POSC RE

Android app & web-based Cloud Back Office

USER GUIDE



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Introduction	5
Architecture	6
Installing the application	8
Setup and onboarding	8
Initial log-in	10
POS terminal screen	12
Customising the layout	13
Defining submenus	17
Saving & loading layouts ("Skins")	20
Configuring hardware	21
Barcode scanner	22
Receipt printer	24
Kitchen/bar printer	25
Label printer	26
Customer display	26
VFD customer display	27
Integrated pin pad (PED)	27
Basic sales & serving	29
Accepting a payment	31
Alternative tendering method	34
Performing a refund	35
Custom payment types	38
Performing an integrated card payment	39
POS functions	44
Overview & summary	44
Best practices	49
Till readings	50
Running a ZREAD	51
Reprinting / correcting a ZREAD	53
Running an EOD (End of Day)	55
Saving & recalling a basket	56
Custom receipt messages	57
Customer accounts	58
Gift Aid	64
Monetary donations	65
Donated goods	68
Table orders	72
Printing a bill	74
Altering a bill	76
Settling a table bill	78

Gift cards & vouchers	79
Issuing a gift voucher	79
Loading / activating a gift card	81
Querying a card/voucher balance	83
Redeeming a gift card/voucher	83
Loyalty rewards	85
Setting up a reward scheme	85
Serving a loyalty customer	87
Issuing rewards	88
Products	90
Adding a new product	91
Editing a product	91
Product options	92
Price embedded barcodes	94
Departments	96
Suppliers	100
Promotional offers	102
Buy X Get Y free	102
Any X for £Y.YY	102
Link deals	103
Adding an offer	104
Editing an offer	105
Deleting an offer	109
Wholesaler integration	110
Product file updates	110
Price changes	111
Customer promotions	111
Uploading orders	112
Stock management	113
Creating a purchase order	113
Closing off a purchase order	117
Booking-in a delivery	118
Downloading delivery notes	120
Amending a delivery	121
Stock returns & transfers	122
Amending a return/transfer	125
Reports	126
Staff access & security	128
Adding a new employee	129
Training mode	131
Configuring the smartphone HHT app	132

Deliverappy platform integration	134
Cloud Back Office	136
Accessing the service	136
Dashboard	137
Customers	138
Manage Stock Lines	140
Stock movement	141
Employees	145
Reports	147

Introduction

POS Core provides a lightweight, "cloud" based POS solution for Android tablets and POS terminals. It is suitable for a broad range of retail and hospitality environments.

POS Core consists of three components:

- an Android front-end that provides both point of sale and back office functions,
- a "cloud back office" in the form of a web / HTML back-end (accessible from almost any device anywhere),
- a central/shared server application managed by Image Retail Solutions Ltd which synchronises the database between devices ("terminals") and the cloud.

Each merchant on the cloud platform is entirely independent of all others. Each merchant can have multiple stores, and each store can have multiple terminals. This makes the platform equally suitable to single store, single device retailers, as retailers running multiple terminals across multiple site estates.

Each device operates off its own database which is synced via the cloud with other devices belonging to that merchant. Data is arranged in "data sets", each with a different "scope". The scope determines the extent to which data is propagated across the estate:

- global scope all terminals at all stores belonging to the merchant
- store scope all terminals belonging to the same store
- terminal scope the individual terminal only

Whilst synchronisation between devices and the cloud requires an active and always-on broadband connection, a loss of Internet will not impair operation of individual terminals. When connectivity is resumed, individual terminals will simply "re-sync" with the cloud, submitting any database transactions they have processed since the outage and retrieving any database transactions performed by other devices (or the web) that they have missed.

Architecture

The interaction of devices within the platform can be depicted as follows:



Each merchant is identified by a Merchant ID ("MID"). Each site is identified by a Site ID ("SID") and each individual terminal within the site by a Terminal ID ("TID").

A MID/SID/TID combination uniquely identifies each device on the platform.

Provisioning

Before a merchant becomes active on the platform and can enroll devices, they must be allocated a unique Merchant ID ("MID"). MIDs are allocated centrally by the Company.

Site IDs ("SID") are incrementally allocated from "1" upwards for each site within the individual merchant's estate. SIDs are unique within the estate.

Terminal IDs ("TID") are incrementally allocated from "1" upwards for each device within an individual store. TIDs are unique within the store, but are not unique across the estate.

Each installation of the POS Core application contains a unique ID. This ID is tied to the MID/SID/TID combination that uniquely identifies the device. If the app is ever re-installed then this unique ID will change. Before the device can be reprovisioned on the platform, the merchant will need to contact the Company to request that the "slot" assigned for the old unique ID be cleared down.

On first provisioning a device, an initial sync with the cloud must be performed. This will load / re-load the dataset for the device.

Installing the application

Installation should only be performed on compatible hardware supplied or recommended by the Company. Due to the vast differences between hardware on the market, and the individual builds of Android it is impossible to guarantee the performance, reliability or compatibility of independently sourced alternatives.

The POS Core application is available from the following URL and should be installed directly on the device, using the browser (Chrome is recommended):

https://imagesoft.co.uk/core.html

This page lists the current release build and all prior builds. Always install the latest build available, unless specifically advised otherwise.

It is possible that test ("beta") builds may also be displayed on this page. These should be avoided unless you are willing to trial new features with the associated risk of running untested software.

When installing the application for the first time, you may be directed to the Settings applet within Android to allow the installation of software from "untrusted" sources. You may also receive one or more warnings about installing software from such sources. In the case of POS Core, these can be safely ignored.

To upgrade POS Core, simply repeat the download and installation process (effectively "on top" of the existing installation). **Do not uninstall the app** or you will also delete the local database and reset the unique ID associated with the device. Should you do this, the device will need to be reprovisioned on the server.

Setup and onboarding

Note that Internet connectivity is required for this step. It is not possible to provision a terminal/device offline.

The application will install to the home screen, as with any other Android application.

Tap the icon to open the app. (Note that the icon may vary from that shown below):

\sim		🔝 † 💎 🗎
POS Core	Calculator	FM Radio

On first running the app, you will be prompted for the provisioning details:

11:01 am 🍁 👁 🖼 🕈 •	🗊 ÷ 🖘 🗎
Onboarding	
LET'S GET YOU ON BOARD AND READY FOR LIFTOFF!	
Enter the details provided to you for this terminal below:	
MID	
TID	
Postcode	
Go! \ominus	image retail solutions

These comprise the Merchant ID ("MID"), unique to each retailer/organisation, the Site ID ("SID"), unique to the site within the retailer's estate, and the Terminal ID ("TID") unique to the terminal within the site.

The postcode of the merchant is also required as a confirmation that the correct MID has been entered.

Enter the details and tap "GO!".



If provisioning has been successful then the cloud syncing page will be displayed:

At this point, the local database is being populated with the global, site and terminal specific datasets from the cloud.

You must wait for this process to complete before the app can be used.

Initial log-in

After the initial sync has been performed following launch of the app, the user is prompted to enter an ID and PIN:

12:07 pm 🌣 🔿 🖼 🕈 🔸				2	÷ 🗣 🗎
Cloud sync					
ID:					
PIN:					
	7	8	9		
	4	5	6		
	1	2	3		
	<<	0	\odot		

Each employee should have their own ID and PIN to access the system. Default IDs and PINs provided in a newly provisioned database are as follows:

ID	PIN	Employee name	Access rights
1	123	STAFF	Basic rights
2	456	MANAGER	Elevated rights
3	789	OWNER	All rights

The access rights shown above are only loose definitions of the rights associated with each employee. Access to specific features & functions of the system is set on the individual employee's record, as will be seen later.

It is possible (and recommended) to edit the default employee details, and to add additional employee records as required. This is covered in the "Staff access & security" section of this guide.

POS terminal screen

On logging in to the app, the POS terminal screen is displayed:

POS Terminal [MID 5318 SID 1 TID 2] - STAFF [Scanner disconnected] [Printer disconnected]					Settings			
ő	*		-9	•		ST 8 CROISSANTS 5027952011811	320G	2.15
MISC 0%	MISC 5%	MISC 20%	£	*		5054073012977 AMERICANO	54.4	0.99
ACCOUNT	£20 NOTE	£10 NOTE	7	8	9	MILK, CARAMEL SYRUP		3.00
MANAGER OPTIONS	EXACT	0	4	5	6			
VOID ALL	PRINT RECEIPT	X	1	2	3			
A?	13		00	0	ENTER	3 items	£6	.14

The top of the screen displays the status of the app:

12:25 pm 🌣 👁 🖼 🕈 🔹

POS Terminal [MID 5318 | SID 1 | TID 1] - STAFF [Scanner disconnected]

Below this are 36 programmable buttons (6 rows of 6 columns) which can be configured to the needs of the individual retailer/venue. Each button is associated with either:

- a product/barcode
- a submenu of up to 36 more buttons (35 + 1 reserved for "back")
- a "command" understood by the app, and which triggers a function

The text on the button, the size and colour of the text and the colour and size of the button itself can all be customised.

To the right of this is the basket/visit list showing the items in the current sale:

RED APPLES		
1010100002		0.50
B/ONE BANANAS 99P	5PK	
5054073012977		0.99
CARRIER BAG		
1010200013		0 10
		0.10

Beneath this is the scan/entry field (green line), and beneath this the visit balance:

3 items £6.14

Customising the layout

The default layout provided for the POS terminal is a good example of a suggested layout but may not suit the exact needs of the individual retailer / venue.

Each of the 36 buttons on the POS keypad/screen can be customised in terms of:

- the text, emoji or picture on the button,
- the size of the text,
- the colour of the text,
- the size of the button (single width/height or double width/height),
- the background colour of the button,
- the barcode, command or submenu layout to which the button maps

Each button has an associated "input" independent of the actual text / picture on the button (which can be almost anything). The input consists of either:

- a barcode (to sell a product)
- a POS command to execute
- the name of a submenu to display when the button is pressed
- numbers or characters to be inserted into the input field
- the URL of a website/webpage to display in the app

For a list of supported POS commands, please see the section titled "POS Functions". The spelling and capitalisation of these are important.

To reprogram a button, hold a finger on the button for 2 seconds (ie. perform a "long click"). This will display the button configuration screen:

← Configure	button	
Button text:	MISC 20%	
Barcode / input:	1010100010	Q
Button colour:	White	*
Text colour:	Black	•
Font size:	24 -	
Double width:		
Double height:		

Enter the desired text into the "button text" field. The contents of this is purely for the user and is not interpreted by the app (except in the case of a single character/digit button, as explained below). It can be any sensible value and can include an emoji (picture character).

As you type, or make changes to the button content, the preview icon to the right of the screen updates:



You can also assign a picture (image) to a button such as one which you have previously downloaded using the device's browser. To do this, tap the file icon to the right of the button text field:

12:05 🗳			
← Configure b	outton		
Button text:	file://1_1_17.jpg		
Barcode / input:	5054073012977	Q	
Button colour:	Default	.	

Images are automatically scaled to fit the size of the button:



The barcode/input field determines what happens when the button is pressed:

- to sell a product when the button is pressed, enter the barcode of the product here. Use the search button (magnifying glass) to search for the product by name.
- to switch to a submenu of buttons, enter the name of the menu here. If a menu doesn't exist under this name then the system will offer to create one.
- to issue a command (from the list of recognised commands in the POS Functions section) enter the command here.
- to enter a character or digit into the input field of the POS terminal window (eg. to compose an amount or a barcode), enter a single character/number.
- to specify a website, enter the URL beginning "http" or "https".

Note that if a button has no input defined then the button text itself will be used as the input text. This saves the need to duplicate the text in the input field where both are the same (eg. in the case of single digits).

Where a button is defined with a single character/digit, this is *appended* to the contents of the input field when the button is pressed. It is necessary to have an ENTER button (with a command of "CR") to submit the entire input once the user has finished entering all the required digits (eg. in the case of a barcode).

To define a payment for a set amount eg. £10 cash, use the format "1000CASH", where the amount is specified in pence. The recognised payment types are "CASH" and "CARD", along with any user defined/custom payment types (see the relevant section on how to set these up).

To disable a button, simply blank out the button text and barcode/input fields.

Defining submenus

POS Core supports an unlimited number of hierarchical submenus of buttons. This means that a button can "break out" into a submenu of further buttons, each of those can break out into another submenu and so on.

This is especially useful for menus in a hospitality settings, where you may have a DRINKS button which switches to a submenu keypad containing HOT DRINKS, COLD DRINKS, ALCOHOL, which in turn break out into submenus showing the range of drinks under each category. In turn, ALCOHOL could break-out into BEER, CIDER, WINE, etc as an example.

Each submenu in the hierarchy can define up to 36 buttons (with one button reserved by the system as a BACK button to return to the previous submenu).

To create a submenu keypad, enter the submenu name as the input text for any of the buttons on an existing menu. This must not be any of the reserved commands (otherwise the button would instead just map to this command).

2:15 pm 🌣 👁 🖻 🕈 🔹		
← Configure b	utton	
Button text:	۵	
Barcode / input:	ALCOHOL	Q
Button colour:	Default	.
Text colour:	Black	Ŧ

On tapping the back button, the app asks to save changes:



It then detects that a submenu does not exist under the given name and so offers to create it:





Tapping "YES" creates a blank submenu / screen of 36 buttons under the given name:

Repeat the process of defining these buttons in the same way. Again, each button can map to a product/barcode, command or further submenu.



