    | Alphanumeric           | <b>ABC123</b>    |
| <b>Quantity :</b>                         | Numeric                | <b>123</b>       |
| <b>Measure :</b>                          | <b>See Notes Below</b> | <b>KG</b>        |
| <b>Allow EBT Tender :</b>                 | <b>Yes or No</b>       | <b>Yes</b>       |
| <b>Buy Price :</b>                        | Integer                | <b>1.23</b>      |
| <b>Sell Price :</b>                       | Integer                | <b>1.23</b>      |
| <b>Inclusive of Tax :</b>                 | <b>Yes or No</b>       | <b>Yes</b>       |
| <b>Tax Code :</b>                         | Alphanumeric           | <b>TAX01</b>     |
| <b>Base Commission :</b>                  | Integer                | <b>1.23</b>      |
| <b>Use Product Modifiers to Up-Sell :</b> | <b>Yes or No</b>       | <b>Yes</b>       |
| <b>List Modifier(s) :</b>                 | <b>See Notes Below</b> | <b>SIZE</b>      |
| <b>Launch Modifier :</b>                  | <b>Yes or No</b>       | <b>Yes</b>       |
| <b>Description :</b>                      | Alphanumeric           | <b>ABC123</b>    |
| <b>Size :</b>                             | Alphanumeric           | <b>ABC123</b>    |
| <b>Style :</b>                            | Alphanumeric           | <b>ABC123</b>    |
| <b>Colour :</b>                           | Alphanumeric           | <b>ABC123</b>    |
| <b>Model :</b>                            | Alphanumeric           | <b>ABC123</b>    |
| <b>Manufacturer :</b>                     | Alphanumeric           | <b>ABC123</b>    |
| <b>Supplier :</b>                         | <b>See Notes Below</b> | <b>SUP0001</b>   |
| <b>Reorder Limit :</b>                    | Numeric                | <b>123</b>       |
| <b>Print Order Receipt :</b>              | <b>See Notes Below</b> | <b>Primary</b>   |
| <b>Custom 1 :</b>                         | Alphanumeric           | <b>ABC123</b>    |
| <b>Custom 2 :</b>                         | Alphanumeric           | <b>ABC123</b>    |
| <b>Custom 3 :</b>                         | Alphanumeric           | <b>ABC123</b>    |
| <b>Custom 4 :</b>                         | Alphanumeric           | <b>ABC123</b>    |
| <b>Custom 5 :</b>                         | Alphanumeric           | <b>ABC123</b>    |
| <b>Earns Loyalty :</b>                    | <b>Yes or No</b>       | <b>Yes</b>       |
| <b>Status :</b>                           | <b>See Notes Below</b> | <b>Disabled</b>  |
| <b>Delete :</b>                           | <b>See Notes Below</b> | <b>Delete</b>    |

## Notes

- **Import Record** :**(Required)** Enter **YES** if you want the product or any changes to be imported, or **NO** if you want the Portal to ignore this line.
- **Product Name** :**(Required)** The name of the product that will appear on the products list and the Register.
- **SKU** :**(Required)** The products unique identification number.
  - For a new product to be created the SKU must not be the same as that for an earlier entry in the import file, or a previously created product. If the SKU matches an earlier entry in the import file, or a previously created product the entry will be an update to the existing product.
- **Barcode** : The Barcode of the Product
- **Dept Code** :**(Required)** The code of the department the product will belong to.
- **Product Group Codes** : are codes used in the Product and Print Groups and can be added as multiple codes separated with a space. See the section on [Product and Print Groups](#) for more information.
  - **For Example:** KIT KIT2 BAR
- **Product Type** :**(Required)** Insert either of the following depending on the Product Type you are creating;
  - Regular – For normal type products
  - Measured – Products that are manually measured by weight, volume or length.
  - Container – Products that contain bulk quantities of the Product to be sold as Fixed Measure Products
  - Fixed Measure – The Product sold as a specific quantity of the Container Product
  - Manual – Products that the Price needs to manually added by the Staff Member on adding to the transaction.
- **Container SKU** : When creating products of type Fixed Measure, enter the Container's SKU number here. (Or leave blank when not creating a Fixed Measure Product)
- **Quantity** : When creating either a UOM or Fixed Measure product, enter the selling quantity here. For example, 0.5 or 500
- **Measure** : The measurement code of either the Container, Fixed Measure, or Measured Product. See below for the full lists of valid codes.
- **Allow EBT Tender** :**(Required)** Enter either **No** if the product does not qualify for EBT tendering,



or **Yes**, if it does.

- **Buy Price** :**(Required)** The price you paid for the product when purchasing from the supplier.
- **Sell Price** :**(Required)** The selling price of the product.
- **Inclusive of Tax** :**(Required)** Either **YES** to indicate that the value entered in the Sell Price includes the tax, or **NO** to indicate that it does not.
- **Tax Code** :**(Required)** The tax code you created that is associated to this product.
  - See [Creating Taxes](#) for the Tax Code creation.
  - You can add multiple Tax Codes here by separating the codes with a space. **For example**, TAX1 TAX2 TAX3
- **Base Commission** :**(Required)** Enter the base commission for the product, or enter "0" for none.
  - For more information, see the chapter on [Base Commissions](#)
- **Use Product Modifiers to Up-Sell** : Enter either **Yes** if the the Product will use Modifiers to upsell, or **No** if it will not.
- **List Modifier(s)** : are the codes associated to that specific product. The List Code must already have been created on the Portal. See the section on [Lists and List Items](#) for more information.
  - You can add multiple List Modifiers here by separating the codes with a space. **For example**, MOD1 MOD2 MOD3
- **Launch Modifier** : Only enter a value in this field if you have added an List Modifier. (See List Modifiers above). Enter **YES** if the Modifier Dialog will launch automatically on adding the product, or **NO** if the Modifier dialog will only display if the product is selected in the Journal.
- **Description** : Free Text field
- **Size** : Free Text field
- **Style** : Free Text field
- **Colour** : Free Text field
- **Model** : Free Text field
- **Manufacturer** : Free Text field
- **Supplier** : is the code associated to the Supplier of the product. See the section on [Suppliers](#) for more information.

- **Reorder Limit** : Enter the value of the Stock Level you want the Product to report on in the Low Level Stock Report.
  - **For example**, If you enter a value of 20, when the stock reaches or goes below 20, it will be reported to you in the **Low Level Stock Report**.
- **Print Order Receipt** :**(Required)** Insert either;
  - **None** for no secondary printing,
  - **Primary Printer** to print on the Primary Printer, or
  - **Secondary Printer** to print of the Secondary Printer.
- **Custom 1** : Free Text field
- **Custom 2** : Free Text field
- **Custom 3** : Free Text field
- **Custom 4** : Free Text field
- **Custom 5** : Free Text field
- **Earns Loyalty** :**(Required)** Enter **YES** if the product forms part of your Loyalty Scheme, or **NO** if it does not.
- **Status** : Insert **Disabled** to disable the Product (Not Delete), **Enabled** or leave blank to Enable the Product.
- **Delete** : Insert **Delete** to permanently delete the product.

## Measurement Symbols

| Type            | Measurement | Symbol |
|-----------------|-------------|--------|
| Imperial Weight | Ounce       | oz     |
| Imperial Weight | Pounds      | lb     |
| Imperial Length | Inches      | in     |
| Imperial Length | Feet        | ft     |
| Imperial Volume | Pints       | pt     |
| Imperial Volume | Gallons     | gal    |
|                 |             |        |
| Metric Weight   | Grams       | g      |
| Metric Weight   | Kilograms   | kg     |
| Metric Weight   | Tonne       | t      |

|                      |              |                |
|----------------------|--------------|----------------|
| <b>Metric Length</b> | Millimetre   | mm             |
| <b>Metric Length</b> | Centimetres  | cm             |
| <b>Metric Length</b> | Metres       | M              |
| <b>Metric Volume</b> | Millilitres  | ml             |
| <b>Metric Volume</b> | Centilitre   | cl             |
| <b>Metric Volume</b> | Litre        | L              |
|                      |              |                |
| <b>Cubic Volume</b>  | Cubic Metres | m <sup>3</sup> |
|                      |              |                |
| <b>Single Units</b>  | Units        | unit           |

## Limitations

The number of characters allowed in each field for the importation file is limited to the following:

| Field         | Character Limit |
|---------------|-----------------|
| SKU           | 100             |
| Barcode       | 100             |
| Name          | 200             |
| Description   | 400             |
| Size          | 100             |
| Style         | 100             |
| Colour        | 100             |
| Manufacturer  | 100             |
| Reorder Limit | 100             |
| Custom 1-5    | 200             |
| Model         | 200             |

### 3.9.2.3.1. Examples

#### Overview

This section will list the fields need to be filled out depending on what Product Type you are creating.

- Only the Required fields will be listed. Optional fields can be filled out at your discretion

## Regular Products

- Bottle Of Soft Drink with the following data;
  - Named as **Acme Soft Drink** with SKU (**SDP1234**)
  - Belongs to the Department “Soft Drinks” with a Department Code of “**SD01**”
  - Does not qualify for Electronic Benefits (**EBT**)
  - Is bought from the Wholesaler for **0.95** and sold **2.99 after Tax** using the standard tax code **TAX01**
  - Staff get paid Commission of **10%** on each item sold.
  - Item will not print on any **Secondary Printer**
  - Customer **qualifies for Loyalty** for this purchase.

| Field                 | Example         |
|-----------------------|-----------------|
| Import Record :       | Yes             |
| Product Name :        | Acme Soft Drink |
| SKU :                 | SDP1234         |
| Dept Code :           | SD01            |
| Product Type :        | Regular         |
| Allow EBT Tender :    | No              |
| Buy Price :           | 0.95            |
| Sell Price :          | 2.99            |
| Inclusive of Tax :    | Yes             |
| Tax Code :            | TAX01           |
| Base Commission :     | 10              |
| Print Order Receipt : | None            |
| Earns Loyalty :       | Yes             |

## Container Products

- **Note:** On creating a Container product, it must be listed before any Fixed Measure Product that will be linked to it, is added to the Import File.
- Container of Soft Drink with the following data:
  - Named as **Acme Soda Fountain Concentrate** with a SKU of **SPC4567**
  - Belongs to the Department “Soft Drinks” with a Department Code of “**SD01**”
  - Has a total quantity of **55 Litres**
  - Is bought from the Wholesaler for **25.99**
  - Item will not print on any **Secondary Printer**

- Customer **qualifies for Loyalty** for this purchase.

| Field                 | Example                        |
|-----------------------|--------------------------------|
| Import Record :       | Yes                            |
| Product Name :        | Acme Soda Fountain Concentrate |
| SKU :                 | SPC4567                        |
| Dept Code :           | SD01                           |
| Product Type :        | Container                      |
| Quantity :            | 55                             |
| Measure :             | L                              |
| Buy Price :           | 25.99                          |
| Print Order Receipt : | None                           |
| Earns Loyalty :       | Yes                            |

## Fixed Measure Products

- Note:** On creating a Fixed Measure product, it must be listed in the Import File after the Container Product that it is linked to.
- Fixed Measure of the Container Product above with the following data:
  - Named as **Acme Soda Fountain Soft Drink** with a SKU of **SPS7890**
  - Belongs to the Department “Soft Drinks” with a Department Code of “**SD01**”
  - Is sold from the Container Acme Soda Fountain Concentrate with a Container SKU of **SPC4567**
  - Is sold in **500ml** quantities
  - Is sold for 3.00 after tax using the Standard tax code of **TAX01**
  - Does not qualify for Electronic Benefits (**EBT**)
  - Item will print at the **Soda Bar** (Secondary Printer)
  - Customer **qualifies for Loyalty** for this purchase.

| Field           | Example                       |
|-----------------|-------------------------------|
| Import Record : | Yes                           |
| Product Name :  | Acme Soda Fountain Soft Drink |
| SKU :           | SPS7890                       |
| Dept Code :     | SD01                          |
| Product Type :  | Fixed Measure                 |
| Container SKU : | SPC4567                       |

|                       |           |
|-----------------------|-----------|
| Quantity :            | 500       |
| Measure :             | ML        |
| Allow EBT Tender :    | No        |
| Sell Price :          | 3.00      |
| Inclusive of Tax :    | Yes       |
| Tax Code :            | TAX01     |
| Base Commission :     | 1.23      |
| Print Order Receipt : | Secondary |
| Earns Loyalty :       | Yes       |

## Measured (UOM) Products

- Measured product that will be priced by the system once the measurement has been added by the Staff Member:
  - Named as **Acme Candy (Loose)** with a SKU of **CAN5225**
  - Belongs to the Department “Sweets and Candy” with a Department Code of **“SAC02”**
  - Is bought from the Wholesaler for **5.99**
  - Is sold for **1.50** after tax per **200 grams** using the Standard tax code of **TAX01**
  - Does not qualify for Electronic Benefits (**EBT**)
  - Staff members will receive 2% commission on sales.
  - Item will not print at the Secondary Printer
  - Customer **qualifies for Loyalty** for this purchase.

| Field              | Example            |
|--------------------|--------------------|
| Import Record :    | Yes                |
| Product Name :     | Acme Candy (Loose) |
| SKU :              | CAN5225            |
| Dept Code :        | SAC02              |
| Product Type :     | Measured           |
| Quantity :         | 200                |
| Measure :          | G                  |
| Allow EBT Tender : | No                 |
| Buy Price :        | 5.99               |
| Sell Price :       | 1.50               |
| Inclusive of Tax : | Yes                |
| Tax Code :         | TAX01              |

|                       |      |
|-----------------------|------|
| Base Commission :     | 2    |
| Print Order Receipt : | None |
| Earns Loyalty :       | Yes  |

## Manual Products

- Manually priced product that will ask the Staff Member to enter the price when added to the basket:
  - Named as **Acme Sherbet \* with a SKU of \*CAN0877**
  - Belongs to the Department “Sweets and Candy” with a Department Code of “**SAC02**”
  - Is bought from the Wholesaler for **9.95**
  - Is sold using the Standard tax code of **TAX01**
  - Does not qualify for Electronic Benefits (**EBT**)
  - Staff members will receive 5% commission on sales.
  - Item will not print at the Secondary Printer
  - Customer **qualifies for Loyalty** for this purchase.

| Field                 | Example      |
|-----------------------|--------------|
| Import Record :       | Yes          |
| Product Name :        | Acme Sherbet |
| SKU :                 | CAN0877      |
| Dept Code :           | SAC02        |
| Product Type :        | Manual       |
| Allow EBT Tender :    | No           |
| Buy Price :           | 9.95         |
| Inclusive of Tax :    | Yes          |
| Tax Code :            | TAX01        |
| Base Commission :     | 5            |
| Print Order Receipt : | None         |
| Earns Loyalty :       | Yes          |

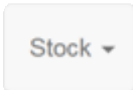
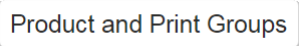
### 3.9.2.4. Product and Print Groups

#### Overview

This section will explain how to Add, Edit and Remove Products from a Product and Print Group using the Portals Export and Import feature.

- Exported files will download into your computer's Download Folder and will be named **Products\_in\_Product\_Group** followed by the **Group Name** and the date and time of the download.
  - For example: **Products\_in\_Product\_Group\_BAR\_2019-03-08\_10-45-01.xls**

## Accessing Products in the Product and Print Groups

| Step | Instruction                            | Operation                                                                         |
|------|----------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar     |  |
| 2    | Click <b>Products and Print Groups</b> |  |
| 3    | Click the <b>Product Items</b> icon    |  |

## Exporting a Blank Product and Print Groups Template

This gives you the ability to **Create**, **Edit** or **Delete** products in the Group on mass.

| Step | Instruction                    | Operation                                                                           |
|------|--------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Download Template</b> |  |
| 2    | Click <b>Download XLS File</b> |  |

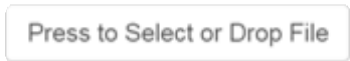
## Exporting the Current Products in the Group

| Step | Instruction                    | Operation                                                                           |
|------|--------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Export Records</b>    |  |
| 2    | Click <b>Download XLS File</b> |  |

## Importing changes into the Group

| Step | Instruction                 | Operation                                                                            |
|------|-----------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Import Records</b> |  |



|   |                                                                                                    |                                                                                    |
|---|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 2 | Drag and drop the file onto the File Import button, or click the button to select the import file. |  |
| 3 | Click on <b>Import Products to Print Group</b>                                                     |  |

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Products\_in\_Product\_Group** followed by the **Group Name** and the date and time of the download.
  - For example: **Products\_in\_Product\_Group\_BAR\_2019-03-08\_10-45-01.xls**

### Default

| Field                  | Format                    | Example       |
|------------------------|---------------------------|---------------|
| <b>Import Record :</b> | <b>Yes or No</b>          | <b>Yes</b>    |
| <b>Product Name :</b>  | Alphanumeric              | <b>ABC123</b> |
| <b>SKU :</b>           | Alphanumeric              | <b>ABC123</b> |
| <b>Remove :</b>        | <b>Yes or Leave Blank</b> | <b>Yes</b>    |

### Field Explanations

- Import Record:** This column instructs the import function to either import the row entry when set to **YES**, or to ignore the row entry when to **NO**. When downloading the Product list, all row entries will be recorded as NO. You will need to change this to YES if you are editing any information regarding the products listed in the row.
- Product Name:** This is only in the current products file and not the template. This field is for information only and can be left blank.
- SKU:** This is a SKU number of the Product you are adding to or removing from the Product or Printer Group. This field is Required.
- Remove:** This is an optional field. Enter the Word **Remove** to remove the product from the Group.

| Import Record | Product Name (Information Only) | SKU    | Remove |
|---------------|---------------------------------|--------|--------|
| No            | Cheese Burger                   | HB0025 |        |
| Yes           | Bacon Burger                    | HB2049 |        |
| Yes           | Fish Burger                     | HB0521 | Remove |

- Row 1: Do not import this record.

- Row 2: Import this record and **Add** the product to the Group
- Row 3: Import this record and **Remove** this product from the Group.

## Limitations

The number of characters allowed in each field for the importation file is limited to the following:

| Field | Character Limit |
|-------|-----------------|
| Name  | 200             |
| SKU   | 50              |

## 3.9.2.5. Stock Quantities

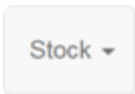
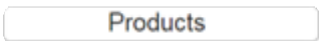
### Overview

This section describes the processes of Importing and Exporting your Stock Quantities information.

- Exported files will download into your computer's Download Folder and will be named **Product\_Stock** followed by the date and time of the download.
  - **For example:** [Product\\_Stock\\_2019-03-08\\_10-45-01.xls](#)

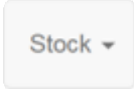
## Exporting a Blank Stock Quantities Template

This gives you the ability to **Edit** the Stock Quantities on mass.

| Step | Instruction                          | Operation                                                                            |
|------|--------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar   |   |
| 2    | Click <b>Products</b>                |   |
| 3    | Click <b>Download Template</b>       |   |
| 4    | Click <b>Download Stock Template</b> |  |
| 5    | Click <b>Download XLS File</b>       |   |

## Exporting the Current Stock Quantities

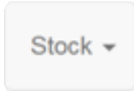
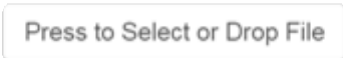
This will export the stock levels of all products across all stores.

| Step | Instruction                          | Operation                                                                          |
|------|--------------------------------------|------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> on the Menu Bar   |   |
| 2    | Click <b>Products</b>                |  |
| 3    | Click <b>Export Records</b>          |   |
| 4    | Click <b>Export Stock Records</b>    |  |
| 5    | Wait for Progress Dialog to complete |                                                                                    |
| 6    | Click <b>Download XLS File</b>       |   |

## Importing Stock Levels

When Importing Stock Levels, please keep in mind that the **Increment / Decrement** method can be used at any time during the day, whereas the absolute adjustment should not be used while any Registers are in use.

- **Absolute:** Setting the stock level to a specific total. (Current Level to X)
- **Increment:** Increasing the current stock level by a specific amount. (Current Level +X)
- **Decrement:** Reducing the current stock level by a specific amount. (Current Level –X)

| Step | Instruction                               | Operation                                                                            |
|------|-------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar        |   |
| 2    | Click <b>Products</b>                     |  |
| 3    | Click <b>Import Records</b>               |  |
| 4    | Click <b>Import Stock Records</b>         |  |
| 5    | Click <b>Press to Select or Drop File</b> |  |
| 6    | Choose the CSV or XML file and “Open”     |                                                                                      |
| 7    | Click <b>Import Stock</b>                 |  |

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Product\_Stock** followed by the date and time of the download.
  - For example: **Product\_Stock\_2019-03-08\_10-45-01.xls**

### Default

| Field                  | Format           | Example                 |
|------------------------|------------------|-------------------------|
| <b>Import Record :</b> | <b>Yes or No</b> | <b>Yes</b>              |
| <b>Product Name :</b>  | Alphanumeric     | <b>ABC123</b>           |
| <b>SKU :</b>           | Alphanumeric     | <b>ABC123</b>           |
| <b>Store :</b>         | Specific         | <b>10 or +10 or -10</b> |

### Field Explanations

- Import Record:** This column instructs the import function to either import the row entry when set to **YES**, or to ignore the row entry when to **NO**.
- Product Name:** This is an optional field which is used for information purposes, and can be left blank. This field is not present in the Template.
- SKU:** The **SKU number of the product**.
- Store:** This field will be named as your Store Name. If you have multiple Stores in your Merchant, all the stores will be listed.
  - Absolute:** Setting the stock level to a specific total. (Current Level to X)
  - Increment:** Increasing the current stock level by a specific amount. (Current Level +X)
  - Decrement:** Reducing the current stock level by a specific amount. (Current Level –X)

| Import Record | Product Name | SKU    | Store 01 | Store 02 | Store 03 |
|---------------|--------------|--------|----------|----------|----------|
| Yes           | Bananas      | FRT001 | 5        | +5       | -5       |
| Yes           | Apples       | FRT002 | 5        | +5       | -5       |
| Yes           | Oranges      | FRT003 | 5        | +5       | -5       |
| No            | Pears        | FRT004 | 5        | +5       | -5       |

- Rows 1-3: Import these records and set Stock Levels as 5 (Absolute) in Store 01, Increase by 5 in Store 02 and Decrease by 5 in Store 03
- Row 4: Don't import this record.

## 3.9.2.6. Suppliers

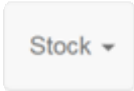
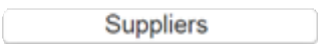
### Overview

This section describes the processes of Importing and Exporting your Suppliers information.

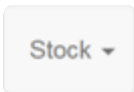
- Exported files will download into your computer's Download Folder and will be named **Suppliers** followed by the date and time of the download.
  - For example: **Suppliers\_2019-03-08\_10-45-01.xls**

### Exporting a Blank Suppliers Template

This gives you the ability to **Create**, **Edit** or **Delete** Suppliers on mass.

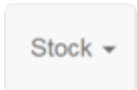
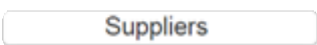
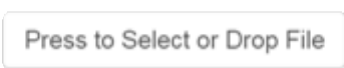
| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |   |
| 2    | Click on <b>Suppliers</b>          |  |
| 3    | Click <b>Download Template</b>     |  |
| 4    | Click <b>Download XLS File</b>     |  |

### Exporting the Current Supplier List

| Step | Instruction                        | Operation                                                                           |
|------|------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click on <b>Suppliers</b>          |  |
| 3    | Click on <b>Export Records</b>     |  |
| 4    | Click <b>Download XLS File</b>     |  |

### Importing Suppliers (Create and Update)

| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                    |                                                                                   |
|---|------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Click <b>Stock</b> in the Menu Bar |  |
| 2 | Click on <b>Suppliers</b>          |  |
| 3 | Click on <b>Import Records</b>     |  |
| 4 | Select the file to import          |  |
| 5 | Click <b>Import Suppliers</b>      |  |
| 6 | Click <b>Close</b>                 |  |

## Working with the Files

- Exported files will download into your computer's Download Folder and will be named **Suppliers** followed by the date and time of the download.
  - For example: **Suppliers\_2019-03-08\_10-45-01.xls**

### Default

| Field                   | Format          | Example              |
|-------------------------|-----------------|----------------------|
| <b>Import Record :</b>  | Yes or No       | Yes                  |
| <b>Supplier Name :</b>  | Alphanumeric    | ABC123               |
| <b>Supplier Code :</b>  | Alphanumeric    | ABC123               |
| <b>Address Line 1 :</b> | Alphanumeric    | ABC123               |
| <b>Address Line 2 :</b> | Alphanumeric    | ABC123               |
| <b>Town / City :</b>    | Alphanumeric    | ABC123               |
| <b>Region :</b>         | Alphanumeric    | ABC123               |
| <b>Post Code :</b>      | Alphanumeric    | ABC123               |
| <b>Country :</b>        | Alphanumeric    | ABC123               |
| <b>Contact Name :</b>   | Alphanumeric    | ABC123               |
| <b>Email :</b>          | See Notes Below | supplier@noemail.com |
| <b>Phone :</b>          | Alphanumeric    | ABC123               |
| <b>Notes :</b>          | Alphanumeric    | ABC123               |
| <b>Delete :</b>         | See Notes Below | Delete               |

## Notes

- **Email** : The email must follow the correct email address formatting.
- **Delete** : Insert **Delete** to permanently delete the Supplier.

## Field Explanations

There are three columns that are required for the import to work correctly; (All other columns are optional and can be left empty!)

- **Import Record**: Enter **YES** if the information contained in that row is to be imported. Enter **NO** if the row is to be skipped.
- **Supplier Name**: The name of the Supplier.
- **Supplier Code**: A unique code associated with the Supplier. This code is used by the system to identify the Supplier in other areas of the Portal.

## Limitations

The number of characters allowed in each field for the importation file is limited to the following:

| Field         | Character Limit |
|---------------|-----------------|
| Supplier Name | 200             |
| Code          | 50              |
| Address 1-2   | 200             |
| City          | 200             |
| Region        | 200             |
| Country       | 200             |
| Postcode      | 200             |
| Phone         | 50              |
| Email         | 200             |
| Contact Name  | 200             |
| Notes         | 500             |

## 3.9.3. Multiple Printers

### Overview

Your Register Solution can be setup to use Multiple Printers that can be used throughout your Store(s) and gives you the ability to assign one printer to several Registers, or to assign one Register to several Printers.

This may be used in environments where information on products that a customer is purchasing needs to be sent to other areas of the Store.

- **For Example,**
  - In a Restaurant you would create a Printer for
    - Printing the Customer Receipt (Primary Printer)
    - Printing to the Bar (Secondary Printer)
    - Printing to the Kitchen (Secondary Printer)

Multiple Printers are not limited to the Food and Beverage industry, but can also be used in Stores where customers pay in one area of the shop, then collect in another area, such as in Catalog Shops.

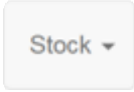
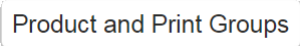
### Creating Multiple Printers

There are several steps needed in order to setup Multiple Printers within your Store(s);

1. Create Printer Groups
2. Add Products to the Printer Group
3. Create Printers in the Printer Configuration
4. Set the Register Profile to Use Advanced Printing
5. Select the Printers in the Devices Settings

### (1) Create Printer Groups

See the section on [Product and Print Groups](#) for more information.

| Step | Instruction                            | Operation                                                                             |
|------|----------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar     |  |
| 2    | Click <b>Products and Print Groups</b> |   |

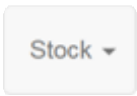
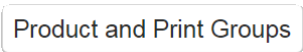
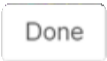


|   |                                                       |                                                                                     |
|---|-------------------------------------------------------|-------------------------------------------------------------------------------------|
| 3 | Click <b>New Product or Print Group</b>               |   |
| 4 | Enter the * Product and Print Groups Name* (Required) | <b>For Example, "Bar Printer"</b>                                                   |
| 5 | Enter the Code* (Required)                            | <b>For Example, "BARPRT"</b>                                                        |
| 6 | Enter a <b>Description</b> (Optional)                 |                                                                                     |
| 7 | Select <b>YES</b> for Print Group                     |   |
| 8 | Click <b>Save</b>                                     |  |

- **Note:** Under Step 5, the Code must be unique for all Groups Created, and cannot be the same as an existing Department Code.

## (2) Add Products to the Printer Group

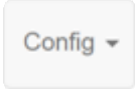
See the section on managing products in a [Product and Print Group](#) for more information.

| Step | Instruction                            | Operation                                                                           |
|------|----------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar     |  |
| 2    | Click <b>Products and Print Groups</b> |  |
| 3    | Click the <b>Product Items</b> icon    |  |
| 4    | Click <b>Add Products</b>              |  |
| 5    | Enter the <b>Search Criteria</b>       | <b>For Example; Hamburger</b>                                                       |
| 6    | Click <b>Search</b>                    |  |
| 7    | Click on the <b>Required Product</b>   |                                                                                     |
| 8    | Click <b>Add</b>                       |  |
| 9    | Click <b>Done</b>                      |  |

- **To add more products, repeat steps 5-8 before using step 9**

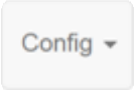
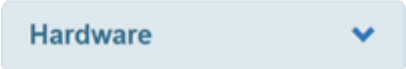
### (3) Create Printers in the Printer Configuration

See the section on creating [Printers](#) for more information.

| Step | Instruction                                              | Operation                                                                             |
|------|----------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar                      |    |
| 2    | Click <b>Printers</b>                                    |     |
| 3    | Click <b>New Printer</b>                                 |     |
| 4    | Enter the <b>Printer Name</b> (Required)                 | <b>For Example</b> , "Kitchen Printer"                                                |
| 5    | Select the <b>Receipt Printer</b> from the dropdown menu | <b>For Example</b> , "EscPOS"                                                         |
| 6    | Enter the <b>Default Line Width</b>                      | <b>For Example</b> , "48"                                                             |
| 7    | Enter the <b>Feed Length</b>                             | <b>For Example</b> , "10"                                                             |
| 8    | Select the <b>Printer Group</b> from the dropdown menu   |                                                                                       |
| 9    | Enter the remaining fields as required                   |                                                                                       |
| 10   | Click <b>Save</b>                                        |  |

### (4) Set the Register Profile to Use Advanced Printing

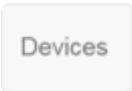
This step assumes you have already created the Profile. If not, see the section on [Profiles](#) for more information.

| Step | Instruction                                    | Operation                                                                            |
|------|------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar            |   |
| 2    | Click <b>Profiles</b>                          |  |
| 3    | Click the <b>Edit</b> Icon                     |   |
| 4    | Open the <b>Hardware</b> Tab                   |  |
| 5    | Click on the <b>Primary Printer</b> dropdown   |                                                                                      |
| 6    | Select <b>Advanced Printing</b> from the list. |                                                                                      |

|   |                   |                                                                                   |
|---|-------------------|-----------------------------------------------------------------------------------|
| 7 | Click <b>Save</b> |  |
|---|-------------------|-----------------------------------------------------------------------------------|

## (5) Select the Printers in the Devices Settings

This step assumes you have already created the Device. If not, see the section on [Devices](#) for more information.

| Step | Instruction                          | Operation                                                                         |
|------|--------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click <b>Devices</b> on the Menu Bar |  |
| 2    | Click the <b>Edit</b> Icon           |  |
| 3    | Select the Printers Needed           |                                                                                   |
| 4    | Click <b>Save</b>                    |  |

- Selecting the Printer as **Primary** will set the Printer to print your Customer Receipts. If in the Printer Profile, you have added a Printing Group, then this printer will also act as a Secondary printer, printing as a Secondary Printer first, then as a Primary Printer for the Customer Receipt.
- Selecting the Printer as **Secondary** will only print Secondary receipts, and not the Customer Receipt.
- Selecting both **Primary** and **Secondary** will set the Printer to be used as both types, depending on the Printing Group selected in the Printer Profile.

## 3.9.4. Product List Modifiers



### Overview

Item Modifiers allows you to add notes or instructions to a product when adding it to a transaction. This is useful for products that would normally be printed on a secondary or 'Kitchen' printer, to pass instructions or specific customer requests to the kitchen staff.

- The Item Modifiers are;

- **Predefined** Modifiers that have been created on the Portal and are displayed automatically to the Staff Member when the product is added to the transaction, and
- **Free Text** Modifiers that allow the Staff Member to add additional notes to the product that do not have a predefined modifier, or when adding specific customer requests.

 Free Text Modifiers do not need to be setup on all products, as the Register will allow you to add notes to any product. For more information, see the chapter on [Product Notes](#).

## Creating an Item Modifier

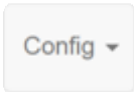
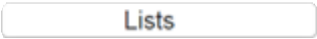
Creating an Item Modifier is done using the Portals [Lists](#) function.

 The List Code must be unique, as you will use it to identify the Item Modifier when adding, editing or deleting it from a product, both manually and through the Portals Import function.

