SOUNDPAYMENTS®
Commerce Solutions

Sound POS

User Guide

Version 1.9

Table of Contents

Version History

Sound POS User Guide

Version	Date	Owner	Description
1.1	2019/07/22	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.5.1
1.1.2	2019/08/25	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.5.2
1.2	2019/11/23	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.5.3
1.3	2020/01/31	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.6.3
1.4	2020/02/28	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.7.0
1.5	2020/09/28	Dennis Palmer	Updates to screenshots to reflect Sound POS v1.7.9, Added Quick Reference for Initial Setup
1.6	2021/3/31	MC	Updated non-cash adjustment, email reports, saved orders to match Sound POS V1.8.2
1.8.5	2021/5/3	MC	Updated for changes to Sound POS v 1.8.5; Changing versioning to match Sound POS versions

Sound

Payments Marketplace:

Sound POS

Supported Devices

Device Manufacturer	Device Name
PAX	E500
PAX	E600
PAX	E700
PAX	E800
PAX	A920

Glossary of Terms

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

Quick Reference for Initial Set-up

Store Setup

Gift Cards
Timecards
Logout

Log In

Users can enter the system by logging in.

Admin/Owner will need to log in to create each employee Profile

There are two login methods:

1. You can enter the user ID and password manually to log in. The administrator will receive the password upon setup in Backoffice. Please contact your system admin. Additional users can be setup either on Sound POS or the Back Office Portal.
2. Use the scanner to scan the user's barcode on the login screen to log in.

Notes: When you add a user, a barcode is generated for the user to log in. This barcode can be printed upon setup of that user. Please refer to the User Setup section on page 25 for additional information.

Main Menu

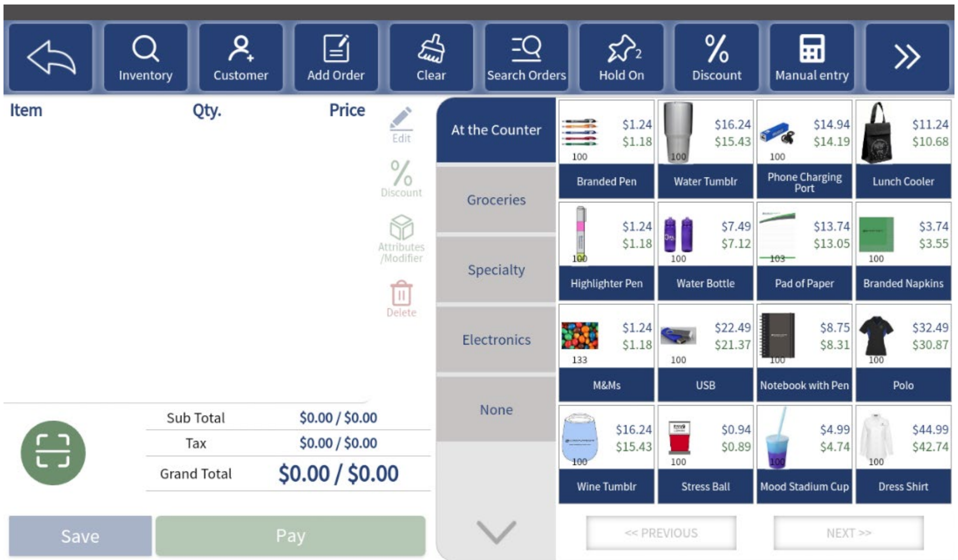
After logging in successfully, you enter the *Main Menu which consists of:*

- Sales - Operations are related to the sale and return of products.
- Reports - View all the reports of the store, including transaction details report, inventory change report, employee sales report, customer purchase report, sales tax report.
- Pay In/ out - View the Pay in and Pay Out records of the store or add a record.
- End of Day - 'Batch out", add a tip for an order paid by a credit card, or send a credit card settlement to the bank.
- Customer - Manage Customers of the store, and recharge Local Gift Cards.
- Inventory - Manage Products, Categories, Inventory Movement, Attributes, Taxes and Tax Categories
- Maintenance - Manage Employees- Users, Manage permissions- Roles , Global Price Change- adjust the price of store products, Menu Order- Change the order in which products/ categories are displayed, Price Level- Name a Price Level, Clean Data- Clean Transactions, Reset Tickets, Clean Log,
- Settings - Change Merchant information, Receipts, Device Configuration, Pay Method, Activation, Cloud and About
- Timecard - Manage Timecard, Manage Breaks, Clock Reporting
- Profile - Set the language (English, Chinese, Spanish, Portuguese), or modify the password of the currently logged in user. This will change system menus used for navigation to reflect language selected this will not change Categories or the name of the product.
- Logout

Sales Screen

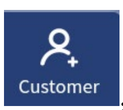
Select "Sales" 

, from Main Menu:



Inventory: Select 

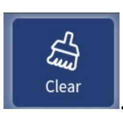
,from the ribbon to quickly look up or add products to the inventory

Customer: Select 

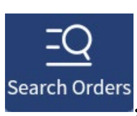
, from the ribbon to quickly look up or add Customer

Add Order: Select 

, from the ribbon to take phone order

Clear: Select 

, from the ribbon to Clear the transaction

Search Order: Select 

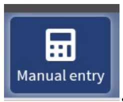
, from the ribbon to search orders

Hold: Select 

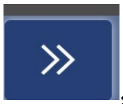
, from the ribbon to continue with previously saved transaction

[Discount](#): Select 

, from the ribbon to provide a discount to entire Cart

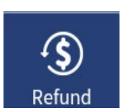
[Manual Entry](#): Select 

, from the ribbon to Enter Manual Entry Mode

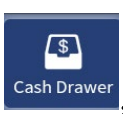
Select , from the ribbon to bring up additional options:

[Print](#): Select 

, from the ribbon to Print transaction

[Refund](#): Select 

, from the ribbon to allow users to enter transaction number to be refunded

[Cash Drawer](#): Select 

, from the ribbon to Opens Cash Drawer

[Tax Exempt](#): Select 

, from the ribbon Marks Tax rate exemption for Tax Category selected

[Category Entry](#): Select 

from the ribbon to Enter Category Entry Mode

Lock Screen: Select 

, from the ribbon Locks Screen so that no other user can access POS during a Sale.