Note the reserved "BACK" button in the bottom right corner of the menu screen. It is not possible to edit/remove this button.

Saving & loading layouts ("Skins")

Once you have defined your buttons and menus, the app allows you to save the entire layout as a "skin" which you can then load onto another terminal.

Tap and hold on any button to bring up the button's configuration.

Tap the menu icon in the top right corner of the screen:



Select the "Save skin" option from the menu:

	Save skin	
	Load skin	
Button preview:		

The app will prompt for a name for the "skin". Enter a suitable / sensible name to save the skin under:

Skin name:		
MY SKIN 2		
	ок	CANCEL

Using the same menu to access the "Load skin" option (on this or any other terminal) will present a list of previously saved skins:

2022-04-12		
MY SKIN 1		
MY SKIN 2		
	ок	CANCEL

Simply select the skin from the list to load it onto the terminal.

Note that you will lose/overwrite the currently defined layout when loading a skin. If you wish to preserve the existing layout then you should save it first.

Configuring hardware

A typical POS installation will include peripheral devices working with the terminal/tablet, such as receipt printer, cash drawer and barcode scanner. Depending on the environment, the venue may also require a kitchen printer, bar printer, etc.

This section of the guide explains how to configure these devices for use with POS Core. Note that all hardware and peripherals differ and compatibility can never be assured.

NB: When pairing new Bluetooth peripherals with the tablet/terminal, it is recommended that the POS Core app be restarted to ensure that these are properly visible to the app.

Barcode scanner

POS Core supports both HID mode and Bluetooth SPP mode barcode scanners. The latter is the recommended connection method as it allows Core to control which field accepts data and when.

If using a cordless scanner, ensure the scanner is fully charged before proceeding.

Scan the configuration barcode supplied with the scanner to enter "Bluetooth SPP mode".

Pair the barcode scanner with the tablet itself via the Settings applet in Android ("Add device"). It should appear under connected devices:

4:19 pm	
÷	Connected devices
\geq	OURRENTLY CONNECTED
0	BarCode Scanner spp
*	KP80B-USEWB
+	Pair new device

Click the cog next to the device name to obtain the MAC address for the scanner:



	Contact sharing
i	Device's Bluetooth address AA:A8:A1:04:E4:25

Make a careful note of this number.

Switch back to the POS Core app and tap Settings in the top right of the POS terminal screen:



This will display the application settings window. Scroll down to the "Hardware configuration":

					💎 🖹 🖥 7:38
÷	Settings				:
Hard	ware configurati	on			
Deietau		las a Deistas	Label D		
Printer	name	InnerPrinter	LabertP		
Printer	MAC		Kitchen IP	192.168.1.87	
Scann	er name	Barcode Scanner SPP	Bar IP		
Scann	er MAC				
VFD na	ame				
VFD M	AC				

Locate the option with the name "Scanner MAC":

Hardware configuration		
Printer name	InnerPrinter	
Printer MAC		
Scanner name	Barcode Scanner SPP	
Scanner MAC		

Enter the MAC address of the scanner which you previously noted. Only include the numbers and letters. Do not enter any colons or dashes.

Click the left arrow at the top right of the screen to return to the POS terminal window.

← Settings	
Hardware configuration	

Receipt printer

POS Core supports printing to a Bluetooth receipt printer and, in hospitality environments, also to a kitchen and/or bar printer over the local network (LAN). The app also supports the use of a cash drawer connected to the receipt printer.

To configure a receipt printer, repeat the process as described for configuring a barcode scanner, but using the option "Printer MAC" in the settings. Remember to pair the printer with the tablet / terminal within the Android settings applet first.

There is no need to configure any settings for the cash drawer. POS Core will always attempt to kick a cash drawer attached to the receipt printer following a payment. If a cash drawer is not connected then the printer will simply ignore this command.

Kitchen/bar printer

POS Core supports printing of orders to a kitchen and/or separate bar printer connected via the network/LAN (hard-wired or WiFi). Products are flagged for being sent to either/both when they are set up, as explained in the relevant section.

Most receipt/slip printers will print a diagnostic/settings slip if powered on when the feed button is held down. This will often give you the information required to configure the app's settings:

System: KP80B-USEWB		
Page Mode Suppor	t	
Command mode:	EPSON(ESC/POS)	
Interface:	USB&	
	Serial 19200, None, 8,1	
	Ethernet	
Ethernet ID:	A6-78-01-DB-28-02	
IP address:	192.168.1.87	
Netmask address	:255.255.255.0	
Gateway address	: 192.168.1.1	
DNS Server1:	4.4.4.4	
DNS Server2:	8.8.8	
Port:	9100	

Note that there may be multiple IP addresses and port numbers shown (one for each interface on the device). Be sure to note the correct one. Also note that a "Web socket port" may also be present. This is not used by POS Core and should be ignored.

To configure a kitchen and/or bar printer, enter the IP address of each in the appropriate fields of the Settings screen:

Kitchen IP	192.168.1.87
Bar IP	

The app will use a default port number of 9100 (which is the industry standard). If you need to change this, as it does not match the port number of your printer, specify a different port separated from the IP address with a colon:

Label IP	
Kitchen IP	192.168.1.87:9101
Bar IP	

Always set/reserve an IP address in the router for network printers, otherwise the IP address is likely to change.

Label printer

POS Core supports printing of Shelf Edge Labels (SEL's) and Gift Aid Labels to a Zebra label printer on the local network (connected by Ethernet or WiFi). The printer should be allocated a fixed IP address on the network. This is done through the router (the method for which will vary from model to model - please refer to your router's manual for instructions on how to do this). The IP address of the printer should be set in the "Label IP" field of the hardware settings.

Customer display

If POS Core detects a secondary monitor on the device, it will automatically utilise this as a customer display. There is no separate configuration required.

The customer display comprises a static or animated image (GIF), the basket contents and the visit balance:



To disable this feature, eg. where the secondary display is being used for another purpose, enable the option to "Ignore 2nd screen".

Suitability of a secondary display will depend on the specific hardware, the version of Android in use and any compatibility issues.

VFD customer display

POS Core also supports the use of textual (2 line x 20 char) VFD customer displays connected as a Bluetooth SSP device. Simply enter the MAC address of the display (from the device settings) into the "VFD MAC" field of the hardware configuration section.

Integrated pin pad (PED)

POS Core supports (and is accredited for) integration with the Paymentsense card payment solution. This allows the app to initiate a card transaction with a suitable payment terminal ("PED") running on the local network, and to query the transaction result.

Configuration of the PED is through the "Card payment processor (EFT)" section of the settings window:

Card payment processor (EFT)	
Payment processor	PAYMENTSENSE
PS Hostname	sq945m480000.test.connect.paymentsense.cloud
PS API key	93eeabeb-f00c-49cd-b0c5-6aab26cc2e09
PS TID	34612817
Cashback	

The hostname, API key and terminal ID (TID) are advised by Paymentsense.

Refer to the documentation supplied with the payment terminal for instructions on setup. As a purely network device, this does not require pairing with, or physical connection to, the tablet/terminal running POS Core.

Note that card receipts are printed through the receipt printer by POS Core itself. By default, the PED may also produce unnecessary copies of these. This can be disabled by speaking to Paymentsense customer services.

Basic sales & serving

Note that in this context, a basic sale refers to any sale that is settled immediately by the customer, irrespective of payment method. This is in contrast to "layaway" sales made on account or table orders in the case of a hospitality setting.

Items are firstly added to the basket by either scanning them (in the case of physically barcoded product) or by tapping the associated button. As items are added, the display updates:

RED APPLES		
1010100002		0.50
B/ONE BANANAS 99P 5054073012977	5PK	0.99
CARRIER BAG		
1010200013		0.10
	£	1.59

If a product does not have a price (eg. a 0.00 price) then the system will prompt the user to enter a price. Such products are said to be "variably priced":



CARKIER DAU	I
1010200013	0.10
MISC 20%	
1010100010	1.23

To edit an entry in the basket, tap it to display the available options:

VOID LINE		
SET PRICE		
CHANGE QTY		
COMMENT		

This allows the user to:

- Void the line (ie. remove it from the basket)
- Change the price (of the item in the basket)
- Amend the quantity
- Add a note/comment to an item in the basket (eg. "NO SAUCE")

The SET PRICE and CHANGE QTY options will prompt for the new price or quantity respectively. The VOID option will simply remove the entry from the basket.

It is also possible to view/edit a product record by doing a "long hold" on a product in the basket to display the product record. Editing product records is covered in a future section.

Accepting a payment

Once all the items have been scanned/entered into the basket, payment can be taken.

To take payment, firstly enter the amount being tendered, either:

- numerically through the keypad (without a decimal point),
- by pressing a "note" button (eg. £20 note, £10 note), or
- by using the EXACT button



The input field will update as a button is pressed:



If you make a mistake when keying an amount manually, simply use the delete button to track back:



Except where using a "note" button (which automatically assumes a cash payment) select the payment method being used:



Left to right, these are cash or card respectively.

If fitted, the cash drawer should automatically kick open and the change box is immediately displayed:



Tap the screen to clear the display ready for the next customer.

To print a receipt, use the PRINT RECEIPT button:



Alternative tendering method

It is also possible to press the cash or card payment buttons without first entering an amount. In such cases, the system will prompt for the payment amount:

POS Terminal [MID 5318 SID 1 TID 1] - OWNER	[Scanner dis	connected]	
CASH amount:				
		7	8	9
		4	5	6
		1	0	0
		1	2	3
	<<	00	0	Θ

Performing a refund

If goods are returned to the store for an exchange or refund then these will need to be processed through the POS as follows.

Starting with an empty visit, press the return/recycle button:

7:41 am 🌣 🛇 🎚	≌ ◊ ·					⊼) ‡¶ (
POS Termin	al [MID 5318 S	SID 1 TID 1] - C	WNER Scar	iner disconnect	tedj	Settings
Ŏ	1			1	7	
MISC 5%	MISC 20%	MISC 0%	£		ŤÍ	
ACCOUNT	£20 NOTE	£10 NOTE	7	8	9	
MANAGER OPTIONS	EXACT		4	5	6	
VOID ALL	PRINT RECEIPT	X	1	2	3	
	PRINT BILL		00	0	ENTER	£0.00

A negative signed is entered at the input prompt:



Now scan the item being returned, or press the associated product button. The item is added as a RETURN entry to the basket:

RETURN ST 8 CROISSANTS	320G
5027952011811	-2.15
	2.15
)
	-£2.15

Note the word "RETURN", the negative line amount and the negative visit balance.

To alter the price, change the quantity or remove the item from the basket, simply tap the entry to view the available options:


If the customer is exchanging the item, the replacement item can be entered into the same basket. If the replacement item is of a lower value than the item being returned then a negative balance (owed to the customer) will remain on the visit for the difference. If the replacement item is of a higher value than the item being returned then a positive balance (owed by the customer) will be shown.

To refund the amount owed to the customer, the process is very similar to taking a payment. Either enter the amount (without a decimal point) or press the EXACT button. The amount appears (always as a positive figure) in the entry field:



Note that for obvious reasons, the refund amount cannot exceed the amount owed to the customer.

Finally, press the button corresponding to the payment/refund type:



The change screen is displayed and shows the amount refunded:



Tap the screen to clear and return to the POS terminal window.

To print a receipt, use the PRINT RECEIPT button:



Custom payment types

Two predefined payment types (CASH and CARD) are recognised by the app without any setup required. In addition to these, it is also possible to add user-defined payment types that you may need (such as VOUCHER). This is done via the "Custom payment types" section of the Settings:

Custom payment types			
Custom #1	VOUCHER		
Custom #2			
Custom #3			
Custom #4			

Up to 4 additional, custom payment types can be defined. The name of the payment type can be any single word, that is not a system command word, and which is of sensible length. It should not contain any non-alphabetic characters (such as numbers, spaces or "special" characters).

Once defined, the payment type can be used as a button command for tender/refund purposes eg:

← Configure button			
Button text:	2		
Barcode / input:	VOUCHER	Q	
Button colour:	Default	.	

Performing an integrated card payment

POS Core supports integration with the Clover & Paymentsense card payment solutions. These enable the app to initiate card transactions on a suitable payment terminal ("PED") attached to the store's network and to read back the transaction result.

Where this feature is enabled (refer to the "Configuring hardware" section), entering a card payment or refund into the POS terminal screen will automatically initiate an integrated card transaction.

The majority of card transactions will be for the exact amount of the balance owed by the customer (although this does not have to be the case, and partial payments are fully supported).

MANAGER OPTIONS G 5 6 EXACT 4 PRINT 2 3 Х **RECEIP1** PRINT 00 0 ENTER BILL £5.90

To process an exact payment, start by tapping the EXACT button:

Followed by the CARD button:



If cashback is enabled (through the [Terminal] CashbackEnabled option in the app settings), the system will ask if cash back is to be offered:

		20
Confirm		
Add cashback?		
CANCEL	NO	YES
4 5	0	

If answering YES then the system will prompt for the cashback amount:

The transaction is then initiated on the PED. The POS screen updates the user on the process of the transaction whilst instructions are presented to the customer on the PED itself:



If payment is successful, a change box is displayed to confirm that payment was successfully taken:



If payment fails, the user is notified and the items remain in the basket with the balance clearly showing as unpaid:

1:32 pm 👁 🔳 🤇	• A' •						🔊 ÷ 🗟 🛙
POS Termina	al [MID 5318 S	SID 1 TID 1] -	OWNER [Scan	iner disconnec	ted]		Settings
Ŏ	٨	Ĵ	~	1	2	B/ONE BANANAS 99P 5054073012977	5PK 0.99
MISC 5%	MISC 20%	MISC 0%	ED		11	ST 8 CROISSANTS 5027952011811 GROLSCH PREMIUM PILS 4PK	320G 2.15 330ML
ACCOUNT	£20 NOTE	£10 NOTE	FAILED Transaction was	DECLINED		321	4.50
MANAGER OPTIONS	EXACT	0	4	Э	D	ок	
VOID ALL	PRINT RECEIPT	X	1	2	3		
	PRINT BILL		00	0	ENTER		£7.64

Alternative payment can then be arranged.