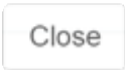
Once you have created the List Modifier, you will need to add the List Items to the Modifier. As

an example, when creating an Item Modifiers for a cup of coffee;

- List Modifier for **Size** (With items Small, Regular, Large)
  - List Name is Coffee
  - List Code is Coffee-Size

| Step | Instruction                           | Operation                                                                           |
|------|---------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar   |  |
| 2    | Click <b>Lists</b>                    |  |
| 3    | Click <b>New List</b>                 |  |
| 4    | Enter the <b>List Name</b> (Required) | <b>For Example</b> , "Coffee"                                                       |
| 5    | Enter the <b>List Code</b> (Required) | <b>For Example</b> , "Coffee-Size"                                                  |
| 6    | Click <b>Save</b>                     |  |

**Once you have successfully created the list, you will need to add the items to the list.**

| Step | Instruction                                                                  | Operation                                                                         |
|------|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Click the <b>List Items</b> icon next to the Item Modifier you just created. |  |
| 2    | Click <b>New Item</b>                                                        |  |
| 3    | Enter the <b>Item Name</b>                                                   | <b>For Example, "Small"</b>                                                       |
| 4    | Click <b>Save</b>                                                            |  |
| 5    | Repeat steps 2~4 to add the rest of the List Items for the Item Modifier     |                                                                                   |
| 6    | Click <b>Close</b>                                                           |  |

## Editing an Item Modifier

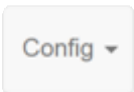
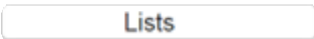
Editing an Item Modifier is carried out through the Portals [Lists](#) function.

## Deleting an Item Modifier



Deleting an Item Modifier is a permanent action, and cannot be undone.

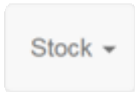
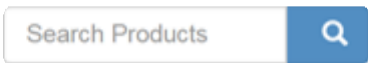
This particular method will delete the list modifier on **ALL** Products. If you only want to remove the List Modifier from a few products, or a single product only, see the section **Manually Adding / Editing Modifiers for Products** below.

| Step | Instruction                                 | Operation                                                                            |
|------|---------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar         |   |
| 2    | Click <b>Lists</b>                          |  |
| 3    | Locate the Item Modifier you want to Delete |                                                                                      |
| 4    | Click the <b>Delete</b> Icon                |   |
| 5    | Click <b>Yes</b>                            |   |

## Manually Adding / Editing Modifiers for Products

**\*** You are not limited to only one modifier per product, and can add as many Item Modifiers as needed, and can be done at anytime, either during or after the creation of the Product.

(This procedure assumes that the product has already been created.)

| Step | Instruction                                      | Operation                                                                            |
|------|--------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the menu bar               |    |
| 2    | Click <b>Products</b>                            |    |
| 3    | Carry out a <b>Search</b> for the Product        |    |
| 4    | Click on the <b>Edit</b> Icon                    |   |
| 5    | Scroll down to the <b>Item Modifiers</b>         |  |
| 6    | Tick the Required <b>Item Modifiers</b>          |  |
| 8    | Choose <b>Launch Modifier Window on Add Item</b> |  |
| 7    | Click "Save"                                     |  |

**\*** To edit the Item Modifiers, follow the same procedure as above, and select / deselect the required Modifiers.

- **Launch Modifier Window on Add Item:** This will instruct the Register when to display the Item Modifier dialog
  - **NO** will wait until the Product is selected in the Journal before displaying the dialog, and
  - **YES** will automatically display the dialog before the Product is added to the Journal. (As soon as the Product is tapped in the Product Browser or scanned.)

## Adding / Editing Modifiers on Products by Importing

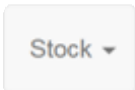
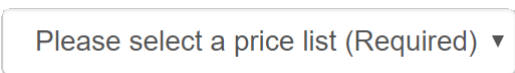
There are three steps needed to Add or Edit the Item Modifiers when using the Importing method. They are;

- **Step 1:** Export the Product list you want to adjust.
- **Step 2:** Make the adjustments in the XLS file.
- **Step 3:** Import the Product list back into the Portal.

### Step 1: Export the Product List.

(This assumes you are adding or editing the Item Modifiers for all your Products)

✱ If you are not using multiple [Price Books](#), you can skip step 5.

| Step | Instruction                                         | Operation                                                                            |
|------|-----------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                  |   |
| 2    | Click <b>Products</b>                               |  |
| 3    | Click <b>Export Records</b>                         |  |
| 4    | Click <b>Export Product Records</b>                 |  |
| 5    | Select the <b>Price List</b> from the dropdown list |  |
| 6    | Click <b>Export</b>                                 |  |
| 7    | Click <b>Download XLS File</b>                      |  |

### Step 2: Make the adjustments in the XLS file.

Using an XLS editor like Microsoft Excel, open the file which will be located in your computers Download directory. The file will be named as follows;

- Products followed by the name of the Price List, followed by the date and time the file was downloaded.
- For example, **Products\_Christmas\_2018-02-04\_15-31-10.xls**, or
- For example, **Products\_2018-02-04\_15-31-10.xls**

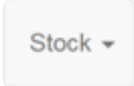
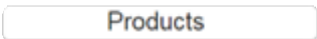
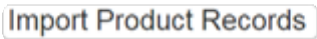
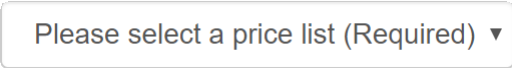
Make the following changes to the file:

- Set the Import Record on each item to **Yes** (Column A)
- Enter the Item Modifier Code in the Item Modifiers column. (Column O) – Add multiple Item Modifiers by separating the Modifier Code with a Space. For example, Mod1 Mod2 Mod3
- Set if the Modifier Dialog will automatically display or not by entering **YES** or **NO** in the Launch Modifier column. (Column P)
- Save the File

✱ If you are editing the Item Modifiers, any entry you make in the Modifier column will replace the existing Item Modifiers already on the Product.

### Step 3: Import the Product list back into the Portal.

✱ If you are not using multiple [Price Books](#), you can skip step 5.

| Step | Instruction                                                   | Operation                                                                             |
|------|---------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                            |  |
| 2    | Click <b>Products</b>                                         |   |
| 3    | Click <b>Import Records</b>                                   |  |
| 4    | Click <b>Import Product Records</b>                           |   |
| 5    | Select the <b>Price List</b> to import from the dropdown list |   |
| 6    | Click <b>Import Records</b>                                   |  |
| 7    | Click <b>Close</b>                                            |  |

! When selecting the **Price List** on the import procedure, it is important to select the **DEFAULT** or **BASE** list, or the changes will not be saved.



## 3.9.5. Product Price Modifiers

### Overview

- ✳ This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

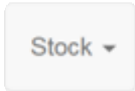
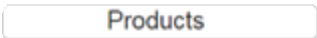
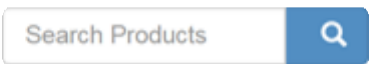
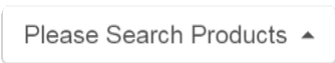
Product Modifiers allows you to create a product that contains a group of products sold as a single item.

- **For example**, in a Pizzeria you would create the “Pizza Product” by combining several “Ingredient Products” into a single product that can be adjusted according to the requirements of the customer.

### Creating a Product Modifier

The creation of a Product Modifier is done by adding or combining products under a single product.

- ✳ Product Modifiers can only be created on a Regular Type Product, but may contain Regular, UOM or Fixed Measure products as the modifiers.

| Step | Instruction                                                                         | Operation                                                                             |
|------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                                                  |   |
| 2    | Click <b>Products</b>                                                               |   |
| 3    | Carryout a <b>Search</b> for the Product that will be used as the Primary Product   |   |
| 4    | Click the <b>Edit</b> icon                                                          |  |
| 5    | Scroll down to the <b>Product Modifier</b> Section                                  |                                                                                       |
| 6    | Carryout a <b>Search</b> for the Product that will be used as the Secondary Product |   |
| 7    | Select the Product from the <b>Dropdown List</b>                                    |   |
| 8    | Set the <b>Modifier</b> values as needed                                            | <b>See below for more details</b>                                                     |

|    |                   |                                                                                     |
|----|-------------------|-------------------------------------------------------------------------------------|
| 9  | Click <b>Done</b> |  |
| 10 | Click <b>Save</b> |  |

 To add more Price Modifiers, repeat steps 6 – 9 before clicking **Save** at step 10.

Product Modifier Cheese Stuffed Crust
✕

Display in Journal

☐ No
☒ Yes

Apply By Default

☐ No
☒ Yes



Editable

☐ No
☒ Yes



Default Quantity



Default Quantity Free Of Charge

☒ No
☐ Yes



Minimum Quantity

Maximum Quantity

Use Price List

☐ No
☒ Yes



Price List

Cancel

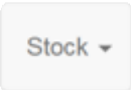
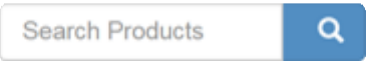
Done

## Explanations of Modifier Values

- **Display in Journal:**
  - Set this to **YES** if the secondary product must always be displayed in the journal.
  - Set this to **NO** if the product is only to be shown in the journal when the default value is changed.
- **Apply by Default:**
  - Set this to **YES** if the product will always be added as a secondary product when the primary product is added to the journal.
  - Set this to **NO** if the product can be added as an optional extra when the primary product is added to the journal.

- **Editable:**
  - Set this to **YES** if the default quantity can be changed in the Register when the primary product is added to the journal.
  - Set this to **NO** if the default quantity cannot be changed in the Register when the primary product is added to the journal
- **Default Quantity:**
  - This is the quantity value of the secondary product being added when the primary product is added to the journal
- **Default Quantity Free of Charge:**
  - Set this to **YES** if the default quantity of the secondary product will not affect the price of the primary product.
  - Set this to **NO** if the price value of the default quantity will affect the price of the primary product.
- **Minimum Quantity:**
  - When editing the default quantity in the Register, this is the minimum quantity that the secondary product can be adjusted to.
- **Maximum Quantity:**
  - When editing the default quantity in the Register, this is the maximum quantity that the secondary product can be adjusted to.
- **Use Price List:**
  - When set to **YES**, the selected price list value will be applied to the secondary product.
  - When set to **NO**, the secondary price will take its value from the price list of the primary product.
- **Price List:**
  - The selected price list of the secondary product, when setting **Use Price List** to **YES**.

## Editing a Price Modifier

| Step | Instruction                                                                  | Operation                                                                            |
|------|------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar                                           |  |
| 2    | Click <b>Products</b>                                                        |  |
| 3    | Carryout a <b>Search</b> for the Product that is used as the Primary Product |  |

|   |                                                    |                                                                                    |
|---|----------------------------------------------------|------------------------------------------------------------------------------------|
| 4 | Click the <b>Edit</b> icon                         |  |
| 5 | Scroll down to the <b>Product Modifier</b> Section |                                                                                    |
| 6 | Click the <b>Edit</b> icon                         |  |
| 7 | Make the necessary changes                         |                                                                                    |
| 8 | Click <b>Done</b>                                  |  |
| 9 | Click <b>Save</b>                                  |  |

 To edit more Price Modifiers, repeat steps 6 – 8 before clicking **Save** at step 9.

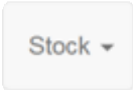
## Setting the Display Order

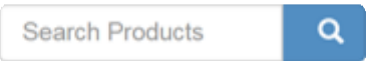
The setting of the Price Modifiers Display Order is done by dragging and dropping the entries into the required order. Simply left click on the line and while holding the mouse button down, move the line to the required position and then release the button. The order will be saved when you click **Save** at the bottom of the page.

| Step | Instruction                                         | Operation                                                                           |
|------|-----------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Scroll down to the <b>Product Modifier</b> Section  |                                                                                     |
| 2    | Use Drag and Drop to order the entries as required. |                                                                                     |
| 3    | Click <b>Save</b>                                   |  |

## Removing a Price Modifier

 Removing a secondary product as a Price Modifier is a permanent action, and cannot be undone.

| Step | Instruction                        | Operation                                                                            |
|------|------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> in the Menu Bar |  |
| 2    | Click <b>Products</b>              |  |

|   |                                                                              |                                                                                    |
|---|------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 3 | Carryout a <b>Search</b> for the Product that is used as the Primary Product |  |
| 4 | Click the <b>Edit</b> icon                                                   |  |
| 5 | Scroll down to the <b>Product Modifier</b> Section                           |                                                                                    |
| 6 | Click the <b>Remove</b> icon                                                 |  |
| 7 | Click <b>Save</b>                                                            |  |

 To remove more Price Modifiers, repeat step 6 before clicking **Save** at step 7.

## 3.9.6. Secondary Printer (Kitchen Printer)

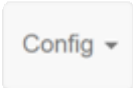
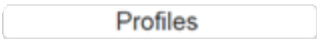
### General

The Register can be set to allow for a Secondary or Kitchen printer, where certain products when added to the Journal will print elsewhere in the Store, in addition to the Point of Sale or Primary Printer. This is especially useful in a small Cafe or Takeaway environment where the customers food order can be printed on another or secondary Printer in the Kitchen, but still have the Customer Receipt printed on the Primary Printer at the Point of Sale.

- This not the same as multiple printers which allows you to have several printers (both Primary and Secondary) associated to one Register such as in a Restaurant environment. For more information on this, please see the section on [Multiple Printers](#)
- On this version of the Portal, there are only a few Secondary Printer options available.
  - **Aevi Carbon** which will use the secondary printers linked to the Aevi Carbon POS Unit.
  - **EscPOS**
  - **Star**
  - **Primary** which will use the main customer receipt printer for secondary printer receipts. This allows you to only have one printer in the store, but gives you the ability to utilise it as both a Primary and a Secondary printer.
    - When selecting this option, the Secondary or Kitchen Receipt will print on the Primary Printer first, after which the Customer Receipt will print.

### Activating the Secondary Printer

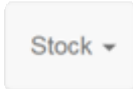
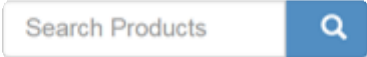
| Step | Instruction | Operation |
|------|-------------|-----------|
|------|-------------|-----------|

|   |                                                            |                                                                                     |
|---|------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Click <b>Config</b> on the Menu Bar                        |  |
| 2 | Click <b>Profiles</b>                                      |   |
| 3 | Click the <b>Edit</b> Icon                                 |  |
| 4 | Click on the <b>Hardware</b> tab                           |   |
| 5 | Select the <b>Secondary Printer</b> from the dropdown list |                                                                                     |
| 6 | Enter the required information in the additional fields    |                                                                                     |
| 7 | Click <b>Save</b>                                          |  |

## Setting the Products to Print at the Secondary Printer

All products are defaulted not to print to the Secondary printer, so each product will need to be individually set to print to the Secondary printer..

\* Using the [Product Import](#) function will allow you to quickly set multiple products as Secondary Printer Products. In the import file under the column “Print Order Receipt” set the entry to None, Primary Printer or Secondary Printer on the products you wish to change.

| Step | Instruction                                                          | Operation                                                                             |
|------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Stock</b> on the Menu Bar                                   |  |
| 2    | Click <b>Products</b>                                                |  |
| 3    | Locate the product using the <b>Search</b> function                  |  |
| 4    | Click the <b>Edit</b> icon                                           |  |
| 5    | Change the <b>Print Order Receipt</b> to either Primary or Secondary |                                                                                       |
| 6    | Click <b>Save</b>                                                    |  |

- Selecting **Primary Printer** will send the Products to the **Primary Receipt** printer used to print the Customer Receipts. This allows you to only have one printer in the store, but gives you the ability

to utilise it as both a Primary and a Secondary printer.

- Selecting **Secondary Printer**, will send the Products to the **Secondary Receipt** printer listed in the Hardware section of the Profile used in the Device.
- Selecting **None**, disables this product from being printed on a Secondary Printer, but will still print on the Customer Receipt after tendering.

## 3.9.7. Timekeeping (Clocking In & Out)

### Overview

 This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.  
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

This feature that allows Staff Members to record when they start and end work, by Clocking In and Out on the Register. This is recorded in the Portal and the data is accessible by running the [Time Keeping Report](#) under Operational Reports.

To activate the Clocking In and Out Function, proceed to the Function Options in Profiles and under the Clock In Out Heading, switch the **Enable Time Keeping** configuration option to **YES**. This will then display two more configuration keys, **Auto Login After Clock In** and, **Require Clock In Before Login**.

- **Auto Login After Clock In**: This tells the Register to either automatically take the POS Staff Member directly to the Register after Clocking In or to the PIN entry screen. Once the Clocking In has taken place. The Staff Member will be required to login each time they logout.
- **Require Clock In Before Login**: This sets the Clocking In process as mandatory before any Staff member can access any feature of the Register. By setting this to **NO**, the clock in process will be available, but Staff Members will not need to Clock In to access the Register through the PIN screen.

## 3.9.8. Transaction Suspending

### General

 This is a **Register Plus** feature, which is additionally paid for and only available through a Plus License.

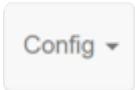
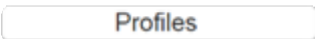
For more information on upgrading to **Register Plus**, please speak to your Solution Provider.

Transaction Suspending allows you to temporarily “**Save**” the transaction either locally on the tablet, or to the Portal. This then allows you to continue with another transaction, and to resume that saved transaction at a later time, or even on another Register device.

- There are various steps required to activate and use Transaction Suspending, depending on how you want to Name the Suspended Transactions. The various naming methods are:
  - **Auto-Generated 4-Digit Number** prints a four digit number on the Secondary Receipt. The first 2 digits represent the Register ID, and the last two are an auto-incremented number. This number increases by 1 for each new transaction.
  - **Customer Name** names the Suspended transaction with the assigned Customer’s Name on the Transaction.
  - **Free Text** allows the Staff Member to freely name the Suspended Transaction.
  - **List** displays the Items given in a predefined list created in [Lists](#)
  - **Prefix Text** displays a predefined Text line that the Staff Member can add to when Suspending a Transaction.

## Setting Up Suspended Transactions.

### Common Procedure

| Step | Instruction                                                                                 | Operation                                                                            |
|------|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> on the Menu Bar                                                         |  |
| 2    | Click <b>Profiles</b>                                                                       |  |
| 3    | Click the <b>Edit</b> Icon                                                                  |  |
| 4    | Click on the <b>Function</b> tab                                                            |  |
| 5    | Click on the <b>Suspend Transaction</b> dropdown, and select which <b>Mode</b> you require. | Either <b>Local</b> or <b>On</b>                                                     |
| 6    | Select the <b>Staff Member Access</b> you require                                           |                                                                                      |

- When selecting the **Mode** under the **Suspend Transaction** config,
  - **Local** will keep suspended transactions local to that device. The transactions will only be available to Staff Members that log in on that specific Register.
  - **On** will store the Suspended Transaction on the Portal, which then makes it available to all



the Registers and Staff Members within the Store. (This is dependent on a Wi-Fi connection.)

- **Staff Member Access To Suspended Transactions** sets which Staff Members will have access to the Suspended Transactions;
  - **All POS Users:** Any Staff Member can access, edit and resume Suspended Transactions.
  - **Assigned Staff Member:** Only the Staff Member that is assigned to the Transaction can access, edit and resume the Suspended Transaction.
  - **Assigned Staff Member and Supervisors:** Only the Staff Member that is assigned to the Transaction and any Supervisor can access, edit and resume the Suspended Transaction.

## Auto-Generated 4-Digit Number

| Step | Instruction                                                                                                          | Operation                                                                            |
|------|----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 7    | Follow the <b>Common Procedure</b> above                                                                             | Steps 1 to 6                                                                         |
| 8    | In the <b>Transaction Reference</b> group, under <b>Transaction Name</b> select <b>Auto-Generated 4-Digit Number</b> |                                                                                      |
| 9    | Click <b>Save</b>                                                                                                    |  |

## Customer Name

| Step | Instruction                                                                                          | Operation                                                                             |
|------|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 7    | Follow the <b>Common Procedure</b> above                                                             | Steps 1 to 6                                                                          |
| 8    | In the <b>Transaction Reference</b> group, under <b>Transaction Name</b> select <b>Customer Name</b> |                                                                                       |
| 9    | Click <b>Save</b>                                                                                    |  |

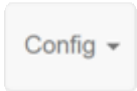
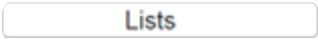
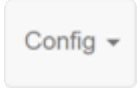
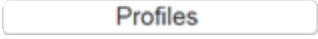
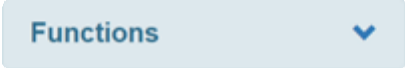
## Free Text

| Step | Instruction                                                                                      | Operation                                                                             |
|------|--------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 7    | Follow the <b>Common Procedure</b> above                                                         | Steps 1 to 6                                                                          |
| 8    | In the <b>Transaction Reference</b> group, under <b>Transaction Name</b> select <b>Free Text</b> |                                                                                       |
| 9    | Click <b>Save</b>                                                                                |  |

## List

- **You would need to have already created a List with List Items before activating Transaction**

**Suspending.**

| Step | Instruction                                                                                                | Operation                                                                             |
|------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar                                                                        |    |
| 2    | Click <b>Lists</b>                                                                                         |    |
| 3    | Click <b>New List</b>                                                                                      |    |
| 4    | Enter the <b>List Name</b> (Required)                                                                      | <b>For Example, "Tables"</b>                                                          |
| 5    | Enter the <b>List Code</b> (Required)                                                                      | <b>For Example, "TABLES"</b>                                                          |
| 6    | Click <b>Save</b>                                                                                          |    |
| 7    | Click the <b>List Items</b> icon                                                                           |    |
| 8    | Click <b>New Item</b>                                                                                      |    |
| 9    | Enter the <b>Item Name</b>                                                                                 | <b>For Example, "Table 1"</b>                                                         |
| 10   | Click <b>Save</b>                                                                                          |  |
| 11   | Repeat steps 8-10 until all your List Items are created                                                    |                                                                                       |
| 12   | Click <b>Config</b> on the Menu Bar                                                                        |  |
| 13   | Click <b>Profiles</b>                                                                                      |  |
| 14   | Click the <b>Edit</b> Icon                                                                                 |  |
| 15   | Click on the <b>Function</b> tab                                                                           |  |
| 16   | Click on the <b>Suspend Transaction</b> dropdown, then select which <b>Mode</b> you require.               | <b>Either "Local" or "On"</b>                                                         |
| 17   | Select the <b>Staff Member Access</b> you require                                                          |                                                                                       |
| 18   | In the <b>Transaction Reference</b> group, under <b>Transaction Name</b> select <b>List</b>                |                                                                                       |
| 19   | In the <b>Transaction Reference</b> group, under <b>Transaction List</b> select the List you just created. |                                                                                       |
| 20   | Click <b>Save</b>                                                                                          |  |

## Prefix Text

| Step | Instruction                                                                                                           | Operation                                                                           |
|------|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 7    | Follow the <b>Common Procedure</b> above                                                                              | Steps 1 to 6                                                                        |
| 8    | In the <b>Transaction Reference</b> group, under <b>Transaction Name</b> select <b>Prefix Text</b>                    |                                                                                     |
| 9    | In the <b>Transaction Reference</b> group, under <b>Prefix Text for Transaction Name</b> , enter the Text you require | <b>For Example</b> , Table Number:                                                  |
| 10   | Click <b>Save</b>                                                                                                     |  |

## 3.9.9. Time Scheduled Price Lists

### Overview

Register can be set to allow for **Time Based Price Lists**, or **Happy Hour** time slots to automatically launch at specific times and days of the week, and then to revert back to the default Price List. At the predefined time, the Register will automatically change the current **Price List** to that of the **Time Based Price List**, which will remain in use for the duration set in the Portal.

- During the period that the **Time Based Price List** is in use;
  - All new Transactions will use the selected Time Based Price List
  - Suspended Transactions created before the Time Based Price List came into use, will keep the existing prices, but any new products added will then use the **Time Based Price List**.
- At the end of the **Time Based Price List** period,
  - The Register will resume using the original Price Book.
  - Suspended Transactions will resume using the original Price Book, but where products were added during the **Time Based Price List** period, these prices will remain unchanged.

An example of this would be using the functionality to create a “**Happy Hour**” in a Bar or Pub, where the Happy Hour would run every Friday between 19:00 and 20:00

- Prior to 19:00 on Fridays, the Register would be using Price List(1). At 19:00 on Fridays, the Register would automatically use Price List(2) until 20:00 when it would revert back to Price List(1).

Select Price List Time Slots

| Time Slots     | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|----------------|-----|-----|-----|-----|-----|-----|-----|
| 15:00 to 15:30 |     |     |     |     |     |     |     |
| 15:30 to 16:00 |     |     |     |     |     |     |     |
| 16:00 to 16:30 |     |     |     |     |     |     |     |
| 16:30 to 17:00 |     |     |     |     |     |     |     |
| 17:00 to 17:30 |     |     |     |     |     |     |     |
| 17:30 to 18:00 |     |     |     |     |     |     |     |
| 18:00 to 18:30 |     |     |     |     |     |     |     |
| 18:30 to 19:00 |     |     |     |     |     |     |     |
| 19:00 to 19:30 |     |     |     |     |     |     |     |
| 19:30 to 20:00 |     |     |     |     |     |     |     |
| 20:00 to 20:30 |     |     |     |     |     |     |     |
| 20:30 to 21:00 |     |     |     |     |     |     |     |
| 21:00 to 21:30 |     |     |     |     |     |     |     |
| 21:30 to 22:00 |     |     |     |     |     |     |     |
| 22:00 to 22:30 |     |     |     |     |     |     |     |
| 22:30 to 23:00 |     |     |     |     |     |     |     |
| 23:00 to 23:30 |     |     |     |     |     |     |     |

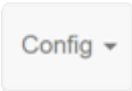
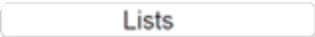
Clear Selected Time Slots

Done

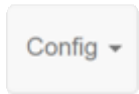
## Using Time Scheduled Price Lists

In order to Create, Edit or Delete the Time Scheduled Price List, there must be at least two [Price Lists](#) created.

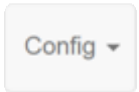
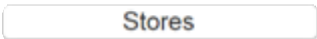
## Create the Price List

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Lists</b>                  |  |
| 3    | Locate the <b>Price Lists</b> entry |                                                                                     |
| 4    | Click the <b>Edit Items</b> icon    |  |
| 5    | Click <b>New Item</b>               |  |
| 6    | Enter the <b>Item Name</b>          | <b>For example, "Christmas Price List"</b>                                          |
| 7    | Click <b>Save</b>                   |  |

## Activate the Time Scheduled Price List:

| Step | Instruction                                                                                         | Operation                                                                             |
|------|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar                                                                 |    |
| 2    | Click <b>Stores</b>                                                                                 |    |
| 3    | Click the <b>Edit</b> Icon                                                                          |    |
| 4    | Check the <b>Price List</b> that will be the Time Scheduled Price List                              |     |
| 5    | Change the <b>Default Price List</b> to <b>Base</b>                                                 |                                                                                       |
| 6    | Change <b>Override Default Price List</b> to the Price List that will be used for the Time Schedule |                                                                                       |
| 7    | Click <b>Select Time Slots</b>                                                                      |    |
| 8    | Click into the required Time Slots                                                                  |                                                                                       |
| 9    | Click <b>Done</b>                                                                                   |  |
| 10   | Click <b>Save</b>                                                                                   |  |

## To Edit or Delete the Time Scheduled Price List:

| Step | Instruction                         | Operation                                                                           |
|------|-------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Config</b> in the Menu Bar |  |
| 2    | Click <b>Stores</b>                 |  |
| 3    | Click the <b>Edit</b> Icon          |  |
| 4    | Click <b>Select Time Slots</b>      |  |
| 5    | Make the necessary changes          |                                                                                     |
| 6    | Click <b>Done</b>                   |  |

|   |                   |                                                                                   |
|---|-------------------|-----------------------------------------------------------------------------------|
| 7 | Click <b>Save</b> |  |
|---|-------------------|-----------------------------------------------------------------------------------|

 Clicking into a time slot that has been previously selected (**Green Box**) , will deselect or remove the time slot.  
Clicking the **Clear Selected Time Slots** will remove all currently selected time slots.

## 4. Hardware Defaults

---

### Overview

This section provides details on all the default hardware settings required for each hardware option available within Register.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [POS Units](#)
- [Barcode Scanners](#)
- [Cash Drawers](#)
- [Card Payment Terminals](#)
- [Receipt Printers](#)
- [Customer Display Units](#)
- [Quick Lookup](#)

## 4.1. POS Units

---

### Overview

This section lists the default configurations for the currently supported POS Units.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Aevi A920](#)
- [Aevi Carbon](#)
- [ELO PayPoint](#)
- [Ingenico iPOS](#)
- [MyPOS](#)
- [Optomany PAX A920](#)
- [PartnerTech PAT110](#)
- [Payworks PAX A920](#)
- [Powa T25](#)
- [SBV Android Terminals](#)
- [Star mPOP](#)

- [Sunmi M2](#)
- [Sunmi T2](#)
- [Sunmi T2 Lite](#)
- [Sunmi V2 Pro](#)
- [Unique Secure MePOS](#)
- [Verifone Carbon](#)

## 4.1.1. Aevi A920

---

### Peripheral Connectivity

Due to the Hardware Library restrictions on this device, no peripheral devices can be added.

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: PAX A920 Direct
  - Barcode Scanner Delay: 1000
- **Non-Specific**
  - Does not support other Barcode Scanners

#### Cash Drawer

- **Specific**
  - Cash Drawer: None – Does not support Cash Drawers
- **Non-Specific**
  - Does not support other Cash Drawers

#### Card Terminal

- **Specific**
  1. **Card Terminal:** Aevi Payment Services
  2. **Enable Authorization for Card Transactions:** Set to **NO** for Card Payments only, or **YES**



to enable pre-authorizations of card payments.

3. **Make Authorization the Default Card Mode:** Only displays when (2) is set to **YES**. Set this option to **NO** if pre-authorizations are not the primary card payment method, or **YES** if it is. When set to **NO** the pre-authorizations will be located in the Other Tender button on the Register.
4. **Authorization Mode:** Only displays when (2) is set to **YES**.
  - a. Selecting **Ask Staff Member which Action to Perform** will display a dialog with the following options when pre-authorizing a card payment.
  - b. Selecting **Full Value of the Transaction** will set the pre-authorization value to the value of the transaction.
  - c. Selecting **Staff entered fixed amount** will prompt the Staff Member to enter the value of the pre-authorization.
  - d. Selecting **Transaction Amount Plus Additional Set Percentage** will add a predefined percentage to the transaction value. See (5) for additional percentage setting.
5. **Authorization Additional Percentage:** Free text field. Add the value of the additional percentage added to the transaction value, when (4) is set to either (a) or (d).
6. **Suspend Transaction After Authorization:** Only displays when (2) is set to **YES**. Set this to **NO** if the transactions is not to be automatically suspended after the pre-authorization, or **YES** to automatically suspend.
7. **Prevent End Day when there are open Pre-Authorizations:** Only displays when (2) is set to **YES**. Setting this to **NO** will allow the End Day process to run when there are pre-authorizations in the Ready to Complete tab, or **YES** to force the completion of all pre-authorizations before allowing the End Day process to run.
8. **Use On-Device Tipping:** Not available on the A920.
9. **Enable Tabs:** Only displays when (2) is set to **YES**. Set to **NO** if TABS are not used within your Store, or **YES** to enable the TABS functionality.
10. **Default Tab Amount:** Only displays when (9) is set to **YES**. When creating TABS, this will be the default value displayed on the Register when pre-authorizing a card for the TAB. The value will still be editable on the Register. Setting this value to **0** will force the Staff Member to enter a value on the Register.
11. **Suspend Tab After Creation:** Only displays when (9) is set to **YES**. Set to **NO** if automatic suspension of the transaction is not to be used when creating a TAB, or **YES** to suspend the transaction once the pre-authorization has completed.
12. **Enable EBT Tender:** Set to **NO** if your Store does not support EBT cards, or **YES** if it does.
13. **Enable Manual/Key Entry:** Set to **NO** if you do not make use of manually entering card details (customer not present), or **YES** if you do.
14. **Inline Tip Percentage 1:** Not available on the A920.
15. **Inline Tip Percentage 2:** Not available on the A920.
16. **Inline Tip Percentage 3:** Not available on the A920.

- **Non-Specific**

- Does not support other Card Payment Devices

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Aevi Printing Service
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Does not support other types of Primary Receipt Printers

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Secondary Printer:** Aevi Printing Services
  - **Receipt Line Width for Secondary Printer:** Set according to printing device in use. Refer to your Reseller.
  - **Aevi Secondary Printer ID:** The Printer ID that you wish to use as the Secondary Printer. This can be found in the Print Service Application.
    - **For Example,** Epson:TM-T20II-m\_001535:BT:E4:7F:B2:6A:E3:E8
- **Non-Specific**
  - Does not support other types of Secondary Receipt Printers

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

# 4.1.2. Aevi Carbon

---

## Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                          | WiFi | LAN | BT | USB |
|--------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b> |      |     | ✓  |     |

# Config / Hardware

## Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - Barcode Scanner: **No Specific Scanner**
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** Aevi Printing Services
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  1. **Card Terminal:** Aevi Payment Services
  2. **Enable Authorization for Card Transactions:** Set to **NO** for Card Payments only, or **YES** to enable pre-authorizations of card payments.
  3. **Make Authorization the Default Card Mode:** **Only displays when (2) is set to YES.** Set this option to **NO** if pre-authorizations are not the primary card payment method, or **YES** if it is. When set to **NO** the pre-authorizations will be located in the Other Tender button on the Register.
  4. **Authorization Mode:** **Only displays when (2) is set to YES.**
    - a. Selecting **Ask Staff Member which Action to Perform** will display a dialog with the following options when pre-authorizing a card payment.
    - b. Selecting **Full Value of the Transaction** will set the pre-authorization value to the value of the transaction.
    - c. Selecting **Staff entered fixed amount** will prompt the Staff Member to enter the value of the pre-authorization.