- The Screen will go back to Screensaver
- Same User will need to Unlock
- Same user must log in with Password.

Products are displayed on the right-handed side in a 4x4 for a total of 16 per page

- Additional products within a selected category can be found by selecting 

 "NEXT" which will go to the next page.
- select  "Previous", from the ribbon to go back to previous page

Categories are listed down the middle of the screen

On the left-handed side of the POS screen is the Shopping Cart:

- Once products are selected, they are put into the shopping cart

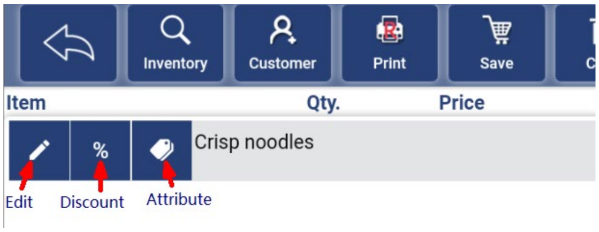
Single Line item Operations:
Single line operation

There are two modes configurable in Settings>Configuration: Popular and Traditional.
See the Single Line Operation and Configuration Section for more details

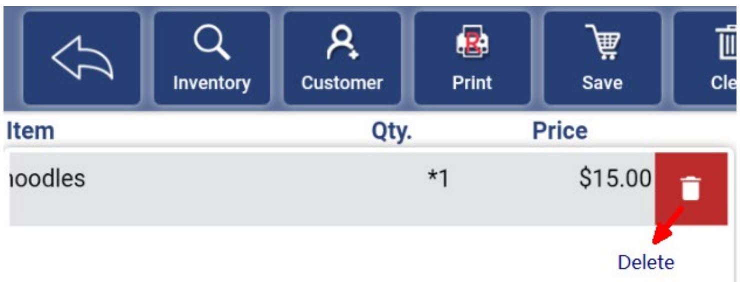
Select how individual products can be Edited, Discounted, Modified, or Deleted See Configuration for details
Traditional: In this mode, operations such as Edit, Discount, Change Modifiers/Attributes, Delete appear in a small column positioned in the middle of the page. (See Sales)
Popular: In this mode, select the desired operation such as Edit, Discount, Attributes can be achieved by sliding the single item in the shopping cart to the right, or sliding left to Delete

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

Please refer to Appendix A for more about how line item edits, discounts, and Attributes affect the final price of a product.



Swipe Left: See the Delete option.



Descriptions of Single Line Item Operations:

<u>**Delete**</u>	Select Single line item, select  , this single line item operation will remove selected item from cart
Edit	Select Single line item, select  , this single line item operation will modify item selected for quantity or price
Discount	Select Single line item, select  , this single line item operation will provide a discount
Attributes / Modifiers	Select Single line item, select  , this single item operation will change attributes/ Modifiers associated to that product

Delete:

Select  "Delete", product in the shopping cart will be removed prior to checkout

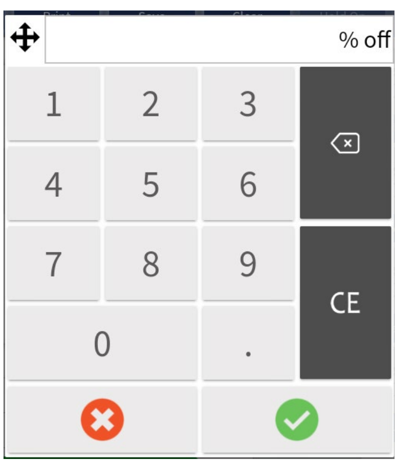
Edit:

Select on Field to Edit:

- Item
- QTY
- Price
- Select Submit "Submit" to proceed with transaction

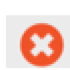
- Select Cancel "Cancel" to return to previous screen

Discount:

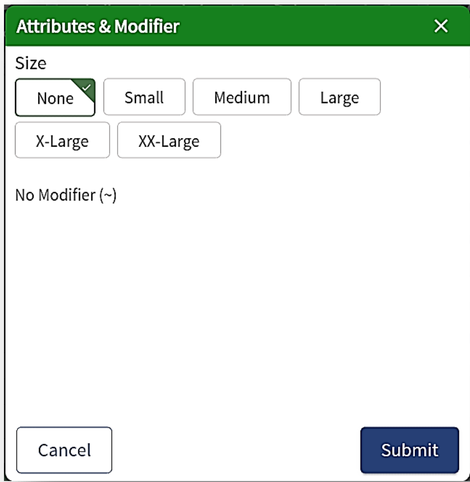


Using Keypad input desired discount for selected item

To proceed select 

To return to previous screen Select 

Attributes/ Modifiers-



To Select Attribute/ Modifier

*Single Selection Example: Size

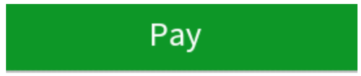
- None
- Small
- Medium
- Large
- X-Large
- XX-Large