Depending on the payment processor in use, mandatory card scheme receipts may either print through POS Core or on the device itself.

POS functions

Overview & summary

Aside from sales and occasional refunds, users will also need to perform other functions (commands) on the terminal. Most of these are self explanatory, or only require a short note. They are summarised in the table below.

Note that the look of each button (icon, text and / or colour) may differ from that shown and can be customised by the user. The underlying "command" is always the same regardless of the text/icon on the button itself.

The "pre-boxed" layout supplied as standard may vary from time to time and not all buttons will necessarily be included by default on individual installations. It is very easy to add and remove buttons.

Button (default design)	Command	Description
VOID	VOID	Voids the current visit / basket. All items are removed. This is a good way to "start over".
PRINT RECEIPT	RECEIPT	(Re)prints the last receipt.
	LOCK	"Locks" the app, prompting for an ID and PIN before any further transactions or operations can be performed.
ACCOUNT	ACCOUNT	Used to access a customer account to process "layaway" sales (or to take payment for previous layaway sales).

*1	TABLE	Used to open/access a table tab. This allows food & drinks to be sold to the table and payment settled at the end of the meal.
PRINT RECEIPT	BILL	Prints a bill on the receipt printer for the currently selected table.
6	-	Return an item scanned or entered after pressing this button. This is used for refunds and exchanges.
EXACT	EXACT	Enters the exact value of the visit balance into the input prompt (ready for a payment type to be selected).
£	CASH	Accepts a cash payment. If an amount has been keyed prior to the button being pressed then this is taken as the payment amount, otherwise it will prompt for the amount.
	CARD	Accepts a card payment or initiates a card transaction in the case of an integrated card payment solution.
£20 NOTE	2000CASH	Accepts a £20 cash payment with a single button press.(Note that the amount is in pence).
£10 NOTE	1000CASH	Accepts a £10 cash payment with a single button press.

£5 NOTE	500CASH	Accepts a £5 cash payment with a single button press.
DONATE	DONATE	Allows charity shops to accept/process a monetary donation.
MANAGER OPTIONS	MANAGER	Display the manager keypad / menu of options.
XREAD	XREAD	Prints an XREAD showing till takings and other information since the last ZREAD was run. An XREAD does not reset the shift totals.
ZREAD	ZREAD	Prints a ZREAD showing till takings and other information since the last ZREAD was run. A ZREAD resets the shift totals.
END OF DAY	EOD	Prints an EOD showing till takings and other information since the last EOD was run. An EOD resets the daily totals.
REPRINT ZREADS REPRINT EOD	ZREADS / EODS	View and/or reprint a previously run ZREAD or EOD.
SAVE LOAD	SAVE / LOAD	Set aside a visit (SAVE) and recall it at a later time (LOAD).

PRODUCT FILE	PRODUCTS	View / add / edit product records. See the corresponding section of this guide for more information.
SHELF LABEL	SEL	Prints a shelf edge label.
PROMO OFFERS	PROMOS	View / add / edit customer promotions (promotional offers such as Buy One Get One Free or 2 for £1). See the corresponding section of this guide for more information.
PURCHASE ORDERS & DELIVERIES	ORDERS	Create purchase orders and book-in deliveries of stock. See the corresponding section of this guide for more information.
STOCK RETURNS & TRANSFERS	TRANSFERS	Return stock to a supplier or transfer damaged or out of date stock to wastage. See the corresponding section of this guide for more information.
REPORTS	REPORTS	Run reports on the store's sales and stock. See the corresponding section of this guide for more information.
STAFF	EMPLOYEES	View / add / edit employee details - including name, PIN and security settings which control access to the different functions of the app.

PRICE CHANGES	PCHANGES	Actions suggested price changes based on MSRP / RRP price changes downloaded from the wholesaler (for wholesaler linked systems only). This also prints a list of price changes on the receipt printer. See the corresponding section of this guide for more information.
TRAINING MODE	TRAINING	Toggles between the live database and training database.
REMOTE SUPPORT	SUPPORT	Launches the Remotely Client for Android to allow support staff to interact with the device for support purposes. Note that this is a separate download.
NO SALE	OPEN	Kicks open the cash drawer (via the receipt printer).
	PCASH	Process a petty cash disbursement from the till. This is intended for sundry expenses made from the cash drawer (eg. for window cleaning).
FLOAT	FLOAT	Adjust the cash float in the cash drawer.
REFRESH APP2TABLE	DELIVERAPPY	Refreshes the product catalogue/menu which appears on the app2table / Deliverappy smartphone apps for the site.

LOGS	LOGS	Emails the application logs to the support team. This only needs to be done if/when instructed.
UPDATE	UPDATE	Launches the default web browser and displays the app's download page. This makes it easy to check for and download updates to the app.
RESET TERMINAL	RESET	Deletes the local database and configuration and immediately closes the app. In essence this resets the app to its state on initial install. On the next launch of the app the "onboarding" screen will be displayed.
	EXIT	Quits/closes the app. Ordinarily, it is not necessary to use this option and the app can be left to run.

Best practices

For the most effective operation of the EPOS:

- Remember to keep the till float accurate (using the FLOAT button/command)
- Run a ZREAD at the end of each shift
- Use ZREAD reconciliation to tally up the cash takings and identify any discrepancies (enabled in the Settings)
- Check the sections of the ZREAD for any possible errors or deliberate acts that can signify loss to the business
- Run an End of Day (EOD) at the end of each trading day

There are several reports that you can use to help identify errors or investigate individual transactions, such as the Audit Roll report.

Till readings

The trading day is split down into one or more shifts. Each shift has its own "Z" reading, and the day as a whole has an "EOD" (End Of Day) reading. Each reading comprises the totals for all transactions and till operations since the last time that the reading was run:

XREAD
Demo Store 1 Avon Road Ferndown Dorset BH22 OEG
Seq#: 92
Date time: 2022-04-17 06:33:14
TILL BALANCE
CASH 120.00 VOUCHER 3.14
Total 123.14
CASH ANALYSIS
Cash sales
Total 120.00
SALES SUMMARY
FRESH FOODS 2.15

XREADs are a snapshot of the till totals. A XREAD does not reset the totals and can be run at any point during a shift without resetting any of the figures.

Running a ZREAD on the other hand finalises the current shift and resets the ZREAD totals ready for the next shift of the day.

Running an EOD will print a combined totals report encompassing all shifts / ZREADs throughout the day (ie. since the last EOD was run). The EOD totals are reset ready for the next trading day.

Readings are terminal/till specific and if you have multiple tills in the store then you will need to run a ZREAD and EOD on each of them independently.

Each reading can be run using the associated button:



Note that you cannot run an EOD without first running a ZREAD. This ensures that the EOD reading is consistent with all the ZREADs run since the last EOD.

Running a ZREAD

A ZREAD should be run at the end of each shift, or at least once at the end of the day, on each terminal/till.

To run a ZREAD, tap the ZREAD button. The app asks you to confirm the operation:



If ZREAD reconciliation is enabled in the settings then the app prompts the operator to count and enter the amount of cash in the till drawer. Unless "blind reconciliation" is enabled, the expected amount of cash (including float) is shown:



If prompted to do so, enter the amount of cash counted. The ZREAD is then displayed in the ZREAD viewer:

			💎 🖹 🖥 6:56
← ZREAD viewer			:
< < 1 > >	1 to 6 out -	of 6	
Sequence#	Date/time	ZREAD	
120	2022-04-17 06:56:50	Demo Store 1 Avon Road Ferndown	
119	2022-04-17 06:44:40	Dorset BH22 OEG	
118	2022-04-15 06:44:33	Seq#: 120 Date time: 2022-04-17 06:56:50	
117	2022-04-13 10:25:18	TILL BALANCE	
116	2022-04-13 06:21:55	Total 176.80	
115	2022-04-13 06:06:33	CASH ANALYSIS	
		Cash sales 56.97 Cash refunds -0.10 Cashback 0.00 Petty cash 0.00 Float 120.00 Over/under -0.07	
		Total 176.80	
		SALES SUMMARY	
		BEERS.LAGER&CIDER 21.54 FRESH FOODS 25.80	Print

Note that any shortage/overage between the expected cash and the cash figure entered by the user is recorded and displayed under the Cash Analysis section:

CASH ANALYSIS				
Cash sales				
Total 176.80				

Reprinting / correcting a ZREAD

Use the REPRINT ZREADS button to open the ZREAD viewer to view or re-print a previous ZREAD and also to amend the cash reconciliation figure if it was incorrectly entered by the user.

To amend the cash count, select the required ZREAD first and then tap the menu button at the top right of the window:

	:
ZREAD Demo Store	

Select the "Edit" option:



Note that this time, the app prompts for the actual discrepancy rather than the cash amount. This should be a negative figure for an underage or a positive figure for an overage:

← ZREAD viewer			
Enter new discrepancy:			
			-0.10
	7	8	9

The till balance and cash analysis on the ZREAD update to reflect the new discrepancy:

ZREAD
Demo Store 1 Avon Road Ferndown Dorset BH22 OEG
Seq#: 120
Date time: 2022-04-17 06:56:50
TILL BALANCE
CASH 176.77
Total 176.77
CASH ANALYSIS
Cash sales
Total 176.77

Running an EOD (End of Day)

An End of Day reading should be taken on each terminal/till at the end of the trading day, and after running the last ZREAD. To run an End of Day, tap the END OF DAY button. The app asks you to confirm the operation and then displays the EOD viewer:

			💎 🖹 🖥 7:12		
← EOD report viewer					
< < 1 > >	1 to 2 out o	f 2			
Sequence#	Date/time	EOD			
20	2022-04-17 07:12:43	Demo Store 1 Avon Road Ferndown			
19	2022-04-13 06:23:54	Dorset BH22 OEG			
		Seq#: 20			
		Date time: 2022-04-17 07:12:43			
		TILL BALANCE			
		CASH			
		Total 198.61			
		CASH ANALYSIS			
		Cash sales 106.94 Cash refunds -8.40 Cashback 0.00 Petty cash -20.00 Float 120.00 Over/under -3.07			
		Total 195.47			
		SALES SUMMARY			
		BEERS.LAGER&CIDER 26.04	Print		

Use the "Print" button to print a physical copy.

To view/re-print previous EOD readings, use the REPRINT EOD button to access the EOD viewer at any time.

Saving & recalling a basket

On occasion, it may be necessary to set a basket aside for a later time eg. if a customer has forgotten their purse or wallet, or wishes to pick up a few more items that they had forgotten. In these instances, the SAVE button can be used to save the basket content. Use the LOAD button to view a list of saved baskets:

			🔍 📓 🛔 8:50
← Saved visits			
< < 1 > >		1 to 6 out of 6	
TID	Date/time	Value	
1	2022-04-14 06:53:38	-2.15	Demo Store
2	2022-04-13 10:22:25	4.50	1 Avon Road Ferndown Dorset Revize des
2	2022-04-13 09:07:40	3.24	Receipt#: 0
2	2022-04-13 08:28:13	2.35	Date time: 2022-04-13 09:07:40 Employee: 1
1	2022-04-12 18:31:42	4.49	ST 8 CROISSANTS 2.15 CARPTER BAG
1	2022-04-12 18:31:24	3.14	TOTAL
			Thank you for your custom!
			very soon!
			Load

Highlight the required basket and tap the "Load" button to load it back into the POS window.

Note that it is also possible to save a basket on one terminal/device at a store and load it on another.

Custom receipt messages

A few lines of text to go on the bottom of each till receipt can be defined in the "POS options" section of the Settings. Use this to add a custom message to receipts:

Receipt footer	Thank you for your custom!
	We hope to see you again
	very soon!

Customer accounts

Customer accounts, colloquially known as "tabs", provide a means of creating "layaway" sales for later settlement.

To create a customer account, tap the ACCOUNT button. This will display the customer search screen:

11:13 am 🌣 🖱 🖭 🕈						🛒 ‡ 🐨 🔒	
← Customer se	← Customer search New						
Search string							
< < 1 >	>					1 to 0 out of 0	
Firstname	Surname	Address 1	Address 2	Postcode	Barcode	Balance	

Tap the menu option "New" at the top right hand corner of the screen:



This will display a blank customer record:

11:14 am 🌣 🔿 🖼 🕈 •					
← Customer record					
Firstname	Phone				
Sumame	Email				
Address	Barcode				
	Points 0				
	Balance 0				
	Marketing consent				
Postcode	Notes Notes and other details				
Cancel		Save			

Enter the details against each field:

11:30 am 🌣 (11:30 am 🌩 👁 🔟 🕈 •						
← Cus	← Customer record						
Firstname	BOB	Phone	07800 1234567				
Surname	BAKER	Email	bob@example.com				
Address	99 <u>DRURY</u> LANE	Barcode					
	COVENT GARDEN	Points	0				
		Balance	0				
	LONDON	Marketing cons	sent				
Postcode	WC2B 5JF	Notes	Notes and other details				
Cano	el		Save				

Most fields are self explanatory. "Barcode" relates to the loyalty card barcode and can be left blank if not applicable. "Notes" can contain any additional information which does not fit elsewhere on the record.