- d. Selecting **Transaction Amount Plus Additional Set Percentage** will add a predefined percentage to the transaction value. **See (5) for additional percentage setting.**
5. **Authorization Additional Percentage:** Free text field. Add the value of the additional percentage added to the transaction value, when (4) is set to either (a) or (d).
6. **Suspend Transaction After Authorization:** **Only displays when (2) is set to YES.** Set this to **NO** if the transactions is not to be automatically suspended after the pre-authorization, or **YES** to automatically suspend.
7. **Prevent End Day when there are open Pre-Authorizations:** **Only displays when (2) is set to YES.** Setting this to **NO** will allow the End Day process to run when there are pre-authorizations in the Ready to Complete tab, or **YES** to force the completion of all pre-authorizations before allowing the End Day process to run.
8. **Use On-Device Tipping:** Set to **NO** if the customer will not be prompted to add a TIP on the payment screen, or **YES** if the customer will be presented with Percentage of Transaction values. (See 14, 15 & 16 below)
9. **Enable Tabs:** **Only displays when (2) is set to YES.** Set to **NO** if TABS are not used within your Store, or **YES** to enable the TABS functionality.
10. **Default Tab Amount:** **Only displays when (9) is set to YES.** When creating TABS, this will be the default value displayed on the Register when pre-authorizing a card for the TAB. The value will still be editable on the Register. Setting this value to **0** will force the Staff Member to enter a value on the Register.
11. **Suspend Tab After Creation:** **Only displays when (9) is set to YES.** Set to **NO** if automatic suspension of the transaction is not to be used when creating a TAB, or **YES** to suspend the transaction once the pre-authorization has completed.
12. **Enable EBT Tender:** Set to **NO** if your Store does not support EBT cards, or **YES** if it does.
13. **Enable Manual/Key Entry:** Set to **NO** if you do not make use of manually entering card details (customer not present), or **YES** if you do.
14. **Inline Tip Percentage 1:** From (8 above) – The value of the first displayed Percentage on the payment screen.
15. **Inline Tip Percentage 2:** From (8 above) – The value of the second displayed Percentage on the payment screen.
16. **Inline Tip Percentage 3:** From (8 above) – The value of the third displayed Percentage on the payment screen.

- **Non-Specific**

- **Does not support other Card Payment Devices**

## Primary Receipt Printer

- **Specific**

- **Receipt Printer:** Aevi Printing Service
- **Receipt Line Width:** 41

- **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Does not support other types of Primary Receipt Printers

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Secondary Printer:** Aevi Printing Services
  - **Receipt Line Width for Secondary Printer:** Set according to printing device in use. Refer to your Reseller.
  - **Aevi Secondary Printer ID:** The Printer ID that you wish to use as the Secondary Printer. This can be found in the Print Service Application.
    - **For Example,** Epson:TM-T20II-m\_001535:BT:E4:7F:B2:6A:E3:E8
- **Non-Specific**
  - Does not support other types of Secondary Receipt Printers

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

# 4.1.3. ELO PayPoint

---

## Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

- Note, this device only has one **USB** port, so only one Hardware Peripheral can be connected through this connection type.

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    |     | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Primary Printer :</b>       | ✓    |     | ✓  | ✓   |

|                     |   |  |   |   |
|---------------------|---|--|---|---|
| Secondary Printer : | ✓ |  | ✓ | ✓ |
|---------------------|---|--|---|---|



## Config / Hardware

### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

### Barcode Scanner

- **Specific**
  - Barcode Scanner: **No Specific Scanner**
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

### Cash Drawer

- **Specific**
  - **Cash Drawer:** ELO PayPoint
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

### Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi connected Card Payment Device
  - See [Card Terminals](#)

### Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** ELO PayPoint
  - **Receipt Line Width:** 32 / 48 (Depending on Model. Refer to your Solution Provider.)
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)

- **Non-Specific**
  - Supports any WiFi connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** No specific Customer Display Unit
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.4. Ingenico iPOS

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                     | WiFi | LAN | BT | USB |
|---------------------|------|-----|----|-----|
| Secondary Printer : |      |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**

- **NO** will display the Android Navigation Buttons at the bottom of the screen
- **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - **Barcode Scanner:** Ingenico iPOS
  - **Barcode Scanner Delay:** 1000
  - **iPOS Scanner URL:** Enter the URL as supplied by your Solution Provider. For Example, **ws://10.4.30.34:8181**
- **Non-Specific**
  - **Does not support other Barcode Scanners**

## Cash Drawer

- **Specific**
  - **Cash Drawer:** Ingenico iPOS
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: Ingenico iPOS
- **Non-Specific**
  - **Does not support other types of Card Payment Devices**

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Ingenico iPOS
  - **Receipt Line Width:** 48
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - **Does not support other types of Primary Receipt Printers**

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**



- **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Miscellaneous Hardware Settings

- **Ingenico iPOS URL:** Enter the URL as supplied by your Solution Provider. For Example, `https://217.109.89.157:9443`

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.1.5. MyPOS

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                            | WiFi | LAN | BT | USB |
|----------------------------|------|-----|----|-----|
| <b>Secondary Printer :</b> | ✓    |     | ✓  |     |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - **Barcode Scanner:** ZXing
  - **Barcode Scanner Delay:** 1000

- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - Cash Drawer: **None – Does not support Cash Drawers**
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: myPOS
- **Non-Specific**
  - **Does not support other types of Card Payment Devices**

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** myPOS
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - **Does not support other types of Primary Receipt Printers**

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** **No Specific Secondary Receipt Printer**
- **Non-Specific**
  - Supports any WiFi connected Printer
  - Supports any Bluetooth connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** **No specific Customer Display Unit**
- **Non-Specific**
  - **Does not support other types of Customer Display Units**

## 4.1.6. Optomany PAX A920

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                     | WiFi | LAN | BT | USB |
|---------------------|------|-----|----|-----|
| Barcode Scanner :   |      |     | ✓  |     |
| Secondary Printer : | ✓    |     | ✓  |     |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - **Barcode Scanner:** PAX A920 Direct
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

#### Cash Drawer

- **Specific**
  - Cash Drawer: **None – Does not support Cash Drawers**
- **Non-Specific**
  - **Does not support other Cash Drawers**

#### Card Terminal

- **Specific**
  - Card Terminal: Optomany Asept Go
- **Non-Specific**
  - **Does not support other types of Card Payment Devices**

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** PAX A920 Direct
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Does not support other types of Primary Receipt Printers

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

# 4.1.7. PartnerTech PAT110

---

## Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Secondary Printer :</b>     | ✓    | ✓   | ✓  | ✓   |

# Config / Hardware

## Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - Barcode Scanner: **No Specific Scanner**
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** PartnerTech PAT-110
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** PartnerTech PAT-110
  - **Receipt Line Width:** 48
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**

- Supports any WiFi or LAN connected Printer
- Supports any Bluetooth connected Printer
- Supports any USB connected Printer
- See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** No specific Customer Display Unit
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

# 4.1.8. Payworks PAX A920

## Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                     | WiFi | LAN | BT | USB |
|---------------------|------|-----|----|-----|
| Barcode Scanner :   |      |     | ✓  |     |
| Secondary Printer : | ✓    |     | ✓  |     |

## Config / Hardware

### Tablet Settings

- **Hide Navigation Buttons:**

- **NO** will display the Android Navigation Buttons at the bottom of the screen
- **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - **Barcode Scanner:** PAX A920 Direct
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - Cash Drawer: **None – Does not support Cash Drawers**
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - **Card Terminal:** Payworks Compatible Device
  - **Merchant Identifier:** As supplied by your Solution Provider
  - **Merchant Secret:** As supplied by your Solution Provider
  - **Provider Mode:** Live
  - **Reader Type:** PAX A920
  - **Connection Method:** Built-In
  - **Capture Signature on Receipt:** Set to **NO** to have the signature capture carried out on the Device Screen, or **YES** for capturing on the receipt.
  - **Use On-Device Tipping:** **Not Supported on this device.** Set as **NO**
  - **Enter Full Amount:** **Not Supported on this device.** Set as **NO**
- **Non-Specific**
  - **Does not support other types of Card Payment Devices**

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** PAX A920 Direct
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - **Does not support other types of Primary Receipt Printers**

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.1.9. Powa T25

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.



## Barcode Scanner

- **Specific**
  - **Barcode Scanner:** Powa-T25
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** Powa-T25
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Powa-T25
  - **Receipt Line Width:** 48
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** No specific Customer Display Unit
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.10. SBV Android Terminals

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:** Not supported on these devices.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: No Specific Scanner
- **Non-Specific**

- Supports Scanners with Bluetooth connectivity.
- Supports Scanners with USB connectivity
- See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** SBV Android Terminals
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
  - **Minipos Cash Drawer Type:** PIN2
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** SBV Android Terminals
  - **Receipt Line Width:** 48
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** **No Specific Secondary Receipt Printer**
- **Non-Specific**

- Supports any WiFi or LAN connected Printer
- Supports any Bluetooth connected Printer
- Supports any USB connected Printer
- See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** SBV Android Terminals
  - **Customer Display Idle Text:** Free text field. **(Default = Next Customer Please)**
  - **Customer Display Line Width:** Set as specified
    - On M11, 16
    - On M50, 20
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)
    - For the Varlink (SBV-A108LD)

## 4.1.11. Star mPOP

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  |     |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Primary Printer :</b>       | ✓    |     | ✓  | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - **Barcode Scanner:** Star mPOP
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** Star mPOP
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Star mPOP
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
  - **Star Printer Port:** BT:STAR mPOP-G9925 (Or the name as it appears in the Tablets Bluetooth settings)
  - **Star Printer Port Setting** **Insert a SPACE**
  - **Use Star Checked Block Mode:** **Not supported on the mPOP** Select **NO**
  - **Star Printer Using Raster:** **Not supported on the mPOP** Select **NO**
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer

- See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.1.12. Sunmi M2

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                     | WiFi | LAN | BT | USB |
|---------------------|------|-----|----|-----|
| Barcode Scanner :   |      |     | ✓  |     |
| Card Terminal :     | ✓    |     | ✓  |     |
| Primary Printer :   | ✓    |     | ✓  |     |
| Secondary Printer : | ✓    |     | ✓  |     |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen

- **YES** (Recommended) will hide the Android Navigation Buttons.

## Barcode Scanner

- **Specific**
  - **Barcode Scanner:** ZXing
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - Cash Drawer: **None – Does not support Cash Drawers**
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** **No Specific Primary Receipt Printer**
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** **No Specific Secondary Receipt Printer**
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer

- Supports any Bluetooth connected Printer
- See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.1.13. Sunmi T2

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: No Specific Scanner
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)



## Cash Drawer

- **Specific**
  - **Cash Drawer:** Sunmi
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - Does not support other Cash Drawers

## Card Terminal

- **Specific**
  - Card Terminal: No Specific Card Payment Device
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Sunmi
  - **Receipt Line Width:** 48
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Android Secondary Display
  - See [Android Secondary Display](#) for more information
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.14. Sunmi T2 Lite

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Primary Printer :</b>       | ✓    |     | ✓  | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: No Specific Scanner
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

## Cash Drawer

- **Specific**
  - **Cash Drawer:** Sunmi
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - Does not support other Cash Drawers

## Card Terminal

- **Specific**
  - Card Terminal: No Specific Card Payment Device
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** No Specific Primary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**

- **Customer Display Type:** Android Secondary Display
- See [Android Secondary Display](#) for more information
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.15. Sunmi T2 Mini

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Primary Printer :</b>       | ✓    |     | ✓  | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: No Specific Scanner
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

#### Cash Drawer

- **Specific**

- **Cash Drawer:** Sunmi
- **Open Cash Drawer for Card Payments:**
  - **NO** will keep the cash drawer closed when tendering by card.
  - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - **Does not support other Cash Drawers**

## Card Terminal

- **Specific**
  - Card Terminal: **No Specific Card Payment Device**
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Sunmi
  - **Receipt Line Width:** 48
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** **No Specific Secondary Receipt Printer**
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Sunmi T2 Mini

- **Idle Text:** Next Customer Please
- **Line Width:** 16
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.16. Sunmi V2 Pro

---

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                            | WiFi | LAN | BT | USB |
|----------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>   |      |     | ✓  |     |
| <b>Card Terminal :</b>     | ✓    | ✓   | ✓  |     |
| <b>Secondary Printer :</b> | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - **Barcode Scanner:** ZXing
  - **Barcode Scanner Delay:** 1000
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - See [Barcode Scanners](#)

#### Cash Drawer

- **Specific**
  - Cash Drawer: None – Does not support Cash Drawers
- **Non-Specific**

- Does not support other Cash Drawers

## Card Terminal

- **Specific**
  - Card Terminal: No Specific Card Payment Device
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Sunmi
  - **Receipt Line Width:** 32
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - See [Secondary Printers](#)

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Does not support Customer Display Units
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.1.17. Unique Secure MePOS

### Peripheral Connectivity

Where not specifically set in the configurations, this device can connect to other hardware through the following methods;

|                                | WiFi | LAN | BT | USB |
|--------------------------------|------|-----|----|-----|
| <b>Barcode Scanner :</b>       |      |     | ✓  | ✓   |
| <b>Card Terminal :</b>         | ✓    | ✓   | ✓  |     |
| <b>Customer Display Unit :</b> |      |     |    | ✓   |
| <b>Secondary Printer :</b>     | ✓    |     | ✓  | ✓   |

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: **No Specific Scanner**
- **Non-Specific**
  - Supports Scanners with Bluetooth connectivity.
  - Supports Scanners with USB connectivity
  - See [Barcode Scanners](#)

#### Cash Drawer

- **Specific**
  - **Cash Drawer:** Unique Secure MePOS
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
  - **Prevent Transactions When The Cash Drawer Is Open:**
    - **NO** will allow the Register to continue with transaction even if the cash drawer has been left open.



- **YES** will prevent any further transactions from taking place until the cash drawer has been closed.
- **Non-Specific**
  - Does not support other Cash Drawers

## Card Terminal

- **Specific**
  - Card Terminal: No Specific Card Payment Device
- **Non-Specific**
  - Supports any WiFi or LAN connected Card Payment Device
  - Supports any Bluetooth connected Card Payment Device
  - See [Card Terminals](#)

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Unique Secure MePOS
  - **Receipt Line Width:** 42
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Primary Receipt Printers.](#)

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Supports any WiFi or LAN connected Printer
  - Supports any Bluetooth connected Printer
  - Supports any USB connected Printer
  - See [Secondary Printers](#)

## Miscellaneous Hardware Settings

### When in USB Mode

- **MePOS Connection:** USB

### When in Wi-Fi Mode

- **MePOS Connection:** Wi-Fi
- **MePOS IP Address:** For Example, **192.168.1.131**

### Customer Display Unit

- **Specific**
  - **Customer Display Type:** No specific Customer Display Unit
- **Non-Specific**
  - **Customer Display Type:** Set as Required
  - See the section on [Customer Display Units](#)

## 4.1.18. Verifone Carbon

---

### Peripheral Connectivity

Due to the Hardware Library restrictions on this device, no peripheral devices can be added.

### Config / Hardware

#### Tablet Settings

- **Hide Navigation Buttons:**
  - **NO** will display the Android Navigation Buttons at the bottom of the screen
  - **YES** (Recommended) will hide the Android Navigation Buttons.

#### Barcode Scanner

- **Specific**
  - Barcode Scanner: No Specific Scanner
- **Non-Specific**
  - Does not support other Barcode Scanners

#### Cash Drawer

- **Specific**
  - **Cash Drawer:** Verifone Carbon
  - **Open Cash Drawer for Card Payments:**
    - **NO** will keep the cash drawer closed when tendering by card.
    - **YES** will open the cash drawer when tendering by card.
- **Non-Specific**
  - Does not support other Cash Drawers

## Card Terminal

- **Specific**
  - **Card Terminal:** Verifone Carbon
  - **Login to Ocius / Carbon Using Details in Profile:**
    - When set to **YES**, the login details will be taken from the Profile, and when set to **NO**, the details will be taken from the Login details of the Staff Member.
- **Non-Specific**
  - Does not support other types of Card Payment Devices

## Primary Receipt Printer

- **Specific**
  - **Receipt Printer:** Verifone Carbon
  - **Receipt Line Width:** 40
  - **Print Feed Length:** 10 (Can be set higher or lower depending on your needs.)
  - **Use Direct Print with Carbon Printer:** When set to **NO** with display a preview of the Receipt before printing, and **YES** will not show a preview.
- **Non-Specific**
  - Does not support other types of Primary Receipt Printers

## Secondary Receipt Printer

Only becomes available when the Licence type is **PLUS**.

- **Specific**
  - **Receipt Printer:** No Specific Secondary Receipt Printer
- **Non-Specific**
  - Does not support other types of Secondary Receipt Printers

## Customer Display Unit

- **Specific**
  - **Customer Display Type:** Verifone Carbon
  - **Customer Display Idle Text:** Free text field. (Default = Next Customer Please)
  - **Customer Display Line Width:** 20
- **Non-Specific**
  - Does not support other types of Customer Display Units

## 4.2. Barcode Scanners

### Overview

This section covers supported barcode scanners that are not directly associated to specific [POS Units](#).

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Motorola Symbol](#)
- [Intermec SG0T](#)
- [Socket CHS 7](#)
- [Zebra LS1203](#)
- [ZXing](#)

### 4.2.1. Motorola Symbol

**Scanner Type:** BLUETOOTH

Config / Hardware

**Barcode Scanner**

| Config Key                            | Value                 |
|---------------------------------------|-----------------------|
| Barcode Scanner :                     | Bluetooth SPP Scanner |
| Barcode Scanner Delay :               | 1000                  |
| Bluetooth SPP Barcode Scanner Namer : | CS3070                |

### 4.2.2. Intermec SG0T

**Scanner Type:** USB HID (The scanner must be configured to USB HID mode.)

Config / Hardware

**Barcode Scanner**

| Config Key        | Value               |
|-------------------|---------------------|
| Barcode Scanner : | Miura ITP or POSzle |

|                         |      |
|-------------------------|------|
| Barcode Scanner Delay : | 1000 |
|-------------------------|------|

## 4.2.3. Socket CHS 7

**Scanner Type:** BLUETOOTH

Config / Hardware

### Barcode Scanner

| Config Key                            | Value                 |
|---------------------------------------|-----------------------|
| Barcode Scanner :                     | Bluetooth SPP Scanner |
| Barcode Scanner Delay :               | 1000                  |
| Bluetooth SPP Barcode Scanner Namer : | Socket CHS            |

## 4.2.4. Zebra LS1203

**Scanner Type:** USB OPOS (The scanner must be configured to USB HID mode.)

Config / Hardware

### Barcode Scanner

| Config Key              | Value              |
|-------------------------|--------------------|
| Barcode Scanner :       | Zebra USB Scanners |
| Barcode Scanner Delay : | 1000               |

## 4.2.5. ZXing

### Overview

This feature makes use of the Tablets Built-In Camera as a Barcode Scanner when pressing either the **Volume Up** or **Volume Down** buttons.

**Note:** This feature is only available on certain OS versions. For more information, please speak to your Solution Provider.

## Scanner Type: Device Built In Camera

### Config / Hardware

#### Barcode Scanner

| Config Key              | Value |
|-------------------------|-------|
| Barcode Scanner :       | ZXing |
| Barcode Scanner Delay : | 1000  |

## 4.3. Cash Drawers

---

### Overview

Cash Drawers rarely form part of the POS unit construction and are normally connected via two methods;

- Cabled directly into the POS unit through the Cash Drawer port, or
- Cabled through a standalone Printer when the Printer does not form part of the POS unit itself.

More information will be given in the [Receipt Printer](#) section of this manual.

## 4.4. Card Payment Terminals

---

### Overview

This section lists the default configurations for the currently supported **Non-Integrated** Card Terminal Devices.

For configuration values of Integrated Card Terminal Devices, please see the Section on [POS Units](#)

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [A Non-Integrated Card Terminal](#)
- [AZ Redcard](#)
- [EeZee Pay](#)
- [Ingenico Telium](#)
- [Optomany Acept](#)

- [Optomany Acept Go](#)
- [PaymentSense Connect](#)
- [Payworks Compatible Device](#)
- [SPT PayTrans](#)
- [Verifone Ocius](#)

## 4.4.1. A Non-Integrated Card Terminal

### Config / Hardware

Use this option where there is no direct communication between the POS Unit and the Card Terminal. Your Solution Provider will be able to give you more information on this.

#### Card Terminal

| Config Key      | Value                          |
|-----------------|--------------------------------|
| Card Terminal : | A Non-Integrated Card Terminal |

## 4.4.2. AZ Redcard

### Config / Hardware

#### Card Terminal

| Config Key       | Value                                     |
|------------------|-------------------------------------------|
| Card Terminal :  | AZ Redcard                                |
| RedCard POS ID : | The ID supplied by your Solution Provider |

## 4.4.3. EeZee Pay

### Config / Hardware

#### Card Terminal

| Config Key            | Value                                                    |
|-----------------------|----------------------------------------------------------|
| Card Terminal :       | eeZee Pay                                                |
| Merchant Identifier : | The <b>Identifier</b> supplied by your Solution Provider |
| Merchant Secret :     | The <b>Secret</b> supplied by your Solution Provider     |

|                              |                                                         |
|------------------------------|---------------------------------------------------------|
| <b>Provider Mode :</b>       | Always select <b>Live</b>                               |
| <b>EeZee Pay User Name :</b> | The <b>User Name</b> supplied by your Solution Provider |
| <b>EeZee Pay Password :</b>  | The <b>Password</b> supplied by your Solution Provider  |

## 4.4.4. Ingenico Telium

### Config / Hardware

 This Device can utilise an Integrated Cash Drawer

### Cash Drawer

| Config Key                                | Value               |
|-------------------------------------------|---------------------|
| <b>Cash Drawer :</b>                      | APG USB Cash Drawer |
| <b>Open Cash Drawer for Card Payments</b> | Set as Required     |

- **NO** will keep the cash drawer closed when tendering by card.
- **YES** will open the cash drawer when tendering by card.

### Card Terminal

| Config Key                                          | Value           |
|-----------------------------------------------------|-----------------|
| <b>Card Terminal :</b>                              | Ingenico Telium |
| <b>Enable Authorization for Card Transactions :</b> | Set as Required |
| <b>Use Conventional Messaging</b>                   | Set as Required |
| <b>Terminal has built-in Printer</b>                | Set as Required |

## 4.4.5. Optomany Axept

### Config / Hardware

### Card Terminal

| Config Key                            | Value                                            |
|---------------------------------------|--------------------------------------------------|
| <b>Card Terminal :</b>                | Optomany Axept                                   |
| <b>Axept Merchant Department ID :</b> | The <b>ID</b> supplied by your Solution Provider |



|                            |                                                        |
|----------------------------|--------------------------------------------------------|
| <b>Axcept IP Address :</b> | The <b>IP</b> address of the Axcept Device             |
| <b>Axcept Username :</b>   | The <b>Username</b> supplied by your Solution Provider |
| <b>Axcept Password :</b>   | The <b>Password</b> supplied by your Solution Provider |

## 4.4.6. Optomany Axcept Go

Config / Hardware

### Card Terminal

| Config Key             | Value              |
|------------------------|--------------------|
| <b>Card Terminal :</b> | Optomany Axcept Go |

## 4.4.7. PaymentSense Connect

Config / Hardware

### Card Terminal

| Config Key                                | Value                              |
|-------------------------------------------|------------------------------------|
| <b>Card Terminal :</b>                    | PaymentSense Connect               |
| <b>PaymentSense Connect Base URL :</b>    | Supplied by your Solution Provider |
| <b>PaymentSense Connect User :</b>        | Supplied by your Solution Provider |
| <b>PaymentSense Connect Password :</b>    | Supplied by your Solution Provider |
| <b>PaymentSense Connect Terminal ID :</b> | Supplied by your Solution Provider |

## 4.4.8. Payworks Compatible Device

Config / Hardware

### Card Terminal

| Config Key                 | Value                              |
|----------------------------|------------------------------------|
| <b>Card Terminal :</b>     | Payworks Compatible Device         |
| <b>Merchant Identifier</b> | Supplied by your Solution Provider |
| <b>Merchant Secret</b>     | Supplied by your Solution Provider |

|                                    |                                    |
|------------------------------------|------------------------------------|
| <b>Provider Mode</b>               | Always select <b>Live</b>          |
| <b>Reader Type</b>                 | Select appropriate device          |
| <b>Connection Method</b>           | Select appropriate connection      |
| <b>Payworks Serial Port Number</b> | Supplied by your Solution Provider |
| <b>Payworks IP Address</b>         | Supplied by your Solution Provider |
| <b>Payworks TCP/IP Port</b>        | Supplied by your Solution Provider |

## Additional Configurations

### Capture Signature on Receipt

- When set to **NO**, If the transaction requires a signature to be captured, this will be done **ON SCREEN**
- When set to **YES**, If the transaction requires a signature to be captured, this will be done **ON RECEIPT**

### Use On-Device Tipping

- When set to **NO**, no Tip will be requested from the Card Terminal (If Supported)
- When set **YES**, the Tip will be requested on the Card Terminal.(If Supported)

### Enter Full Amount

- When set to **NO**, the Customer will be asked to enter the Tip amount to append to the transaction.
- When set to **YES**, the Customer will be asked to enter the full transaction amount they wish to pay, and not the amount of tip to append to the transaction.

## 4.4.9. SPT PayTrans

### Config / Hardware

#### Card Terminal

| Config Key                 | Value                              |
|----------------------------|------------------------------------|
| <b>Card Terminal :</b>     | SPT PayTrans                       |
| <b>Merchant Identifier</b> | Supplied by your Solution Provider |
| <b>Merchant Secret</b>     | Supplied by your Solution Provider |
| <b>Provider Mode</b>       | Always select <b>Live</b>          |
| <b>Reader Type</b>         | Select appropriate device          |

|                                    |                                    |
|------------------------------------|------------------------------------|
| <b>Connection Method</b>           | Select appropriate connection      |
| <b>Payworks Serial Port Number</b> | Supplied by your Solution Provider |
| <b>Payworks IP Address</b>         | Supplied by your Solution Provider |
| <b>Payworks TCP/IP Port</b>        | Supplied by your Solution Provider |

## Additional Configurations Available

### Capture Signature on Receipt

- When set to **NO**, If the transaction requires a signature to be captured, this will be done **ON SCREEN**
- When set to **YES**, If the transaction requires a signature to be captured, this will be done **ON RECEIPT**

## 4.4.10. Verifone Ocius

 These configurations cover both the **Built-In** and **Non-Built-In** Printer Ocius Devices.

### Config / Hardware

#### Card Terminal

| Config Key                                                    | Value                                                                                                                                                 |
|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Card Terminal :</b>                                        | Verifone Ocius                                                                                                                                        |
| <b>Ocius Card Terminal IP Address :</b>                       | The <b>IP</b> address of the device                                                                                                                   |
| <b>Ocius Card Terminal Login ID :</b>                         | The <b>Login ID</b> supplied by your Solution Provider                                                                                                |
| <b>Ocius Card Terminal PIN :</b>                              | The <b>PIN</b> supplied by your Solution Provider                                                                                                     |
| <b>Ocius RS Device</b>                                        | If your Verifone Terminal supports the new Ocius RS protocol, please set to <b>YES</b> for correct operation.                                         |
| <b>Enable Ocius Debug Receipt</b>                             | Enable or Disable the Ocius Debug Receipt.                                                                                                            |
| <b>Login to Ocius / Carbon using details in profile</b>       | Setting to <b>NO</b> will use the Staff Member Login details<br>Setting to <b>YES</b> will use the Profile Login information                          |
| <b>Allow menu access to logged in users on Ocius terminal</b> | Setting to <b>NO</b> will prevent Staff Members accessing the menu of the device<br>Setting to <b>YES</b> will allow access to the menu of the device |

# 4.5. Receipt Printers

## Overview

This section lists the default configurations for the currently supported **Standalone Printers**.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Primary Receipt Printer](#)
- [Secondary Receipt Printer](#)

## 4.5.1. Primary Receipt Printer

### Overview

This sections covers **Standalone Printers** that are currently available to be used as **Primary Printers** with the Register Client.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Epson ePOS](#)
- [EscPOS](#)
- [Star Generic Printer](#)
- [Zebra Link-OS](#)

### 4.5.1.1. Epson ePOS

#### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
|      | ✓   |    |     |

## Config / Hardware

### Primary Receipt Printer

| Config Key            | Value                      |
|-----------------------|----------------------------|
| Receipt Printer :     | Epson ePOS                 |
| Receipt Line Width :  | 48                         |
| Print Feed Length :   | 10                         |
| ePOS / Esc POS Port : | TCP:[enter the IP address] |
| ePOS Printer Type :   | Select from Dropdown List  |

#### Notes

- **Print Feed Length** can be set higher or lower depending on your needs.

### Cash Drawer

| Config Key                           | Value                     |
|--------------------------------------|---------------------------|
| Cash Drawer :                        | Epson ePOS                |
| Open Cash Drawer for Card Payments : | See Notes                 |
| ePOS Cash Drawer Type :              | Select from Dropdown List |

#### Notes

- **Open Cash Drawer for Card Payments:**
  - **NO** will keep the cash drawer closed when tendering by card.
  - **YES** will open the cash drawer when tendering by card
- **ePOS Cash Drawer Type:**
  - Select either **PIN2** or **PIN5** depending on your hardware specifications. Refer to the Device's User Manual.

## 4.5.1.2. EscPOS

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
| ✓    | ✓   | ✓  | ✓   |

 EscPOS Printers are a Type of Printer and not from a specific manufacturer. Because the Connection Type varies from device to device, refer to the Printers User Manual for more information.

## Config / Hardware

### Primary Receipt Printer

| Config Key            | Value            |
|-----------------------|------------------|
| Receipt Printer :     | EscPOS           |
| Receipt Line Width :  | <b>See Notes</b> |
| Print Feed Length :   | 10               |
| ePOS / Esc POS Port : | <b>See Notes</b> |

#### Notes

- **Receipt Line Width:** Normally 48, but refer to the Printers User Manual.
- **Print Feed Length** can be set higher or lower depending on your needs.
- **ePOS / Esc POS Port**
  - For WiFi or Lan: Use the Prefix (TCP:) followed by the IP address. For Example, **TCP:192.168.1.200**
  - For BT: Use the Prefix (BT:) followed by the name listed in the devices Bluetooth connection list. For Example, **BT:Epson M267D**
  - For USB: Insert only **USB**: On first use, the Register Device will ask you permission to use the Printer through the USB port. When prompted, tap on the YES / OK button.

### Cash Drawer

| Config Key                           | Value            |
|--------------------------------------|------------------|
| Cash Drawer :                        | EscPOS           |
| Open Cash Drawer for Card Payments : | <b>See Notes</b> |

#### Notes

- **Open Cash Drawer for Card Payments:**
  - **NO** will keep the cash drawer closed when tendering by card.
  - **YES** will open the cash drawer when tendering by card

## 4.5.1.3. Star Generic Printer

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
| ✓    | ✓   | ✓  | ✓   |

\* Star Generic Printer are a series of Standalone Printers that the Register Supports. Because of the large selection available, this section will not go into each one separately but will concentrate generically on their connection to the Register. For more information, refer to the Printers User Manual.

### Config / Hardware

#### Primary Receipt Printer

| Config Key                    | Value                |
|-------------------------------|----------------------|
| Receipt Printer :             | Star Generic Printer |
| Receipt Line Width :          | See Notes            |
| Print Feed Length :           | 10                   |
| Star Printer Port :           | See Notes            |
| Star Printer Port Setting :   | See Notes            |
| Use Star Checked Block Mode : | See Notes            |
| Star Printer Using Raster :   | See Notes            |

#### Notes

- **Receipt Line Width:** Normally 48, but refer to the Printers User Manual.
- **Print Feed Length** can be set higher or lower depending on your needs.
- **Star Printer Port :**
  - For WiFi or Lan: Use the Prefix (TCP:) followed by the IP address. For Example, **TCP:192.168.1.200**
  - For BT: Use the Prefix (BT:) followed by the name listed in the devices Bluetooth connection list. For Example, **BT:Epson M267D**
  - For USB: Insert only **USB:** On first use, the Register Device will ask you permission to use the Printer through the USB port. When prompted, tap on the YES / OK button.
- **Star Printer Port Setting:** Enter the Port Setting when connection is over Bluetooth. Refer to the Printers User Manual.

- **Use Star Checked Block Mode:** Setting this to **YES** will improve the connection stability in slow network environments, but can cause a noticeable delay in printing.
- **Star Printer Using Raster:** Raster Mode sends the printing information in the form of an image rather than a string of text. Printing will be slower, and the Receipt Line Width will need to be set according to the specifications outlined in the Printers User Manual when selecting this mode.