Select Submit to proceed with transaction

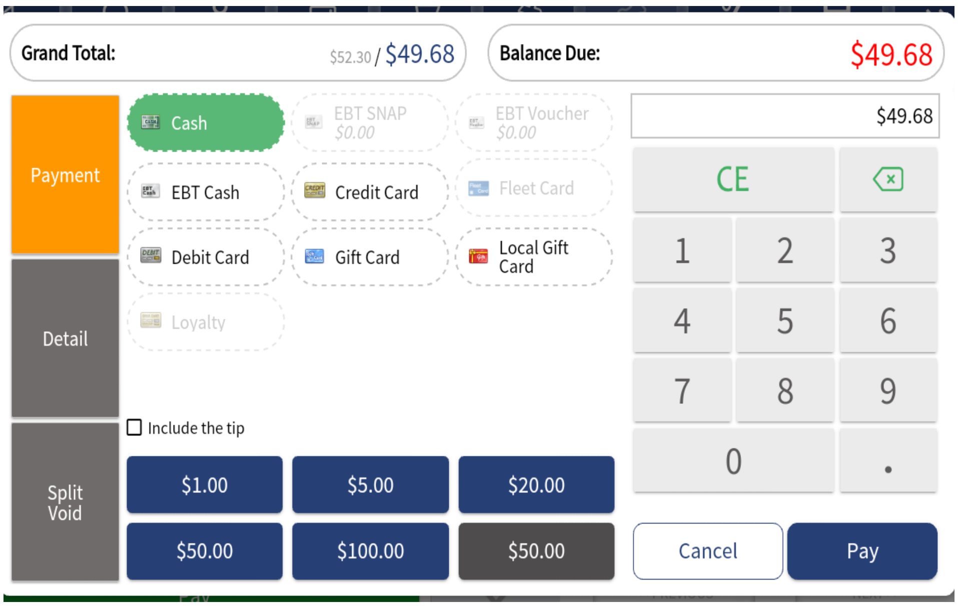
Select Cancel to return to previous screen

Completing a Sale:

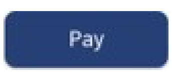
Select and edit the product(s) to be purchased from the Menu

- From the Sales Screen, select 

"Pay" to bring up payment selection screen where payment type can be selected.
*See screenshot below for more detail.



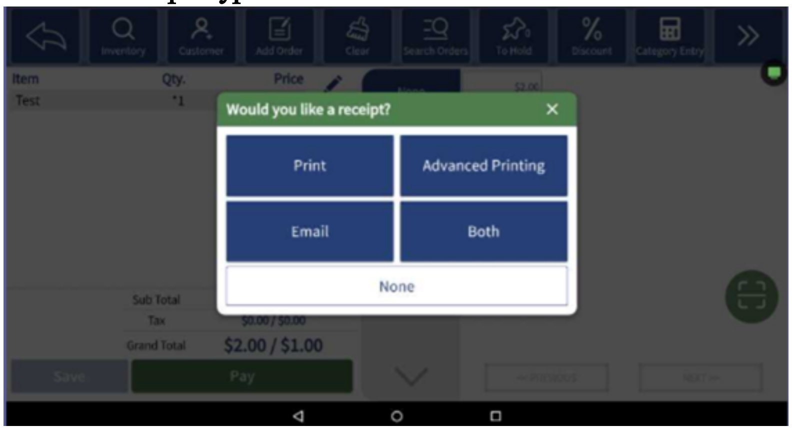
  - Select a method of payment
  - If different from Balance Due Enter Value to be charged

- Select 

"Pay", to proceed to *Receipt Type*

Note: If the payment amount is less than the total amount owed, the system will prompt for additional payment. This is known as a split tender.

Select Receipt Type:



- Print- Prints Receipt
- Email- Emails Receipt and will bring up Enter Email Address Screen
- Advanced Printing: Allows you to printer to external printer. Ex: Kitchen Printer
- Both- Will both Print and bring up Enter Email Address Screen
- None- No Receipt

***When hand keyed manual entry is needed*

- Select Card type Credit/ Debit/ Gift
- Manually keyed into the customer facing unit.
- Customer Selects keyboard located on bottom right side of unit.
- Prompt on Customer Screen
- Please Enter Card number
- Please Enter Expiry date on Card
- Please Enter Your CVV2
- Please Enter Your Zip

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

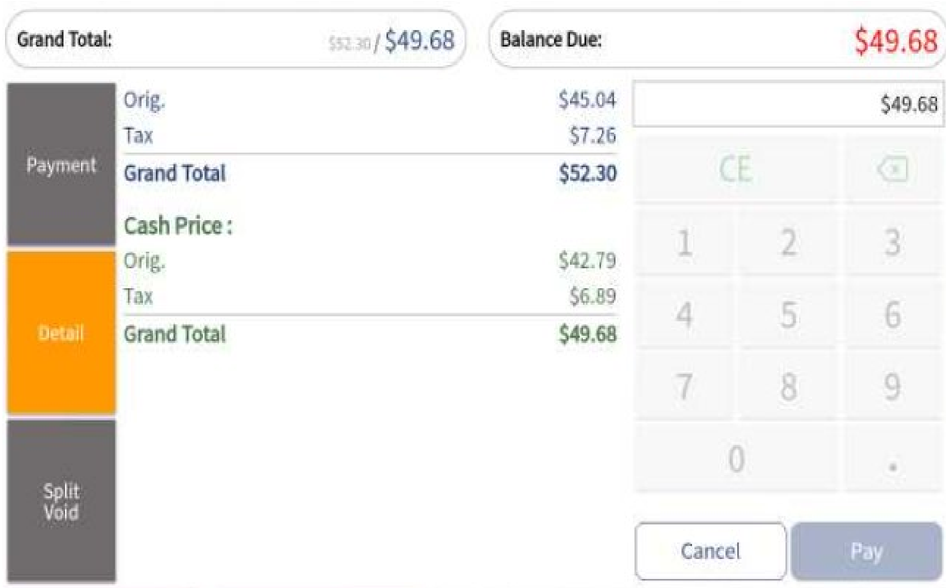
Detail (Orange selection shown below)

To Provide a detail breakdown of Price, Tax, Total

- From Payments Screen
  - Select "Detail"

In the Example below:

*Cash Discount has been enabled so "Cash Price" will be displayed in Green.