Note that "Points" and "Balance" cannot be manually entered as they are calculated by the system based on the transactions performed by the customer.

Tap "Save" to save the record and return to the search screen.

Once a customer is in the database, use the search screen to find them. The system will search by name, postcode or loyalty barcode:

11:33 am 🌣 👁 🔟 🕈 🔹	11:33 am 🌣 👁 🔟 🕈 •						
← Customer sea	← Customer search New						
Search string WC2	Search string WC2B						
< < 1 >	>					1 to 1 out of 1	
Firstname	Surname	Address 1	Address 2	Postcode	Barcode	Balance	
вов	BAKER	99 DRURY LANE	COVENT GARDEN	WC2B 5JF		0.00	

(A *long hold* on the customer's entry will take you back into the customer record to make any changes).

Tap the customer to select them. The app returns to the POS terminal window with the account active. The customer's name and any balance from prior visits is displayed:

11:36 am 🂠 👁	⊠ ◊ ·					∏ † ▼ 0
POS Terminal [MID 5318 SID 1 TID 1] - STAFF [Scanner disconnected]						Settings
Ŏ	>	J	?		2	Current customer: BOB BAKER
MISC 5%	MISC 20%	MISC 0%	£		"	0.00
ACCOUNT	£20 NOTE	£10 NOTE	7	8	9	
MANAGER OPTIONS	EXACT	3	4	5	6	
VOID ALL	PRINT RECEIPT	Х	1	2	3	
	PRINT BILL		00	0	ENTER	£0.00

Any items added to the basket are now recorded against the customer's transaction history:

	🕽 🕈 🐨 (
	Settings
Current customer: BOE	BAKER
BALANCE C/EWD	
DALANCE CITIVD	0.00
RED APPLES	
1010100002	0.50
GREEN APPLES	0.50
MIXED APPLES	
1010100007	2.75
	£3.75

Unlike a cash customer, the balance can be left on the account. To exit the account, tap the ACCOUNT button again. The display clears:

11:38 am 🂠 👁	⋈ ◊ •					sa: sa 0
POS Termin	al [MID 5318 S	SID 1 TID 1] - S	STAFF <mark>[Scanr</mark>	ner disconnecte	ed]	Settings
Ŏ	>		8	1	2	
MISC 5%	MISC 20%	MISC 0%	£		"1	
ACCOUNT	£20 NOTE	£10 NOTE	7	8	9	
MANAGER OPTIONS	EXACT	•	4	5	6	
VOID ALL	PRINT RECEIPT	X	1	2	3	
	PRINT BILL		00	0	ENTER	£0.00

Use the PRINT RECEIPT button to print a receipt for the visit. This details the balance carried forward, the items purchased and the total outstanding balance.

To go back into the account, simply search for the customer again using the "ACCOUNT" button, and select their account from the results:

11:33 am 🌣 👁 🖬 🕈 -						🔝 ‡ 💎 🔒
← Customer se	arch					New
Search string wc	28					1 to 1 out of 1
Firstname	Surname	Address 1	Address 2	Postcode	Barcode	Balance
вов	BAKER	99 DRURY LANE	COVENT GARDEN	WC2B 5JF		0.00

The balance carried forward from the previous transactions is displayed:



Additional items can be added to the account and/or payment can be taken.



Note that it is possible to take a partial payment if required and leave the balance on the account. Simply process the payment in the usual manner and then use the ACCOUNT button to exit the account and leave the remaining balance to be settled at a later time.

Gift Aid

Charity shops will either take monetary donations from customers and/or will sell donated stock (technically sold on behalf of the customer, with the proceeds being donated to the charity).

POS Core supports both forms of donation, allows for printing of Gift Aid Declarations and provides for reporting on Gift Aid qualifying transactions. This allows the charity to complete the necessary paperwork for HMRC.

Note that in order to qualify for a Gift Aid claim on a donation, the customer's details must be entered onto the system and a Gift Aid Declaration signed.

Monetary donations

To accept a monetary donation, tap the "DONATE" button:



The system prompts for the value of the donation:



Enter the value of the donation and tap the bold enter / right arrow button:

Enter value of donation



The system then asks as to whether this is a Gift Aid qualifying donation:



If the donation qualifies for Gift Aid then tap YES.

The system now prompts to search for the customer (if they have previously donated) or to add a new customer record to the system. In the case of an existing customer, use the search field to search for them, otherwise tap "New" to add a new customer record:

11:33 am 🌣 💿 🖻 🕈	•					📰 ‡ 🐨 🔒
← Customer se	earch					New
Search string wc	28					1 to 1 out of 1
Firstname	Surname	Address 1	Address 2	Postcode	Barcode	Balance
вов	BAKER	99 DRURY LANE	COVENT GARDEN	WC2B 5JF		0.00

Select the customer from the search results. The system will ask if a Gift Aid Declaration should be printed:



Answer "YES" to print a Gift Aid Declaration for the customer to sign (ordinarily this is only necessary if they have not previously signed a declaration).

The donation is added to the basket:

DONATION	7
D010400068	10.00

Tender payment for the donation (cash or card) as for any other sale.

The "Monetary Donations" report provides a breakdown and total value of donations (both Gift Aid and non-Gift Aid) for any given date range.

Donated goods

Charity shops will often sell donated goods with a view to reclaiming "Gift Aid" from HMRC. In order to do this, the store must track what goods are sold on behalf of which donors and complete a periodic Gift Aid return.

Through its Gift Aid support, POS Core provides a method by which charity shops can produce barcoded labels for donated goods which link the goods to the donor and allow the system to produce a periodic report on the value of qualifying donations sold.

For charity shops, the accounts feature takes on a slightly different role. Rather than providing credit facilities for customers, it keeps a record of donated goods sold on behalf of the customer.

Creating a new customer record for a donor is done in exactly the same way as described previously (refer to the previous section).

Once a donor/customer is on the database, use the ACCOUNT button to search for their record:

11:33 am 🌣 👁 🖻 오	ା:33 am 🏚 👁 🔟 🕈 •							
← Customer s	earch					New		
Search string	228 >					1 to 1 out of 1		
Firstname	Surname	Address 1	Address 2	Postcode	Barcode	Balance		
вов	BAKER	99 DRURY LANE	COVENT GARDEN	WC2B 5JF		0.00		

(Remember that a long hold on a customer's entry will take you back into the customer record to make any changes).

Tap the customer's entry to display the Gift Aid Labels window:

← Gift Aid	labels		
Donor:	BOB BAKER		
Product:		Q	
Label qty:	1		

Use the search button (magnifying glass) to search for the departmental product (eg. BRIC-A-BRAC) and enter the quantity of labels required:

← Gift Aid	labels	
Donor:	BOB BAKER	
Product:	BRIC-A-BRAC	Q
Label qty:	10	

Tap the Print button in the bottom right corner of the screen:



The system will print the specified number of labels on the attached label printer:



Repeat this process for each type of label / department product required.

Note that each label contains a unique barcode. These barcodes are linked to the particular donor (customer) account. The label also includes the date of printing. This allows shop staff to easily identify slow-moving products.

To sell a donated product, simply scan the barcode in the POS as you would any other product, and enter the price:



POS Termin	al [MID 5318 \$	SID 1 TID 4] -	OWNER				Settings
Ŏ	1		?	1	2	BRIC-A-BRAC D010400058	1.00
MISC	MISC	MISC			81		

The "Gift Aid Sales" report provides a summary of sales value for each donor, for any given period and should be used to complete the HMRC paperwork.

Table orders

Hospitality venues will often sell food and drinks on "tabs" to be settled at the end of the visit rather than taking payment at the time of order. Items can be added to the tab throughout the visit, a bill produced and then payment taken. This is in contrast to cash sales where the balance is settled immediately.

POS Core supports an unlimited numbers of tables/tabs and tracks the amount owing on each separately.

To access a table/tab, press the table button:



The app prompts for the table number:

10:47 am O 🖼 🕈 A' • POS Terminal [MID 5318 SID 1 TID 1]	- OWNER	[Scanner dis	connected]		S
Enter table number:					
				10	
		7	8	9	
		4	5	6	
		1	2	3	
	<<	00	0	Θ	
Enter the table number.

The display returns to the POS terminal screen with the current table shown above the transaction display:

10:48 am 💿 🖾	♦ A' •						📆 ‡ 🐩 🗎
POS Terminal [MID 5318 SID 1 TID 1] - OWNER [Scanner disconnected]							Settings
Ŏ	1	Ĵ	8	1	2	Current table: 10	

Enter the items being ordered, in the usual manner:

Current table: 10						
ST 8 CROISSANTS	320G					
5027952011811	2.15					
AMERICANO						
MILK	2.50					
	64.65					
	£4.65					

Tap the TABLE button to exit the table. The items are recorded against the tab and the display is cleared, ready to serve the next customer. At this point, the order is sent to the kitchen/bar printers.

Tap the table button again and enter the table number to recall the table and add further items:

Current table: 10					
ST 8 CROISSANTS 5027952011811	320G 2.15				
AMERICANO MILK	2.50				
TIGER BEER 5035766060406	330ML 1.49				

The total balance owing is shown at the bottom of the screen:

£6.14

Repeat this process as many times as necessary.

Printing a bill

At the end of the meal/visit, bring up the table and tap the PRINT BILL button:

10:58 am ⓒ 🗐 🕈 A' • 🗊 * 🖬									
POS Terminal [MID 5318 SID 1 TID 1] - OWNER [Scanner disconnected]									
Ŏ	1	A	?	1	2	Current tab	le: 10		
MISC 5%	MISC 20%	MISC 0%	ED		H	ST 8 CROISSANTS 5027952011811 AMERICANO MILK	320G 2.15		
ACCOUNT	£20 NOTE	£10 NOTE	7	8	9	TIGER BEER 5035766060406	330ML 1.49		
MANAGER OPTIONS	EXACT	0	4	5	6				
VOID ALL	PRINT RECEIPT	Х	1	2	3	L			
	PRINT BILL		00	0	ENTER		£6.14		

A bill is produced on the receipt printer, which itemises the items ordered:

	TABLE 10
Date time: 2021-07-	-23 11:00:00
ST 8 CROISSANTS 5027952011811	2.15
AMERICAND	2.50
TIGER BEER 5035766060406	1.49
TOTAL	6.14

Altering a bill

If any mistakes have been made on a table order then you can retrospectively amend the bill and reprint it before taking payment.

To do this, bring up the table and tap the item to be edited.



This presents the available review options:



Select the required option eg. SET PRICE and enter the new price/quantity, if applicable:

Enter new unit price



This updates the table bill as displayed on the screen:

Current table: 10				
ST 8 CROISSANTS	320G			
5027952011811	2.15			
AMERICANO				
MILK	2.00			
TIGER BEER	330ML			
5035766060406	1.49			
	£5.64			

Reprint the bill using the PRINT BILL option. Any changes made will be reflected on the bill.

Settling a table bill

Once the customer is ready to settle the bill for a table, bring up the bill on the screen and process the payment in the usual manner (the same as for a cash sale).

There are three ways to enter a payment onto the system:

- By entering the amount followed by the payment button.
- By pressing the payment type and entering the amount into the onscreen keypad.
- By using one of the note buttons (eg. £20 NOTE, £10 NOTE).

Gift cards & vouchers

POS Core provides for both store generated gift vouchers (printed on the attached receipt printer) and the loading / activation of pre-printed, pre-barcoded gift cards produced by a third party.

Once activated, gift vouchers and gift cards are spent just like money. They both operate in very much the same way, with the only difference really being in how they are issued.

Issuing a gift voucher

Gift vouchers are generated on demand by the app. They are printed on the local receipt printer and contain an automatically generated barcode.

Gift vouchers are cheap and easy to produce and do not require stock of pre-printed cards. They do not look as good as pre-printed gift cards and typically fade over time if not used relatively quickly.

To issue a gift voucher, press the button that is assigned to the "GIFTVOUCHER" command. If you do not already have a button assigned to this command then you will need to set one up.



The system will prompt for the value of the voucher you wish to issue:

POS Core v38 [MID 9999 SID 1 TID	1] - OWNER			
Enter value of voucher				
				10.00
		7	8	9
		4	5	6
		1	2	3
	<<	00	0	Θ

Confirm the amount.

An entry is added to the visit:

GIFT VOUCHER ISSUE	
	10.00

Note that until payment is tendered, a gift voucher is not actually printed. This avoids situations where a voucher is issued but payment is not taken.

Tender payment in the usual manner (eg. by cash or card).

At this stage, a voucher containing a unique barcode is printed on the attached printer.

Note that not all receipt printers support the printing of barcodes. In this case, you should consider using pre-printed gift cards instead.



Loading / activating a gift card

Gift cards are pre-printed, pre-barcoded cards which have no intrinsic value until "loaded" and activated through the app. Gift cards are available from a number of sources in a wide range of materials, shapes, sizes and colours, with a customised design. They are durable and look professional.

NB: Before having a batch of cards produced, you need to consider the numbering convention used for the barcodes. It is important that the numbering does not clash with any other barcodes you are likely to have in the store (eg. retail barcodes). For a simple scenario, we would recommend using a 9 digit numbering scheme with a prefix of "999". In this example, the first barcode would be 999000001, the next 999000002, etc.