## Cash Drawer

| Config Key                           | Value                |
|--------------------------------------|----------------------|
| Cash Drawer :                        | Star Generic Printer |
| Open Cash Drawer for Card Payments : | <b>See Notes</b>     |

### Notes

- **Open Cash Drawer for Card Payments:**
  - **NO** will keep the cash drawer closed when tendering by card.
  - **YES** will open the cash drawer when tendering by card

## 4.5.1.4. Zebra Link-OS

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
| ✓    | ✓   | ✓  | ✓   |

### Config / Hardware

#### Primary Receipt Printer

| Config Key           | Value                             |
|----------------------|-----------------------------------|
| Receipt Printer :    | Zebra Link-OS Compatible Printers |
| Receipt Line Width : | 48                                |
| Print Feed Length :  | 10                                |
| Connection Type :    | <b>See Notes</b>                  |
| Address:             | <b>See Notes</b>                  |
| Printing Port :      | <b>See Notes</b>                  |



|                     |                  |
|---------------------|------------------|
| Status Port :       | <b>See Notes</b> |
| Zebra Device Name : | <b>See Notes</b> |

### Notes

- **Print Feed Length** can be set higher or lower depending on your needs.
- **Connection Type:**
  - **Bluetooth:**
    - **Address:** Enter the prefix (BT:) followed by the Bluetooth name as appears in the Bluetooth connection list of the Tablet device. For Example: **BT:Zebra Link-OS**
  - **TCP:**
    - **Address:** Enter the prefix (TCP:) followed by the IP address of the Printer. For Example: **TCP:192.168.1.120**
    - **Printing Port:** Enter the Port number of the Printer. Refer to the Printers User Manual.
  - **TCP\_Multi:**
    - **Address:** Enter the prefix (TCP:) followed by the IP address of the Printer. For Example: **TCP:192.168.1.120**
    - **Status Port:** Enter the Status Port number. Refer to the Printers User Manual.
  - **USB:**
    - **Zebra Device Name:** The name of the Zebra device as it appears in the USB settings

## Cash Drawer

This Printer does not support any Cash Drawers.

## 4.5.2. Secondary Receipt Printer

### Overview

This section covers **Standalone Printers** that are currently available to be used as **Secondary Printers** with the Register Client.

**!** Cash Drawers cannot be attached to the Secondary Printer. When using **Advanced Printing** the Secondary Printing options are hidden, and are controlled through **Devices** and **Advanced Printing**

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Epson ePOS](#)
- [EscPOS](#)
- [Star Generic Printer](#)
- [Using the Primary Printer](#)

## 4.5.2.1. Epson ePOS

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
|      | ✓   |    |     |

### Config / Hardware

#### Secondary Receipt Printer

| Config Key                                 | Value                      |
|--------------------------------------------|----------------------------|
| Secondary Printer :                        | Epson ePOS                 |
| Receipt Line Width for Secondary Printer : | 48                         |
| ePOS / EscPOS Port for Secondary Printer : | TCP:[enter the IP address] |
| ePOS Type for Secondary Printer :          | Select from Dropdown List  |

## 4.5.2.2. EscPOS

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
| ✓    | ✓   | ✓  | ✓   |

✱ EscPOS Printers are a Type of Printer and not from a specific manufacturer. Because the Connection Type varies from device to device, refer to the Printers User Manual for more information.

## Config / Hardware

### Secondary Receipt Printer

| Config Key                                 | Value     |
|--------------------------------------------|-----------|
| Secondary Printer :                        | EscPOS    |
| Receipt Line Width for Secondary Printer : | See Notes |
| ePOS / EscPOS Port for Secondary Printer : | See Notes |

#### Notes

- **Receipt Line Width for Secondary Printer:** Normally 48, but refer to the Printers User Manual.
- **ePOS / EscPOS Port for Secondary Printer**
  - For WiFi or Lan: Use the Prefix (TCP:) followed by the IP address. For Example, **TCP:192.168.1.200**
  - For BT: Use the Prefix (BT:) followed by the name listed in the devices Bluetooth connection list. For Example, **BT:Epson M267D**
  - For USB: Insert only **USB:** On first use, the Register Device will ask you permission to use the Printer through the USB port. When prompted, tap on the YES / OK button.

## 4.5.2.3. Star Generic Printer

### Connection Type

| WiFi | LAN | BT | USB |
|------|-----|----|-----|
| ✓    | ✓   | ✓  | ✓   |



Star Generic Printer are a series of Standalone Printers that the Register Supports. Because of the large selection available, this section will not go into each one separately but will concentrate generically on their connection to the Register. For more information, refer to the Printers User Manual.

## Config / Hardware

### Secondary Receipt Printer

| Config Key | Value |
|------------|-------|
|------------|-------|

|                                            |                      |
|--------------------------------------------|----------------------|
| Secondary Printer :                        | Star Generic Printer |
| Receipt Line Width for Secondary Printer : | <b>See Notes</b>     |
| Star Port for Secondary Printer :          | <b>See Notes</b>     |
| Star Port Setting for Secondary Printer :  | <b>See Notes</b>     |
| Star Printer Using Raster :                | <b>See Notes</b>     |

### Notes

- **Receipt Line Width for Secondary Printer:** Normally 48, but refer to the Printers User Manual.
- **Star Port for Secondary Printer :**
  - For WiFi or Lan: Use the Prefix (TCP:) followed by the IP address. For Example, **TCP:192.168.1.200**
  - For BT: Use the Prefix (BT:) followed by the name listed in the devices Bluetooth connection list. For Example, **BT:Epson M267D**
  - For USB: Insert only **USB:** On first use, the Register Device will ask you permission to use the Printer through the USB port. When prompted, tap on the YES / OK button.
- **Star Port Setting for Secondary Printer:** Enter the Port Setting when connection is over Bluetooth. Refer to the Printers User Manual.
- **Star Printer Using Raster:** Raster Mode sends the printing information in the form of an image rather than a string of text. Printing will be slower, and the Receipt Line Width will need to be set according to the specifications outlined in the Printers User Manual when selecting this mode.

## 4.5.2.4. Using the Primary Printer

### Overview

When using only one printer in your Store, you can set the Primary Printer to work as your Secondary Printer. In this setup, all products that are set to Print on the Secondary printer will then print out on the Primary Printer but in the same format as that of a Secondary Printer.

### Secondary Receipt Printer

| Config Key          | Value                   |
|---------------------|-------------------------|
| Secondary Printer : | Use the Primary Printer |

## 4.6. Customer Display Units

### Overview

This sections covers **Standalone Customer Display Units** that are currently available to be used with the Register Client.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Android Secondary Display](#)
- [Bixolon](#)

### 4.6.1. Android Secondary Display

#### Overview

The Android Secondary Display option is designed to be used on any POS unit that has an additional Tablet Type Customer Facing Display (CFD)

#### Config / Hardware

##### Customer Display Unit

| Config Key                 | Value                                                                                              |
|----------------------------|----------------------------------------------------------------------------------------------------|
| Customer Display Type :    | Android Secondary Display                                                                          |
| Idle Text :                | See Notes                                                                                          |
| Enable Marketing Images :  | <div> <input type="checkbox"/> No           <input checked="" type="checkbox"/> Yes         </div> |
| Image 1 :                  | <div>Press to Select or Drop File</div>                                                            |
| Image 2 :                  | <div>Press to Select or Drop File</div>                                                            |
| Image 3 :                  | <div>Press to Select or Drop File</div>                                                            |
| Image Rotation (seconds) : | See Notes                                                                                          |



### Notes

- **Idle Text:**
  - This is the text that will display at the top of the screen, while the Register is waiting to begin a new transaction.
  - This is a free text field but the character count should not exceed 100.
    - **Default Text – Next Customer Please**
- **Images:**
  - Use the Drag and drop method to add an image of type JPG or PNG
- **Image Rotation (seconds):**
  - Set the time in seconds that the images should rotate. Setting this to 0 will prevent the images from rotating, and only the first image will display.
- **Image Background Colour:**
  - Select the background colour to display on the CFD

## 4.6.2. Bixolon

### Overview

The Bixolon Customer Display Unit will work with any hardware that has a USB-Type A port.

### Config / Hardware

#### Customer Display Unit

| Config Key                    | Value     |
|-------------------------------|-----------|
| Customer Display Type :       | Bixolon   |
| Customer Display Idle Text :  | See Notes |
| Customer Display Line Width : | 20        |

### Notes

- **Customer Display Idle Text:**

- This is the text that will display while the Register is waiting to begin a new transaction.
- This is a free text field with a maximum character count of 20.

- **Default Text – Next Customer Please**

## 4.7. Quick Lookup (Printer Width)

### Overview

This section lists the Print Widths of the currently supported Printers.

| Printer                         | Width   | Notes                   |
|---------------------------------|---------|-------------------------|
| Aevi A920 :                     | 32      |                         |
| Aevi Carbon :                   | 41      |                         |
| ELO Paypoint :                  | 32 / 48 | Depending on Model      |
| Epson ePOS :                    | 48      |                         |
| EscPOS :                        | 48      | Refer to Product Manual |
| Ingenico iPOS :                 | 48      |                         |
| Miura M012 Printer Sled :       | 40      |                         |
| Miura ITP or POSzle :           | 40      |                         |
| myPOS :                         | 32      |                         |
| PartnerTech PAT110 :            | 48      |                         |
| Pax A920 Direct :               | 32      |                         |
| Powa T25 :                      | 48      |                         |
| SBV Android Terminals :         | 48      |                         |
| Star Generic Printer :          | 48      |                         |
| Star Generic Printer (Raster) : | 40      |                         |
| Star mPOP :                     | 32      |                         |
| Sunmi T2 :                      | 48      |                         |
| Sunmi V2 Pro :                  | 32      |                         |
| Unique Secure MePOS :           | 42      |                         |
| Verifone Carbon :               | 41      |                         |
| Zebra Link-OS :                 | 48      |                         |

## 5. Merchant Quick Setup

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### Overview

This section provides all the details for a Solution Provider to quickly setup a Merchant account and provision it against a template. Merchants can also use this section if they are creating additional profiles.

In brief, to setup a new Merchant on Register you will need to complete the following steps. (Note each step will link to the appropriate section of the manual):

1. Create the [Merchant Account](#)
2. Provision the Merchant using one of the below templates;
  - a. [Retail Template](#)
  - b. [Hospitality Template](#)
  - c. [Services Template](#)

After provisioning the Web Portal you will need to setup the Merchants Device(s) using the steps below:

1. [Setup the Hardware](#)
2. [Enrol Register](#)
3. [Check provisioning using Training Mode](#)

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Portal Quick Start](#)
- [Register Quick Start](#)
- [Working with Tenants and Merchants](#)
- [Hardware Defaults](#)
- [Setup Templates / Examples](#)

### 5.1. Register Merchant Provisioning Quick

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# Start Guide

This quick start guide provides you with instructions on how to configure the basics within the Web Portal for your Register EPOS system.

 Some information may have already been entered by your Solution Provider, in which case please check the information entered and continue to the next step.

For more information, please use the **YouTube** links to watch a tutorial video. You can watch a full tutorial video on the below process by watching this [Video](#).

Dashboard   Config ▾   Reports ▾   Stock ▾   CRM ▾   Devices   Admin ▾   Logout

|   |                                                                                                                                                                                                                                                                                                                       |                                                                  |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| 1 | <b>Login to the Web Portal</b><br>Open your web browser (Chrome is best) and login to the <a href="#">Register Web Portal</a> with the details provided by your Solution Provider.                                                                                                                                    | See <a href="#">Logging In</a>                                   |
| 2 | <b>Configure your Profile</b><br>Configure how you want your Register to operate by setting up a Profile. To do this click <b>Config</b> in the top menu and select <b>Profiles</b> from the sub menu. Click the <b>New Profile</b> button to add a profile or click the edit pen button to view an existing profile. | See <a href="#">Profiles</a> and <a href="#">This Video</a>      |
| 3 | <b>Add Stores</b><br>Enter the details of all your Stores using Register. To do this click <b>Config</b> in the top menu and select <b>Stores</b> from the sub menu. Click the <b>New Store</b> button to add a new store or click the edit pen button to view an existing store.                                     | See <a href="#">Stores</a> and <a href="#">This Video</a>        |
| 4 | <b>Add Staff Members</b><br>Enter the details of all your Staff Members using Register. To do this, click <b>Config</b> in the top menu and select <b>Staff</b> from the sub menu. Click the <b>New Staff Member</b> button to add a new Staff Member or click the edit pen button to view an existing staff member.  | See <a href="#">Staff Members</a> and <a href="#">This Video</a> |
| 5 | <b>Add Taxes</b><br>Enter the details of all your applicable Taxes used in Register. To do this, click <b>Config</b> in the top menu and select <b>Taxes</b> from the sub menu. Click the <b>New Tax</b> button to add a new tax or click the edit pen button to view an existing tax.                                | See <a href="#">Taxes</a> and <a href="#">This Video</a>         |
| 6 | <b>Add Discounts (Optional)</b><br>Enter the details of any Fixed Discounts you have (Staff Discount etc). To do this, click <b>Config</b> in the top menu and select <b>Discounts</b> from the sub menu. Click the <b>New Discount</b> button to add a new discount or click the edit pen                            | See <a href="#">Discounts</a> and <a href="#">This Video</a>     |

|    |                                                                                                                                                                                                                                                                                                                     |                                                                     |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
|    | button to view an existing discount.                                                                                                                                                                                                                                                                                |                                                                     |
| 7  | <b>Add Departments</b><br>Create or import your Departments (product categories).<br>To do this, click <b>Stock</b> in the top menu and select <b>Departments</b> from the sub menu.<br>Click the <b>New Department</b> button to add a new department or click the edit pen button to view an existing department. | See <a href="#">Departments</a> and <a href="#">This Video</a>      |
| 8  | <b>Add Suppliers (Optional)</b><br>Create or import your Suppliers.<br>To do this, click <b>Stock</b> in the top menu and select <b>Suppliers</b> from the sub menu.<br>Click the <b>New Supplier</b> button to add a new supplier or click the edit pen button to view an existing supplier.                       | See <a href="#">Suppliers</a> and <a href="#">This Video</a>        |
| 9  | <b>Add Products</b><br>Create or import your Products and Services<br>To do this, click <b>Stock</b> in the top menu and select <b>Products</b> from the sub menu. Click the <b>New Product</b> button to add a new product or click the edit pen button to view an existing product.                               | See <a href="#">Products</a> and <a href="#">This Video</a>         |
| 10 | <b>Add a Product Browser</b><br>Create a Product Browser<br>To do this, click <b>Config</b> in the top menu and select <b>Product Browsers</b> from the sub menu.<br>Click the <b>New Product Browser</b> button to add a new browser or click the edit pen button to view an existing browser.                     | See <a href="#">Product Browsers</a> and <a href="#">This Video</a> |
| 11 | <b>Add Devices (Tills)</b><br>Create Devices / Tills<br>To do this, click <b>Devices</b> from the top menu.<br>Click the <b>New Device</b> button to add a new device or click the edit pen button to view an existing device.                                                                                      | See <a href="#">Devices</a> and <a href="#">This Video</a>          |
| 12 | <b>Setup Device / Till</b><br>Using the enrolment code generated in the previous step, setup your device / till by entering the enrolment code on the Settings screen within Register. This can be accessed by tapping the button with 3 dots on the login screen.                                                  | See <a href="#">Enrolment</a> and <a href="#">This Video</a>        |

## 5.2. Register Quick Start Guide

This quick start guide demonstrates how to use the basic functions within Register so you can serve your customers quickly.

For more information, please use the **YouTube** links to watch a tutorial video.

|   |                                                                                               |                                                                                       |
|---|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | <b>Launch Register</b><br>Click the Register icon on the home screen to start using Register. |  |
|---|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

|   |                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                           |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| 2 | <b>Login</b><br>To login to Register, first tap your name on the screen and enter your PIN using the number pad.                                                                                                                                                                                                                                                                                                                                    | See <a href="#">Login</a> and <a href="#">This Video</a>                  |
| 3 | <b>Add Items</b><br>To add items to your basket, either scan the item barcode using the barcode scanner or select the item from the Product or Department Browser.                                                                                                                                                                                                                                                                                  | See <a href="#">Adding Products</a> and <a href="#">This Video</a>        |
| 4 | <b>Tender the Transaction Pay with Card</b><br>To pay for the transaction with a card, tap the CARD button and follow the on-screen instructions. <b>Pay with Exact Cash</b><br>To pay for the transaction with the exact amount of cash, simply tap the CASH button. <b>Pay with amount of Cash</b><br>To pay for the transaction with an amount of cash greater than the transaction, enter the amount using the keypad then tap the CASH button. | See <a href="#">Tendering Transactions</a> and <a href="#">This Video</a> |
| 5 | <b>Print Receipt</b><br>After accepting payment, the customer receipt will automatically print and any change owed will be displayed on the Transaction Summary screen. Tap the Done button to start the next transaction.                                                                                                                                                                                                                          | See <a href="#">Tendering Transactions</a> and <a href="#">This Video</a> |

## 5.3. Portal Quick Start

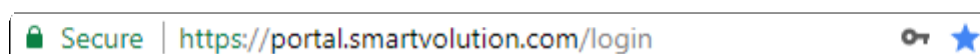
### General

This section details the essentials to get the minimum data into the Register to get a Merchant up and running.

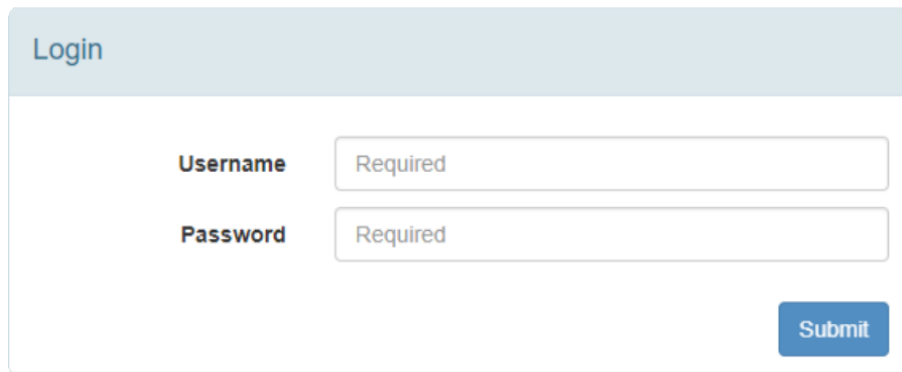
### Logging In

Also, see [Login Process](#).

Using your Internet browser, navigate to the Portal URL provided when you purchased the Register Equipment. This will likely be <https://portal.smartvolution.com/login>



Enter the **Username** and **Password** you were provided. Note that both the Username and Password are case sensitive so please take note of any upper and lower-case characters.


 A screenshot of a login form. At the top, there is a light blue header bar with the word "Login" in white. Below this, the form has two input fields. The first field is labeled "Username" and contains the text "Required". The second field is labeled "Password" and also contains the text "Required". To the right of these fields is a blue button with the word "Submit" in white.

Click on **SUBMIT**. If you have entered all your details correctly, you will be taken to the Dashboard page and your Login was successful.

Once you have logged in and you are at the [Dashboard](#) page, it is time to enter all the data that is necessary for your Register application to work correctly. There is a certain order in which the data needs to be created and the headings below are listed in the correct order.

## Creating a Profile

Also see [Profiles](#)

- On the Menu Bar, click **Config** then **Profiles**
- Click **New Profile**
- Enter a **Name** for the profile and click **Create**.
- The Profile will be created with defaulted values and Auto-Saved by the system, so there is no need to make any changes at this point.
- Click **Close**

## Create a Store

Also see [Stores](#)

- On the Menu Bar, click **Config** then **Stores**
- Click **New Store**
- The required fields here are;
  - Enter the **Store Name**, for example "London Branch"
  - Enter the **Store Number**, for example 1234. (Must be 4 digits)
  - Enter the **Address**
  - Enter the **Town or City**
  - Enter the **Zip / Postal Code**
  - Select the **Time Zone** from the dropdown list.
- At the bottom of the page, click **SAVE**

## Create Staff Members

Also see [Staff](#)

- On the Menu Bar, click **Config** then **Staff**
- Click **New Staff Member**
  - All fields are required to set up a Staff Member except Commission Rate and CRM Calendar, which are Plus License fields only.
    - Enter the **First Name** of the Staff Member, for example “John”
    - Enter the **Last Name** of the Staff Member, for example “Jackson”
    - Enter the **Staff Code**. This must be in the format of four to eight digits. For example, “1234” or “12345678”
    - Enter the **PIN** the Staff Member will use to Login to the Register. This must be in the format of four digits. For example, “1234”
    - Re-enter the **PIN** number for the system to validate.
    - Select the Staff Members **Role** from the dropdown list.
    - Select the **Valid for Store(s)** for which the Staff Member has access to, by checking the box next to the Store name. You can select multiple stores for a Staff Member.
  - At the bottom of the page, click **SAVE**

## Create Taxes

Also see [Taxes](#)

- On the Menu Bar, click **Config** and then on **Taxes**
- Click **New Tax**
  - There are four required fields here, namely the **Tax Name**, **Tax Code**, **Tax Type** and the **Tax Value**.
    - Enter the name of the Tax, for example, “Standard Tax” or “VAT”
    - Enter the Tax Code. Valid characters are **A~Z** and **0~9**, and cannot contain any spaces.
    - Select the Tax Type, either **Fixed Value** or **Percentage**.
    - Enter the Tax Value. For example, 1.50 for a **Fixed Value** or 5.175 for a **Percentage**. In both instances, do not add a currency or the percentage symbol to the value.
  - At the bottom of the page click **SAVE**
  - If you need to create a second tax level, repeat the steps above.



Note: The **Percentage** value must be between **0** and **99.9999** and may not have more than 4 decimal places, and the **Fixed** value must be between **0.00** and **999.99** and may not have more than 2 decimal places.

# Create Departments

## Manually

Also see [Departments](#)

- On the Menu Bar, click **Stock** and then **Departments**
- Click **New Department**
  - The required fields for each Department are; **Name**, **Code** and the **Department Product Tax Code**.
    - Enter the **Name** of the Department, for example “Dairy”
    - If this is a top-level department, leave **Parent Department** empty, or select the parent department from the dropdown list.
    - Enter the Department **Code**, for example “0001”
    - Select the **Tax Code(s)** from the tax list by clicking the selection box to the right of the required tax. This will be used for the Department Product that is automatically created. You can select more than one tax code if required.
    - Add a **Description** if required.
    - Select whether the Department will appear in the [Plus Browser](#) or not. (Plus License Only)
    - You can add a Department **Image** by uploading from the local computer.
  - At the bottom of the page click **SAVE**

## Importing

Also see [Department Importing](#)

- On the Menu Bar, click **Stock** and then **Departments**
- Click **Download Template**.
- Click **Download XLS File**
- Open the template XLS file and add your Department information. Like manually adding a Department, the XLS file has a column for each mandatory and optional field. Each row in the XLS file represents a Department to be imported.
  - Set the **Import Record** to **Yes**
  - Enter the **Department Code**
  - If the Department is a Child Department, enter the **Code** of the Parent Department under **Parent Dept Code**, or leave blank to create a Parent Department.
  - Enter the **Name** of the Department.
  - Leave **Department Path** blank. This column is only displayed when exporting current Departments, and will not be visible on the Department Creation Template.
  - Enter the **Tax Code(s)** for the Department Product under **Dept Product Tax Code**. For multiple Tax Codes, enter each code separated with a space.

- Enter a **Description** in needed.
- Enter **Yes** if the Department is to be shown in the [Plus Browser](#) (Plus License Only). Enter **No** if the Department is not to be shown in the [Plus Browser](#), or you only have a Core License.
- Save the changes to the file.
- On the Portal, click **Import Records**.
- Upload the file using the **Press to Select or Drop File** button.
- The portal will validate the file and highlight any errors in red
- Once validated and accepted by the Portal, click **Import Departments**.
- Click **Close** when the import has finished.

## Create Products

### Manually

Also see [Products](#)

- On the Menu Bar, click **Stock** and then **Products**
- Click **New Product**
  - There are six required fields here.
    - Enter the **Product Name**, for example “Cheese”
    - Enter the **SKU** number of the product, for example “0001001”. The SKU number is unique to the product and cannot be used again for another product.
    - Select the **Department** from the dropdown list, for example “Dairy”
    - Select the **Price Type** from the dropdown list. In the example, select **Regular**
    - Enter the **Price Excluding Tax**, for example “2.99”
    - Select the **Tax(s)** by clicking in the selection box to the right of the required tax. You can select multiple taxes if required.
  - All other fields are optional.
  - At the bottom of the page, click **SAVE**

### Importing

Also see [Importing Products](#)

- On the Menu Bar, click **Stock** then **Products**
- Click **Download Template** then **Download Product Template**.
- Click **Download XLS File**
- Open the XLS file and update with product information. Like adding a single product, the XLS file has a column for each mandatory and optional field. Each row in the XLS file represents a product to be imported.
  - Under **Import Record**, enter **Yes**

- Enter the **Product Name**
- Enter the **SKU** number. This number must be unique.
- Enter the **Department Code** where the product will be placed. This code needs to match an existing valid Department Code.
- Set the **Product Type** as **Regular**
- Enter the **Sell Price** of the Product.
- The **Inclusive of Tax** field needs to be set to either **Yes** or **No**, and references the sell price of the item.
- The **Tax Code** must be a valid Tax Code from the tax table. You can select multiple tax codes by separating each code with a space.
- Set the **Base Commission** to **0**
- Set the **Print Order Receipt** to **None**
- Set **Earns Loyalty** to either **Yes** or **No**.
- Save the file.
- On the Portal, click **Import Records** then **Import Product Records** on the products page.
- Upload the file using the **Press to Select or Drop File** button.
- The portal will validate the file and highlight any errors in red
- Once validated and accepted by the Portal, click **Import Products**.
- Click **Close** when the import has finished.

## Create a Product Browser

Also see [Product Browser](#)

- On the Menu Bar, click **Config** then **Product Browser**
- Click **New Product Browser**
  - There is one required field here, the Product Browser Name.
    - Enter the **Name** of the Browser, for example “The Store”
  - To add a new product to the browser, search all products in the right window, then drag and drop them onto the ‘+’ sign in the left window.
- At the bottom of the page click **SAVE**

## Create a Device

Also see [Devices](#)

- On the Menu Bar, click **Devices**
- Click **New Device**
  - There are five required fields here.
    - Enter the **Name** of the Device, for example “Till 01”
    - Select the **License Type** from the dropdown list. (Core or Plus)
    - Select the **Store** from the dropdown list.



- Select the **Profile** from the dropdown list.
- Select the **Product Browser** from the dropdown list.
- At the bottom of the page, click **SAVE**

## Deploying the Data to the Register

Now that you have successfully created the background data in the Web Portal, it is time to deploy it to the Register. Please ensure that your Wi-Fi is switched on and connected to the internet.

When you purchased your license(s) for the Register, you would have received in addition to the Register equipment and software, a Base URL Address which is needed by the Register Application to communicate with the Database Servers.

But before we continue with the deployment, go to the Web Portal Main Menu and click on “Devices”. Make a note of the **Enrolment Code** on the “Till” that you created, as you will need this shortly. Then carry out the following:

- On the Tablet, tap on the Register icon to launch the application.
- On first use, the Register application will have no background data so the Staff list will be empty.
- In the top right-hand corner of the Register application, you will see three vertical dots. Tap on these and then tap on **Settings**
- Here you will see two required fields.
  - Enter the **Enrolment Code** (Case Sensitive). This is the Enrolment Code you obtained from **Devices**
  - Enter the **Base URL** that was supplied to you.
  - Tap on **Enrol**. If the entered data is correct, the device will now communicate with the server and download all the data that you created.
  - Once the Sync is complete, tap **Done** in the top right-hand corner.
  - You should now see the Staff Member you created before.

You have now successfully deployed the data from the Web Portal to the Register and you are ready to go.

## 5.4. Register Quick Start

### General

This section details the layout of, and provides a quick overview of the Register Application.

## Tablet Setup

After the setup of your hardware, you will need to setup your tablet. There are two parts to this; first joining your Wi-Fi network and second, pairing the Bluetooth Hardware (Depending on Hardware!) These are once off operations, and will not have to be repeated each time you use the Register on the tablet.

To setup your tablet, you will first need to unlock it if you have the screen lock function active!

Open the app drawer and tap the Settings icon.

From the Settings Function:

- Tap **Wi-Fi** on the left and tap the switch to the green **ON** position.
- Tap the **Scan** button found in the top right corner.
- Tap the **Name** of your Wi-Fi network and enter the Wi-Fi **Password**. If you do not know your Wi-Fi details, these can normally be found on the back of your Wi-Fi router or on the quick reference card that came with it.
- After entering the password, tap **Connect** and you should see a notification saying you are connected.

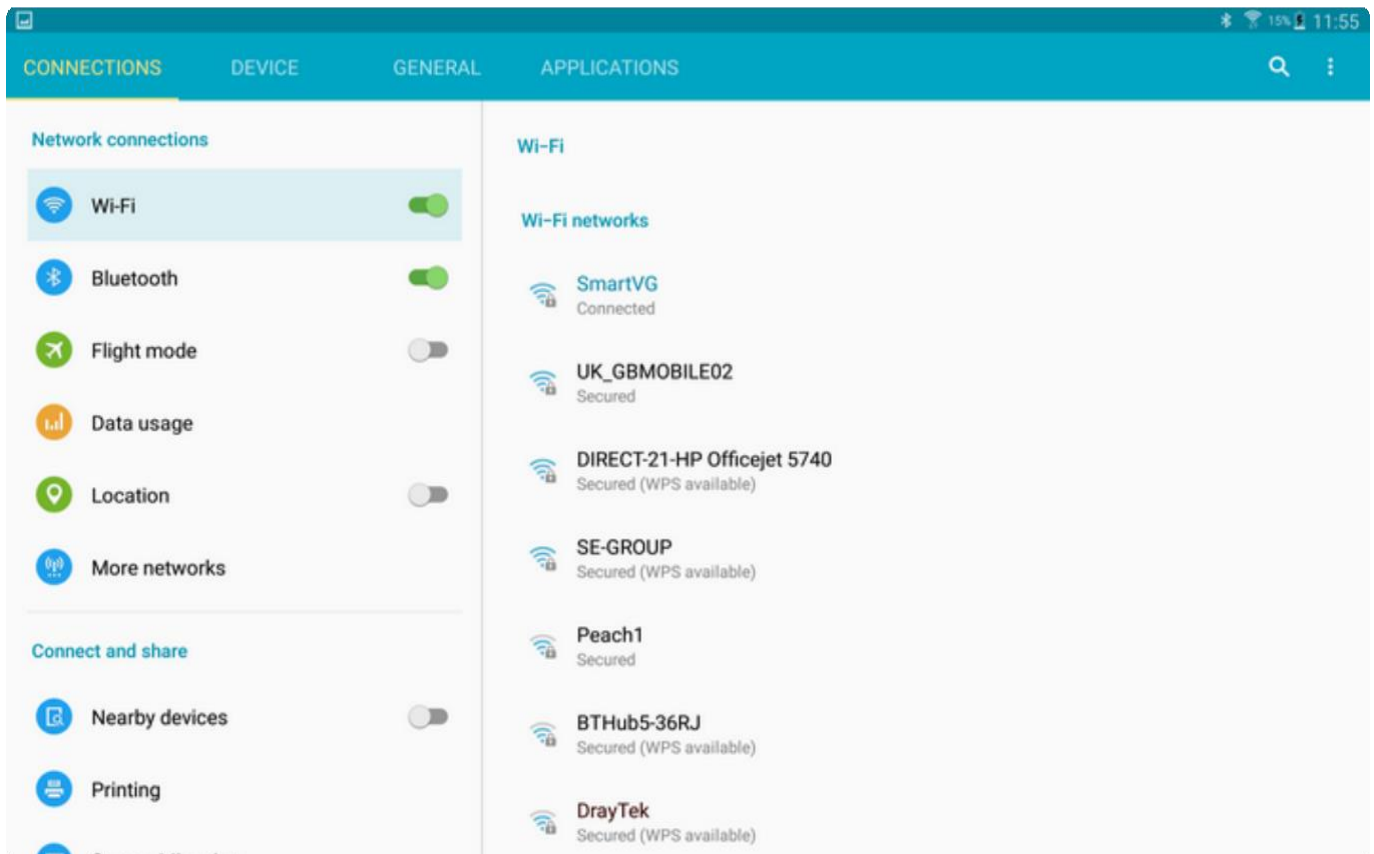
The next step is to pair the Bluetooth Hardware.

**!** The Hardware must only be paired to one tablet or you run the risk of conflicts occurring between the tablets the hardware is paired with. Resulting issues include not being able to scan, or scanned items appearing in the journal of the wrong Register, or receipt printouts printing on the wrong printer.

Again, from the Settings Function:

- Turn on the hardware.
- Tap **Bluetooth** on the left and tap the switch to the green **ON** position.
- Tap the **Scan** button found in the top right corner.
- Follow the hardware manufacturer's directions on completing the pairing.
- Tap **OK** on the message prompt and the hardware will pair with the tablet.

Your tablet is now setup and each time you turn on the tablet it should automatically join your store Wi-Fi and connect to the hardware.



## Start-Up Procedure



This chapter only applies to hardware that is connected to the tablet via USB cable. If your hardware operates through Bluetooth or Wi-Fi, you can skip this chapter.