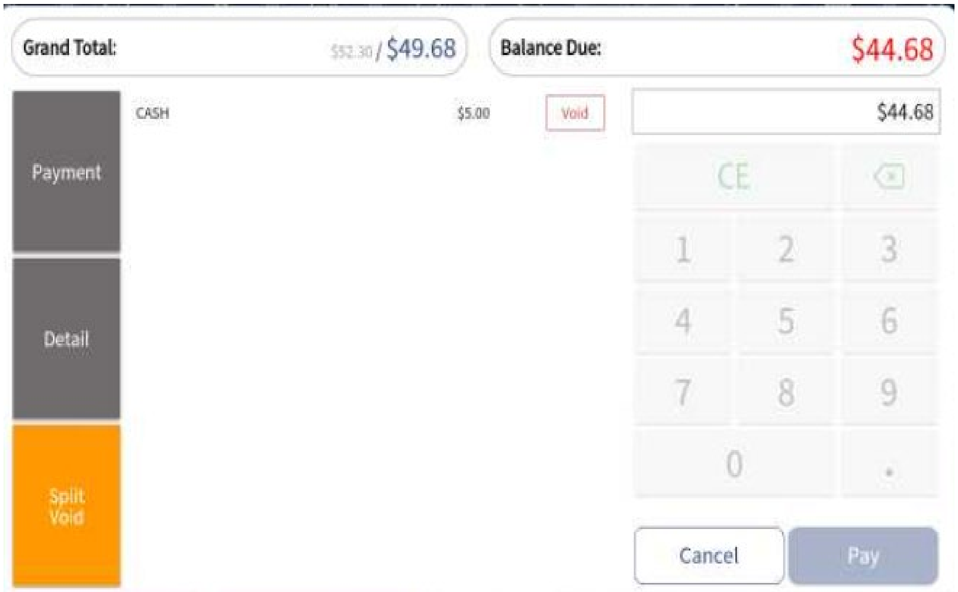


Split Void

When a customer only provides partial payment for a transaction.

- From Payments Screen select "Split Void"

"Split Void" can be used to Void out any previously used payment types.

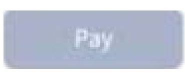


Select 

"Void", will remove previously provided payment type

Select 

"Cancel", to return to previous screen

Select 

"Pay", to proceed

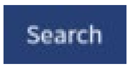
Inventory

1. Select 

“Sales” from Main Menu:

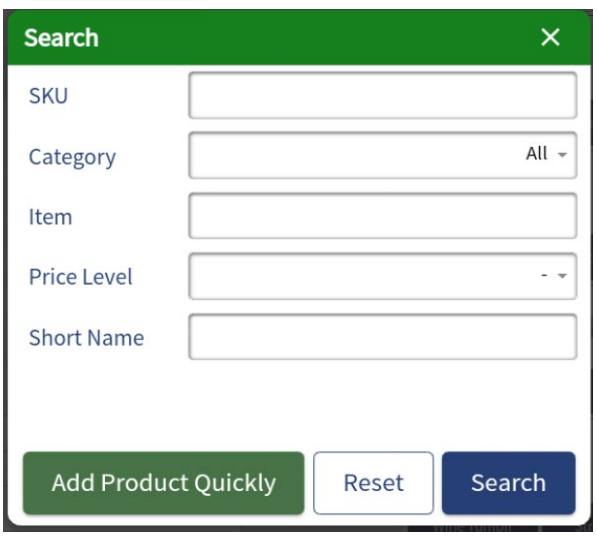
2. Select 

"Inventory", from the ribbon to enter the Search page

3. Select 

“Search”, To find the desired item and add it to the shopping cart, provide criteria and search inventory

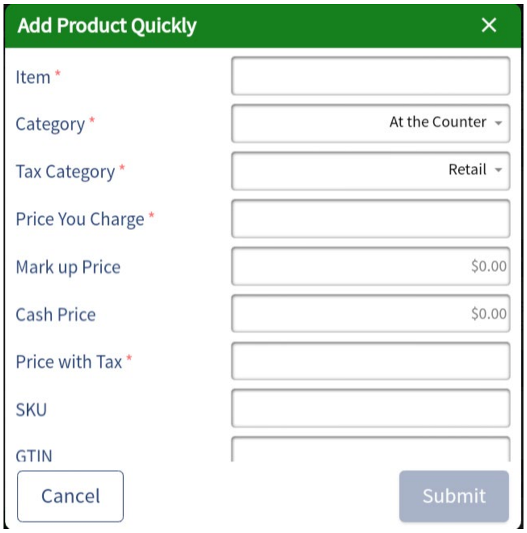
- SKU
- Category
- Item
- Price Level
- Short Name



Add Product Quickly:

1. Select 

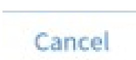
"Add Product Quickly"



- Required fields to be completed are:
  - Item name
  - Select Category from drop down
  - Select Tax Category from Drop Down
  - Enter "Price You Charge"
  - Price with Tax will be calculated based upon Tax Category Selected

Select 

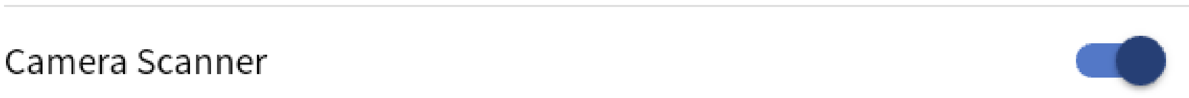
"Submit", to add product to inventory

Select 

"Cancel", to go back to Sale Screen

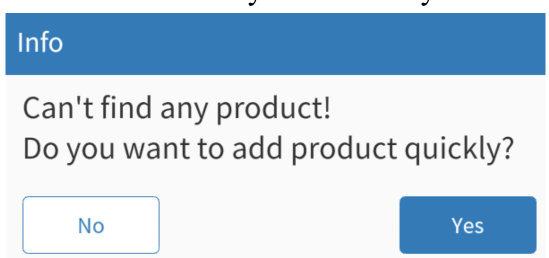
Additional Option to Add Product Quickly: Camera Scanner

When the Camera Scanner is enabled (See Configuration for how to enable the camera as a scanner)