Before issuing any cards, you will need to set the format of the chosen barcode numbering in the advanced app settings, where any specified digits must match and an "X" represents a "wildcard". As an example, consider the previously mentioned numbering scheme of 9 digit barcodes beginning "999". In this instance, the option would need to be set as follows:

[Estate] GiftCardBarcode1 = 999XXXXXX

This tells the app that any 9 digit barcode beginning "999" will be a barcode.

Of course, it goes without saying that each gift card must have a barcode that is unique.

To activate a gift card, scan the barcode. The app prompts for the value to be loaded on to the card:

POS Core v38 [MID 9999 SID 1 TID	1] - OWNER			
Enter value to load				
				50.00
		7	8	9
		4	5	6
		1	2	3
		_		
	<<	00	0	Ð

Confirm the amount. An entry for the gift card is added to the visit:

GIFT CARD ISSUE	
999000008	50.00

Note that at this stage, the card has not yet been activated as we have not taken payment.

Now tender payment. The card is then activated on the server.

Should there be a problem activating the card on the server, the card is returned to the basket with a negative value. This will then need refunding to the customer using their original payment method.

Querying a card/voucher balance

To query the balance of a gift card/voucher, simply scan the barcode into an empty basket. The system will display the amount available to spend:



Redeeming a gift card/voucher

To redeem all or part of a gift card/voucher, simply scan the barcode at the end of the visit. The app will prompt for the value to redeem:

POS Core v38 [MID 9999 SID 1 TID 1]	- OWNER			
Enter value to redeem (max 1	3.13)			
		7	8	9
		4	5	6
		1	2	3
				•
	<<	00	0	Θ

The maximum redemption value will be the lower of the visit balance and the balance available on the voucher/card.

Enter the amount to redeem and confirm. If the amount tendered satisfies the visit balance entirely then the change box is displayed:

 Total
 £13.13

 GIFT CARD
 -£13.13

 Change
 £0.00

The gift card/voucher balance is reduced accordingly.

If the gift card redemption only satisfies part of the balance then the remainder can be taken through another payment method such as cash or card.

You can also issue a refund to a gift card/voucher in the same way. In this scenario, the balance of the card/voucher is *increased* rather than *decreased* as the balance is loaded back on to the card/voucher.

Loyalty rewards

Running a loyalty scheme will help to build and reward customer loyalty to your business. It encourages return trade and discourages customers from spending money elsewhere.

POS Core supports two types of loyalty scheme:

- 1. A "value" based scheme where customers earn X points per £ of spend when purchasing goods and services from you, and can then use those points as a discount off future purchases at a pre-defined value of pence-per-point.
- 2. A "stamp" based scheme where customers earn X stamps per item purchased and can then redeem those stamps for rewards once they have earnt a given number.

An example of a value based scheme could be that customers earn 1 point per £1 of spend and can then use each point as 1p discount in the future.

An example of a stamp based scheme could be in a coffee shop, where customers earn 1 point ("stamp") per hot drink and for every 10 hot drinks are entitled to a free one.

The number of points awarded for purchases using either scheme is set at the department level. Departments can be included or excluded from the scheme. It is also possible to specify more finely whether or not a department is included in qualifying spend when rewarding or redeeming points. This is important as you may not wish to issue points for certain purchases (eg. low margin lines) or allow redemption against certain purchases (eg. for legal reasons).

Setting up a reward scheme

Decide which scheme you would like to run based on the nature of your business and how you would like to reward customers. You'll also need to have a batch of loyalty cards produced, each with a unique barcode that can be linked to each customer.

Before enabling the loyalty scheme, you will need to set the loyalty options against each department record:

← Man	age Departments	New	
Department:	DRINKS-BEERS	 Min age: 0	
Name:	DRINKS-BEERS	Sell online: Sell on app: Loyaty accrue: Loyaty reward: Points award: 1	

"Loyalty accrue" specifies whether or not purchases of products in this department are to be included in qualifying spend when rewarding points for a basket. The number of points awarded, if this option is enabled, is set in the "Points reward" field.

"Loyalty Reward" specifies whether or not points can be redeemed against purchases in this department.

Once the departments have been set up, the loyalty scheme will need enabling in the app's advanced configuration.

For a stamp based scheme, set the options as follows:

[Estate] LoyaltySchemeType = "STAMP" [Estate] LoyaltyPointCostOfReward = <number of points before reward is claimed>

In the case of a coffee shop wanting to award a free coffee for every 10, the latter option would be set to "10".

For a value based scheme, set the options as follows:

[Estate] LoyaltySchemeType = "VALUE" [Estate] LoyaltyPointValue = <value of each point in pence on redemption>

In the case of a retailer wanting to allow 2p discount per point on redemption, the latter option would be set to "2".

The final step in setting up a loyalty scheme is to assign a barcode to each customer. You should do this using pre-barcoded cards which use a "safe" numbering convention that is outside the range of any other barcodes used in the store (this is very important). Loyalty barcodes are assigned on the customer record screen:

← Cust	tomer record	
Firstname	FRED	Phone
Surname	BLOGGS	Email
Address		Barcode 123456789

Serving a loyalty customer

To process a sale attributable to a loyalty account, simply scan the customer's loyalty card at any point in the visit. An entry appears in the basket to indicate that the card has been scanned:

1010100222	3.54
LOYALTY CARD	
123456789 - FRED BLOGGS - 118 points	0.00

Tender payment as normal. In any other respect, loyalty visits are the same as any other.

The app will automatically calculate the points to be awarded for the visit and apply them to the account.

If you are running a stamp based scheme and you scan the loyalty card at the end of the visit (ie. after processing the purchases) the system will notify you if the customer qualifies for a reward:



Issuing rewards

If a customer's loyalty card has been scanned, the items in the basket qualify for a reward, and the customer wishes to redeem their points, then use the button assigned to the "REWARD" command to do so.

If you do not have a button setup for this then you can easily add one. A suitable button might look like this:



The system confirms the number of rewards redeemable (if using a stamp based scheme), or the discount available (as a monetary figure) if using a value based scheme.



The app then prompts for the number of rewards (or value of points) to be redeemed:



The reward is issued in the form of a discount to the basket:

1010100222	3.54
REDEEMED REWARD	
1 reward(s) redeemed	-4.76
LOYALTY CARD	
123456789 - FRED BLOGGS - 112 points	0.00

Note that under the stamp based scheme, the highest value item is awarded first, followed by others in descending price order.

Discounts issued through the reward scheme are shown under the "LOYALTY REDEMPTIONS" total on reports and on the till readings.

Products

When a merchant is initially provisioned, the database is ordinarily blank, aside from a MISC product for each of the VAT rates.

To access the product file in order to add new products, or edit existing products in the database, use the PRODUCT FILE button. By default, this is located on the MANAGER OPTIONS keypad:



This displays the product search screen:

1:55 pm	¢ © 🖻	۰ •						0 💎 0
÷	Manage	products				Download Departr	ments Suppliers	New
Search	string							
<	<	>>						
		Product name	Barcode	Department	Retail price	VAT	Order code	

Adding a new product

To add a new product to the database, tap the "New" option at the top right of the screen:



This presents a blank product record, ready to be populated.

Editing a product

To edit an existing product record, use the search field to search for the product by name. It is also possible to scan a barcode into this field:

1:57 pm 🌣 🕾 🖻 🕈 🔹					🗩 🕫 🕄
← Manage products	Download Departm	nents Suppliers New			
Search string MISC		_			
$ \langle \langle 1 \rangle \rangle $					1 to 3 out of 3
Product name	Barcode	Department	Retail price	VAT	Order code
MISC 0%	1010100012	MISC	0.00	0.00	
MISC 20%	1010100010	MISC	0.00	20.00	
MISC 5%	1010100009	MISC	0.00	5.00	

Tap a product in the results table to view the associated record. Alternatively to add a new product, tap the "New" menu option in the top right of the screen.

1:58 pm 🌻 👁	ē 🕈 ·						🔊 💎 i 🔜
← Prod	uct record				I	Departments	Suppliers
Name	MISC 20%		-	Supplier	MISC		*
Barcode(s)	1010100010		_	Order code			
Department	MISC	-		Pack size		1	
Subdept		*		Pack cost		0.00	
Retail price	0.00						
147.000					Options		
VAI rate	20.00 -						
Stock qty	-4						
Kitchen print	Bar print						
Cance	•1					Save	

Most fields are self explanatory.

Note that when entering retail price or pack cost, the use of the decimal point is optional. If entering an amount with the decimal point omitted, the system will assume the entered amount is in pence and convert it accordingly (eg. $100 \Rightarrow 1.00$). For hospitality venues, the kitchen and bar print options indicate if orders for the product should be sent to the respective printer:

Product options

POS Core allows a user to define up to 10 options associated with a product. This is particularly useful for food and drinks in a hospitality setting.

To access a product's options, tap the "Options" button on the product's record:

2:37 pm 🂠 🕅) ⊡ 🕈 •								🔉 💎
← Pro	duct record							Departments	Suppliers
Name	AMERICANO			_		Supplier	MISC		*
Barcode(s)	1010200018			_		Order code			
Department	HOT DRINKS		*			Pack size		1	
Subdept	COFFEES		*			Pack cost		0.00	
Retail price		2.50					Options	>	
VAT rate	0.00	Ŧ							

This displays the options panel:

Product options:						roups:
MILK	0.00	1	Ŧ		Group 1	
NO MILK	0.00	1	*		Group 2	
VANILLA SYRUP	0.50	2	Ŧ		Group 3	
CARAMEL SYRUP	0.50	2	Ŧ		Group 4	
EXTRA SHOT	0.50	3	Ŧ		Group 5	
0-4 /	0.00	4			Group 6	

Options are placed into groups, with each group being declared optional or mandatory.

At the point of sale, the system prompts the user to select the applicable options. Only one option can be selected in a group. Mandatory groups must have an option selected.

In the above example, the user would be forced to select either "MILK" or "NO MILK" as these options are both in the same group and the group is marked as mandatory. Only one syrup could be selected as these are both in the same group, but as the group is not mandatory a selection is optional. Being in its own, non-mandatory group, "EXTRA SHOT" is independent of the other options and is optional.

At the point of sale, the user is presented with the applicable options when adding the item to the basket:

Product options. Please select:		
MILK	0.00	*
NO MILK	0.00	*
VANILLA SYRUP	0.50	
CARAMEL SYRUP	0.50	
EXTRA SHOT	0.50	

Note the red star against a group, which indicates a selection is required.

After selecting the applicable options and confirming the selection, the item is added to the basket. The selected options are displayed under the product in the basket:

AMERICANO MILK, VANILLA SYRUP, EXTRA SHOT 3.50

Price embedded barcodes

Some products, such as lottery tickets and pre-packed meats are supplied with "price embedded" barcodes. The digits of these barcodes represent the PLU code (item code) and price. Take for example, the barcode format 20aaaaacbbbb, where aaaaa is the PLU code of the product (always the same for the particular item), c is a padding character (to be ignored) and bbbb is the price of the item (in pence). A barcode of 201234591050 in this format would represent PLU code 12345 with a price of £10.50 (1050 pence).

POS Core can be configured to recognise and decode multiple price embedded barcode formats. This is done through the corresponding section of the Settings window:

Price embedded barcodes						
Mask #1	20aaaaacbbbb					
Mask #2						
Mask #3						

Use "a" to represent the PLU code digits, "b" to represent the digits of the price, "c" to represent any characters to be ignored, and any numbers (0-9) to represent any literal digits to be expected as stated.

NB: The length of the barcode and any literal digits must match in order for the app to match a barcode to the mask.

Each PLU code should be added to the database as an individual product with just the PLU code ("a" digits) as the barcode.

Departments

Products within the POS Core database are organised into departments, which can in turn contain sub-departments.

A freshly provisioned database contains only a MISC department. To access the department file in order to add new departments, or edit existing departments, use the PRODUCT FILE button. By default, this is located on the MANAGER OPTIONS keypad:



This displays the product search screen:

1:55 pm	ف 🖻 🕈	۰ •					🔊 💎 k 📰
÷	Manage	products				Download Departn	nents Suppliers New
Search	string						
<	<	>>					
		Product name	Barcode	Department	Retail price	VAT	Order code

On the menu bar of this screen, select the "Departments" option:



This displays the department window:

3:09 pm 🌣 👁	₩ 			🗩 : : 🕄
← Man	age Departments			New
Department:	ALCOHOL +	Mina	age: 18	.
Name:	ALCOHOL	Sell (online:	
Subdepts:	BEER			
	SPIRITS			
	WINE			
		+		
Cance	21			Save

To edit an existing department, select the department name from the top dropdown field:

3:10 pm 🌻 🔿	⊠ ◊ ·	
← Mana	age Departments	
Department:	ALCOHOL	Ŧ
	BACON	
Name:	BEERS.LAGER&CIDER	
	CATERING	

To add a new department, select the "New" option at the top right of the screen:

			🔊 🔁 📾
			New
Min age:	19		

Enter the department name at the prompt:



Most of the fields of the department record are self explanatory.

When a minimum age is set, the system will prompt the user to confirm the age of the customer at the point of sale when a product belonging to the department is added to the basket:



"Sell online" toggles the visibility of the department on the retailer's website (this is reserved for future use).

"Sell on app" toggles whether or not the department is visible in the app2table / club2app / Deliverappy apps. Refer to the corresponding section of this guide for further information on how POS Core integrates with these apps.