Before powering up your tablet first ensure it is not connected to the hardware by USB. You must allow Android to fully load, and then unlock the screen before plugging in the USB cable.

After plugging in the cable, you will see a message stating a USB device is connected and a prompt asking permission for the Register to access the USB device! Tap the checkbox to use this by default and tap OK.

When the Register loads, you might see the same message prompt again, in which case tap the checkbox and tap OK.

This is normally a once off operation. However, as some devices clear the defaults on power off or reboot, the process will need to be repeated after it is switched off or rebooted.

## Enrollment



When using the Register for the first time you will need to configure it with your account. To configure the Register, follow these steps

\* Your Solution Provider may have completed this process for you. In which case, you can skip this section.

\* You will need your account details to hand which were issued to you when you purchased your license(s), and the tablet must be on a Wi-Fi network so that the Register can sync with your account and obtain your products, staff members and other configurations.

| Step | Instruction                                              | Operation                                                                             |
|------|----------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Tap the <b>Settings</b> Button (top right corner)        |  |
| 2    | Tap <b>Settings</b>                                      |  |
| 3    | Tap <b>Enrolment Code</b>                                |  |
| 4    | Enter Enrolment Code                                     | <i>Case Sensitive</i>                                                                 |
| 5    | Tap <b>OK</b>                                            |  |
| 6    | <b>Base URL</b>                                          | Leave as defaulted by App unless otherwise instructed by your Solution Provider       |
| 7    | Tap <b>Enrol</b>                                         |  |
| 8    | The Register will now sync and configure to your account | A spinning "Sync" icon will display during this process                               |
| 9    | Tap <b>Done</b>                                          |  |

## Basic Use



To become familiar with the basic functions of the Register, follow the steps below to mimic a standard transaction from Start to Finish.

 This assumes that the Staff Member has already logged in! See [Staff Member Sign On](#)

This example will add a product to the journal using the Product Browser, and completing the transaction using the Quick Tender Function.

| Step | Instruction                                   | Operation                                                                           |
|------|-----------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Tap a <b>Product</b> to add it to the journal |   |
| 2    | Tap the <b>£20</b> on the Quick Tender        |  |
| 3    | Tap <b>Done</b>                               |  |

## 5.5. Tenants and Merchants

### General

This section will cover the processes for creating, editing and deleting both Tenants and Merchants.

A **Tenant** can contain Sub-Tenants or Merchants

A **Merchant** is the end user account

Register supports multiple levels of Tenants, once a Merchant has been added to a tenant a sub tenant can no longer be created. Please see below example:

- Smart Volution (Tenant)
  - Solution Provider (Tenant)
    - Solution Provider Merchants (Tenant)

- Merchant 1 (Merchant)
- Merchant 2 (Merchant)
- Merchant 3 (Merchant)
- Merchant 4 (Merchant)
- Solution Provider Franchised Merchants (Tenant)
  - Franchise 1 (Tenant)
    - Franchisee 1 Merchant 1 (Merchant)
    - Franchisee 1 Merchant 2 (Merchant)
    - Franchisee 1 Merchant 3 (Merchant)
  - Franchise 2 (Tenant)
    - Franchisee 2 Merchant 1 (Merchant)
    - Franchisee 2 Merchant 2 (Merchant)
    - Franchisee 2 Merchant 3 (Merchant)

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

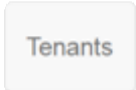
- [Tenants](#)
- [Merchants](#)
- [Tenant and Merchant Licences](#)

## 5.5.1. Tenants

### General

This section deals with the Creation, Editing and Deletion of a Tenant.

### Accessing Tenants

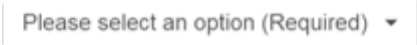
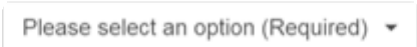
| Step | Instruction                          | Operation                                                                           |
|------|--------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Tenants</b> on the Menu Bar |  |

### Creating a Tenant

This allows you to create a Tenant on the Web Portal



Only Web Portal users with Admin privileges can complete this action.

| Step | Instruction                                                                                    | Operation                                                                           |
|------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Navigate to the Tenant you wish to create a tenant under by clicking <b>Access Tenant</b>      |  |
| 2    | Click on* New Tenant*                                                                          |  |
| 3    | Enter the <b>Tenant Name</b>                                                                   | <b>Required</b>                                                                     |
| 4    | Enter the <b>Core</b> and <b>Plus Licenses</b> to be assigned to all sub tenants and merchants |                                                                                     |
| 5    | Enter all other <b>Required Fields</b>                                                         |                                                                                     |
| 6    | Select the <b>Country</b> from the dropdown list                                               |  |
| 7    | Select the <b>Time Zone</b> from the dropdown list                                             |  |
| 8    | Enter other <b>Optional Fields</b>                                                             |                                                                                     |
| 9    | Click <b>Save</b>                                                                              |  |

## Editing a Tenant

This allows you to Edit an existing Tenant on the Web Portal

 Only Web Portal users with Admin privileges can complete this action.

| Step | Instruction                                                              | Operation                                                                             |
|------|--------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Navigate to the Tenant you wish to edit by clicking <b>Access Tenant</b> |  |
| 2    | Click on the <b>Edit</b> icon                                            |  |
| 3    | Make the changes needed                                                  |                                                                                       |
| 4    | Click <b>Save</b>                                                        |  |

## Deleting a Tenant

This allows you to Delete a Tenant on the Web Portal

 Only Web Portal users with Admin privileges can complete this action.

**!** Deleting a Tenant is a permanent action and cannot be undone.

**!** All other Sub-Tenants and Merchants below the Tenant will also be deleted.

| Step | Instruction                                                                | Operation                                                                         |
|------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1    | Navigate to the Tenant you wish to delete by clicking <b>Access Tenant</b> |  |
| 2    | Click on the <b>Delete Icon</b>                                            |  |
| 3    | Click <b>Yes</b>                                                           |  |

## 5.5.2. Merchants

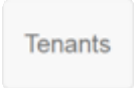
### General

This section deals with the Creation, Editing and Deletion of a Merchant.

### Creating Merchants

This allows you to create a Merchant on the Web Portal

**\*** Only Web Portal users with Admin privileges can complete this action.

| Step | Instruction                                        | Operation                                                                             |
|------|----------------------------------------------------|---------------------------------------------------------------------------------------|
| 1    | Click <b>Tenants</b> on the Menu Bar               |  |
| 2    | Locate the Tenant you want to add the Merchant too |                                                                                       |
| 3    | Click <b>Access Tenant</b>                         |  |
| 4    | Click <b>New Merchant</b>                          |  |
| 5    | Fill in the Merchants <b>Name</b>                  | <b>Required</b>                                                                       |
| 6    | Fill in the Licenses to be issued                  |                                                                                       |



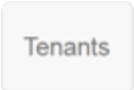
|    |                                                                      |                                                                                     |
|----|----------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 7  | Complete all other <b>Required</b> Fields                            |                                                                                     |
| 8  | Complete all other <b>Optional</b> Fields                            |                                                                                     |
| 9  | Select the <b>Country</b> from the dropdown list                     | Please select an option (Required) ▾                                                |
| 10 | Select the <b>Time Zone</b> from the dropdown list                   | Please select an option (Required) ▾                                                |
| 11 | Select the <b>Message Bundle Type</b>                                |                                                                                     |
| 12 | Select the <b>Associated Information</b> for the Message Bundle Type |                                                                                     |
| 13 | Click <b>Save</b>                                                    |  |

\* If no Plus licenses are issued, the Message Bundle Type and Associated Information will be hidden.

## Editing a Merchant

This allows you to Edit a Merchant on the Web Portal

\* Only Web Portal users with Admin privileges can complete this action.

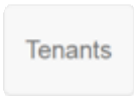
| Step | Instruction                                    | Operation                                                                            |
|------|------------------------------------------------|--------------------------------------------------------------------------------------|
| 1    | Click <b>Tenants</b> on the Menu Bar           |   |
| 2    | Locate the Tenant where the Merchant is stored |                                                                                      |
| 3    | Click <b>Access Tenant</b>                     |  |
| 4    | Locate the Merchant                            |                                                                                      |
| 5    | Click on the <b>Edit</b> icon                  |   |
| 6    | Make the required changes                      |                                                                                      |
| 7    | Click <b>Save</b>                              |   |

## Deleting a Merchant

This allows you to Delete a Merchant on the Web Portal

 Only Web Portal users with Admin privileges can complete this action.

 Deleting a Merchant is a permanent action and cannot be undone, and will permanently delete all merchant data including historic sales.

| Step | Instruction                                    | Operation                                                                           |
|------|------------------------------------------------|-------------------------------------------------------------------------------------|
| 1    | Click <b>Tenants</b> on the Menu Bar           |    |
| 2    | Locate the Tenant where the Merchant is stored |                                                                                     |
| 3    | Click <b>Access Tenant</b>                     |   |
| 4    | Locate the Merchant                            |                                                                                     |
| 5    | Click on the <b>Delete</b> Icon                |  |
| 6    | Click <b>Yes</b>                               |  |

### 5.5.3. Tenant and Merchant Licences

Licensing in the Portal allows a Tenant to create Merchants and Merchants to create Devices. Devices are the Registers (Tills) used within the Store(s) to carry out Transactions.

There are currently two types of Licences;

- The **Core License** provides all functionality required to complete transactions
- The **Plus License** provides all Core functionality with the following enhanced features:
  - Customer Relationship Management
  - Commissions
  - Plus-Browser (Displaying items in a menu format)
  - Multiple Transaction Suspending
  - Staff Time Keeping
  - Hospitality

 If a Merchant only has Core Licenses, the Plus features will be hidden in the Profile setups. CRM will be visible on the Main Menu but will not be accessible

## Important Notes around Licences:

- Only a Tenant can assign and adjust Merchant licenses. Merchants can view their licenses and assign them to Devices (Tills).
- A Tenant's Licenses will be reduced by the number of licenses given to the Merchants below them, or increased when removing licenses from Merchants.
- If a Tenant that is two or more levels up from the Merchant adjusts the licenses of that Merchant, the licenses will be adjusted from the Tenant just above the Merchant.
- If the Tenant has Sub-Tenants i.e. tiered tenants, then each Tenant in the whole tier must have licenses. For Example;
  - Tenant (Level 1) – Must have licenses, and gives licenses to Tenant (Level 2)
  - Tenant (Level 2) – Must have licenses, and gives licenses to Tenant (Level 3)
  - Tenant (Level 3) – Must have licenses, and gives licenses to Merchants

## 5.6. Setup Templates / Examples

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Retail Quick Setup Guide](#)
- [Hospitality Quick Setup Guide](#)
- [Services Quick Setup Guide](#)

### 5.6.1. Retail Quick Setup Guide

General settings for a typical Retailer

## General

This document provides details on how to configure a Profile in the Web Portal for a typical Retail use case. This covers the individual settings to be configured but does not provide a full walk through for on- boarding a Merchant (please see the quick setup guide).

The Profile setup in this example is a good base level of general settings used for a typical retailer that does not require Plus features such as CRM or a Secondary Printer

This setup uses a lot of the default profile values and can be changed to meet the customers exact preferences.

The following slides detail what to set for each config key / setting within a profile for a general retail use case.

Profiles are split into sections, we have displayed these sections as individual tables, these tables provide details on the Config Key / Setting Name, if we are using the Default Value and what Value should be used.

To configure a profile you must first login to the Web Portal (<https://portal.smartvolution.com>) and under the applicable Merchant account click Config > Profiles > New Profile

After setting up your profile, please ensure the following has also been setup in the below order:

1. [Create Profile](#)
  - a. [Enter Retail Template Details](#)
2. [Add Stores](#)
3. [Add Staff](#)
4. [Add Taxes](#)
5. [Add Additional Tender Types](#)
6. [Add Fixed Discounts](#)
7. [Add Departments](#)
8. [Add Products](#)
9. [Add Product Browser](#)
10. [Add Web Portal Users](#)
11. [Add Devices \(Tills\)](#)

A retailer may want to leverage the CRM (customers, appointments & messages) functionality, if the customer would like this option please also complete the below steps:

1. [Add Lists](#)
  - a. [Create all lists required for CRM fields](#)
2. [Configure CRM](#)
  - a. [Customer Fields](#)
  - b. [Message Settings](#)



**Important Note:** Devices / Licences will need to be configured to Plus in order to use CRM and Hospitality functionality!

## 5.6.1.1. Retail Profile Setup

 This section provides details on the settings used within the profile. There is a chapter for each section of the profile but does not include Branding.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Retail – General](#)
- [Retail – Functions](#)
- [Retail – User Permissions](#)
- [Retail – Tendering](#)
- [Retail – Receipt](#)
- [Retail – Tax & Commissions](#)
- [Retail – Hardware](#)
- [Retail – Branding & Logging](#)

### 5.6.1.1.1. Retail – General

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                    | Config Key                    | Default | Value                     |
|-------------------------|-------------------------------|---------|---------------------------|
| <b>General Settings</b> | Automatically Update Register | No      | Update on Start Day       |
| <b>General Settings</b> | Keep Local Data for X Days    | Yes     | 90                        |
|                         |                               |         |                           |
| <b>Start Day</b>        | Remember Last Float           | Yes     | Yes                       |
|                         |                               |         |                           |
| <b>End Day</b>          | Automatically End Day         | Yes     | Yes                       |
| <b>End Day</b>          | Auto End Day Time             | Yes     | 23:59:59                  |
| <b>End Day</b>          | Blind Declaration             | Yes     | No                        |
| <b>End Day</b>          | Cashing Up Type               | Yes     | Denominations             |
| <b>End Day</b>          | Logout User After End Day     | Yes     | No                        |
| <b>End Day</b>          | End Day Reference             | Yes     | Off                       |
|                         |                               |         |                           |
| <b>Logging In</b>       | Staff Login Screen            | Yes     | Single Staff Member Login |

|                                 |                                    |     |                                                                                 |
|---------------------------------|------------------------------------|-----|---------------------------------------------------------------------------------|
| <b>Logging In</b>               | Staff Login Method                 | Yes | Name and Pin                                                                    |
| <b>Logging Out</b>              | Logout User After Each Transaction | Yes | No                                                                              |
| <b>Logging Out</b>              | Logout User After X Seconds        | No  | 300                                                                             |
| <b>Register Settings Access</b> | Enable Settings Password           | Yes | No                                                                              |
| <b>Side Menu URL's</b>          | Custom URL Label                   | Yes | About Register                                                                  |
| <b>Side Menu URL's</b>          | Custom URL Address                 | Yes | <a href="http://www.smartvolution.com">http://www.smartvolution.com</a>         |
| <b>Side Menu URL's</b>          | Register User Guide                | Yes | <b>See Notes</b>                                                                |
| <b>Side Menu URL's</b>          | Web Portal URL                     | Yes | <a href="https://portal.smartvolution.com">https://portal.smartvolution.com</a> |
| <b>Reasons</b>                  | Enable No Sale Reasons             | No  | Yes                                                                             |
| <b>Reasons</b>                  | Enable Cancel Sale Reasons         | No  | Yes                                                                             |
| <b>Reasons</b>                  | Enable Refund Reasons              | No  | Yes                                                                             |

## Notes

<https://www.manula.com/manuals/register-manual/register-manual?key=eybstPShxpqYOGAuCPIjOcQuV7oJEn0IMb27QKdeZu4D2tYt0x>

## 5.6.1.1.2. Retail – Functions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                                  | Config Key                | Default   | Value              |
|---------------------------------------|---------------------------|-----------|--------------------|
| <b>Product and Department Browser</b> | Browser View Layout       | Yes       | Grid (With Images) |
| <b>Product and Department Browser</b> | Enable Department Browser | Yes       | Yes                |
| <b>Product and Department Browser</b> | Reset Department Browser  | Yes       | No                 |
| <b>Product and Department Browser</b> | Extended Browser Enabled  | No        | Yes                |
| <b>Product and Department Browser</b> | *Plus Browser Layout      | Plus Only | Off                |
| <b>Product and Department Browser</b> | Extend Browser On Login   | Yes       | No                 |

|                                         |                                                |           |                                       |
|-----------------------------------------|------------------------------------------------|-----------|---------------------------------------|
| <b>Product and Department Browser</b>   | Collapse Browser On Add Item                   | Yes       | No                                    |
| <b>Transaction Suspension</b>           | Allow Switch Staff                             | Yes       | Yes                                   |
| <b>Transaction Suspension</b>           | *Suspend Transaction                           | Plus Only | Local Suspend Only                    |
| <b>Transaction Suspension</b>           | *Suspend Transaction Name                      | Plus Only | Free Text                             |
| <b>Transaction Suspension</b>           | *Staff Member Access To Suspended Transactions | Plus Only | All POS Users                         |
| <b>Customer Relationship Management</b> | *Enable CRM                                    | Plus Only | Yes                                   |
| <b>Customer Relationship Management</b> | *CRM Conflict Warnings                         | Plus Only | Impacted POS User and All Supervisors |
| <b>Customer Relationship Management</b> | *Show Notifications on Login Screen            | Plus Only | Yes                                   |
| <b>Customer Relationship Management</b> | *Force Customer Assignment to Transaction      | Plus Only | No                                    |
| <b>Discounting</b>                      | Enable Decimal Percentage Discounts            | Yes       | No                                    |
| <b>Discounting</b>                      | Enable Discount Limits                         | Yes       | No                                    |
| <b>Clock In Out</b>                     | *Enable Time Keeping                           | Plus Only | Yes                                   |
| <b>Clock In Out</b>                     | *Auto Login After Clock In                     | Plus Only | No                                    |
| <b>Clock In Out</b>                     | *Require Clock In Before Login                 | Plus Only | Yes                                   |
| <b>Price Lists</b>                      | Remember Last Price List                       | Yes       | No                                    |
| <b>Price Lists</b>                      | Price List Selection Message                   | Yes       | Please Select Price List              |
| <b>Loyalty</b>                          | *Enable LoyalZoo Integration                   | Plus Only | No                                    |

### 5.6.1.1.3. Retail – User Permissions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area            | Config Key                    | Default | Value               |
|-----------------|-------------------------------|---------|---------------------|
| Function Access | Percentage Discount           | Yes     | All POS Users       |
| Function Access | Price Discount                | Yes     | All POS Users       |
| Function Access | Cancel Sale                   | Yes     | All POS Users       |
| Function Access | No Sale                       | Yes     | All POS Users       |
| Function Access | Price Override                | No      | Supervisor Approval |
| Function Access | Refund                        | No      | Supervisor Approval |
| Function Access | Manual Refunds                | Yes     | All POS Users       |
| Function Access | Void Item                     | Yes     | All POS Users       |
| Function Access | Staff Can Delete Appointments | Yes     | All POS Users       |
| Function Access | Surcharge                     | Yes     | Disabled            |
| Function Access | Tip                           | Yes     | Disabled            |
| Function Access | Assign Staff To Transaction   | Yes     | All POS Users       |
|                 |                               |         |                     |
| Module Access   | Access Custom URL             | Yes     | All POS Users       |
| Module Access   | Access Paid In                | No      | Supervisor Only     |
| Module Access   | Access Paid Out               | No      | Supervisor Only     |
| Module Access   | Access Reports                | Yes     | All POS Users       |
| Module Access   | Access Stock                  | Yes     | All POS Users       |
| Module Access   | Access Transaction History    | Yes     | All POS Users       |
| Module Access   | Access Web Portal             | Yes     | All POS Users       |
| Module Access   | Perform Start Day             | Yes     | Supervisor Only     |
| Module Access   | Perform End Day               | Yes     | Supervisor Only     |

## 5.6.1.1.4. Retail – Tendering



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area              | Config Key                           | Default | Value |
|-------------------|--------------------------------------|---------|-------|
| General Tendering | Allow Split Payment                  | Yes     | Yes   |
| General Tendering | Open Cash Drawer For Receipt Reprint | Yes     | No    |
| General Tendering | Card Button: Name                    | Yes     | CARD  |



|                                   |                         |     |      |
|-----------------------------------|-------------------------|-----|------|
| <b>General Tendering</b>          | Allow Cash Transactions | Yes | Yes  |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Name        | Yes | £5   |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Value       | Yes | 5    |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Name     | Yes | £10  |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Value    | Yes | 10   |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Name     | Yes | £20  |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Value    | Yes | 20   |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Name        | Yes | €5   |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Value       | Yes | 5    |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Name     | Yes | €10  |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Value    | Yes | 10   |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Name     | Yes | €20  |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Value    | Yes | 20   |
| <b>Quick Tender Buttons: (US)</b> | Top Button: Name        | Yes | \$5  |
| <b>Quick Tender Buttons: (US)</b> | Top Button: Value       | Yes | 5    |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Name     | Yes | \$10 |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Value    | Yes | 10   |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Name     | Yes | \$20 |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Value    | Yes | 20   |

## 5.6.1.1.5. Retail – Receipt



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                    | Config Key                         | Default   | Value                |
|-------------------------|------------------------------------|-----------|----------------------|
| <b>Receipt Settings</b> | Print Price Overrides on Receipt   | Yes       | No                   |
| <b>Receipt Settings</b> | Print Daily Report on End Day      | Yes       | Yes                  |
| <b>Receipt Settings</b> | Print Paid In & Out Receipts       | Yes       | Yes                  |
| <b>Receipt Settings</b> | Print No Sale Receipts             | Yes       | No                   |
| <b>Receipt Settings</b> | *Print Customer Details on Receipt | Plus Only | No                   |
| <b>Receipt Settings</b> | Default Receipt Behaviour          | Yes       | Always Print Receipt |

|                         |                                                  |           |    |
|-------------------------|--------------------------------------------------|-----------|----|
| <b>Receipt Settings</b> | <b>*Show Item Modifiers on Customer Receipts</b> | Plus Only | No |
| <b>Receipt Settings</b> | <b>*Add Signature and Tip to Customer Bill</b>   | Plus Only | No |
|                         |                                                  |           |    |
| <b>Receipt Text</b>     | Receipt Header Text                              | Yes       |    |
| <b>Receipt Text</b>     | Receipt Footer Text                              | Yes       |    |

## 5.6.1.1.6. Retail – Tax & Commissions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                      | Config Key                                            | Default   | Value    |
|---------------------------|-------------------------------------------------------|-----------|----------|
| <b>Commissions</b>        | <b>*Commissions Calculated Inclusive of Tax</b>       | Plus Only | Yes      |
| <b>Commissions</b>        | <b>*Commissions Calculated after Discount Applied</b> | Plus Only | Yes      |
|                           |                                                       |           |          |
| <b>Tax Settings (UK)</b>  | Display Prices Inclusive of Tax                       | Yes       | Yes      |
| <b>Tax Settings (UK)</b>  | Price Override Inclusive of Tax                       | Yes       | Yes      |
| <b>Tax Settings (UK)</b>  | Apply Discounts After Tax                             | Yes       | Yes      |
| <b>Tax Settings (UK)</b>  | Manual Item Entry is Exclusive of Tax                 | Yes       | No       |
|                           |                                                       |           |          |
| <b>Tax Settings (USA)</b> | Display Prices Inclusive of Tax                       | No        | No       |
| <b>Tax Settings (USA)</b> | Price Override Inclusive of Tax                       | No        | No       |
| <b>Tax Settings (USA)</b> | Apply Discounts After Tax                             | No        | No       |
| <b>Tax Settings (USA)</b> | Manual Item Entry is Exclusive of Tax                 | No        | Yes      |
|                           |                                                       |           |          |
| <b>Labelling</b>          | Before Tax Label                                      | Yes       | Ex Tax:  |
| <b>Labelling</b>          | Tax Label                                             | Yes       | TAX:     |
| <b>Labelling</b>          | Net Tax Label                                         | Yes       | Net Tax: |

## 5.6.1.1.7. Retail – Hardware

 Note, each merchant will likely have differing settings in this section.

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is

configured to Plus

| Area                             | Config Key            | Default   | Value                     |
|----------------------------------|-----------------------|-----------|---------------------------|
| <b>Barcode Scanner</b>           | Barcode Scanner       | Yes       | None                      |
| <b>Cash Drawer</b>               | Cash Drawer           | Yes       | None                      |
| <b>Card Terminal</b>             | Card Terminal         | No        | A Non-Integrated Terminal |
| <b>Primary Receipt Printer</b>   | Receipt Printer       | Yes       | None                      |
| <b>Secondary Receipt Printer</b> | *Secondary Printer    | Plus Only | None                      |
| <b>Customer Display</b>          | Customer Display Type | No        | None                      |

[Full details on all the Barcode Scanner options can be found here](#)

[Full details on all the Cash Drawer options can be found here](#)

[Full details on all the Card Terminal options can be found here](#)

[Full details on all the Primary Receipt Printer options can be found here](#)

[Full details on all the Secondary Receipt Printer options can be found here](#)

[Full details on all the Customer Display options can be found here](#)

## 5.6.1.1.8. Retail – Branding & Logging

### Branding

\* Typically all branding will be either left as the default values or inherited from the tenant the merchant is under.

| Area                  | Config Key             | Default | Value |
|-----------------------|------------------------|---------|-------|
| <b>Device Logging</b> | Enable Device Logging  | Yes     | No    |
| <b>Device Logging</b> | Device Log Interval    | Yes     | 15    |
| <b>Device Logging</b> | Log Cash Drawer Events | Yes     | No    |
| <b>Device Logging</b> | Log Intents            | Yes     | No    |

## 5.6.2. Hospitality Quick Setup Guide

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### Introduction

This document provides details on how to configure a Profile in the Web Portal for a typical Hospitality use case. This covers the individual settings to be configured but does not provide a full walkthrough for on-boarding a Merchant (please see the quick setup guide).

The Profile setup in this example is a good base level of general settings used for a typical Hospitality establishment that displays products like a menu and prints orders to the kitchen.

This setup uses some Plus Only settings and can be changed to meet the customers exact preferences.

The following slides detail what to set for each config key / setting within a profile for a general hospitality use case.

Profiles are split into sections, we have displayed these sections as individual tables, these tables provide details on the Config Key / Setting Name, if we are using the Default Value and what Value should be used.

To configure a profile you must first login to the Web Portal (<https://portal.smartvolution.com>) and under the applicable Merchant account click Config > Profiles > New Profile

After setting up your profile, please ensure the following has also been setup in the below order:

1. [Add Lists](#)
  - a. [Create a list of tables and or tab names to suspend against](#)
  - b. [Create a list of tables for CRM Calendar for Appointments](#)
2. [Create Profile](#)
  - a. [Enter Hospitality Template Details](#)
3. [Add Stores](#)
  - a. Set Appointment Resource Type to Table List previously created for Appointments
4. [Add Staff](#)
5. [Add Taxes](#)
6. [Add Additional Tender Types](#)
7. [Add Fixed Discounts](#)
8. [Add Departments](#)
  - a. Set desired Departments to appear on Menu / Plus Browser
9. [Add Products](#)
  - a. Mark products for secondary printer
10. [Add Product Browser](#)

**11. [Add Web Portal Users](#)****12. [Add Devices](#)**

- a. As Plus Devices

A hospitality establishment may want to leverage the CRM (customers, appointments & messages) functionality, if the customer would like this option please also complete the below steps:

**1. [Add Lists](#)**

- a. [Create all lists required for CRM fields](#)

**2. [Configure CRM](#)**

- a. [Customer Fields](#)
- b. [Message Settings](#)



Important Note: Devices / Licences will need to be configured to Plus in order to use CRM and Hospitality functionality!

## **5.6.2.1. Hospitality Profile Setup**



This section provides details on the settings used within the profile. There is a chapter for each section of the profile but does not include Branding.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Hospitality – General](#)
- [Hospitality – Functions](#)
- [Hospitality – User Permissions](#)
- [Hospitality – Tendering](#)
- [Hospitality – Receipt](#)
- [Hospitality – Tax & Commissions](#)
- [Hospitality – Hardware](#)
- [Hospitality – Branding & Logging](#)

### **5.6.2.1.1. Hospitality – General**



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                            | Config Key                         | Default | Value                                                                           |
|---------------------------------|------------------------------------|---------|---------------------------------------------------------------------------------|
| <b>General Settings</b>         | Automatically Update Register      | No      | Update on Start Day                                                             |
| <b>General Settings</b>         | Keep Local Data for X Days         | Yes     | 90                                                                              |
|                                 |                                    |         |                                                                                 |
| <b>Start Day</b>                | Remember Last Float                | Yes     | Yes                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>End Day</b>                  | Automatically End Day              | Yes     | Yes                                                                             |
| <b>End Day</b>                  | Auto End Day Time                  | Yes     | 23:59:59                                                                        |
| <b>End Day</b>                  | Blind Declaration                  | Yes     | No                                                                              |
| <b>End Day</b>                  | Cashing Up Type                    | Yes     | Denominations                                                                   |
| <b>End Day</b>                  | Logout User After End Day          | Yes     | No                                                                              |
| <b>End Day</b>                  | End Day Reference                  | Yes     | Off                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>Logging In</b>               | Staff Login Screen                 | Yes     | Single Staff Member Login                                                       |
| <b>Logging In</b>               | Staff Login Method                 | Yes     | Name and Pin                                                                    |
|                                 |                                    |         |                                                                                 |
| <b>Logging Out</b>              | Logout User After Each Transaction | Yes     | No                                                                              |
| <b>Logging Out</b>              | Logout User After X Seconds        | No      | 300                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>Register Settings Access</b> | Enable Settings Password           | Yes     | No                                                                              |
|                                 |                                    |         |                                                                                 |
| <b>Side Menu URL's</b>          | Custom URL Label                   | Yes     | About Register                                                                  |
| <b>Side Menu URL's</b>          | Custom URL Address                 | Yes     | <a href="http://www.smartvolution.com">http://www.smartvolution.com</a>         |
| <b>Side Menu URL's</b>          | Register User Guide                | Yes     | <b>See Notes</b>                                                                |
| <b>Side Menu URL's</b>          | Web Portal URL                     | Yes     | <a href="https://portal.smartvolution.com">https://portal.smartvolution.com</a> |
|                                 |                                    |         |                                                                                 |
| <b>Reasons</b>                  | Enable No Sale Reasons             | No      | Yes                                                                             |
| <b>Reasons</b>                  | Enable Cancel Sale Reasons         | No      | Yes                                                                             |
| <b>Reasons</b>                  | Enable Refund Reasons              | No      | Yes                                                                             |

## Notes

<https://www.manula.com/manuals/register-manual/register-manual?key=eybstPShxpqYOGAuCPIjOcQuV7oJEn0IMb27QKdeZu4D2tYt0x>

## 5.6.2.1.2. Hospitality – Functions



Note, Keys starting with \* denote Plus features and will only be enabled if a device is

configured to Plus

| Area                                    | Config Key                                     | Default   | Value                                 |
|-----------------------------------------|------------------------------------------------|-----------|---------------------------------------|
| <b>Product and Department Browser</b>   | Browser View Layout                            | Yes       | Grid (With Images)                    |
| <b>Product and Department Browser</b>   | Enable Department Browser                      | Yes       | Yes                                   |
| <b>Product and Department Browser</b>   | Reset Department Browser                       | Yes       | No                                    |
| <b>Product and Department Browser</b>   | Extended Browser Enabled                       | No        | Yes                                   |
| <b>Product and Department Browser</b>   | *Plus Browser Layout                           | Plus Only | Off                                   |
| <b>Product and Department Browser</b>   | Extend Browser On Login                        | Yes       | No                                    |
| <b>Product and Department Browser</b>   | Collapse Browser On Add Item                   | Yes       | No                                    |
|                                         |                                                |           |                                       |
| <b>Transaction Suspension</b>           | Allow Switch Staff                             | Yes       | Yes                                   |
| <b>Transaction Suspension</b>           | *Suspend Transaction                           | Plus Only | Local Suspend Only                    |
| <b>Transaction Suspension</b>           | *Suspend Transaction Name                      | Plus Only | Free Text                             |
| <b>Transaction Suspension</b>           | *Staff Member Access To Suspended Transactions | Plus Only | All POS Users                         |
|                                         |                                                |           |                                       |
| <b>Customer Relationship Management</b> | *Enable CRM                                    | Plus Only | Yes                                   |
| <b>Customer Relationship Management</b> | *CRM Conflict Warnings                         | Plus Only | Impacted POS User and All Supervisors |
| <b>Customer Relationship Management</b> | *Show Notifications on Login Screen            | Plus Only | Yes                                   |
| <b>Customer Relationship Management</b> | *Force Customer Assignment to Transaction      | Plus Only | No                                    |
|                                         |                                                |           |                                       |
| <b>Discounting</b>                      | Enable Decimal Percentage Discounts            | Yes       | No                                    |
| <b>Discounting</b>                      | Enable Discount Limits                         | Yes       | No                                    |
|                                         |                                                |           |                                       |
| <b>Clock In Out</b>                     | *Enable Time Keeping                           | Plus Only | Yes                                   |

|                     |                                       |           |                          |
|---------------------|---------------------------------------|-----------|--------------------------|
| <b>Clock In Out</b> | <b>*Auto Login After Clock In</b>     | Plus Only | No                       |
| <b>Clock In Out</b> | <b>*Require Clock In Before Login</b> | Plus Only | Yes                      |
|                     |                                       |           |                          |
| <b>Price Lists</b>  | Remember Last Price List              | Yes       | No                       |
| <b>Price Lists</b>  | Price List Selection Message          | Yes       | Please Select Price List |
|                     |                                       |           |                          |
| <b>Loyalty</b>      | <b>*Enable LoyalZoo Integration</b>   | Plus Only | No                       |