Sound POS can use the Onboard Camera

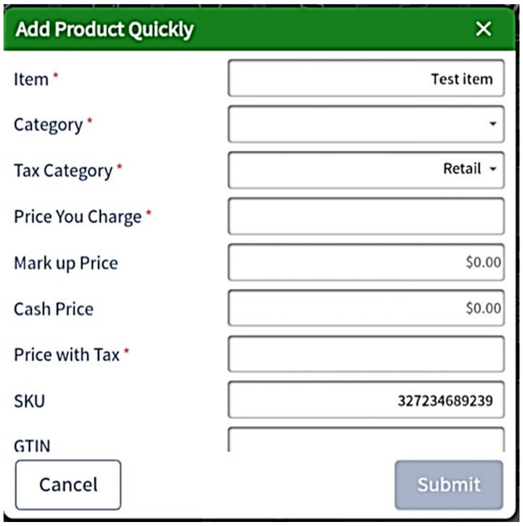
- Select on the  (Scan) camera icon at the bottom right of the POS Sales screen.)
    - The onboard camera screen will appear
- Scan Barcode
    - If the Barcode is already in system, it will be recognized
    - If the Barcode is not already in System, you will receive the following prompt:
        - Info: Can't Find any Product Do you want to add Product Quickly



        - Select  , to proceed

        - Select  , to cancel and return to previous screen

**The SKU will auto populate in SKU field*



*Required fields to be completed are:

- Item name
- Select "*Category*" from drop down
- Select "*Tax Category*" from Drop Down
- Enter "*Price You Charge*"
- Price with Tax will be calculated based upon "*Tax Category*" *Selected*

Working with Customers from the Sales screen

To assign customer to order for Loyalty and to keep track of customer history

- Select 

“Sales” from Main Menu:
- Select 

"Customer", from the ribbon to Search existing customer database, or [Add a New Customer Quickly]

To search Customers, enter desired criteria:

- Name
- Phone
- Price Level

Select 

”Search”, to Search

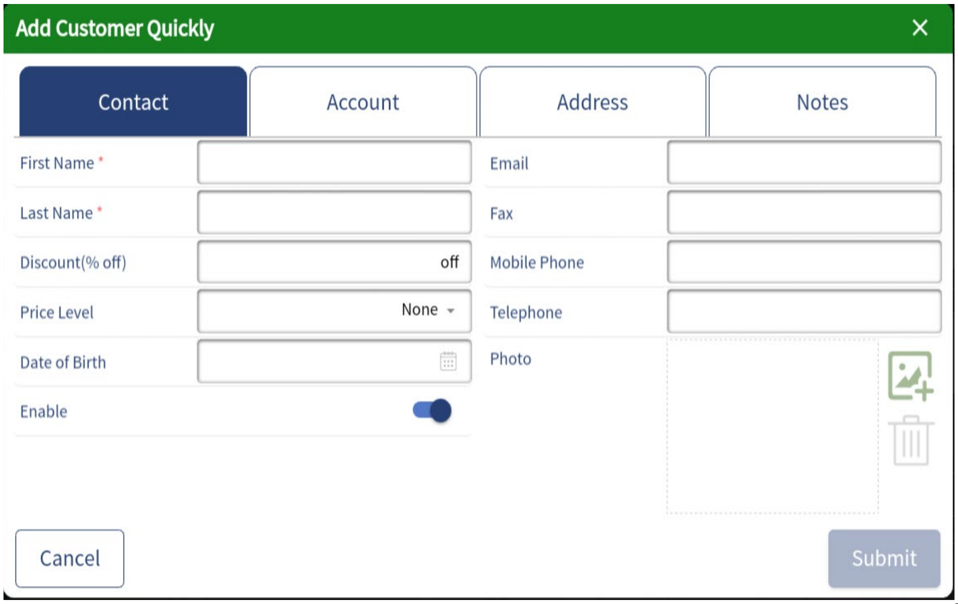
Select 

”Reset”, to clear Fields

Add a New Customer

Select 

"Add Customer Quickly"

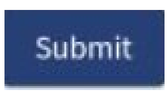


<u>Tabs</u>

1. **Contact:** This tab displays general information about the Customer, such as Name, Discount, Price Level, contact information etc.
2. **Account:** This tab shows the account credit information for the Customer and the current remaining loyalty.
3. **History:** This tab shows the purchase record for this Customer.
4. **Address:** This tab allows for the customers address information to be captured as well as edited.
5. **Notes:** This tab displays the Notes for this Customer. This is free form information text field about that customer. This information can be edited within any of the Customer Screens.

Contact:

- Name: Unique name for customer
  - First Name (*Required)
  - Last Name (*Required)
- Discount (%off): Customer specified discount amount
- Price Level: Customers associated Price Level
- Date of Birth: Date of birth of customer
- Mobile Phone: Mobile Contact number
- Email: Unique email address
- Fax: Fax Number
- Enable: Enable Customer
- Telephone: Phone Number
- Photo Image:
  - An image can be taken directly from the POS by selecting the  , Add Image icon
  - Select 

, Camera Icon
    - Take Photo image
- Select 

"Submit" to Save

For additional information on Customers See Customer

Print

1. Select 

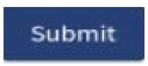
"Sales" from Main Menu:

2. Select 

"Print", from the ribbon to Print transaction

Select "Print": Which Ticket do you want to Print?

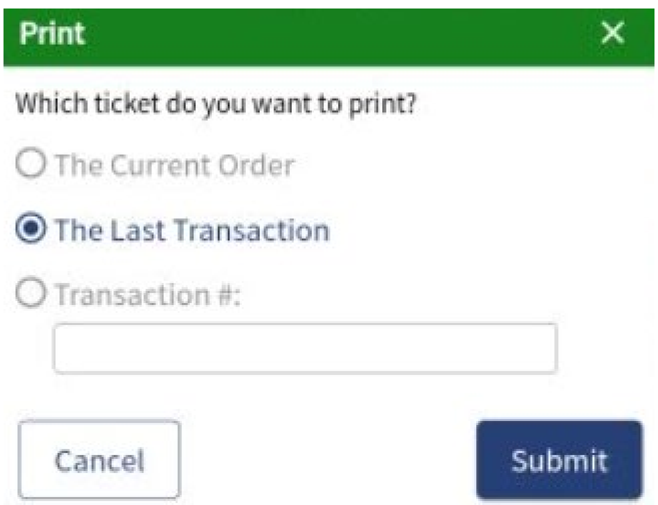
- "The Current Order"
- "The Last Transaction"
- Enter an Invoice Number to reprint that invoice