Suppliers

Products within the POS Core database are associated with a supplier. Each product has an order code, pack size and pack cost representing the way in which the product is purchased from that supplier.

A freshly provisioned database contains only a MISC supplier. To access the supplier file in order to add new suppliers, or edit existing suppliers, use the PRODUCT FILE button. By default, this is located on the MANAGER OPTIONS keypad:



This displays the product search screen:

1:55 pm 🏼 🌣	:55 pm 🌣 🗇 🔟 🕈 •					
← м	lanage products				Download Departm	nents Suppliers New
Search strir	ng					
< <	>>					
	Product name	Barcode	Department	Retail price	VAT	Order code

On the menu bar of this screen, select the "Suppliers" option:



This displays the supplier window:

6:52 pm 🂠 😋) 🖾 🕈 •	S#*€
← Mar	nage Suppliers	New
Supplier:	MISC -	
Name:	MISC	-
Email:		-

To edit an existing supplier, select the supplier name from the top dropdown field:

6:52 pm 🌣 🗇 🗉 🕈						
← Manage Suppliers						
Supplier:	BESTWAY	•				
	BOOKER					

To add a new supplier, select the "New" option at the top right of the screen:



Enter the supplier name at the prompt:

Supplier name:		
	ок	CANCEL

After making any changes to a supplier's record, be sure to tap "Save" to retain any changes.

Promotional offers

Most retail businesses offer consumer promotions on their products at some point or other. These offers include the likes of "Buy One Get One Free" (BOGOF), "2 for £1", etc. POS Core allows you to manage these types of offers and will automatically discount them at the point of sale, based on the basket contents:

```
      GALAXY COUNTER TREAT £1 78G

      5000159491334
      1.00

      M&M CRISPY TREAT BAG £1 77G

      5000159500920
      1.00

      MARS CONFECT TREAT BAG VAR PM (2 FOR PROMO DISCOUNT

      -0.50
```

The types of offer supported by Core are:

- Buy X Get Y Free (eg. buy 2 get 1 free)
- Any X for £Y.YY (eg. 4 for £1)

These provide for the majority of promotions run by retailers.

Buy X Get Y free

This type of offer consists of "qualifiers" and "rewards". A product in the offer is either a qualifier, a reward or both. The customer must purchase X qualifiers to receive Y rewards.

Any X for £Y.YY

This type of offer, sometimes referred to as a "mix & match" allows the customer to purchase any X of the products in the offer (either the same or different) for a total price of \pounds Y.YY. This type of offer supports an additional price break allowing, for example, 2 for \pounds 1 and 4 for \pounds 1.75 on the same promotion.

Link deals

This type of offer (often used in supermarkets for "meal deals") comprises two or more groups of products. One product must be purchased from each of the groups to receive the combined purchase for the deal price. As an example, for a "meal deal", group 1 could comprise a range of sandwiches, group 2 soft drinks and group 3 crisps. A consumer would need to purchase a sandwich, drink and packet of crisps to qualify for the offer price.

Management of promotional offers is done through the PROMO OFFERS button on the MANAGER OPTIONS menu:



This displays the promotions window, displaying a searchable list of any/all promotions currently on the system:

6:53 am Þ 🔿 🖻 🕈 🔸				🛒 † 💎 🗎
← Promotional Offers				Download New
∢ ∢ 1 ≻ ≻ Search				1 to 14 out of 970
Promotion name	Туре	Start date	End date	Enabled
3 BARRELLS PM 35CL	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
A G BARR VAR PM 500ML&2LTR	ANY X FOR £Y	2021-06-22	2021-07-19	Yes
A/B APPLE PIE PM 550G	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
A/B CROQUETTE PM 550G	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
A/B HOME ROASTS PM 800G	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
A/B HOMESTYLE CHIPS PM 600G	ANY X FOR £Y	2021-06-22	2021-07-19	Yes
A/B MASH PM 650G	ANY X FOR £Y	2021-06-22	2021-07-19	Yes
ACE CIDER 1LTR	ANY X FOR £Y	2021-05-25	2021-06-21	Yes
ACE CIDER 1LTR (SCOT)	ANY X FOR £Y	2021-05-25	2021-06-21	Yes
ACE CIDER VAR 500ML	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
ACE CIDER VAR 500ML (SCOT)	ANY X FOR £Y	2021-07-20	2021-08-16	Yes
ACE ULT FOR WHITES FLORAL 1LTR	ANY X FOR £Y	2021-05-25	2021-06-21	Yes
ACTIMEL VARIOUS 8PACKS	ANY X FOR £Y	2021-06-22	2021-07-19	Yes
ACTIMEL VARIOUS 8PK	ANY X FOR £Y	2021-05-25	2021-06-21	Yes

The list shows, at a glance, the name, type, effective dates and status (enabled or disabled) of each offer. To search/filter the list, simply type into the search bar at the top of the table. Tap an offer to view the record and edit it.

To quickly enable / disable an offer without having to edit the individual record, tap directly on the Yes/No value in the "Enabled" column on the associated row of the table.

Adding an offer

To create a new offer, tap the "New" option on the menu bar at the top right of the screen. This displays a pop-up box prompting for the type of offer:

Create new purchase order fo	r.	
Any X for £Y	*	
		Create

Select the required offer type and tap "Create". (Note that whilst other attributes of an offer can be changed after the offer has been created, it is not possible to change the type of an offer).

The offer is created with default details and the edit screen is shown. Editing an existing offer already on the system, by selecting it from the search table, will display the same screen.

Editing an offer

Immediately after creating a new offer, or upon selecting an existing offer from the search table, the system displays the edit screen for that offer:

7:01 am 🌣 🕤 🖭 🕈	7:01 am 🌣 🗇 🖼 🕈 🔸						
← Edit prom	← Edit promotional offer						
NEW OFFER						DELETE	
Start date 20	021-07-22	Enabled					
End date 20	022-07-22						
Qty 1	0	Qty 2		0			
Price 1	0.00	Price 2	0	.00 Prod	uct search		
< < 1	> >					1 to 0 out of 0	
SKU		Product nam	ne	Barcode	Retail price	Action	
SKU		Product nam	ne	Barcode	Retail price	Action	

The fields applicable to all types of offer are:

Field D	Description
---------	-------------

Name	The name of the offer. This appears on the screen in the POS terminal, on the customer display (if fitted) and on customer receipts.
Start date	The first day the promotion is active. Discounts will be issued from this date provided the offer is also enabled.
End date	The last day the promotion is active. Discounts will not be issued beyond this date.
Enabled	The status of the offer. If an offer is enabled it will work between the start and end dates. Disabled offers are ignored by the system when calculating basket discounts.

The remaining fields of the window are dependent on the offer type. For Any X For \pounds Y.YY offers, these are the quantity and price fields:

Qty 1	2	Qty 2	0
Price 1	1.50	Price 2	0.00

"Price 1" defines the price to be paid for purchasing "Qty 1" of the product (where "Qty 1" is the X, and "Price 1" is the £Y.YY of the offer). If an additional price break is required for the same products then this can be entered into the "Qty 2" and "Price 2" fields.Note that this is purely optional.

Beneath these fields is the product table, showing the products in the offer:

1 to 7 out of 13				
SKU	Product name	Barcode	Retail price	Action
250276	GALAXY COUNTER TREAT £1 78G	5000159491334	1.00	Đ
320700	M&M CRISPY TREAT BAG £1 77G	5000159500920	1.00	Ū
347601	REVELS TREAT BAG £1 71G	5000159503914	1.00	Ŵ
347612	M&M CHOC TREAT BAG £1 82G	5000159504003	1.00	圃
347623	M&M PEANUT TREAT BAG £1 82G	5000159504393	1.00	圃
347634	MALTESERS TREAT BAG £1 68G	5000159503631	1.00	Ĩ
347891	MINSTRELS TREAT BAG £1 80G	5000159503822	1.00	筪

To add a product to the offer, type or scan into the "Product search" field. You can search by name, order code or barcode:



To remove a product from the offer, tap the delete icon in the "Action" column on the corresponding row of the table:

			1.07.001.01.10
Product name	Barcode	Retail price	Action
COUNTER TREAT £1 78G	5000159491334	1.00	<u>ش</u>
ISPY TREAT BAG £1 77G	5000159500920	1.00	Ē
S TREAT BAG £1 71G	5000159503914	1.00	
IOC TREAT BAG £1 82G	5000159504003	1.00	Ē

In the case of a "Buy X Get Y Free" offer, a buy quantity (X) and free/reward qty (Y) are required in place of the price breaks:

Buy qty (X)	1
Free qty (Y)	1

The product entries are individually marked as a qualifier, reward or both:

Product name	Barcode	Retail price	Qlfr / Rwrd	Action
1ST CLASS STAMPS (12)	5014721112282	10.20	Both	圃
R/MAIL 2ND CLASS STAMPS 12'S	5014721112299	7.92	Both	Ē

Tap the value in the "Qlfr / Rwrd" column to toggle between each classification.

Qualifiers count towards the "X" value. For each X of qualifying products in the basket, the system will discount Y reward products. Where a product is marked as "both" a qualifier and a reward then instances of the product in the basket are classed automatically depending on how many have been purchased.

In the case of a "link deal" offer, there is a single deal price:

Products in a link deal offer need a group number:

Barcode	Retail price	Group#	Action
5054073073626	0.99	1	Ê
5010236157558	1.00	1	Ê

Tap the group number value to edit the group number:
Group number(s):		
1		
	ок	CANCEL

Note that it is actually possible for a product to be added to 2 or more groups. In this case, use a comma to separate the group numbers.

Deleting an offer

To delete an offer from the system, use the DELETE button on the promotional record screen. Deleted offers are hidden from search results and are automatically disabled by the system. Delete with care as it is not possible to retrieve or reactivate a deleted offer.

11:57 am 💠 🔿 🖻 🕈 🔸	📰 † 🐨 🗎
← Edit promotional offer	
MARS CONFECT TREAT BAG VAR PM (2 FOR £1.50)	DELETE

Wholesaler integration

POS Core includes support for linking the app to certain wholesale suppliers. This allows the app to download product file updates & price changes, customer promotions and delivery notes / invoices, and also to upload orders. This greatly reduces the amount of work required to manually administer the database.

Configuration of the required settings is performed on special request and requires registration with the appropriate supplier. Please contact Image Retail Solutions Ltd for further information.

Once setup, the following options become available.

Product file updates

These are provided by all linked suppliers. New products are added to the local database and any price changes applied.

Use the "Download" option on the "Manage Products" screen to initiate a download:



Downloads run in the background, the status of which is displayed on the title bar of the Manage Products screen:



Price changes

Once a product file download has been performed, the system can apply any MSRP price changes (manufacturer suggested retail price). This helps ensure the store is maintaining margins on stock and not absorbing any cost increases at the expense of the retailer.

Tap the PRICE CHANGES button:



The app prompts for confirmation:



This changes the effective retail price of any products stocked by the store which have had an MSRP increase since the function was last performed. A report is produced on the receipt printer which can then be used for re-pricing of product on the shop floor.

Customer promotions

Monthly customer promotions can also be provided by some linked suppliers. This saves having to manually key the offers each month.

Use the "Download" option on the "Promotional Offer" screen to check for new promotions:



Downloads run in the background, the status of which is displayed on the title bar of the Promotional Offers screen:



Uploading orders

POS Core also provides for uploading purchase orders for stock directly to the linked supplier. Refer to the "Stock management" section for information on how to create a purchase order. When closing an open order for a linked supplier, the app will automatically upload it for fulfilment.

Stock management

Retail businesses in particular will need to manage stock, and one of the main purposes of an EPOS system is to make this as simple and efficient as possible.

POS Core provides complete management of the stock control process, from creating purchase orders, to booking-in deliveries to transferring stock to wastage or returning to the supplier. It also provides stock audit / stock taking facilities through its integration with the HHT smartphone app.

POS Core also integrates with supported wholesalers to provide electronic ordering and the download of delivery notes / goods-in notifications.

Creating a purchase order

The stock control flow is centred around the purchase order. Purchase orders transition through 5 states:

- Open
- Closed
- Uploaded
- Delivered
- Archived

The initial state of an order is "open". Products are added to the order, the order is closed, after which it is delivered and archived. The "uploaded" state is reserved for suppliers offering linked integrations whereby POS Core uploads the order directly to the supplier's back-end system for fulfilment.

Purchase orders are created through the PURCHASE ORDERS & DELIVERIES button on the MANAGER OPTIONS menu. Pressing this opens the Purchase Orders screen:

4:33 pm 🌣 🔿 🖼 🕈 •				🗐 🌾 i 📆
← Purchase orders				:
< < 1 >>				1 to 3 out of 3
Supplier name	PO#	Packs	Cost	Status
BOOKER	1044	1	5.99	DELIVERED
BESTWAY	1042	4	38.66	OPEN
BESTWAY	1041	6	56.44	DELIVERED

To create a new order, tap the ellipses icon in the top right corner of the screen:



And select the "New order" option:



This presents a pop-out box requesting the supplier of the order:



Select the required supplier and tap "Create".