## 5.6.2.1.3. Hospitality – User Permissions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                   | Config Key                    | Default | Value               |
|------------------------|-------------------------------|---------|---------------------|
| <b>Function Access</b> | Percentage Discount           | Yes     | All POS Users       |
| <b>Function Access</b> | Price Discount                | Yes     | All POS Users       |
| <b>Function Access</b> | Cancel Sale                   | Yes     | All POS Users       |
| <b>Function Access</b> | No Sale                       | Yes     | All POS Users       |
| <b>Function Access</b> | Price Override                | No      | Supervisor Approval |
| <b>Function Access</b> | Refund                        | No      | Supervisor Approval |
| <b>Function Access</b> | Manual Refunds                | Yes     | All POS Users       |
| <b>Function Access</b> | Void Item                     | Yes     | All POS Users       |
| <b>Function Access</b> | Staff Can Delete Appointments | Yes     | All POS Users       |
| <b>Function Access</b> | Surcharge                     | Yes     | Disabled            |
| <b>Function Access</b> | Tip                           | Yes     | Disabled            |
| <b>Function Access</b> | Assign Staff To Transaction   | Yes     | All POS Users       |
|                        |                               |         |                     |
| <b>Module Access</b>   | Access Custom URL             | Yes     | All POS Users       |
| <b>Module Access</b>   | Access Paid In                | No      | Supervisor Only     |
| <b>Module Access</b>   | Access Paid Out               | No      | Supervisor Only     |
| <b>Module Access</b>   | Access Reports                | Yes     | All POS Users       |
| <b>Module Access</b>   | Access Stock                  | Yes     | All POS Users       |
| <b>Module Access</b>   | Access Transaction History    | Yes     | All POS Users       |



|                      |                   |     |                 |
|----------------------|-------------------|-----|-----------------|
| <b>Module Access</b> | Access Web Portal | Yes | All POS Users   |
| <b>Module Access</b> | Perform Start Day | Yes | Supervisor Only |
| <b>Module Access</b> | Perform End Day   | Yes | Supervisor Only |

## 5.6.2.1.4. Hospitality – Tendering



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                              | Config Key                           | Default | Value |
|-----------------------------------|--------------------------------------|---------|-------|
| <b>General Tendering</b>          | Allow Split Payment                  | Yes     | Yes   |
| <b>General Tendering</b>          | Open Cash Drawer For Receipt Reprint | Yes     | No    |
| <b>General Tendering</b>          | Card Button: Name                    | Yes     | CARD  |
| <b>General Tendering</b>          | Allow Cash Transactions              | Yes     | Yes   |
|                                   |                                      |         |       |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Name                     | Yes     | £5    |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Value                    | Yes     | 5     |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Name                  | Yes     | £10   |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Value                 | Yes     | 10    |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Name                  | Yes     | £20   |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Value                 | Yes     | 20    |
|                                   |                                      |         |       |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Name                     | Yes     | €5    |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Value                    | Yes     | 5     |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Name                  | Yes     | €10   |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Value                 | Yes     | 10    |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Name                  | Yes     | €20   |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Value                 | Yes     | 20    |
|                                   |                                      |         |       |
| <b>Quick Tender Buttons: (US)</b> | Top Button: Name                     | Yes     | \$5   |
| <b>Quick Tender Buttons: (US)</b> | Top Button: Value                    | Yes     | 5     |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Name                  | Yes     | \$10  |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Value                 | Yes     | 10    |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Name                  | Yes     | \$20  |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Value                 | Yes     | 20    |

## 5.6.2.1.5. Hospitality – Receipt

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area             | Config Key                                | Default   | Value                |
|------------------|-------------------------------------------|-----------|----------------------|
| Receipt Settings | Print Price Overrides on Receipt          | Yes       | No                   |
| Receipt Settings | Print Daily Report on End Day             | Yes       | Yes                  |
| Receipt Settings | Print Paid In & Out Receipts              | Yes       | Yes                  |
| Receipt Settings | Print No Sale Receipts                    | Yes       | No                   |
| Receipt Settings | *Print Customer Details on Receipt        | Plus Only | No                   |
| Receipt Settings | Default Receipt Behaviour                 | Yes       | Always Print Receipt |
| Receipt Settings | *Show Item Modifiers on Customer Receipts | Plus Only | No                   |
| Receipt Settings | *Add Signature and Tip to Customer Bill   | Plus Only | No                   |
| Receipt Text     | Receipt Header Text                       | Yes       |                      |
| Receipt Text     | Receipt Footer Text                       | Yes       |                      |

## 5.6.2.1.6. Hospitality – Tax & Commissions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area               | Config Key                                     | Default   | Value |
|--------------------|------------------------------------------------|-----------|-------|
| Commissions        | *Commissions Calculated Inclusive of Tax       | Plus Only | Yes   |
| Commissions        | *Commissions Calculated after Discount Applied | Plus Only | Yes   |
| Tax Settings (UK)  | Display Prices Inclusive of Tax                | Yes       | Yes   |
| Tax Settings (UK)  | Price Override Inclusive of Tax                | Yes       | Yes   |
| Tax Settings (UK)  | Apply Discounts After Tax                      | Yes       | Yes   |
| Tax Settings (UK)  | Manual Item Entry is Exclusive of Tax          | Yes       | No    |
| Tax Settings (USA) | Display Prices Inclusive of Tax                | No        | No    |
| Tax Settings (USA) | Price Override Inclusive of Tax                | No        | No    |

|                           |                                       |     |          |
|---------------------------|---------------------------------------|-----|----------|
| <b>Tax Settings (USA)</b> | Apply Discounts After Tax             | No  | No       |
| <b>Tax Settings (USA)</b> | Manual Item Entry is Exclusive of Tax | No  | Yes      |
|                           |                                       |     |          |
| <b>Labelling</b>          | Before Tax Label                      | Yes | Ex Tax:  |
| <b>Labelling</b>          | Tax Label                             | Yes | TAX:     |
| <b>Labelling</b>          | Net Tax Label                         | Yes | Net Tax: |

## 5.6.2.1.7. Hospitality – Hardware

**!** Note, each merchant will likely have differing settings in this section.

**\*** Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                             | Config Key            | Default   | Value                     |
|----------------------------------|-----------------------|-----------|---------------------------|
| <b>Barcode Scanner</b>           | Barcode Scanner       | Yes       | None                      |
|                                  |                       |           |                           |
| <b>Cash Drawer</b>               | Cash Drawer           | Yes       | None                      |
|                                  |                       |           |                           |
| <b>Card Terminal</b>             | Card Terminal         | No        | A Non-Integrated Terminal |
|                                  |                       |           |                           |
| <b>Primary Receipt Printer</b>   | Receipt Printer       | Yes       | None                      |
|                                  |                       |           |                           |
| <b>Secondary Receipt Printer</b> | *Secondary Printer    | Plus Only | Use the Primary Printer   |
|                                  |                       |           |                           |
| <b>Customer Display</b>          | Customer Display Type | No        | None                      |

[Full details on all the Barcode Scanner options can be found here](#)

[Full details on all the Cash Drawer options can be found here](#)

[Full details on all the Card Terminal options can be found here](#)

[Full details on all the Primary Receipt Printer options can be found here](#)

[Full details on all the Secondary Receipt Printer options can be found here](#)

[Full details on all the Customer Display options can be found here](#)

## 5.6.2.1.8. Hospitality – Branding & Logging

### Branding

 Typically all branding will be either left as the default values or inherited from the tenant the merchant is under.

| Area           | Config Key             | Default | Value |
|----------------|------------------------|---------|-------|
| Device Logging | Enable Device Logging  | Yes     | No    |
| Device Logging | Device Log Interval    | Yes     | 15    |
| Device Logging | Log Cash Drawer Events | Yes     | No    |
| Device Logging | Log Intents            | Yes     | No    |

## 5.6.3. Services Quick Setup Guide

### Introduction

This document provides details on how to configure a Profile in the Web Portal for a typical Services (Salon, Nail Bar, Bike Shop etc) use case. This covers the individual settings to be configured but does not provide a full walk-through for on-boarding a Merchant (please see the quick setup guide).

The Profile setup in this example is a good base level of general settings used for a typical Services establishment that leverages the CRM (customers, appointments & messages) for recording customer details and appointments.

This setup uses some Plus Only settings and can be changed to meet the customers exact preferences.

The following slides detail what to set for each config key / setting within a profile for a Services environment use case that requires CRM such as a Salon, Nail Bar, Garage, Bike Shop etc.

Profiles are split into sections, we have displayed these sections as individual tables, these tables provide details on the Config Key / Setting Name, if we are using the Default Value and what Value should be used.

To configure a profile you must first login to the Web Portal (<https://portal.smartvolution.com>) and under the applicable Merchant account click Config > Profiles > New Profile

After setting up your profile, please ensure the following has also been setup in the below order:

1. [Create Profile](#)
  - a. [Enter Services Template Details](#)
2. [Add Stores](#)
  - a. Set Appointment Resource Type to CRM Staff
3. [Add Staff](#)
  - a. Set Commission Rate
  - b. Set if Staff Members are to appear in the Calendar for Appointments
4. [Add Taxes](#)
5. [Add Additional Tender Types](#)
6. [Add Fixed Discounts](#)
7. [Add Departments](#)
8. [Add Products](#)
9. [Add Product Browser](#)
10. [Add Lists](#)
  - a. [Create all lists required for CRM fields](#)
11. [Configure CRM](#)
  - a. [Customer Fields](#)
  - b. [Message Settings](#)
12. [Add Web Portal Users](#)
13. [Add Devices](#)
  - a. As Plus Devices



Important Note: Devices / Licences will need to be configured to Plus in order to use CRM and Hospitality functionality!

## 5.6.3.1. Services Profile Setup



This section provides details on the settings used within the profile. There is a chapter for each section of the profile but does not include Branding.

Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!

- [Services – General](#)
- [Services – Functions](#)
- [Services – User Permissions](#)
- [Services – Tendering](#)
- [Services – Receipt](#)
- [Services – Tax & Commissions](#)

- [Services – Hardware](#)
- [Services – Branding & Logging](#)

## 5.6.3.1.1. Services – General



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                            | Config Key                         | Default | Value                                                                           |
|---------------------------------|------------------------------------|---------|---------------------------------------------------------------------------------|
| <b>General Settings</b>         | Automatically Update Register      | No      | Update on Start Day                                                             |
| <b>General Settings</b>         | Keep Local Data for X Days         | Yes     | 90                                                                              |
|                                 |                                    |         |                                                                                 |
| <b>Start Day</b>                | Remember Last Float                | Yes     | Yes                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>End Day</b>                  | Automatically End Day              | Yes     | Yes                                                                             |
| <b>End Day</b>                  | Auto End Day Time                  | Yes     | 23:59:59                                                                        |
| <b>End Day</b>                  | Blind Declaration                  | Yes     | No                                                                              |
| <b>End Day</b>                  | Cashing Up Type                    | Yes     | Denominations                                                                   |
| <b>End Day</b>                  | Logout User After End Day          | Yes     | No                                                                              |
| <b>End Day</b>                  | End Day Reference                  | Yes     | Off                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>Logging In</b>               | Staff Login Screen                 | Yes     | Single Staff Member Login                                                       |
| <b>Logging In</b>               | Staff Login Method                 | Yes     | Name and Pin                                                                    |
|                                 |                                    |         |                                                                                 |
| <b>Logging Out</b>              | Logout User After Each Transaction | Yes     | No                                                                              |
| <b>Logging Out</b>              | Logout User After X Seconds        | No      | 300                                                                             |
|                                 |                                    |         |                                                                                 |
| <b>Register Settings Access</b> | Enable Settings Password           | Yes     | No                                                                              |
|                                 |                                    |         |                                                                                 |
| <b>Side Menu URL's</b>          | Custom URL Label                   | Yes     | About Register                                                                  |
| <b>Side Menu URL's</b>          | Custom URL Address                 | Yes     | <a href="http://www.smartvolution.com">http://www.smartvolution.com</a>         |
| <b>Side Menu URL's</b>          | Register User Guide                | Yes     | <b>See Notes</b>                                                                |
| <b>Side Menu URL's</b>          | Web Portal URL                     | Yes     | <a href="https://portal.smartvolution.com">https://portal.smartvolution.com</a> |
|                                 |                                    |         |                                                                                 |
| <b>Reasons</b>                  | Enable No Sale Reasons             | No      | Yes                                                                             |
| <b>Reasons</b>                  | Enable Cancel Sale Reasons         | No      | Yes                                                                             |
| <b>Reasons</b>                  | Enable Refund Reasons              | No      | Yes                                                                             |

## Notes

<https://www.manula.com/manuals/register-manual/register-manual?key=eybstPShxpqYOGAuCPljOcQuV7oJEn0IMb27QKdeZu4D2tYt0x>

### 5.6.3.1.2. Services – Functions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                             | Config Key                                     | Default   | Value                                 |
|----------------------------------|------------------------------------------------|-----------|---------------------------------------|
| Product and Department Browser   | Browser View Layout                            | Yes       | Grid (With Images)                    |
| Product and Department Browser   | Enable Department Browser                      | Yes       | Yes                                   |
| Product and Department Browser   | Reset Department Browser                       | Yes       | No                                    |
| Product and Department Browser   | Extended Browser Enabled                       | No        | Yes                                   |
| Product and Department Browser   | *Plus Browser Layout                           | Plus Only | Off                                   |
| Product and Department Browser   | Extend Browser On Login                        | Yes       | No                                    |
| Product and Department Browser   | Collapse Browser On Add Item                   | Yes       | No                                    |
|                                  |                                                |           |                                       |
| Transaction Suspension           | Allow Switch Staff                             | Yes       | Yes                                   |
| Transaction Suspension           | *Suspend Transaction                           | Plus Only | Local Suspend Only                    |
| Transaction Suspension           | *Suspend Transaction Name                      | Plus Only | Free Text                             |
| Transaction Suspension           | *Staff Member Access To Suspended Transactions | Plus Only | All POS Users                         |
|                                  |                                                |           |                                       |
| Customer Relationship Management | *Enable CRM                                    | Plus Only | Yes                                   |
| Customer Relationship Management | *CRM Conflict Warnings                         | Plus Only | Impacted POS User and All Supervisors |
| Customer Relationship Management | *Show Notifications on Login Screen            | Plus Only | Yes                                   |

|                                         |                                                  |           |                          |
|-----------------------------------------|--------------------------------------------------|-----------|--------------------------|
| <b>Customer Relationship Management</b> | <b>*Force Customer Assignment to Transaction</b> | Plus Only | No                       |
| <b>Discounting</b>                      | Enable Decimal Percentage Discounts              | Yes       | No                       |
| <b>Discounting</b>                      | Enable Discount Limits                           | Yes       | No                       |
| <b>Clock In Out</b>                     | <b>*Enable Time Keeping</b>                      | Plus Only | Yes                      |
| <b>Clock In Out</b>                     | <b>*Auto Login After Clock In</b>                | Plus Only | No                       |
| <b>Clock In Out</b>                     | <b>*Require Clock In Before Login</b>            | Plus Only | Yes                      |
| <b>Price Lists</b>                      | Remember Last Price List                         | Yes       | No                       |
| <b>Price Lists</b>                      | Price List Selection Message                     | Yes       | Please Select Price List |
| <b>Loyalty</b>                          | <b>*Enable LoyalZoo Integration</b>              | Plus Only | No                       |

## 5.6.3.1.3. Services – User Permissions



Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area            | Config Key                    | Default | Value               |
|-----------------|-------------------------------|---------|---------------------|
| Function Access | Percentage Discount           | Yes     | All POS Users       |
| Function Access | Price Discount                | Yes     | All POS Users       |
| Function Access | Cancel Sale                   | Yes     | All POS Users       |
| Function Access | No Sale                       | Yes     | All POS Users       |
| Function Access | Price Override                | No      | Supervisor Approval |
| Function Access | Refund                        | No      | Supervisor Approval |
| Function Access | Manual Refunds                | Yes     | All POS Users       |
| Function Access | Void Item                     | Yes     | All POS Users       |
| Function Access | Staff Can Delete Appointments | Yes     | All POS Users       |
| Function Access | Surcharge                     | Yes     | Disabled            |
| Function Access | Tip                           | Yes     | Disabled            |
| Function Access | Assign Staff To Transaction   | Yes     | All POS Users       |



|                      |                            |     |                 |
|----------------------|----------------------------|-----|-----------------|
| <b>Module Access</b> | Access Custom URL          | Yes | All POS Users   |
| <b>Module Access</b> | Access Paid In             | No  | Supervisor Only |
| <b>Module Access</b> | Access Paid Out            | No  | Supervisor Only |
| <b>Module Access</b> | Access Reports             | Yes | All POS Users   |
| <b>Module Access</b> | Access Stock               | Yes | All POS Users   |
| <b>Module Access</b> | Access Transaction History | Yes | All POS Users   |
| <b>Module Access</b> | Access Web Portal          | Yes | All POS Users   |
| <b>Module Access</b> | Perform Start Day          | Yes | Supervisor Only |
| <b>Module Access</b> | Perform End Day            | Yes | Supervisor Only |

## 5.6.3.1.4. Services – Tendering

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                              | Config Key                           | Default | Value |
|-----------------------------------|--------------------------------------|---------|-------|
| <b>General Tendering</b>          | Allow Split Payment                  | Yes     | Yes   |
| <b>General Tendering</b>          | Open Cash Drawer For Receipt Reprint | Yes     | No    |
| <b>General Tendering</b>          | Card Button: Name                    | Yes     | CARD  |
| <b>General Tendering</b>          | Allow Cash Transactions              | Yes     | Yes   |
|                                   |                                      |         |       |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Name                     | Yes     | £5    |
| <b>Quick Tender Buttons: (UK)</b> | Top Button: Value                    | Yes     | 5     |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Name                  | Yes     | £10   |
| <b>Quick Tender Buttons: (UK)</b> | Middle Button: Value                 | Yes     | 10    |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Name                  | Yes     | £20   |
| <b>Quick Tender Buttons: (UK)</b> | Bottom Button: Value                 | Yes     | 20    |
|                                   |                                      |         |       |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Name                     | Yes     | €5    |
| <b>Quick Tender Buttons: (EU)</b> | Top Button: Value                    | Yes     | 5     |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Name                  | Yes     | €10   |
| <b>Quick Tender Buttons: (EU)</b> | Middle Button: Value                 | Yes     | 10    |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Name                  | Yes     | €20   |
| <b>Quick Tender Buttons: (EU)</b> | Bottom Button: Value                 | Yes     | 20    |

|                                   |                      |     |      |
|-----------------------------------|----------------------|-----|------|
| <b>Quick Tender Buttons: (US)</b> | Top Button: Name     | Yes | \$5  |
| <b>Quick Tender Buttons: (US)</b> | Top Button: Value    | Yes | 5    |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Name  | Yes | \$10 |
| <b>Quick Tender Buttons: (US)</b> | Middle Button: Value | Yes | 10   |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Name  | Yes | \$20 |
| <b>Quick Tender Buttons: (US)</b> | Bottom Button: Value | Yes | 20   |

## 5.6.3.1.5. Services – Receipt

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                    | Config Key                                | Default   | Value                |
|-------------------------|-------------------------------------------|-----------|----------------------|
| <b>Receipt Settings</b> | Print Price Overrides on Receipt          | Yes       | No                   |
| <b>Receipt Settings</b> | Print Daily Report on End Day             | Yes       | Yes                  |
| <b>Receipt Settings</b> | Print Paid In & Out Receipts              | Yes       | Yes                  |
| <b>Receipt Settings</b> | Print No Sale Receipts                    | Yes       | No                   |
| <b>Receipt Settings</b> | *Print Customer Details on Receipt        | Plus Only | No                   |
| <b>Receipt Settings</b> | Default Receipt Behaviour                 | Yes       | Always Print Receipt |
| <b>Receipt Settings</b> | *Show Item Modifiers on Customer Receipts | Plus Only | No                   |
| <b>Receipt Settings</b> | *Add Signature and Tip to Customer Bill   | Plus Only | No                   |
| <b>Receipt Text</b>     | Receipt Header Text                       | Yes       |                      |
| <b>Receipt Text</b>     | Receipt Footer Text                       | Yes       |                      |

## 5.6.3.1.6. Services – Tax & Commissions

 Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area               | Config Key                                     | Default   | Value |
|--------------------|------------------------------------------------|-----------|-------|
| <b>Commissions</b> | *Commissions Calculated Inclusive of Tax       | Plus Only | Yes   |
| <b>Commissions</b> | *Commissions Calculated after Discount Applied | Plus Only | Yes   |

|                           |                                       |     |          |
|---------------------------|---------------------------------------|-----|----------|
| <b>Tax Settings (UK)</b>  | Display Prices Inclusive of Tax       | Yes | Yes      |
| <b>Tax Settings (UK)</b>  | Price Override Inclusive of Tax       | Yes | Yes      |
| <b>Tax Settings (UK)</b>  | Apply Discounts After Tax             | Yes | Yes      |
| <b>Tax Settings (UK)</b>  | Manual Item Entry is Exclusive of Tax | Yes | No       |
| <b>Tax Settings (USA)</b> | Display Prices Inclusive of Tax       | No  | No       |
| <b>Tax Settings (USA)</b> | Price Override Inclusive of Tax       | No  | No       |
| <b>Tax Settings (USA)</b> | Apply Discounts After Tax             | No  | No       |
| <b>Tax Settings (USA)</b> | Manual Item Entry is Exclusive of Tax | No  | Yes      |
| <b>Labelling</b>          | Before Tax Label                      | Yes | Ex Tax:  |
| <b>Labelling</b>          | Tax Label                             | Yes | TAX:     |
| <b>Labelling</b>          | Net Tax Label                         | Yes | Net Tax: |

## 5.6.3.1.7. Services – Hardware

**!** Note, each merchant will likely have differing settings in this section.

**\*** Note, Keys starting with \* denote Plus features and will only be enabled if a device is configured to Plus

| Area                             | Config Key            | Default   | Value                     |
|----------------------------------|-----------------------|-----------|---------------------------|
| <b>Barcode Scanner</b>           | Barcode Scanner       | Yes       | None                      |
| <b>Cash Drawer</b>               | Cash Drawer           | Yes       | None                      |
| <b>Card Terminal</b>             | Card Terminal         | No        | A Non-Integrated Terminal |
| <b>Primary Receipt Printer</b>   | Receipt Printer       | Yes       | None                      |
| <b>Secondary Receipt Printer</b> | *Secondary Printer    | Plus Only | None                      |
| <b>Customer Display</b>          | Customer Display Type | No        | None                      |

[Full details on all the Barcode Scanner options can be found here](#)

[Full details on all the Cash Drawer options can be found here](#)

[Full details on all the Card Terminal options can be found here](#)

[Full details on all the Primary Receipt Printer options can be found here](#)

[Full details on all the Secondary Receipt Printer options can be found here](#)

[Full details on all the Customer Display options can be found here](#)

## **5.6.3.1.8. Services – Branding & Logging**

### **Branding**

 Typically all branding will be either left as the default values or inherited from the tenant the merchant is under.

| Area                  | Config Key             | Default | Value |
|-----------------------|------------------------|---------|-------|
| <b>Device Logging</b> | Enable Device Logging  | Yes     | No    |
| <b>Device Logging</b> | Device Log Interval    | Yes     | 15    |
| <b>Device Logging</b> | Log Cash Drawer Events | Yes     | No    |
| <b>Device Logging</b> | Log Intents            | Yes     | No    |

## 6. Troubleshooting & FAQ's

---

 For General Assistance or Enquiries, or for any issue not covered in these manuals, please contact your Solution Provider.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Portal](#)
- [Register](#)
- [Hardware](#)

### 6.1. Portal

---

 If your issue is not listed in the sub-chapters. or you are still experiencing issues after following the listed remedies, please contact your Solution Provider for further assistance.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Adding Ingredients or Allergens to Products](#)
- [Adding Multiple Products](#)
- [General CRM Issues](#)
- [General Portal Issues](#)
- [Licence Upgrade](#)
- [Products will not Import](#)
- [Register and GDPR](#)
- [The Export File will not download](#)
- [Unable to Login](#)
- [Web Portal reporting lower sales than Register](#)

## 6.1.1. Adding Ingredients or Allergens to Products

---

### Is there a way to add ingredients or allergens to products?

You can record details of any allergens or ingredients in the product details.

When [creating](#) or [editing](#) products, there is a set of 5 custom fields. These custom fields can be used for recording any information against a product including key ingredients and allergens.

The custom fields can be viewed on the Register in the [Stock Module](#) when viewing a product. They can also be viewed on the Web Portal when [Editing](#) a product, or the [Import](#) / [Export](#)

## 6.1.2. Adding Multiple Products

---

### Can I add multiple products at once?

Yes, the Register Web Portal allows you to [Import Multiple Products](#) from a single spreadsheet. The same is true for:

[Departments](#)  
[Stock Quantities](#) , and  
[Customers](#)

## 6.1.3. General CRM Issues

---

**I can see the CRM module on the menu bar but it is greyed out and nothing happens when I click on it.**

- The CRM or [Customer Relationship Management](#) module is a module that belongs to the Plus version of the Portal, and is a paid for addition. For further information, please speak to your solution provider.

**I have purchased the CRM module, but the text message settings have remained greyed out and I cannot access them.**

- Although the [Text Message](#) service forms part of the CRM module, it is an additional paid for element. For further information, please speak to your Solution Provider.

## 6.1.4. General Portal Issues

You have made mention of several configuration keys in this manual, but I cannot find them.

- Certain configuration keys are linked directly to the **Register Plus** functions. If you have only purchased a Core License, these keys will be hidden.

## 6.1.5. Licence Upgrade

There are currently two licence options available to purchase;

- **Core:** which will give you access to the core functions of the Register, and
- **Plus:** which will give you access to the enhanced features of the Register. These include;
  - [Commissions](#)
  - [Customer Relationship Management](#)
  - [Text Reminders](#)
  - [Time Keeping](#)
  - [Multiple Transaction Suspending](#)

 If you currently have a Core Licence but wish to upgrade to a Plus Licence, please speak to your Solution Provider who will be happy to help you.

## 6.1.6. Products will not Import

### Why wont my products import?

When importing anything into the Web Portal, it will automatically check the data you are attempting to import. If any issues are detected, the Portal will stop the import process, and will display the incorrect data in the table. All errors will be highlighted in red.

To view the details of the error, hover your mouse pointer over the cell containing the error, a tool tip will display providing information on the issue:

**Import Products**

**Status:** The file contains 92 product records that have one or more errors in the record data. The records that contain errors, highlighted in red and identified by the row number (hover mouse over cell for more details), are shown in the table below. Please correct these records and then re-select the file.

Press to Select or Drop File Import Products Close

|     |    |                   |          |              |               |  |      |    |      |   |  |      |                 |  |  |
|-----|----|-------------------|----------|--------------|---------------|--|------|----|------|---|--|------|-----------------|--|--|
| Yes | 15 | Cappuccino (Lrg)  | Cafe0003 | No Dept Code | Regular       |  | 3.53 | No | TAX1 | 0 |  | 1.33 | Primary Printer |  |  |
| Yes | 16 | Cafe Latte (Med)  | Cafe0004 | 30200        | Regular       |  | 3.27 | No | TAX1 | 0 |  | 1.23 | Primary Printer |  |  |
| Yes | 17 | Cafe Latte (Lrg)  | Cafe0005 | 30200        | Regular       |  | 3.53 | No | TAX1 | 0 |  | 1.33 | Primary Printer |  |  |
| Yes | 18 | Americano (Med)   | Cafe0006 | 30200        | Regular       |  | 2.93 | No | TAX1 | 0 |  | 1.1  | Primary Printer |  |  |
| Yes | 19 | Americano (Lrg)   | Cafe0007 | 30200        | Regular       |  | 3.20 | No | TAX1 | 0 |  | 1.2  | Primary Printer |  |  |
| Yes | 20 | Espresso          | Cafe0008 | 30200        | No Such Thing |  | 1.93 | No | TAX1 | 0 |  | 0.73 | Primary Printer |  |  |
| Yes | 21 | Espresso (Double) | Cafe0009 | 30200        | Regular       |  | 2.40 | No | TAX1 | 0 |  | 0.9  | Primary Printer |  |  |

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Full details on how to input the data into your import file can be found [\\*here\\*](#).

The other common reason for products not importing is not setting the import record column to **Yes** on the appropriate rows.

**!** If you continue to experience issues importing files, please contact your Solution Provider who will be able to offer further assistance.

## 6.1.7. Register and GDPR

[Please check this link to see our recommendations on how to make yourself GDPR compliant when using Register](#)

## 6.1.8. The Export File will not download

I have clicked on the Download button, but the file is not downloading.

**\*** When downloading any file from the Portal, the file will be placed in the Computer's Default Download folder. For more information, refer to your computers manual or contact your System Administrator.

### Know Issue with "Ad Blockers" on Chrome™

If you are using an Ad Blocker extension on Chrome™ you will need to Whitelist the Portal URL with that extension to allow the download to take place. Follow the instructions that came with the extension or contact your **System Administrator** for more information.



## 6.1.9. Unable to Login

---

### Unable to Login to the Web Portal.

When trying to access the Web Portal and you see the below message after tapping Login;

**! Invalid username and/or password.**

There are three possible reasons for this:

1. Your Login details were incorrectly filled in when you tried to login. (Please remember that both the **Username** and **Password** are case sensitive!)
2. Your Login details have been deactivated by your Portal Administrator
3. Your Login details have been deleted / removed from the Portal.

You will need to either contact your Web Portal Administrator to either;

1. Confirm your login details and update your password. (The password cannot be seen by the Administrator, so a New Password will need to be issued!)
2. Reactivate your Login Details, or
3. Re-Create new Login details for you on the Portal.



Alternatively please contact your solution provider who will also be able to assist with this process.

## 6.1.10. Web Portal reporting lower sales than Register

---

### Why is the Web Portal reporting lower sales than my Register?

- The most likely cause is a drop in the internet connection on your till as transactions would still be recorded but would not be able to send them to the Web Portal for reporting. This could be a result of the device/till disconnecting from the Wi-Fi, or a problem with your internet connection.
  - The first thing to check is the Wi-Fi status. To do this swipe down from the top of the screen and tap the settings cog. From settings make sure your Wi-Fi is switched on and connected to your Wi-Fi network.
  - If the tablet is connected, the next thing to check is the internet connection. To do this tap the home button and open a web browser such as Chrome and try to navigate to a website. If

the website loads, tap the home button and return to the Register and try the sync again.

- If a website does not load and you are connected to the Wi-Fi, this points to an internet fault either with your router or internet service provider. In a lot of cases simply resetting your device and router will resolve an internet issue. Failing that you will need to contact your Solution Provider or Internet Service Provider.

## 6.2. Register

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If your issue is not listed in the sub-chapters, or you are still experiencing issues after following the listed remedies, please contact your Solution Provider for further assistance.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Adding Products to the Register Screen](#)
- [Changing a Staff Member's Access Level](#)
- [Data will not Update or Sync](#)
- [Licence Upgrade](#)
- [Prices displaying in the wrong Currency](#)
- [Products not found when scanning a Barcode](#)
- [The Customers and Calendar buttons are Greyed Out](#)
- [Viewing Notes added to Products](#)
- [What versions of Android are supported](#)

### 6.2.1. Adding Products to the Register Screen

---

#### How do I add products to the Register screen?

The Product Browser is what we call the area in the middle of the Register screen that displays some of your products. You can configure which products appear in this section and there is no limit to the number of products as this part of the screen scrolls. The majority of customers typically add their top selling items, non bar-coded items and items sold by the till point to this section of the Register for quick access.

You can configure the [Product Browser](#) on the Web Portal.

## 6.2.2. Changing a Staff Member's Access Level

### How do I change a Staff Member's Access Level?

You can change the Access Levels of your Staff Members from;

- POS User to POS Supervisor, or
- POS Supervisor to POS User

To make these changes, follow these simple steps:

- **Login** into the Web Portal
- Click **Config** in the Menu Bar
- Click the **Staff** option
- Click the **Edit** icon next to the **Staff Member** you want to change
- Click the **Role** dropdown menu
- Select either **POS User** or **POS Supervisor** as required from the dropdown.
- Click **Save**

 Remember to tap **Update Data** on the Register to carry these changes down.

## 6.2.3. Data will not Update or Sync

### Why cant I update my data / sync data?

The most likely cause is a drop in the internet connection, which could be a result of the device disconnecting from the Wi-Fi or a problem with your internet connection.

The first thing to check is the Wi-Fi status.

- Swipe down from the top of the screen and tap the settings cog.
- From settings, make sure your Wi-Fi is switched **On** and connected to your Wi-Fi network.

If the tablet is connected, the next thing to check is the internet connection.

- Tap the **Home Button** and open a web browser such a Chrome and try to navigate to a website.

- If the website loads, tap the **Home Button** and return to the **Register** and try the **Update Data/Sync** again.

If a website does not load and you are connected to the Wi-Fi, this points to an internet fault either with your router or internet service provider. In a lot of cases simply resetting your device and router will resolve an internet issue. Failing that you will need to contact your Solution Provider or Internet Service Provider.