Select 

"Submit" to print

Select 

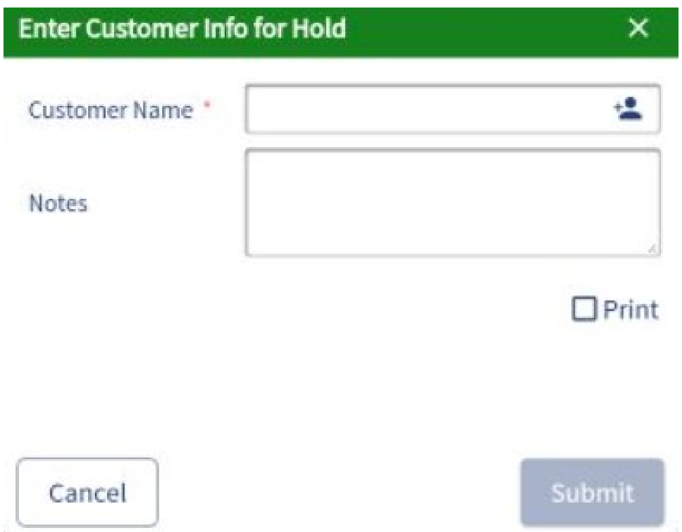
"Cancel" to go back to Sale Screen



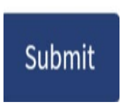
Save:

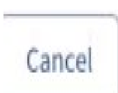
1. Select  "Sales" from Main Menu:
2. Select  "Save", to Save the shopping cart and move it to **Hold On**. [See Hold On]

Enter Customer Info for Hold Screen will appear:

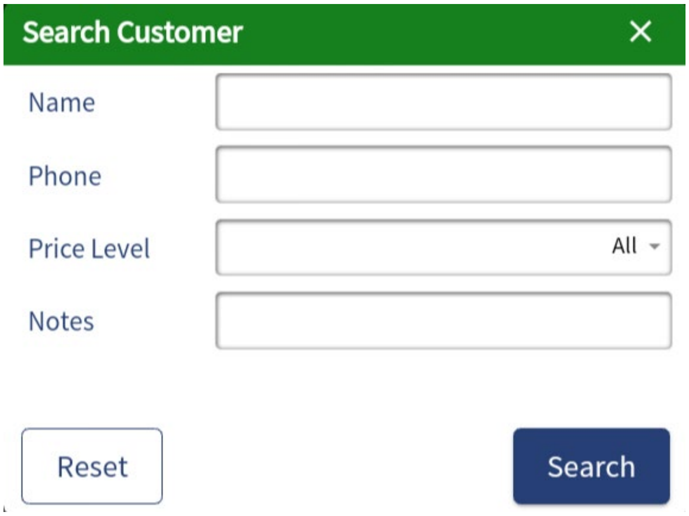


- Insert (Customer Name)
- Insert any Notes (Optional)
- Select Print (Optional)

Select  , To Proceed

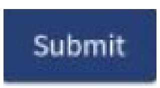
Select  , To Cancel and return to previous screen,

Select  , To Add Existing Customer to Hold, Search Customer will appear:



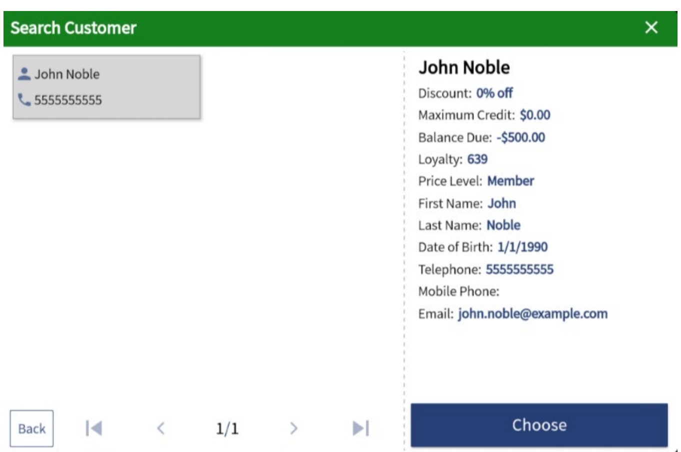
To Search Customer enter desired information into search criteria

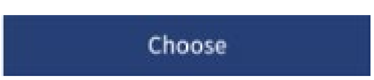
1. Name
2. Phone
3. Price Level
4. Notes

Select 

"Submit":

1. Results will return in "Search Customer" for Search criteria entered

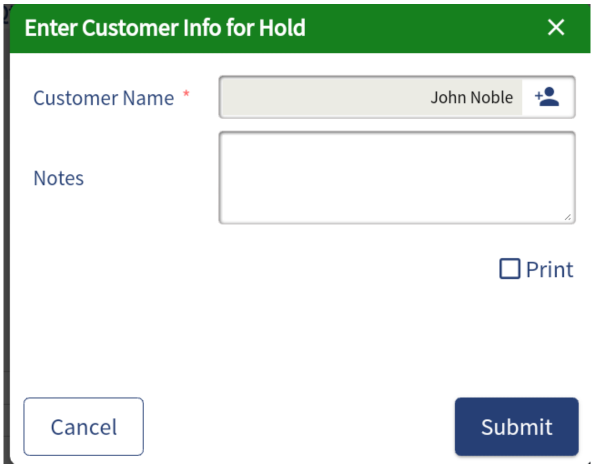


Select 

"Choose" to proceed

Optional

- Insert Notes
- Print



Add Order

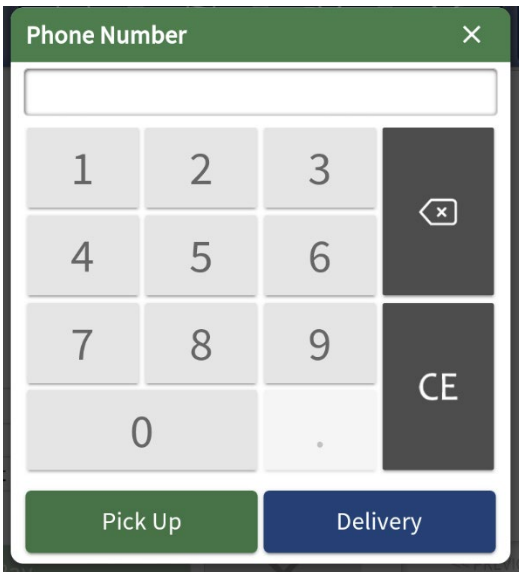
Allows a user to add an order for pick-up or delivery

Select 

then select 

or 

Note: phone number can be entered here or on the next screen, the information will carry over.