A new, blank, open order is created for the requested supplier:

5:32 pm 🌣 🔿 🔟 🕈 🔸				🛒 ‡ 💎 📋
← Purchase orders				:
< < 1 >>				1 to 4 out of 4
Supplier name	PO#	Packs	Cost	Status
BESTWAY	1045	0	0.00	OPEN
BOOKER	1044	1	5.99	DELIVERED
BESTWAY	1042	4	38.66	OPEN
BESTWAY	1041	6	56.44	DELIVERED

Tap the order to view and edit it:

5:35 pm 🌣 🔿 🖻 🕈						📰 ‡ 🐨 🗎
← Purchase 0	rder #1045					:
Purchase Order #	1045					DELETE
Total qty	0					
Total cost	£0.00	Add product				
< < 1 >	>					1 to 0 out of 0
SKU	Pr	roduct name	Pack size	Cost	Qty	Total

Initially the order is blank. To search for products to add to the order, enter a product name, order code or barcode into the "add product" field and select the required product from the search results screen.

The product is added to the order with an initial quantity of 1:

SKU	Product name	Pack size	Cost	Qty	Total
676941	BROTHERS MARSH MALLOW 4% 500ML	12	15.29	1	15.29

Tap the entry to change the quantity:

BROTHERS MARSH MALLOW 4% 500ML	
	Update

To remove a product, change the quantity to "0".

You can also add products to an order through the HHT smartphone app, by using the "Order" button available on the Product Maintenance screen after scanning the item:

07:04 	atil 🗢 🔳
< Main Menu	Product Save
Name: BISCO	LATA
Retail:	Stock qty:
0.69	0
VAT rate:	On order:
20.00	0 (0)
Main supplier:	BESTWAY
Order code:	
Pack size:	Pack cost:
1	0.00
Margin %:	Margin £:
100	0.57
Promo:	
Wkly sales	
Daily sales	
	\mathbf{x}
Label	Order Clearance
	SCAN

Note that it is also possible to create and manage orders through the POS Core Cloud Back Office web portal.

Closing off a purchase order

Once all the items have been added to an order, it is ready to be closed off. In the case of a linked supplier, this also uploads the order to the wholesaler.

With the order loaded up, tap the "CLOSE-OFF" button, or select the same option under the menu available by tapping the ellipses icon:



The order is now closed and its status in the purchase order window will change to reflect this.

The action button changes "BOOK-IN", ready to accept the delivery on to the system once it arrives:



Note that in the case of linked suppliers with which POS Core receives order updates, any order acknowledgements received by the app will automatically amend the items on the purchase order to accurately reflect the expected stock based on availability, etc.

To re-open a closed order, use the corresponding menu option available under the ellipses button:



Booking-in a delivery

Once a delivery has been received at the store, the system will need to update the stock levels to reflect the newly delivered stock. This is referred to as "booking in" the order.

Note that in the case of a linked supplier, POS Core is able to download delivery notes from the supplier without the need to manually book them into stock. This is covered later.

To manually booked on a delivery, tap the relevant order in the Purchase Order screen:

← Purchase orders				:
< < 1 > >				1 to 4 out of 4
Supplier name	PO#	Packs	Cost	Status
BESTWAY	1045	0	0.00	OPEN
BOOKER	1044	1	5.99	DELIVERED
BESTWAY	1042	4	38.66	OPEN
BESTWAY	1041	6	56.44	CLOSED

This displays the order record.

Select the action button in the top right corner of the screen to BOOK-IN the delivery, or select the corresponding option from the ellipses menu:

	📆 † 🗫 📋
Book-in	
Re-open	
Delete	
Duplicate	

The app asks for confirmation that the stock has been received and that the stock levels are to be adjusted:



Tap "YES" to confirm.

The stock levels are adjusted and the order now shows as DELIVERED in the order list:

7:16 am ⊚ 📓 🕈 A ^x ∙				📰 ‡ 💎 📋
← Purchase orders				:
< < 1 >>				1 to 4 out of 4
Supplier name	PO#	Packs	Cost	Status
BESTWAY	1045	0	0.00	OPEN
BOOKER	1044	1	5.99	DELIVERED
BESTWAY	1042	4	38.66	OPEN
BESTWAY	1041	6	56.44	DELIVERED

Downloading delivery notes

In the case of a linked supplier, POS Core is able to download delivery notes (sometimes referred to as Electronic Delivery Notes ("EDN"s) or Electronic Good Received Notifications ("EGRN"s)) without the need to manually book the stock in. This has the advantage that the supplier is able to adjust quantities (eg. due to stock shortages) or change products on the order where items have been substituted.

Some suppliers also provide order updates (sometimes referred to as "order acknowledgements") which update orders with advanced warning of substitutions prior to delivery.

In addition to this, some suppliers provide electronic delivery notes (technically "invoices") for stock purchased in person from the cash and carry or via their website.

To check for delivery notes, order updates and invoices, use the "Download" option on the ellipses menu on the Purchase Orders screen:

45am © 🖻 🕈 A' ∙				
← Purchase orders				Refresh
< < 1 >>				
Supplier name	PO#	Packs	Cost	Status
BESTWAY	1045	0	0.00	OPEN
BOOKER	1044	1	5.99	DELIVERED
BESTWAY	1042	4	38.66	OPEN
BESTWAY	1041	6	56.44	DELIVERED

The app will use the order number in the received file to match the delivery note / invoice against the originating order on the system. If no match is found (eg. the order was not created through the app) then the app will create an order to update against.

Amending a delivery

Altering the products and/or quantities on a delivery note is simply a matter of editing the relevant entries on the order. Tap the order in the Purchase Orders screen and amend the record as required. As the order is in the DELIVERED state, any changes will automatically update the stock.

It is also possible to:

- "Undo" the delivery. This will revert the order to the CLOSED state and adjust the stock back to pre-delivery levels (as if the stock was never booked in).
- "Archive" the order. This will simply hide it (ie. remove it from the list of orders) to prevent the list from continuously growing and becoming unwieldy.
- "Duplicate" the order. This creates a new purchase order based on the same products and quantities. This saves time when creating an order for a supplier for products ordered on a regular basis.

These options are available under the ellipses menu in the top right corner of the screen:

	🔊 † 💦 🗋
Archive	- 1
Undo	- 1
Duplicate	

Stock returns & transfers

On occasion, stores may have the need to return stock to a supplier or to transfer stock to "wastage". It is important to record this stock movement to keep the stock levels accurate and to account for the stock leaving the business.

To this end, POS Core provides a stock returns and transfer facility, accessible through the STOCK RETURNS & TRANSFERS button on the MANAGER OPTIONS menu.

This facility works in much the same way as the purchase order ("goods-in") facility.

Start by creating a stock transfer by selecting the "New" option in the top right corner of the screen:

7:31 am. © 🖻 🕈 A ^x ∙				📆 † 🐄 🗎
← Stock Returns / Transfers				New
< < 1 >>				1 to 0 out of 0
Supplier name	Transfer#	Units	Value	Status

This will prompt for the name of the supplier to which the stock is being sent/returned:

Create new return/transfer	for:	
BESTWAY	*	
		Create

The app asks for confirmation that the correct supplier has been selected, following which it creates an empty, open transfer ready to accept a list of the stock to be transferred / returned:

7:50 am 💿 🖾 🕈 A′ 🔸				📰 † 🐨 🗎
← Stock Returns / Transfers				New
< < 1 >>				1 to 1 out of 1
Supplier name	Transfer#	Units	Value	Status
BESTWAY	1012	0	0.00	OPEN

Tap the transfer to view it:

7:51 am 💿 🖬 🕈 A' 🔸						📆 ‡ 💦
← Transfer Note	#1012					
Transfer Note #1012						DELETE
Total qty	0					
Total cost	£0.00	Add product				
< < 1 >>						1 to 0 out of 0
SKU	Pro	duct name	Pack size	Cost	Qty	Total

Items are added to the transfer in the same way as for purchase orders with the crucial difference that stock is always transferred in individual units rather than outer packs eg:

SKU	Product name	Pack size	Cost	Qty	Total
21326	MARS BARS 51G	1	0.36	10	3.60

Note that pack size is always "1" in the case of a return/transfer. This enables the store to return/transfer product individually. This is especially important when transferring stock to wastage as product will tend to spoil or damage as individual units.

It is possible to exit the stock form and leave it open by using the back button and opting to save changes. The transfer/return will not be actioned but will be retained in the "OPEN" state on the system. This can be useful if compiling a list of stock over the course of a few days.

To submit the transfer and adjust the stock levels, use the TRANSFER button in the top right of the screen:

🛒 † 📢 🗎	
TRANSFER	

Confirm that the stock is to be transferred off of the system:



The status of the form changes to "TRANSFERRED":

7:57 am 💿 🖾 🕈 A′ •				📰 ‡ 🐨 🗋
← Stock Returns / Transfers				New
< < 1 >>				1 to 1 out of 1
Supplier name	Transfer#	Units	Value	Status
BESTWAY	1012	10	174.90	TRANSFERRED

Amending a return/transfer

As with a purchase order, it is also possible to amend a transfer/return to correct any errors.

Tap the corresponding entry in the Stock Returns / Transfers screen to view the transfer note and make any changes. On clicking the back arrow and confirming the changes are to be retained, the stock levels are adjusted accordingly.

To prevent future changes from being made to a return/transfer and to keep the list of transfers concise, use the "ARCHIVE" option.

Reports

One of the primary functions of any POS system is to generate reports on the store's sales and stock holding/activity.

POS Core provides a built-in report generator accessible from the REPORTS button in the MANAGER OPTIONS menu:



Tapping this button opens the report generator:

9:58 am 💿 🖻	9:58 am 🔿 🖼 🕈 🖌 🔸							
← Repo	← Reports							
Report:	Sales summary		*					
Start date:		#						
End date:		Ê						
	_							
	Run report							

Select the desired report from the "Report" dropdown menu.

Use the calendar icons to specify the start and end dates of the period covered by the report.

Tap the "Run report" button.

The report is generated and is displayed on the screen:

10:01 am 👁 🖾 🕈 A				📰 ‡ 🐨 🗎
← Reports				
Sales Summary				
23/07/2021 10:01:00				
Date range: 2021-06-01 - 2021-06-30				
Department	Revenue	VAT	COGS	Margin
BEERS.LAGER&CIDER	56.68	9.44	35.31	11.91
CONFECTIONERY	37.40	1.40	12.50	23.50
FRESH FOODS	387.40	0.00	289.65	97.75
FRUIT & VEG	963.75	0.00	0.00	963.75
FRUIT & VEG.	57.42	0.00	42.92	14.50
MISC	55.75	7.26	0.00	0.00
NON FOOD	198.00	0.00	195.25	2.75
OTHER (15)	20.97	0.00	0.00	20.97
STAMPS	204.00	0.00	150.00	54.00
STATIONERY	56.25	9.37	15.00	31.87
TOILETRIES	2.08	0.00	0.00	2.08
Totals	2039.70	27.47	740.63	1223.08

Returning back to the report window, a QR code is displayed:



Scan the QR code on a smartphone (with the device's camera) to download the report as a PDF for onward emailing / printing, etc.

Staff access & security

POS Core is provided with three default employee records with ID numbers 1, 2 and 3. Each of these provide progressively higher access to the functions of the app, but only serve as an example and to provide initial access to the system.

Prior to live use of the system, it is highly recommended that these be replaced with specific staff records. Each staff member will have their own ID and PIN to access the system, along with a list of functions to which they have access.

The employee database is accessible from the STAFF button on the MANAGER OPTIONS menu:



Tap this button to display the "Manage employees" screen:

10:15 am 💿 🖟	∎ ♥ A' •				📰 † 🗫
← Man	age Employ	ees			New
Employee:	STAFF (1)		*		
Name:	STAFF				
PIN:	123				
Voids		Products	No sale		
Petty cash		Promos	Employees		
Lottery wins		Stock in	Reports		
XREAD		Stock out			
ZREAD		Settings			
Canc	el				Save

Adding a new employee

To add a new employee, tap the "New" option on the menu bar at the top right of the screen. This prompts for the name of the employee. Enter their name, as you would like it to appear on the system:

Employee nam	ne:	
JANE		
*	ок	CANCEL

The system allocates an ID number and displays a blank employee record:

10:23 am 🔿 🗎	⊇ ♥ A′ •			
← Man	age Employ	ees		
Employee:	JANE (10)		*	
Name:	JANE			
PIN:				
Voids		Products	No sale	
Petty cash		Promos	Employees	
reity cash		FIGHIOS	Linployees	
Lottery wins		Stock in	Reports	
XREAD		Stock out		
ZREAD		Settings		
Conr	-1			
Cane	er			

Enter a PIN for the employee. They will use this along with their ID to gain access to the system and authorise any special functions when they come to use them.

By default, employees have no authority to use the special functions of the system. Use the toggle switches to enable/disable access as required:



Finally, save the record to commit the changes to the database.

Training mode

For training new members of staff, POS Core provides a training mode. Any operations performed with training mode enabled will run off the local training database and will not impact the live database in any way.

To enable training mode, use the TRAINING MODE button. The app very quickly makes a local copy of the live database and switches over to using that in preference to the live database. The background of the main POS terminal window will change to a salmon/pink colour and a prominent message displayed at the top of the screen:



Warning! Whilst POS Core will be in training mode, any third party services with which it interacts will not be. This will include any card payment gateways, wholesaler links, etc. For this reason, you should not process any test card transactions or upload any stock orders, etc.

To exit training mode, tap the TRAINING MODE button again and confirm that you wish to switch the app back to the live database.

Configuring the smartphone HHT app

POS Core supports the use of the *ProEPOS HHT* app (available on both the Apple App Store for iOS and the Google Play Store for Android).