 The Register will operate offline. If there is no internet connection, you can still login and process transactions as all data will be held locally until the next successful sync is completed. The only thing you will not be able to do is sync down any new settings.

## 6.2.4. Licence Upgrade

There are currently two licence options available to purchase;

- **Core:** which will give you access to the core functions of the Register, and
- **Plus:** which will give you access to the enhanced features of the Register. These include;
  - [Commissions](#)
  - [Customer Relationship Management](#)
  - [Text Reminders](#)
  - [Time Keeping](#)
  - [Multiple Transaction Suspending](#)

 If you currently have a Core Licence but wish to upgrade to a Plus Licence, please speak to your Solution Provider who will be happy to help you.

## 6.2.5. Prices displaying in the wrong Currency

### All my prices are in the wrong currency?

Register displays the currency based on the Android Location Settings. If Register is displaying the incorrect currency, you will need to edit the Android settings'

To do this, follow these simple steps:

1. Logout from Register.

2. Tap the **Home Button** on your device. On some devices you might need to swipe up from the bottom of the screen to access the home button first.
3. Open the **Settings** application, this is usually pictured with a cog
4. Tap the **General** tab
5. Tap **Language & Input**
6. Tap **Language**
7. Select the appropriate **Language** (and country)
8. Tap the **Home Button**
9. Open Register and Login
10. The currency should now be correct

✳ Steps 4 & 5 may differ on some devices. When in Settings, look for **Language** and is sometimes under a Section/Tab called **Personal**.

## 6.2.6. Products not found when scanning a Barcode

---

### My product is not found when scanning the barcode?

The message 'Product not found' is displayed when Register scans a barcode and cannot find a matching product. This could be caused by a number of things, the common reasons are listed below:

#### The barcode label is damaged / unreadable.

In this scenario the barcode scanner is unable to read the full barcode and is only providing part of the barcode number.

To test this;

- Tap the **Prod** button on the Register and manually enter the barcode number in the search box
- Tap **Search**
- If the product displays in the search results, then the barcode is damaged or unreadable.

#### The product has not been added to the system.

From the Web Portal;

- Click **Stock** in the **Menu Bar** followed by **Products**
- Enter the barcode number in the search box and click the search button.
- If the product is not returned, then
  - Try searching for the **Product Name** or **SKU**

- Open the Product by clicking on the **Edit** icon.
  - Validate that the barcode has been entered correctly and if necessary, correct the entry and then click **Save**
- If no Product is returned after entering the Name or SKU, then it is possible that the Product has not been added to your Product list.
  - In this case read the chapter on [Adding Products](#)

#### The product is on the Web Portal but the barcode is incorrect.

This can happen from time to time for a number of reasons, for example suppliers providing the wrong barcodes and the odd mistake in the import spreadsheet like missing the first 0, having a space somewhere or Excel has changed the cell to scientific (901E+12 for example). If you have multiple products to correct we suggest exporting your products, making the corrections in the Excel spreadsheet and importing the products again. If there are only one or two to correct you can do this manually on the Web Portal.

For more information on these processes, see the following chapters;

[Exporting and Importing Products](#)

[Manually Editing Products](#)

#### The product is on the Web Portal but not the Register.

The product may have been added since the Register last carried out an Update Data or it failed its last attempt and is out of date. Simply logout of the Register and tap the Update Data button to sync the data and fetch the latest product information.

## 6.2.7. The Customers and Calendar buttons are Greyed Out

---

### Why are the Customers and Calendar button greyed out?

The [Customer Relationship Management](#) (CRM) module forms part of the Register Plus edition. The Customers and Calendar functionality will be disabled from the Register Menu and CRM disabled from the Web Portal Menu if you have 0 Plus licences in your account.



To upgrade to Register Plus to enable this and other functionality, please speak to your solution provider.

## 6.2.8. Viewing Notes added to Products

### How can I view Notes added to items in a transaction?

If you need to review notes that were added to items during a transaction, you will need to run the Transaction Report in the Web Portal. Once the report has been generated look for the column named **Item Note** which is also column V when exporting the report to Excel.

- To view the Transaction Report you will need to complete the following steps:
  - Login to the Web Portal
  - Click Reports
  - Click Operational
  - Apply Report filters (date, store, till) if applicable
  - Click the view button (eye button) to the left of Transaction
- The report will then be generated and displayed
- We are currently working on a report that only shows transactions that include items with notes to speed this process up.

## 6.2.9. What versions of Android are supported

### What versions of Android are supported?

Register will operate on devices running Android 4.2.2 and newer.

## 6.3. Hardware

**!** If your issue is not listed in the sub-chapters. or you are still experiencing issues after following the listed remedies, please contact your Solution Provider for further assistance.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Card Terminal has lost connection with the POS](#)
- [Configure the Socket CHS Bluetooth Barcode Scanner](#)
- [Socket CHS Scanner does not scan](#)
- [Licence Upgrade](#)
- [My receipts look odd](#)

- [Payment Device is Hanging](#)
- [Scanner beeps but nothing happens on the Register](#)
- [Why wont my Cash Draw open and Receipts print](#)

## 6.3.1. Card Terminal has lost connection with the POS

---

### My integrated card terminal is not connecting with the POS anymore?

- We have occasionally seen some transactions fail to communicate with the integrated payment terminal resulting in Register displaying the Payment Failed message. This is typically due to a communications error between the Register and the terminal. Please see below troubleshooting steps:
  - If using a Bluetooth terminal, check on your ePOS device that **Bluetooth** is **On**, and the terminal appears in the **Paired Devices** section within Android Settings.
  - If using a Network / WiFi terminal, check that your terminal is connected to the network.
    - Sometimes a reboot of the Router re-establishes the connection.
    - You can also check the IP address of the terminal within its settings. This IP address should match the address stated in the Profile in the Web Portal. We recommend contacting your Solution Provider for further assistance if these do not match.

## 6.3.2. Configure the Socket CHS Bluetooth Barcode Scanner

---

### How to configure Register to work with a Socket CHS Bluetooth Barcode Scanner.

In order to configure Register to operate with a Socket CHS scanner we must do a few things.

- Configure your profile to use the appropriate scanner
- Configure your scanner
- Pair the scanner with your ePOS terminal
- Launch & Update Register

### Configuring Register for the Socket CHS Bluetooth Scanner.

You will first need to configure a profile with the appropriate settings. To do this you will either need to create a new profile or update your profile.



- First login to the Web Portal and click Config from the Top Bar
- Click Profiles from the sub menu.
- If you are updating an existing profile click the Edit pen icon.
- If no profile exists click the **New Profile** button.
- Once in the profile, click on the Hardware group to expand the settings.
- Now we can choose the appropriate settings.
  - First select 'Bluetooth SPP Scanner' from the Barcode Scanner drop down menu.
  - Leave the Barcode Scanner Delay as 1000.
  - Finally change the Bluetooth SPP Barcode Scanner Name to 'Socket CHS'.
- Now scroll down and click the Save button.

The screenshot shows a 'Hardware' configuration section. Under the 'Barcode Scanner' heading, there are three settings:

- Barcode Scanner:** A dropdown menu currently showing 'Bluetooth SPP Scanner'.
- Barcode Scanner Delay:** A text input field containing the value '1000'.
- Bluetooth SPP Barcode Scanner Name:** A text input field containing the value 'Socket CHS'.

Each setting has an information icon (i) to its right.



Check your ePOS terminal is using the correct profile by clicking Devices from the Top Bar and ensure your device is using the profile we just created or updated.

## Configuring the Scanner

Now power up your scanner by pressing and holding the small button until you hear the start-up sound and see the blue light flashing. To configure the scanner, you will need the Socket CHS Command Barcodes or the barcodes below. We will now scan a series of barcodes to configure the scanner:

- Step 1: Scan the 'SPP Mode' barcode. This sets the barcode scanner to the correct Bluetooth mode. The scanner will beep 3 times to confirm the setting has been applied.



- Step 2: Scan the 'Suffix – Carriage Return' barcode. The scanner will beep 3 times to confirm the setting has been applied.



## Pairing the Scanner

Moving on to the ePOS terminal, you will need to pair the scanner with the device.

- To do this open the Settings App from the home screen or app tray.
- This next process will vary depending on your device.
  - Once in Settings navigate to Bluetooth. This is commonly in a Connections tab / area.
  - First turn Bluetooth on and tap Scan if your device does not scan automatically. Your Socket CHS scanner should appear in the list
  - Tap the device name and it should automatically pair.
- Once paired your scanner will appear under the Paired Devices section of the Bluetooth screen.
- Press the home button to exit the Settings app.

## Launching Register

Now we can launch the Register application by tapping the Register icon on your home screen or app tray.

- Once the Register has launched, tap the **Update Data** button to download the updated profile.
- When the Sync has completed, login and test the scanner on the Register screen.

**!** After completing the above, if Register does not scan or does not display 'barcode not found' after scanning, please carry out a factory reset on the scanner and repeat the above process.

- To factory reset your Socket CHS:
  - Exit the Register app by pressing the home button.
  - Turn off Bluetooth (from the Settings app)
  - Scan the 'Factory Reset' barcode below. The scanner will beep 3 times to confirm the settings have been reset.



## 6.3.3. Socket CHS Scanner does not scan

**I press the scan button on the Socket CHS scanner but nothing happens.**

There are a number of reasons that would cause this issue to happen;

- **The Scanner has not been paired correctly to the tablet.**
  - Follow the process to pair the scanner to the tablet in the [Configure the Socket Scanner](#) chapter.
- **The Scanner has entered Sleep Mode**

- Logout the current Staff Member on the Register so that the Login screen is displayed.
- On the Scanner, press and hold the Power Button until you hear a “Beep”
- Log back onto the Register and the Scanner should now be working correctly.
- **The Scanner lost connection to the Tablet.**
  - Logout the current Staff Member on the Register so that the Login screen is displayed.
  - Access the Tablets Settings page and navigate to the Connections Tab.
  - Select Bluetooth
  - On the Scanner, press and hold the Power Button until you hear a “Beep”
  - Switch off the Bluetooth, wait a few seconds, then switch the Bluetooth back on
  - Exit the Settings and Launch the Register.
  - Log back onto the Register and the Scanner should now be working correctly.

## 6.3.4. Licence Upgrade

There are currently two licence options available to purchase;

- **Core:** which will give you access to the core functions of the Register, and
- **Plus:** which will give you access to the enhanced features of the Register. These include;
  - [Commissions](#)
  - [Customer Relationship Management](#)
  - [Text Reminders](#)
  - [Time Keeping](#)
  - [Multiple Transaction Suspending](#)



If you currently have a Core Licence but wish to upgrade to a Plus Licence, please speak to your Solution Provider who will be happy to help you.

## 6.3.5. My receipts look odd

### Why do my receipts look odd?

If your receipt settings are incorrect, it will cause the receipts to print incorrectly. If the entire receipt is printing incorrectly (see below example), it is likely due to the Receipt Line Width being set incorrectly in the Profiles on the Web Portal.



This is an example of a printed receipt with the receipt line width set incorrectly, this causes the receipt to print incorrectly:

This is the same receipt printed with the correct receipt line width:



To rectify this issue, first check the recommended default settings listed [here](#).

You will then need to update the Receipt Line Width setting in your [Profile](#), under the Hardware group.

If the main part / body of the receipt is printing correctly but the header and footer (top and bottom parts) are not, you will need to re-enter your receipt header and footer in the profile on the Web Portal under

the receipt group. The same receipt line width can be used to format the text within the header and footer. Please see further details on the formatting [here](#)

## 6.3.6. Payment Device is Hanging

There is a known issue on the M010 devices, where sometimes when trying to process a card payment the device will display a message “**Please wait....**” but proceeds no further.

If this occurs, follow this procedure to reset the device. In

the first instance;

- Restart the M010 device and try the card payment again.

If this fails to rectify the issue, then follow this procedure;

- Wait for the Register to report the payment failed or displays the prompt “Has the Transaction Completed”. In this instance Tap **Cancel**
- Suspend the transaction by either following the normal [Transaction Suspending](#) process or use the [Switch Staff Member](#) function. (If neither of these functions are available, once this process has been completed, you will need to carry out the transaction again.)
- Access the Tablets settings module and select **Connection** then **Bluetooth**
- Find the M010 device and tap the ‘cog’ icon, then select **Un-pair**
- Restart the tablet and the M010 device
- Follow the process to Pair the M010 device to the tablet.
- Start the Register application and resume the Suspended Transaction.
- Carry out the Card payment as normal.

### Process to Pair the M010 to the Tablet.

- Access the tablets settings module.
- Select **Connections** then **Bluetooth**
- Tap **Scan**
- On the M010, press and hold the **Connection Button** for a few seconds until the blue light starts flashing in quick succession.
- On the Tablet, select the M010 device when it displays in the list.
- Tap **Pair** on the Tablet
- Tap the “✓” on M010
- The M010 should now be paired to the tablet again.

## 6.3.7. Scanner beeps but nothing happens

## on the Register

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### My Scanner is beeping but nothing happens on the till?

- On a rare occasion the connection between a Bluetooth barcode scanner and a till might drop or disconnect. This can happen for a number of reasons such as low battery, being out of range or even interference.
- If your scanner is operating as normal i.e. scans and beeps, but Register does not add any products, it is likely that the connection between the scanner and till has been lost.
  - To resolve this issue, you will need to repair your scanner with the Tablet. The process will vary slightly depending on your scanner and tablet but the main process will remain the same:
    - Press the **Home Button** on your Tablet
    - Navigate to the **Settings** application
    - Find the Bluetooth option and switch (this is typically under a section called Connections)
    - Tap the word Bluetooth to see a list of Paired Devices
    - Tap on the **Name** of your barcode scanner
    - Tap the **Unpair** option
    - Now put your scanner into Bluetooth pairing mode (please refer to your device user manual)
    - Tap the **Scan** button on the Bluetooth screen
    - Tap the **Barcode Scanner Name** and complete the pairing process detailed in your device user manual
    - Press the **Home Button** on your device
    - Return to **Register**
  - Your barcode scanner should now be repaired and fully operational.
- If you still require assistance, please contact your Solution Provider who will further troubleshoot the issue with you.

## 6.3.8. Why wont my Cash Draw open and Receipts print

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### Why wont my cash draw open and receipts print?

Depending on which device you are using this will likely be one of two issues.

- Either you have entered Training Mode which will not open the cash draw or,
- Your device has disconnected from the network meaning it cannot communicate with the Printer and Cash Drawer.

## Training Mode

Ensure you are not in [Training Mode](#)

To exit Training Mode you will need to first logout the current user and from the login screen:

- From the Staff List Screen, tap the “**3 dots**” icon in the top right.
- Tap **Disable Training Mode**

## Network Connection

If using a network based printer either over WiFi or LAN, it is likely there is a network issue. To troubleshoot this please attempt the following;

- Check your device is on the correct WiFi network.
  - Turn WiFi off and on again in Android Settings to rejoin the network.
- Check that the LAN cables are correctly inserted.
- Reboot the Receipt Printer
- Reboot the Wireless Router
- Check the configuration is correct on the Web Portal as your printers IP address may have changed.



If this does not resolve the issue, please contact your Solution Provider for further assistance.

## 7. Release Notes

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Register is continuously being improved upon, this section provides detailed release notes that includes all changes and new features you and your end users should be aware of.

**Follow the links below to navigate to the sub topics,  
or scroll the topics to the left!**

- [Release 4.18 September 2019](#)
- [Release 4.17 July 2019](#)
- [Release 4.16 June 2019](#)
- [Release 4.14 February 2019](#)
- [Release 4.13 October 2018](#)
- [Release 4.12 July 2018](#)
- [Release 4.11 May 2018](#)
- [Release 4.9 February 2018](#)
- [Release 4.8 November 2017](#)
- [Release 4.7 September 2017](#)
- [Release 4.4 May 2017](#)

### 7.1. Release 4.18 September 2019

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

#### Customer Facing Screen

In addition to our existing, traditional customer display integrations, Register is now able to support the use of a customer facing screen. This is available for POS hardware with the option of a customer facing screen. The screen can be used as a mirror of the primary display, or alternatively used as a dedicated customer display, which will show transaction items, a running total, and up to 3 scrolling images. The images can be specified by the merchant and used to inform or advertise to customers. The scroll time between images can be set on the Register Portal.





## **7.2. Release 4.17 July 2019**

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### **Multiple Order Receipt Printers**

Register can now support multiple order receipt printers, allowing merchants to send order receipts to specific printer locations, based on the products being sold. For example, a restaurant can now configure products into different Print groups and send the order to printers at different stations in the kitchen: Salad Bar, Grill, Main Course or Drinks.

Products can be assigned to certain Print Groups, then linked to specific printers. This is all managed through the Register Portal.

Multiple Printers are available to merchant devices using a Plus license. The feature is enabled from the profile area by setting the printer type to 'Advanced Printing', then configuring individual printers and print groups.

Merchant Devices using a Core license now have the ability to add 1 Order Receipt Printer in addition to their customer receipt printer.

### **Numbered Order References (automatic)**

Merchants are now able to create order receipts that use an incrementing number, as opposed to entering in a text reference or selecting from a list. The digit number is generated based on the till number followed by 2 incrementing values. This option can be enabled from the Profile area of the Register Portal, using the Transaction Name option.

This feature would be good for quick service merchants who typically take payment, then prepare the order for the customer to collect. On completion of the transaction both the order receipt and customer receipt will automatically show 'Order Number: 0123', allowing the merchant to identify the customer when the order is ready.

### **General Updates**

- Large text on order receipts
  - When using Advanced Printers, the order receipts have the option to use a normal or large font size. This is set from the new Printers area of the Config Menu on the Portal.
- Display product modifiers on customer receipts
  - A new profile option allows merchants to set if product modifiers are displayed on the

customer receipts. This controls both price modifiers and list modifiers.

- Display product modifiers in Transaction History
  - When viewing a transaction basket from the Transaction History screen, staff members will now be able to view any applied modifiers against products.
- New Supplier Product Report
  - A new report has been added to the Sales Reporting group on the Register Portal. The report will detail all products sold within the selected time period, giving a breakdown of each product, the quantities sold, and their supplier.
- Configure tax identifiers on receipts
  - When managing taxes on the Portal merchants are now able to assign a single character tax reference to each tax. The character is then used on customer receipts against each item sold, and in the printer tax summary area.
- Grouping products on order receipts
  - A small change has been made to the printer Order Receipt for staff members. If multiples of the same product have been ordered, they will be printed on one line with a quantity. Allowing staff to read and identify the order items much quicker.
- Total savings line added to customer receipts
  - The customer receipt has been updated to include a new line for the total amount saved from discounts. This line is only printed on receipts where an item or transaction level discount has been applied by the merchant.
- Refund items on customer receipts
  - A minor change has been made to ease identifying Refund items on customer receipts. Any refund items are now prefixed with \*\* REFUND.
- Profile layout adjustments on the Portal
  - When editing a Profile on the web portal, the settings for assigning a transaction reference have been moved. There is a new sub section within the Functions group of a profile, called 'Transaction Reference', where merchants are able to choose the type of Reference. As before this can be set by text entry or from a custom list.
- Some Register Portal Reports have been renamed. Below are the old and new names for reference
  - PLU Report is now the Product Report
  - PLU Profitability Report is now the Product Profitability Report
  - Staff PLU Report is now the Staff Product Report

## **7.3. Release 4.16 June 2019**

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

Email Customer Receipts



## Customer Receipts

Register now has the ability to send customer receipts via email. Once setup on your account a new 'email customer receipt' button will be available from the Transaction Summary screen.

- The address can be keyed in by the user, or if using CRM and a customer is assigned the email address will be pre-populated.
- On tap of send Register will pass the details to the SMTP details entered by the merchant.
- The email sender address, subject and body text can all be configured in the profile section of the Register Portal.

## Run reports based on time of day

The **Range Report Filter** has been updated to now also support times. This will allow you to run reports over a specific date range, with defined start and end times.

## General Updates

- For merchants using the extended Hospitality Browser; the Department browser can now be accessed when in extended mode, saving the need to minimise the browser.
- The Store and Device Name can now be displayed at the top of the Register Login screen.
- Report optimization for improved response times

## 7.4. Release 4.14 February 2019

Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

## Handheld / Mobile Device Support

Register can now operate in portrait orientation on smaller devices such as mobile phones or portable devices. All Register Features available today, have been fully optimized to run on mobile devices. This new handheld layout offers merchants a very powerful and mobile tool within their business. Mobile devices can be used to improve customer experience, help serve customers faster during busy periods and release your staff members from behind the counter. To learn more about adding a handheld device

to your current device pool, please reach out to your solution provider.

## General Updates

- Improved speeds when running reports on the Register Portal
- Optimised XLS import and export processes
- Customers can now be searched for via a Postcode
- Improved date and time selectors for customers & appointments
- General UI and performance updates to the application and web portal
- Merchants using Pay Works for their card payments now have added support for linked refunds and adjustments.
- Full support for the PAX A920 and card payment functionality
- New logic to prevent a pre-authorized transaction being completed on another device
- Customers can now be searched for via a Postcode / Zip code

## **7.5. Release 4.13 October 2018**

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### **EBT Payments (US Only)**

Merchants are now able to accept EBT payments for goods sold. Via the web portal merchants can enable EBT functionality, and select which products are able to be tendered using EBT. When building the basket, the EBT tender option will be listed under the 'OTHER TENDER' button. Any products not EBT applicable will remain in the basket and the customer can pay for these using another method.

### **MOTO Payments (Aevi Payments Only)**

Merchants are now able to process MOTO (Mail Order / Telephone Order) card payments using Register. Via the web portal merchants can enable MOTO functionality. When building the basket, the 'Manual or Keyed Entry' tender option will be listed under the 'OTHER TENDER' button. Selecting this option will begin a keyed entry process, where the merchant can manually enter the customers card details on the payment screen. From a reporting perspective, Register includes any successful MOTO payments in the current CARD total value.

### **Time Based Price Lists**

A previous Register update introduced Price Lists, allowing merchants to assign different price levels to a single product. During a transaction these price lists can be changed to suit to current sale, for

example changing the price for a VIP customer, or perhaps a Take Out order.

In this release Price Lists have been extended, and can now be scheduled to change automatically at certain times of the day. This is configured at a store level, allowing for the default price list to be changed automatically between selected 30 minute slots. A good example of this would be for a merchant that runs regular offers such as happy hour, the screenshot below shows an example price list which will activate between 4-6PM Monday-Friday. Once the selected time period ends, the Register will automatically return to use the default price list.

## Shift and Sales Reports now include Adjustments

The Shift and sales reports have been updated and now include the total value of adjustments that have been performed during the selected date range. Adjustments show the total of all item or transaction discounts, along with any reduced price overrides.

The new adjustments value can be seen on the Register within both the Store and Till Sales Report. The value is also included in the shift and sales reports on the Web Portal.

## Partial Authorization (US Only)

A new workflow has been introduced on Register when a customers' card is authorized, but only a partial authorize takes place. On return to Register the merchant will be warned of the partial authorization, and have a number of options to choose from. They can accept this amount and continue with the transaction, cancel the first authorization and run another card, or alternatively cancel the authorization and use a different tender type. This workflow is presented for both partial authorizations, and partial pre-authorizations.

## General Updates

- Edit customer receipts to show the tender method used for the tip
- Refine process for downloading and changing product images in the browser
- Improve product import validation around Fixed Measure products
- Improve report response speeds on Portal

## 7.6. Release 4.12 July 2018

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### Create and Manage Price Modifiers

Merchants are now able to create product modifiers that can influence the overall price of the parent product. Modifiers are assigned and managed via the Register Portal then utilized on the Register Client

when building transactions. There are many options on the portal for each modifier, such as adding a default quantity to the order, allowing the user to adjust this quantity, giving the modifier a price or adding it free of charge.

Price Modifiers allow for a great flexibility to merchants who sell products in any industry, where they can be customised and altered as needed by the customer at the time of ordering. These customer changes may or may not add additional costs to the overall cost of the order, and can be catered for in the setup process of each modifier.

## Using Modifiers to Up-Sell to your customers

Another option that can be used within the new price modifier section is to enable Up-Selling. This uses the same modifiers assigned to a product, but is more of a guide to the staff when making the sale. A dialog is shown on screen with any associated modifier products, and the staff member can ask the customer if they would like to make any additional purchases whilst at the counter. For example, when buying a new TV, the modifier window could prompt the staff member to ask if the customer required any cables or other accessories.

## 7.7. Release 4.11 May 2018

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Smart Volution are releasing an update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### Assign Staff Member to Transaction

Register gives the ability for the Staff Member currently operating the till, to assign a different Staff Member to the transaction. The transaction is then recorded against the assigned Staff Member and will be visible in applicable reports. This will link any transaction tips to the assigned staff member, along with any products that have been configured to give a commission based on sales.

The assigned staff member can be changed by tapping the 'assigned' button underneath the transaction total amount, in the bottom left side of the screen. This will bring up a list of all staff members available to the assigned.

### Emailing Receipts – Cash and Card Payments

Customer receipts can now be emailed once the transaction has been fully tendered. **This is only available on specific card integrations as the email is sent via the card service.**

If a customer has been assigned to the transaction (with a valid email address), this will automatically be passed through and used for the e-receipt. For transactions completed by card payment, the email receipt is requested from the card payment screen. For transactions completed by cash, the staff member will have the ability to request an email receipt from the Transaction Summary screen within Register.

## Pre-Authorise / Complete Card Payments

Register is now able to process card authorisations and completions for transactions. **This is only available on specific card integrations.** The Card authorisation and completion is carried out like a typical card transaction from Register and can be configured to appear on the main Register keypad, or the Other Tender list. There are several configurable options accessible from the Register Portal, to control the default authorisation value (transaction amount, manual amount, or transaction +%), there are also options to automatically suspend the transaction after the authorisation completes.

Authorised transactions are not included in the Register Sales Reports until they have been completed. The completion can be done when the transaction is resumed to the basket or can be completed from the 'Ready to Complete' tab of the Open Transactions dialog. From this dialog, Staff Members can complete transactions one at a time or tap 'Complete All' to close all open authorisations.

## Staff Access to Suspended Transactions

Merchants can now set different permission levels for suspended transactions on Register. Using the Register Portal, Merchants can restrict access so that only the transaction owner is able to resume and update a transaction, or All Staff Members. This allows for greater control within a busy environment, so that only certain user groups can access pending transactions.

## Start Tabs

Merchants who can perform card authorisations are also able to offer customers the ability to start a tab for their transaction. Typically, in the hospitality industry, merchants will authorise a customer card for a set amount and the customer can then add items until the amount is reached. **Tabs and authorisations are only available to merchants using specific card payment integrations.**

When starting a new transaction, the staff member will have a new 'open tab' button at the top right of the keypad. The default tab amount can be set using the Register Portal, or the staff member can enter an amount each time. If there are already items in the transaction, the staff member will be able to tap the Other Tender button, and then use 'Open Tab on Card'.

Using the Register Portal merchants can configure options for tab's such as if the transaction is suspended on return to Register, or alternatively disable Tabs in their store.

## Surcharges

Register now allows Merchants to manage and apply Surcharges to customer transactions. These can be added as price or percentage values, selected from a list of merchants specified surcharges or by the staff member adding the value directly in Register. Merchants can assign a commission value to surcharges, just like a product, which can then be recorded against all staff member sales. Like discounts, when a percentage surcharge is applied to the transaction, the surcharge value is based on

all items in the basket.

## Tip Adjustments

Merchants can now record tips against transactions within their stores. The tips are captured against any supported Tender Type and assigned to specific Staff Members allowing for both reporting and tip distribution.

A tip can be added at multiple points during a transaction:

- Before, during or after adding items to the basket
- From the Ready to Complete tab of the Open Transactions dialog
- From the Transaction Summary after tendering is complete
- From the Transaction History screen once the transaction is complete

The tip can be entered as a set amount given by the Customer or added as a percentage of the overall transaction. Like other features within Register, tip permissions and access are controlled by the Profile and managed on the Register Portal. Staff Member tip amounts, split by tender type, are now available within the Staff Report on the Register Portal. This allows Merchants to run accurate reports on the sales and tip values.

## **7.8. Release 4.9 February 2018**

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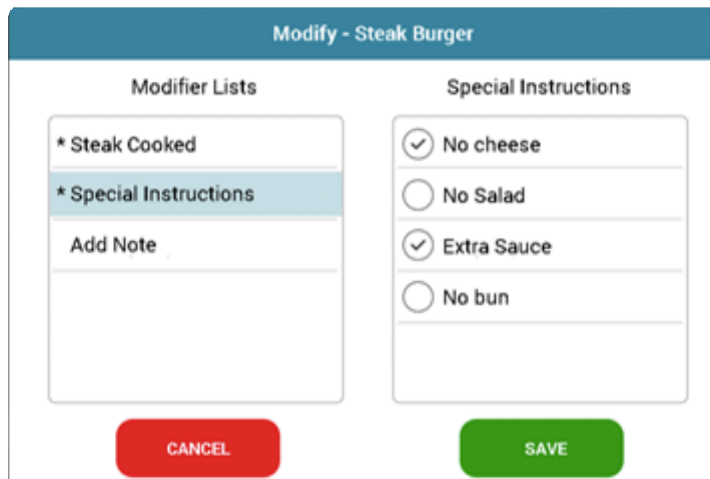
Smart Volution are releasing a major update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### Product List Modifiers

Merchants are now able to add preset modifiers/comments to products, to easily apply changes to the customers' item. This is in addition to our existing products notes option. Each modifier list is created on the Portal and assigned to the required products. Products also have the option of automatically launching the modifier window when they are added to the basket, or set so the staff can continue and only add modifiers where needed. From the modifier window the Staff Member can select multiple pre-set modifiers, including adding a 'free' text note when a modifier is not listed or the customer has special instructions.

An example use case for item modifiers would be at a restaurant or café, where the customer may want a burger but asked for certain items to be removed. For Register Plus users, these details can then be sent to the kitchen via the secondary printer.





**Modify - Steak Burger**

**Modifier Lists**

- \* Steak Cooked
- \* Special Instructions
- Add Note

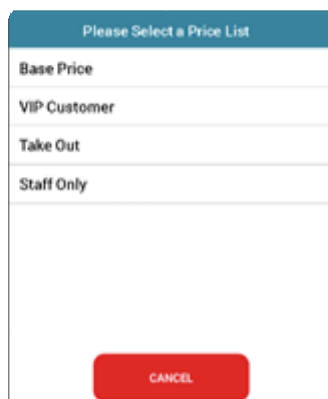
**Special Instructions**

- ☒ No cheese
- ☐ No Salad
- ☒ Extra Sauce
- ☐ No bun

**CANCEL** **SAVE**

## Price Lists

Register now supports multiple price lists, allowing a single product to have multiple prices. Price lists can also be used to manage different prices across multiple stores, but still using the same base product data. The price list is selected when starting a new transaction, and is then used for all items added to that sale. A special price list can be created for VIP Customers, or perhaps take away orders, which provide a discount over the normal item price.



**Please Select a Price List**

Base Price

VIP Customer

Take Out

Staff Only

**CANCEL**

## Multiple Taxes (£ and %)

Two big changes have been made to taxes on the Web Portal.

- Taxes can now be either percentage or price based – for example a product tax could be 10%, or a fixed £1.
- Multiple taxes can now be assigned to a single product. Both the new product form, and import XLS have been updated for this. A screenshot below shows the new taxes section of the product form.

|                     |                             |                                     |
|---------------------|-----------------------------|-------------------------------------|
| Tax                 | Reduced Tax (VAT5) 5%       | <input type="checkbox"/>            |
|                     | Tax Exempt (VAT0) 0%        | <input type="checkbox"/>            |
|                     | Value Added Tax (VAT20) 20% | <input checked="" type="checkbox"/> |
| Price Including Tax | 1.60                        |                                     |

## Staff Code Only Login

A new login mode will be introduced in this Register release known as Staff Code Only. The current login method requires Staff Members to first select their name, then enter a 4-digit PIN. Merchants now have the option to set their device to use Code Only (screenshot below) which is a one-step login process. To login, a Staff Member just needs to enter in their Staff Code and tap the green button.

## Client Updates

- Additional settings now available for the Extended Product Browser
  - Core Users can now set the browser to extended on login
  - Browser now remembers it's last state, so on return to the Register screen the browser will return to either extended or collapsed. Available for all users
- Update layout used on Refund Dialog to use vertical button spacing
- General UI refinements throughout

## Portal Updates

- Each cash denomination value used during the cashing up process can now be adjusted by the merchant as needed. A default set is applied based on the merchant location, for example UK merchants will receive denominations 1p – £50, but these can be adjusted if needed. These are only for cash tender values.
- To make the Profile section easier to navigate various settings are now hidden / shown based on selections. Only settings the merchant needs are visible on screen, keeping the menus simple.