Pick Up

- Enter Phone number and Customer name
- Select pick up time
  - If Items have been entered into the shopping cart the option to save will be available.
  - If the shopping cart is empty select continue with sale
- Once order is entered, select Save to save the order to pay later

Delivery

- Enter Phone number, Customer name, delivery address
- An option to add comments or special delivery instructions is available for each order
  - If Items have been entered into the shopping cart the option to save will be available.
  - If the shopping cart is empty select continue with sale
- Once order is entered, select Save to save the order to pay later

HINT: print the receipt for easy order retrieval and to easily complete the payment

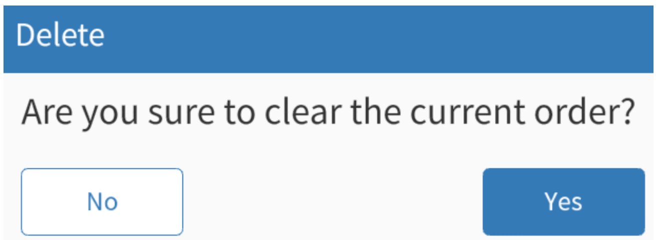
Clear

1. Select 

"Sales" from Main Menu:

2. Select 

"Clear", Clear the products in your current shopping cart.



Selecting 

"Yes" will clear cart

Selecting 

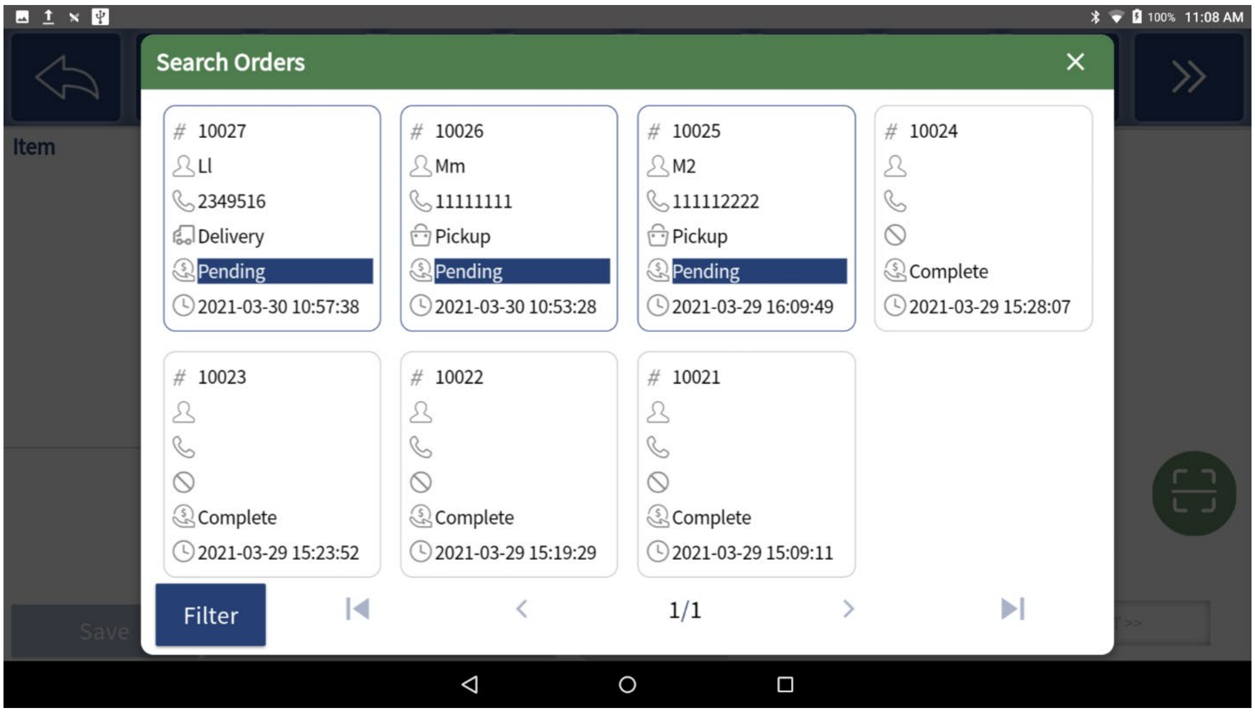
"No" will back out and products in cart will remain

Search Orders

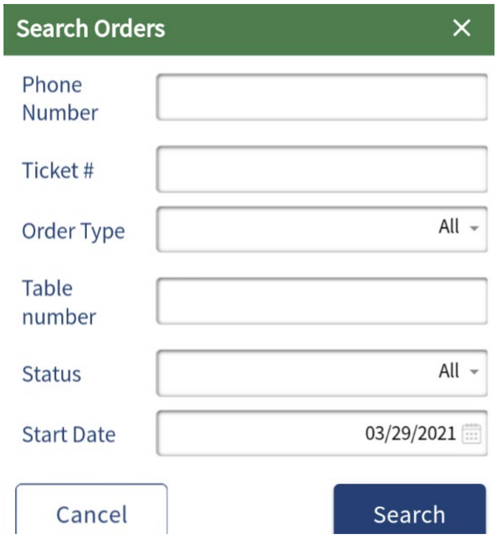
To search for saved orders select 

Select method to retrieve saved orders

- phone number
- Cancel – will return you to the Sales screen
- Scan – will activate the consumer facing camera
- OK– will take you to a search screen to select an order including completed orders



- Filter – will allow you to narrow the search by Phone number, ticket #, Order Type, Table Number, Status and/or Start date



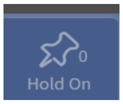
- Select any pending order will take you to the sales screen where you can edit the order or start the payment process.