This app allows smartphones within the store to be utilised as handheld terminals ("HHTs") by staff for:

- Checking / changing prices and other product information
- Checking / amending stock levels
- Ordering stock

Download and install the app and then simply enter the IP address of the tablet/terminal (on the LAN) into the app's settings:



You should reserve an IP address in the router for the tablet/terminal to avoid the IP address from changing between reboots of the equipment.

Note that not all functions of the app are available to Core users as the feature set has been purposely reduced.

Deliverappy platform integration

The Deliverappy platform consists of three customer ordering / home shopping apps, all of which integrate with POS Core:

- Deliverappy (home delivery and click & collect for retail stores)
- app2table (table ordering for hospitality venues)
- club2app (refreshment & ticketing app for sports venues)

Owing to its tight integration, departments need only be enabled for "sell on app" in POS Core to be active for sale in the app:

3:27 pm 💿 🖻	3:27 pm 💿 🖼 🕈 A' 🔸						
← Man	← Manage Departments						
Department:	CONFECTIONERY	v	Min age:	0			
Name:			Sell online: (
	CONFECTIONERY		Sell on app:				
Subdepts:	CHOCOLATE						
	PROTEIN						
	SEASONAL SPECIFIC						
	SUGAR						

To refresh the product catalogue on the app, use the REFRESH button on the MANAGER OPTIONS menu:



The Deliverappy home shopping app consists of many thousands of images and descriptions of products which are automatically assigned to products.

The Deliverappy Platform Manager (web portal) allows app2table and club2app venues to set images and further information against products uploaded from POS Core.

Orders placed by the Deliverappy apps are automatically downloaded by POS Core and printed on the attached receipt printer. In the case of table orders placed through app2table, these are automatically assigned to the corresponding table and will print on the kitchen/bar printers as expected.

Cloud Back Office

Although all the features of the system can be accessed through the POS Core app for Android, the Core Cloud Back Office provides a convenient means of accessing back office features from almost any web enabled device such as PC, laptop or smartphone.

The Core Cloud Back Office allows administrative tasks to be completed away from the service area, in a back room, at a remote location/office or even on the move, without the need to install any software. All that is required is a capable web browser and an Internet connection.

POS Core terminals and tablets continuously sync with the cloud, providing the Core Cloud Back Office with *almost* real-time access to the retailer's data. Changes made through the Cloud Back Office are automatically propagated across the estate.

Accessing the service

The Core Cloud Back Office is accessible from the following URL:

https://imagesoft.co.uk/core/

The login details advised at the signup to the service are required to login to the site:

Login - POS Core cloud back office					
Username	fred@example.com				
Password					
	Remember me				
	Sign in Reset				
Not yet registered? Call our sales team now on 01202 698610					

Once logged in, the available options are shown on the left hand navigation menu:



Dashboard

The dashboard provides an "at a glance" overview of the day's trade and recent activity:



Customers

The "Customers" option provides access to customer records, including customer history. From here the user can view/edit customer details and see the history of transactions on the customer's account.

Click the "Customers" option on the menu bar. Use the search field to search by name, postcode or loyalty barcode number:

POS Core cloud back office									8	Darren -	*
希 Home	Customer maintenance							# Home / Customers			
🔟 Dashboard											1
😁 Customers	Customers										1
Manage Stock Lines	Search t	ext Sea	rch text								1
Stock movement		Sea	rch								
🛓 Employees	Add new cust	omer									
	Customer	r matching	search							~ ×	
Our Shop 1 Avon Road West Moors BH22 0EG +	Customer name BOB BAKER	Address 99 DRURY LANE	Postcode WC2B 5JF	Telephone 07800 1234567	Email address bob@example.com	Other details	Points 0	Credit limit 0	Loyalty barcode	Actions	

To the right of each search result row are the action buttons. Actions available are:

Button	Action
	View / edit the customer's personal details.
	View the transaction history on the customer's account.

Note also that it is possible to add a new customer record using the "Add new customer" button beneath the search field.

If editing a customer's details, remember to click "Save" to commit the changes.

Use the "X" icon to close the record and return to the search results.

POS Core cloud back office		a D	arren -				
A Home	Customer maintenance # Home / Customers						
🔟 Dashboard			_				
😁 Customers	Customers						
Manage Stock Lines	View / edit custo	omer 🗸	×				
Stock movement							
🏝 Employees	BOB BAKER						
I Reports	Firstname	BOB					
	Surname	BAKER					
Store	Address (line 1)	99 DRURY LANE					
Our Shop 1 Avon Road West Moors	Address (line 2)	COVENT GARDEN					
BH22 0EG▼	Address (line 3)						
	Address (line 4)	LONDON					
	Postcode	WC2B 5JF					
	Telephone	07800 1234567					
	Email address	bob@example.com					
	Other details						
	Credit limit	0	- 1				
	Loyalty barcode						
		Cancel Save					

The account transaction history shows all the activity on the account, with the most recent entries at the top:

POS Core cloud back office							
🖀 Home	Customer maintenance # Home / Customers						
🔟 Dashboard							
👑 Customers	Customers						
Manage Stock Lines	View customer history						
Stock movement	BOB BAKER						
	Date	Store#	Emp#	Description	Amount	Balance	
🚠 Employees	2021-07-21 11:45:05	1	1	ST 8 CROISSANTS 320G	2.15	3.14	
III Reports	2021-07-21 11:45:05	1	1	B/ONE BANANAS 99P 5PK	0.99	0.99	
	2021-07-21 11:41:41	1	1	CASH	-5.90	0.00	
Store	2021-07-21 11:41:41	1	1	ST 8 CROISSANTS 320G	2.15	5.90	
Our Shop	2021-07-21 11:38:40	1	1	MIXED APPLES	2.75	3.75	

Manage Stock Lines

Use the "Manage Stock Lines" option to add, view and edit products, departments, suppliers and customer promotions through the respective tabs:

POS Core cloud back office						
🖶 Home	Manage Stock Lines & Home / Manage Stock Lines					
🔟 Dashboard						
😁 Customers	Products Promotions Departments Suppliers Tools					
🗅 Manage Stock Lines	Search text					
Stock movement	Search text					
🛔 Employees	Search					
Reports	Options In stock On promo Price-marked Stocked Below MSRP					
Store	Add new product					

Each option provides a similar and familiar CRUD (create, read, update and delete) paradigm for the respective records; first search for the required record and then select the required action against the record in the search results.

If editing, then commit the changes with the "Save" button. Use the red "Add new..." button to create a new record.

Available actions will depend on the type of record:

Button	Action
	View / edit the record.
@	Delete the record.

Stock movement

The "Stock Movement" option allows the user to create and amend purchase orders, book-in deliveries, transfer stock off the system (return to supplier or transfer to wastage) and amend any existing delivery notes and transfer notes.

Each of the above entities is a standard stock form and they are all amended in the same way.

Note the flow of an order mentioned in the "Stock management" section of this guide still applies; an order is first created as a purchase order, which then becomes a delivery note. To be available for receipt ("booking-in"), an order must first be created and closed. Until this is done, the order will not be available under the "Receive PO" option.

Start by selecting the required option from the "action" menu:

S Stock Movement - Core Cloud Ba X + O							
\leftrightarrow \rightarrow C \triangle $$ image	gesoft.co.uk/core/stockMovement.php?session=NTMxOF8x	☆ 🍊	۲	D	:		
POS Core cloud back o f	ffice		🎓 Da	arren -	•		
🖶 Home	Stock Movement Create and manage orders, deliveries and transfers	倄 Home / S	itock Mov	ement	1		
Lul Dashboard							
😁 Customers	Stock form Product search Tools				-		
Manage Stock Lines Action							
Stock movement	Please select Please select						
🛔 Employees	Purchase order Receive PO (from supplier) Transfer						
E Reports	View / edit delivery note View / edit transfer						

The available options are as follows:

Action	Description
Purchase order	Create / amend a purchase order. An order must be created and closed before it can be booked-on under the "Receive PO" option.
Receive PO	"Book-in" the stock on a closed purchase order. The PO must have been created and closed-off before it is available under this option. Stock levels are <i>increased</i> by this option.
Transfer	Create and post a transfer of stock off of the system. This is used to return stock to a supplier or to transfer to a "cost centre" such as "wastage". Stock levels are <i>decreased</i> by this option.
View / edit delivery note	Amend a delivery note previously created

	on the system (either by the store or through the cloud back office). Stock levels are amended accordingly.
View / edit transfer note	Amend a delivery note previously created on the system (either by the store or through the cloud back office). Stock levels are amended accordingly.

Remember that the store devices and cloud back office share the same dataset, so orders can be part created at the store and then completed through the web. Likewise, deliveries booked-in at the store can be viewed/amended through the web, etc.

Note that each stock form contains a "Main details" tab and a "Products" tab. For example, for a purchase order:

POS Core cloud back office		🎓 Darren 🗸					
希 Home	Stock Movement Create and manage orders, deliveries and transfers	🆀 Home / Stock Movement					
Luu Dashboard	Staduteren Disduterente Table						
😁 Customers	Stock form Product search 100IS						
Manage Stock Lines	Purchase Order						
Stock movement	Main details Products						
🛔 Employees	Purchase order						
⊞ Reports	Cost centre BESTWAY 🗸						
Store	Ref1 1042						
Our Shop 1 Avon Road	Ref2 Ref2						
West Moors BH22 0EG ▼	Date 13/07/2021						
	Total qty 4 Total cost £38.66						
	Closed						
	Cancel Save						

POS Core cloud back office							\$	Darren -
🖀 Home	Stock Movement Create and manage orders, deliveries and transfers						Movement	
🔟 Dashboard								_
😁 Customers	Stock form Product sear	ch Tools						
🗅 Manage Stock Lines	Purchase Order							
Stock movement	Main details Products							- 1
📥 Employees	Product name	Barcode	Order code	Pack size	Pack cost	Qty	Line cost	Action
Reports	BARR GINGER BEER 49P 330ML	5000382107026		24	5.99	1	5.99	Û
Store	BUNDABERG GINGER BEER 375ML	9311493003234		12	10.09	1	10.09	Û
Our Shop 1 Avon Road	BUNDABERG ROOT BEER 375ML	9311493000608		12	10.09	1	10.09	Đ
West Moors BH22 0EG v	C/STON GINGER BEER 330ML	5060054134125	221006	24	12.49	1	12.49	Û
	Add Barcode o	r ord Add						

Note that for purchase orders, the pack size is fixed (as product has to be ordered in outers) but in other contexts, the pack size can be set for singles:

Product name	Barcode	Order code	Pack size		
BARR GINGER BEER 49P 330ML	5000382107026	588115	24 🗸		
BUNDABERG GINGER BEER 375ML	9311493003234	545944	24 1		

This is particularly useful for transfers where goods are often returned (or transferred to wastage) as single units, or part-packs.

When adding products to a stock form, enter the barcode or order code into the add field at the bottom of the form:
BUNDABERG R	OOT BEER 375ML	9311493000608	
C/STON GINGE Add product	R BEER 330ML Barcode or order c	5060054134125	221006

Use the "Product search" tab to help locate products for ordering:

Stock form Product search Tools						
Search text	Search text					
	Search					
Options	🗌 In stock 🗌 On pro	omo 🗌 Price-markeo	d 🗌 Stocked 🗌 Below I	MSRP		
Add new product						
Products match	ing search					
Product name		Parcodo	Department	Potail	Cost	Stock atu
Froduct name		Barcode	Department	Retail	COSL	SLOCK QLY
BROTHERS MARSH N	MALLOW 4% 500ML	5027342003631	BEERS.LAGER&CIDER	2.10	1.27	0
MARS BARS 51G		5000159319829	CONFECTIONERY	0.50	0.36	-20

And switch back to the "Stock form" tab to add them.

Employees

The Employees facility allows the user to add, view and edit employee records. This includes the ability to select which features/functions are accessible to each employee.

Using a similar and familiar CRUD (create, read, update and delete) paradigm used throughout the cloud back office user interface, it is easy to search and access an employee record:

POS Core cloud back office						🎓 Darren 🗸
🖷 Home	Emplo Add & maintai	yee maintena n employee records, timecloc	ance k entries and sect	urity rights	🔏 Ho	ome / Employees
🔟 Dashboard						
😁 Customers	Employees					
Manage Stock Lines	Search text	Search text				
Stock movement		Search				
🏝 Employees	Add new emp	oloyee				
Reports	Employee	e matching search				~ ×
Store	ID#	Employee name	Address	Telephone	Enabled	Action
Our Shop	6	BOB			Enabled	1
West Moors BH22 0EG •	4	EMILY			Enabled	/
	8	FRANK			Enabled	

Use the action button to view/edit the corresponding record.

The access rights match those detailed in the "Staff access & security" section of this guide:



Reports

The "Reports" facility allows the user to run reports on the store's sales and stock activity. These can be downloaded as a PDF or CSV (spreadsheet). The latter is useful for spreadsheet manipulation and further processing/analysis.

POS Core cloud back office		🍰 Darren 🗕
🖶 Home	Reports Stock and sales reporting	🆀 Home / Reports
🔟 Dashboard		
😁 Customers	Report runner	^
Manage Stock Lines	Report	
Stock movement	Report name Sales Summary	~
📥 Employees	Format PDF 💙	
■ Reports		
Store	Start date 01/06/2021 I End date 30/06/2021 I	
Our Shop 1 Avon Road West Moors BH22 0EG v	Run	

Simply select the report to run, the required format of the resulting file (PDF for readability or CSV for manipulation), enter the start and end dates and click "Run".

All data used is live (subject to connectivity of individual devices).