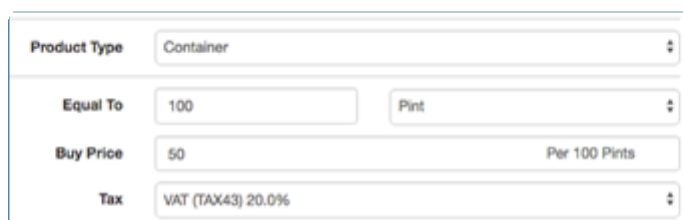
## 7.9. Release 4.8 November 2017

Smart Volution are releasing a major update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

### Container and Fixed Measure products.

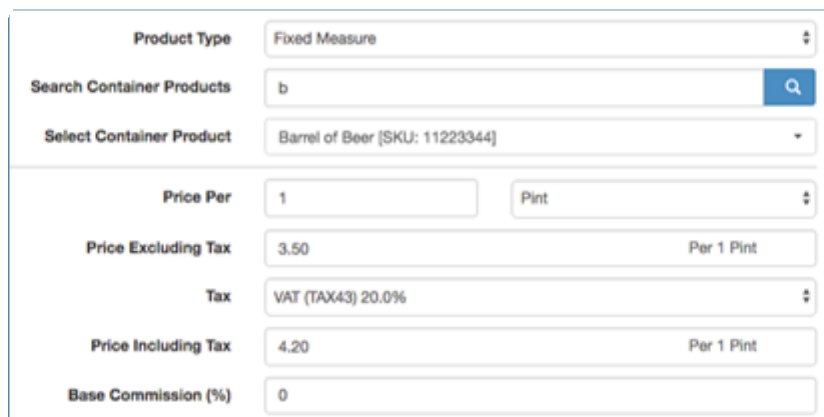
This release of Register introduces two new product types. These are Container & Fixed Measure. They allow merchants to sell stock from a single master product, by preset measures and fixed prices. Fixed Measure Products can now be added to the basket just like any other item, but the stock is managed at the container level. This makes stock management, re-ordering and individual pricing much easier.

An example container product could be a 'barrel of beer', which is equal to 100 pints. The merchant can then create Fixed Measure Products linked to the container, such as '1 pint of beer' and '1/2 pint of beer'. Each of these would have an assigned price, and each time one is sold the quantity of the barrel would decrease accordingly.



|              |                   |               |
|--------------|-------------------|---------------|
| Product Type | Container         |               |
| Equal To     | 100               | Pint          |
| Buy Price    | 50                | Per 100 Pints |
| Tax          | VAT (TAX43) 20.0% |               |

Setting up the size and price of the container product



|                           |                                |            |
|---------------------------|--------------------------------|------------|
| Product Type              | Fixed Measure                  |            |
| Search Container Products | b                              |            |
| Select Container Product  | Barrel of Beer [SKU: 11223344] |            |
| Price Per                 | 1                              | Pint       |
| Price Excluding Tax       | 3.50                           | Per 1 Pint |
| Tax                       | VAT (TAX43) 20.0%              |            |
| Price Including Tax       | 4.20                           | Per 1 Pint |
| Base Commission (%)       | 0                              |            |

Setting up the fixed measure product: linked to the barrel, assigning the quantity (1 pint), and the price.

### List Reasons

The Reason functionality with Register has been greatly extended in this release. Currently Reasons could be used for 'Paid In' and 'Paid Out' transactions to show why the money was moved. Reasons can now be entered for the following processes on the Register:

- Refunds
- No Sales
- Cancel Sales
- Stock Adjustments

Each process above uses an individual list of reasons that can be customised by the merchant. These are found in the **List** section of the Web Portal.

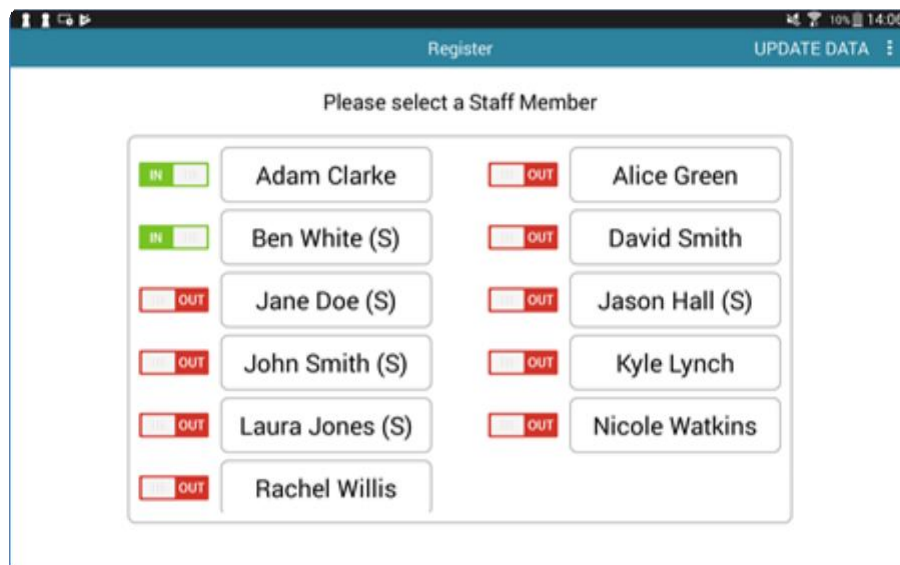
When refunding an item, merchants are now able to choose if the product is returned to stock for re-sale, or not (if damaged etc.).

## Track Cash Drawer Openings on certain till hardware

It is now possible to monitor how many times a day the cash drawer is opened, and the total length of time it was open for. This information can be seen on the Reports page and is included in the Daily Sales Report print out. This is enabled from the Web Portal and available on the MePOS, PAT-110 and Miura POSzle hardware. Please contact your reseller if you would like to learn more about this.

## Double Staff Columns on login screen

The Register login screen now supports both single or double columns for staff member names. This can be enabled from the Profile area of the Web Portal and is useful for merchants who have many staff members assigned to the Register. The double column layout still allows for vertical scrolling.



## Client Updates

- Customer receipts can now be printed using Star Raster image based printers (e.g. TSP 100)
- ESCPos Printers can now be used as secondary printers when printing order receipts

- All receipts now display the currency code for the Transaction Total (e.g. 'GBP 14.99')
- Improved handling when creating multiple appointments

## Portal Updates

- A new column is available on the Stock->Products table to display the product type of each product. Such as Fixed Measure, Regular or UOM.
- When viewing products within a selected department or supplier, when creating a new product from that screen, the department or supplier field will automatically populate.
- Customer CRM XLS Import and Export speeds have been improved.
- All Stock adjustments completed on the portal are now listed in the transaction report. The user will be shown as 'Portal' for easy tracking.

## Portal Reports Updates

- Several reports have been updated to support the introduction of Reasons on the Register client. Reason columns have been added to the following reports:
  - Refunds Report
  - No Sale Report
  - Cancel Sale Report
  - Reasons are also now included in Transaction Report
- New Additional Tender Notes Report
  - This is a new report that will display all transactions for a selected time range, where an additional tender note has been entered. For example, a cheque number or payment reference.
- New Stock Movement Report
  - This is a new report that displays all stock adjustments made, along with the quantity and reason. The stock movement report can also be filtered by department to help filter results.
- Update to PLU Report
  - The PLU Report now contains additional columns listing the quantity of sales split out for each tender type. Allowing merchants to know how many products have sold by Cash, Card, or other tender methods.

# **7.10. Release 4.7 September 2017**

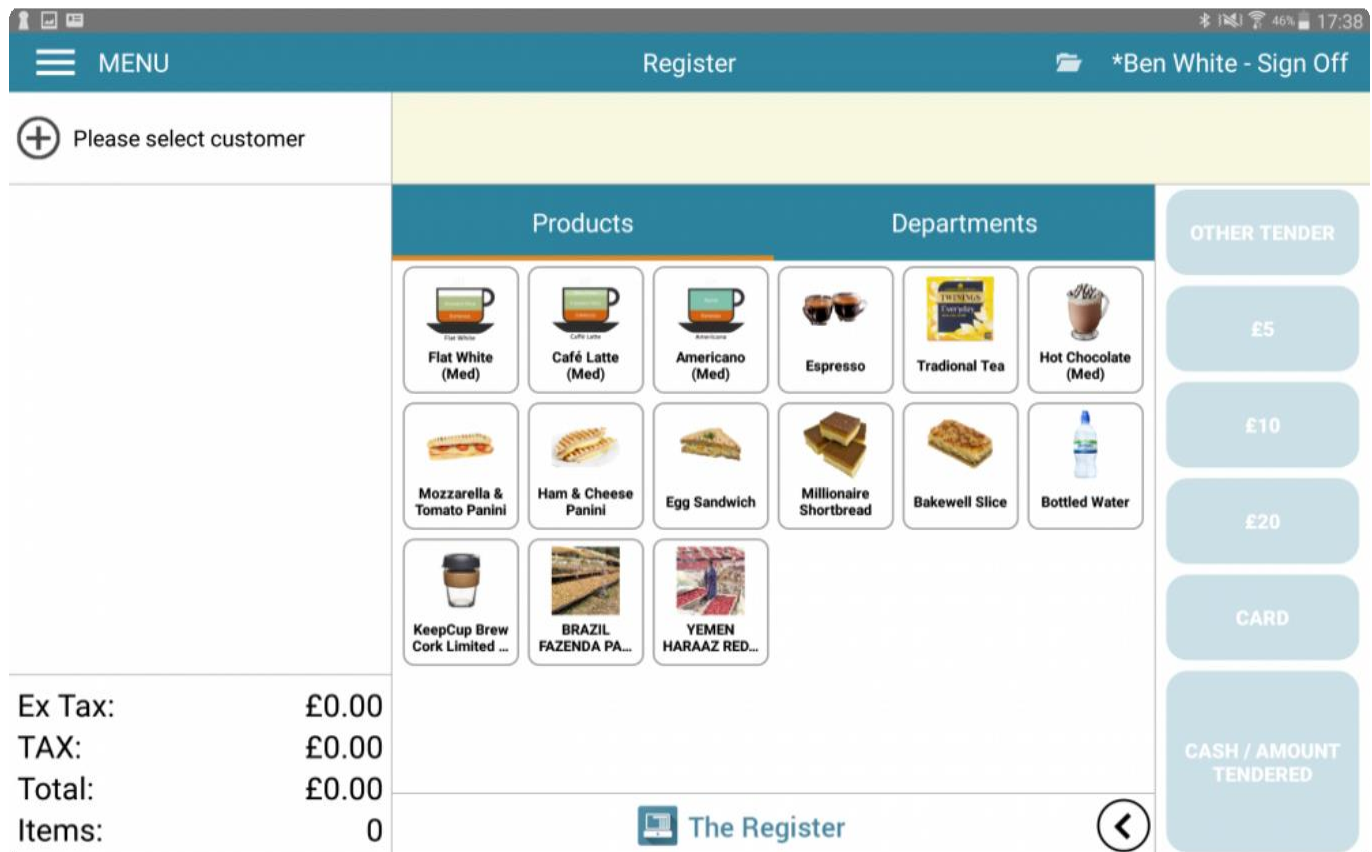
Smart Volution are releasing a major update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

This 4.7 Portal and Register update introduces the grouping of functionality for license types of Core and Plus. These have an impact on what features are accessible at both the portal and application level, depending on the license type purchased.

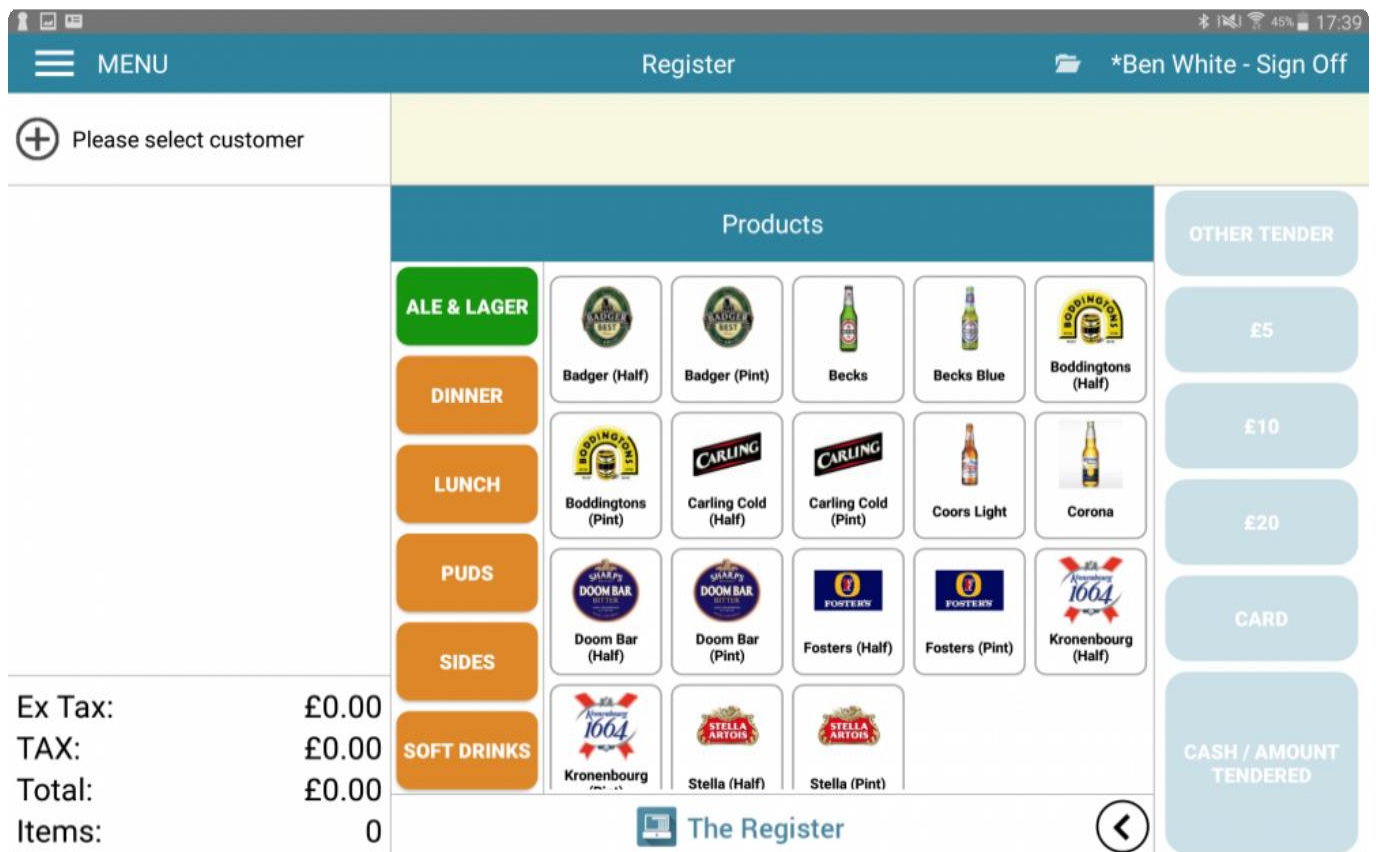
## Extended Product Browser

The product browser can now be considerably larger and extend across the screen to the right. An extended version of the product browser is now available to all users, and has several configurable options. The browser can be set to expanded on login, or configured to collapse once an item has been added.

For Core customers, the extended browser is a larger version of the product/department browser that is available today extending from left to right.



Plus customers can use the new 'Extended Plus Browser'. This uses a different layout more suited to hospitality where selected departments can be listed to the left-hand side. For example, appetizers, mains or drinks etc.

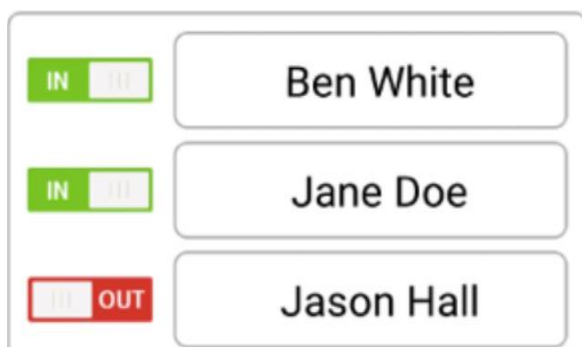


## Timekeeping (Clocking In / clocking Out)

Staff timekeeping can now be managed with the new Clocking In / Out module. This feature is available with Register Plus.

**Portal** – With several configurable options, all staff members can be required to clock in before having access to the Register. A new Staff Member Type of 'Timekeeping Only' has been added allowing non-Register users (any staff member) to take advantage of the Clocking In / Out module. There is also a new report under the Operational tab listing all of the times the staff members clocked In / Out.

**Client** – From the login screen all staff members will be able to clock in / out by tapping the new icon to the left of their name. The Register will record the time and display this in the report.



## Book Appointments against Anything

Stores can now be configured to book customer appointments against a bespoke list of any type. For example, this could be for tables at a restaurant, stylists or tanning beds at a salon, service bays at a garage or any other bookable items. Until this point appointments were booked against Staff Members, but this change allows merchants to define and use their own list of items to book against. The lists are created and managed under the Config ->Lists option allowing merchants to create and define their own Booking Resources. Each store can be updated to book appointments against a specific list, or staff members.

This feature is available with Register Plus, and can be leveraged when creating appointments on both the Portal or client.

| <div> <div>≡</div> <div>MENU</div> </div> |                        | Register                                                                            |                              |
|-------------------------------------------|------------------------|-------------------------------------------------------------------------------------|------------------------------|
| Select date                               |                        | <div> <div>⏪</div> <div>Tuesday</div> <div>08 August 2017</div> <div>⏩</div> </div> |                              |
|                                           | *Ben White             | *Jane Doe                                                                           | *Jason Hall                  |
| 01:00 PM                                  |                        |                                                                                     | Debbie Tyler<br>Consultation |
| 02:00 PM                                  | Arthur Ford<br>Haircut |                                                                                     |                              |
| 03:00 PM                                  |                        | Celia Hardy<br>Wash & Colour                                                        |                              |



| MENU        |                                  | Register                                                                            |                                   |
|-------------|----------------------------------|-------------------------------------------------------------------------------------|-----------------------------------|
| Select date |                                  | <div> <div>◀</div> <div>Tuesday</div> <div>08 August 2017</div> <div>▶</div> </div> |                                   |
|             | Table 01                         | Table 02                                                                            | Table 03                          |
| 01:00 PM    |                                  |                                                                                     | Debbie Tyler<br>Business Function |
| 02:00 PM    | Arthur Ford<br>Table Reservation |                                                                                     |                                   |
| 03:00 PM    |                                  | Celia Hardy<br>Private Function                                                     |                                   |

## Suspend transaction – custom, prefix, list

As with booking appointments, there are new options to choose when suspending transactions. Staff can suspend using a free text field (e.g. Guy Red jersey at bar), a prefix text value (Bar: “Guy Red jersey”), or suspend against a pre-defined list (e.g. table No. 1 >10). This pre-defined list to suspend against can be anything for example tables, chairs or bar positions.

This feature is available with Register Plus.

## PAYG text message bundles

Our SMS service for appointment confirmation and reminders has been extended to also include a Pay as You Go model. This gives merchants the option to purchase bundles of messages up front and then work through them. Low credit reminders will be sent via SMS and email to warn the merchants that a top up will soon be required.

## Card Only Payments

With this new profile option enabled the Register will only accept Card Payments. Cash floats and transactions will not be accepted. In certain use cases this is a very useful option, the card tender button is moved down to replace the ‘CASH / AMOUNT TENDERED’ button. To simplify the user experience the Start Day Float, Paid In and Paid Out menus have all been disabled in this mode of operation.

## Additional Client Features

- Create Appointments direct from the calendar

- For a better user experience Staff can now book customer appointments straight from the calendar screen without having to lookup the customer beforehand. From the calendar screen simply tap an available appointment slot, select the customer and enter the appointment details.
- Optional customer receipt
  - We have added a new profile configuration for Optional Customer Receipts. When selected this option will not automatically print a receipt once a transaction has been completed. Instead it can be printed on demand if required by the customer.
- Print bill
  - From the suspended transactions window staff can now print the transaction details at any time (customer bill) before tendering the transaction. This is useful with hospitality for instance.
- Mandatory assign customer to transaction
  - This option enforces that every transaction has a customer assigned. With this new profile option enabled, staff will be required to assign a customer to every transaction before being able to complete the tendering process.
- Print customer address and contact details on receipt
  - When enabled, this profile option will print the customer details to the bottom of the receipt (Customer Name, Address and Primary Phone number). If a customer has not been assigned to the transaction the receipt will not show this section. This is useful in a takeaway environment or in a jeweller for a pre-paid repair.
- Delete appointments from the customer details 'appointments' tab
  - When viewing a customer's details, appointments can now be deleted right from the Appointments tab – there is no need to go to the calendar first to delete an appointment.
- Rename card button
  - The 'CARD' text used on the card tender button can now be changed using a new profile option. This can be updated to a more suitable name when using an integrated payment option.
- PAYG low text alerts
  - If using our Pay As You Go SMS service for appointment reminders, a new alert can be seen on the staff login screen when the balance is running low.

## Other Client Updates

Products that print to the kitchen printer using the 'Order Receipt' can be sent to either the Primary or Secondary Printer.

- Clerks are referred to as Staff or Staff Members throughout the Register application and portal.
- General user interface changes and improvements.
- 4 digit QTY Support when adding products to the basket.
- The Register will sync whilst loading the Customers Screen to get any updates.
- Quantity of items purchased or refunded is now listed on the customer receipt.

- The Order Receipt can now be reprinted to the kitchen printer from the transaction history screen.
- Additional tender notes can now be edited before completing a transaction.

## Other Portal Updates

- User interface improvements in the profile area. Options are now hidden until they are required based on other settings. For example, all profile settings for a barcode reader are hidden until a specific scanner has been selected.
- A user interface improvement has been made to all table views on the portal, they now remember their last position. For example, if you disable a device, or edit a product, when you return to the table it will be in the same position as when you left it. This saves users from needing to scroll or search again.
- All Labels in the Custom Fields form can now be edited by the merchant. (System and Custom).
- A user interface improvement has been made to applicable tables in the portal. Where reordering fields is applicable, this can now be done by dragging & dropping as opposed to the up & down arrows.
- When logging into the portal in a web browser the keyboard focus has now been set to the username field, allowing staff to begin typing without having to click in the text entry box.

## Portal Report Updates

- Customer Transaction Report
  - A new report added to the Operational tab of the Reports menu. This new report lists any transactions where a customer has been assigned to them. It includes details about the customer, the transaction and any items purchased.
- Summary row added to Cashing Up Report
  - A new summary row has been added to the Cashing Up Report. This new row shows the total value for all Cashing Up entries in the selected time frame.
- Remove summary on applicable reports
  - If any reports return a single row of data, the summary row will be removed to keep the data simple and easy to read.

## **7.11. Release 4.4 May 2017**

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Smart Volution are releasing a major update with exciting new functionality to the Register application. Please read the below information for details on the new functionality.

# Client

## Supervisor Approval

Our clerk and supervisor permissions have now been extended to include Supervisor approval. Previously a clerk could be prevented from performing a certain action, but now there is the option to allow it once a supervisor has approved the action. For example, a clerk may be able to apply discounts, but require approval to give a refund. These permissions can be controlled within the Profile area of the Web Portal.

## Measured Products

A new product type of Measured has been added which allows the product to be assigned a measure such as gram or metre. The UOM and price are assigned to the product on the Web Portal – as example a product can be given a price of £2.00 per 100grams. When adding the product to the basket the application will ask the clerk to enter the amount being purchased, then work out the price. Using the above £2.00 per 100grams, if the customer is buying 200grams, the price will be £4.00.

## Linked Refunds

Customer refunds now have the option of being linked to the original transaction, allowing for better tractability. This allows a clerk to lookup the original transaction, select the appropriate items(s) then add them into a new transaction as a refund. Alternatively, a manual refund can be processed with no link to the original purchase, just like today.

## Other Tender Types

The Register can now support other Tender Types, in addition to the usual Cash or Card. These are created and managed on the Portal then used by the clerk when completing a sale. Once items have been added to the transaction the 'Other Tender' button above quick tender will list out all Other Tender available for use. Just like a normal cash or card sale, once the full transaction amount has been tendered the transaction will complete. Clerks are also able to process split payments if the profile allows it.

## Application Branding – colours, product browser image

The 4.4 Application now supports full client branding; this web portal update will introduce the 'Branding' profile category that is needed to control the application colours. Almost all colours in the application can be controlled, for example – screen backgrounds, register buttons, fonts, borders, title-bars along with the image at the bottom of the product browser.

*Client branding will form part of our TCR Plus version in the next release.*

# General Updates

## New App Icon and Name

The application name has changed to Register, and uses a new application icon on the Android app's menu. The application will no longer be called 'Smart Volution TCR', and no longer use the Smart Volution dot's logo.

## Tax information on receipts

Customer receipts and cashing up receipts will now display a tax summary underneath the transaction items and total. This will allow the customer, and clerk, to see a breakdown of all taxes used and their amounts. For example, a customer would be able to see how much Zero Rate and Standard Rate VAT was used in their transaction.

## Abort Sync Spinner

The Spinning icon shown on screen during an Update or device sync has been changed. It no longer uses the rotating Smart Volution icon. The updates can also be cancelled using the abort button if there are any issues with the connection, and will continue the next time Update is tapped.

## Settings Screen Password

Access to the settings screen (from the clerk login screen) can now be password protected. This is to prevent clerks from accessing the settings area if required. To control this a new option has been added to the Profiles area of the Web Portal: from here the password can be changed, or turned off if not required.

## Cashing up Total or Denomination

The cashing up process traditionally lists out all cash denominations for the staff to enter (20p, £1, £5 etc). A new option has been added to the Profile section of the Web Portal that allows the cashing up process to use denominations or a simple 'Cash Total'.

## Remove sign off icon

The lock icon to the right of 'User – Sign off' on the top navigation bar has been removed.

## Move Training mode

The Training Mode switch has been moved out of the settings area and can now be enabled from the overflow menu of the clerk screen. The 'Enable Training Mode' option is now listed below the 'Settings'

item in the menu. Once in training mode, the same menu item will change to 'Disable Training Mode' and return the Register to normal use.

# Portal

## Supplier Management

Suppliers are now managed in a new dedicated area of the Web Portal. This allows many suppliers to be created, along with contact information and other details. These suppliers can then be assigned to products, allowing for more in depth reports and better product management.

## Additional Tender Types

The Register can now support other Tender Types, in addition to the usual Cash or Card. These are created and managed on the Portal then utilised by the client when completing a sale. Each tender type can be customised to open the Cash Drawer (to keep the receipt), add a note, or add to the cashing up process.

## Stock Transfer Containers

Our Stock Transfer module has been extended to support Containers. This allows a merchant to create a single 'shipment' to a location in the business, and add multiple products to the transfer.

This can then be received by the new location and the goods can be processed (Their quantities can be Accepted, Rejected or adjusted as needed).

# General Updates

## Measured Products (Unit of Measure)

A new product type of Measured has been added to the Product Form, which allows the product to be assigned a measure such as gram or metre. The UOM and price are assigned to the product on the Web Portal – as example a product can be given a price of £2.00 per 100grams. When adding the product to the basket the application will ask the clerk to enter the amount being purchased, then work out the price. Using the above £2.00 per 100grams, if the customer is buying 200grams, the price will be £4.00.

## Improved Profile Management

The Profile section of the Web Portal (under the config dropdown) has been updated. The profile categories have been moved into a vertical accordion menu, each category will expand on click to show all options. The new menu and improved option grouping will make profile management and changes much easier.

## Application Branding Profile Options

The 4.4 Application release will support full client branding, this web portal update will introduce the 'Branding' profile category that is needed to control the application colours. Almost all colours of the application can be controlled for example – screen backgrounds, register buttons, fonts, borders, title- bars along with the image at the bottom of the product browser.

Client branding will form part of our TCR Plus version in the next release.

## Export Data based on current view

When viewing the product or department tables on the web portal, the Export Data button currently exports all products or departments to XLS. Now, if the table is showing only products based on a search term, or products within a department, or products from a specific supplier: the export will only contain the products based on that search, department or supplier.

## Enter button to perform a search

When performing a search on the web portal the enter button on the keyboard can be used to bring the search. Previously the user needed to click the search button on the screen to perform the search. But now the user can click the button, or tap the Enter.

## Product Search by Supplier

From the new supplier screen, the user can drill down and view a filtered list of all products that are provided by that supplier. This is done using the button to the right of the delete supplier button.

## Report Updates

### Supplier Report

A new report has been added to the 'Sales' section within the Reports dropdown. This report lists out the total sales for each supplier used in the selected date range, along with a summary section at the top for all suppliers. This gives merchants a great overview of how the different suppliers are performing within their business.

### Supplier Filter

A new filter has been added to the reports pages to allow users to filter the data by specific suppliers. This new filter has been added to the right of existing filters for Stores, Devices and Departments.

## Profitability PLU Report

A new report has been added to the 'Sales' section within the Reports dropdown. This report will list the sales and profit for each product sold within the selected date range. Included for each product, and a combined summary, will be blended values for product markup and margin based on the buy price and selling price.

## Existing Report Updates for UOM Products

Several reports have been updated to provided more useful information around UOM Products. This will allow merchants to get a better understanding of the UOM sales, for both how many times a product was purchased and the measure that equates to. For example, a UOM product may have been sold 5 times but the merchant will need to know that the Net Measure was 500grams.

## Existing Report Updates for Tender Types

Many sales reports have been updated to provided much more detail around the tender types used for the selected date range. With existing cash and card payments, and the addition of new tender types, merchants now need to know how much of each tender type has been used.

## Transaction Approval

Following the 4.4 Client update merchants will be able to introduce Supervisor Approval on certain actions, such as applying a refund, performing a no sale, adding discounts etc. The Transaction Report has been updated to include a new field to show the name of the supervisor who approved the action for the clerk.



## 8. Glossary of Terms

| Item                     | Description                                                                                                                                                                                |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Child Department</b>  | Sub Department of a Parent or Top Level Department.                                                                                                                                        |
| <b>Column</b>            | In an Excel sheet, a column runs vertically from top to bottom and is labelled as A, B, C...                                                                                               |
| <b>Core License</b>      | The Registers Standard license that gives you access to the standard features of the Register.                                                                                             |
| <b>CSV</b>               | Comma Separated Value files used by many programs such as Excel to import or export data in column format with each column entry separated by a comma.                                     |
| <b>Database</b>          | The file on the Server that stores all the data from your Register and Web Portal in a structured way that is accessible by both the Register and the Web Portal in bi-directional manner. |
| <b>Department</b>        | The parent organiser to the products held on the Register or Web Portal. Like the Folder holding the file contents in one place.                                                           |
| <b>Department Code</b>   | A number used by the Register when using the built-in Department search option.                                                                                                            |
| <b>Device</b>            | The Hardware or Tablet that the Register application is installed on.                                                                                                                      |
| <b>Merchant</b>          | The level on the Web Portal that allows the creation of the Register data environment.                                                                                                     |
| <b>Landscape Mode</b>    | The orientation of the tablet device when the width is longer than the height of the display                                                                                               |
| <b>Parent Department</b> | Top Level Department                                                                                                                                                                       |
| <b>PIN</b>               | Personal Identification Number, like a password.                                                                                                                                           |
| <b>PLU</b>               | Price Look Up code: Used to identify a specific product in your store. The number must be unique to the product and cannot be reused. See also SKU                                         |
| <b>Plus License</b>      | The Registers enhanced version which has features not available with a Core License. For example, Hospitality, CRM and Transaction Suspension.                                             |
| <b>Portrait Mode</b>     | The orientation of the tablet device when the height is longer than the width of the display                                                                                               |
| <b>Pre Authorisation</b> | Where the clients credit or debit card is pre authorised for a transaction value, prior to actually completing the transaction by requesting payment from the Card Issuer.                 |
| <b>Product</b>           | The item that is physically sold in store.                                                                                                                                                 |
| <b>Product Browser</b>   | A list of regularly sold items, or items that have been marked as being on "Special" and is used as a Quick List lookup reference in the Register.                                         |
| <b>Provision Code</b>    | A code that the Register application users to identify itself to the Database Server.                                                                                                      |
| <b>Register</b>          | The device used to record all sales transactions in the Store.                                                                                                                             |
| <b>Row</b>               | In an Excel sheet, a row runs horizontally from left to right and is numbered as 1, 2, 3...                                                                                                |

|                  |                                                                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SKU</b>       | Stock Keeping Unit code: Used to identify a specific product in your store. The number must be unique and cannot be reused. See also PLU                               |
| <b>Surcharge</b> | An additional charge or payment added to the transaction. For example, a surcharge added when reserving a table at a restaurant.                                       |
| <b>Sync</b>      | An action that sends and receives data from the Database Server to the Register and vice versa and ensures that the data is up to date and accurate on both platforms. |
| <b>Tenant</b>    | A level on the Web Portal that is set as the primary User above a Merchant.                                                                                            |
| <b>TIP</b>       | A gratuity that is added to the transaction value, and is normally paid to the staff for the value of the service given.                                               |
| <b>URL</b>       | Uniform Resource Locator, or an Internet Web Address                                                                                                                   |
| <b>VAT</b>       | Value Added Tax, also known as GST (Government Sales Tax) or just Sales Tax.                                                                                           |
| <b>Wi-Fi</b>     | Wireless Internet. Your device will have Wi-Fi capability if it can connect to the internet without the use of hardwiring.                                             |
| <b>XLS</b>       | File format of downloaded files from the portal. Can be opened and edited in Excel or any program that reads XLS or XML formatting.                                    |
| <b>XML</b>       | See XLS                                                                                                                                                                |