HINT: For locations with multiple devices, saved orders can be retrieved from any device, but ALL devices must have synced to the cloud. If a saved order cannot be found, Sync the corresponding devices, See section on Settings.

Hold On:

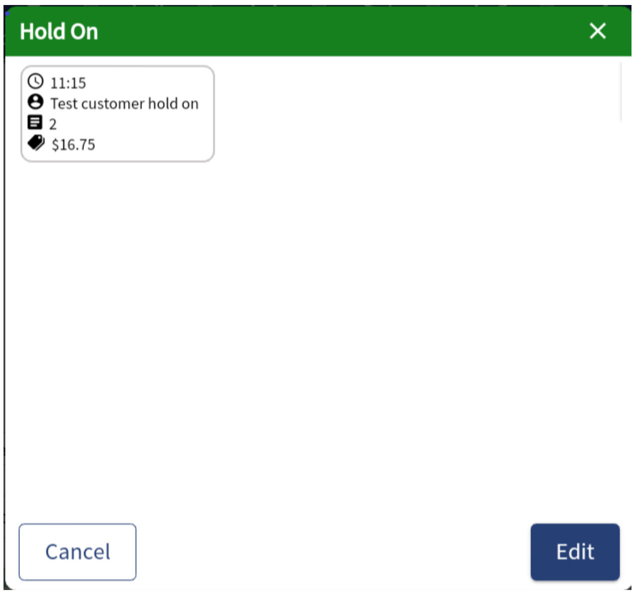
1. Select 

"Sales" from Main Menu:

2. Select 

"Hold On", Any previously saved shopping cart records will appear.

Select on a record in the list to continue with this order.



Select 

"Edit" to continue transaction

Select 

to Cancel request and exit back to Sale

Discount:

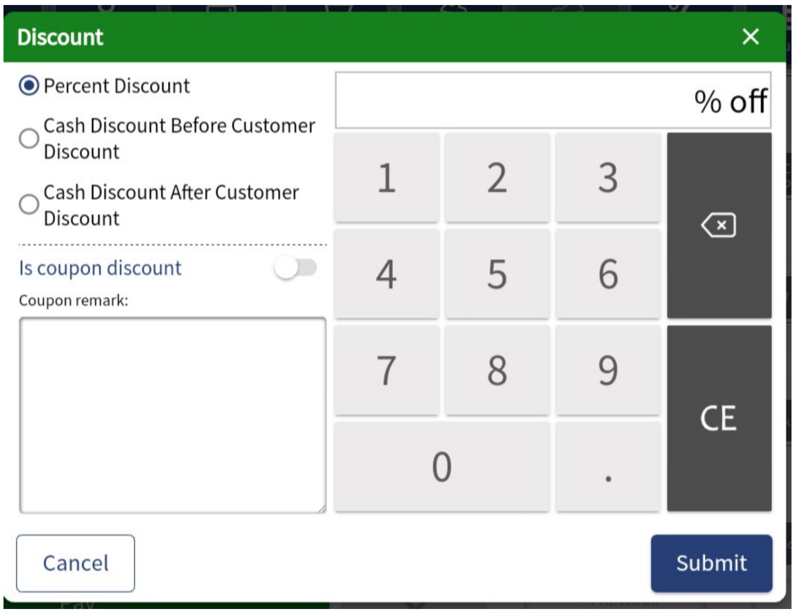
1. Select 

“Sales” from Main Menu:

2. Select 

“Discount”, Choose the appropriate discount for the current order.

Please refer to Appendix A for more about how the options on this screen affect the final price.



Select Discount Type

- Percent Discount
- Cash Discount Before Customer Discount
- Cash Discount After Customer Discount

If this a Coupon, toggle On

- Enter Amount of Discount to be provided by using Number pad

Select 

to add Discount

Select 

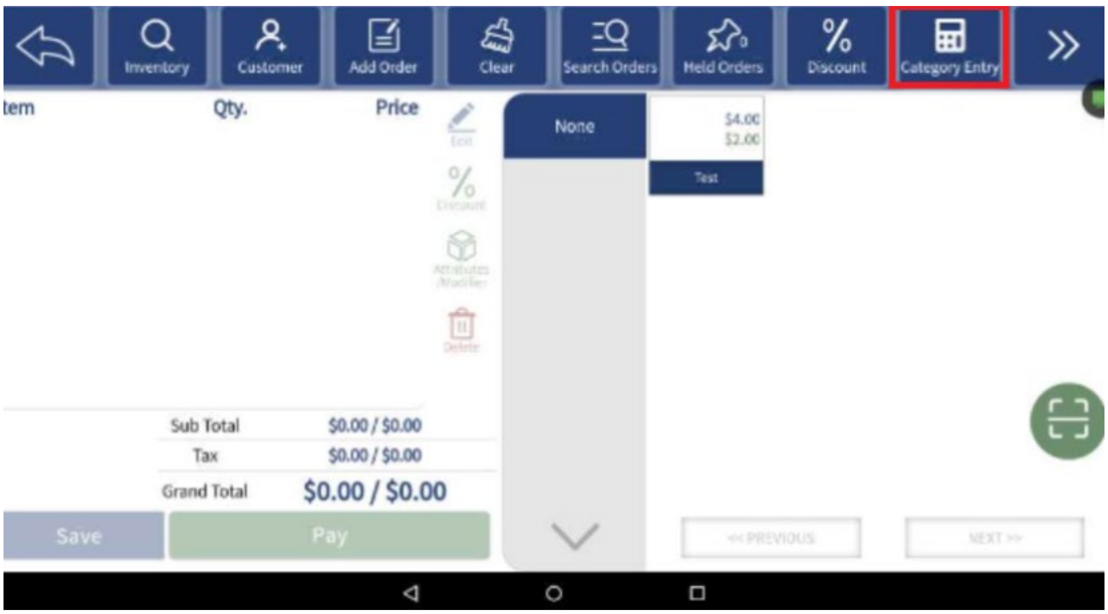
to go back to Sale Screen

Category Entry:

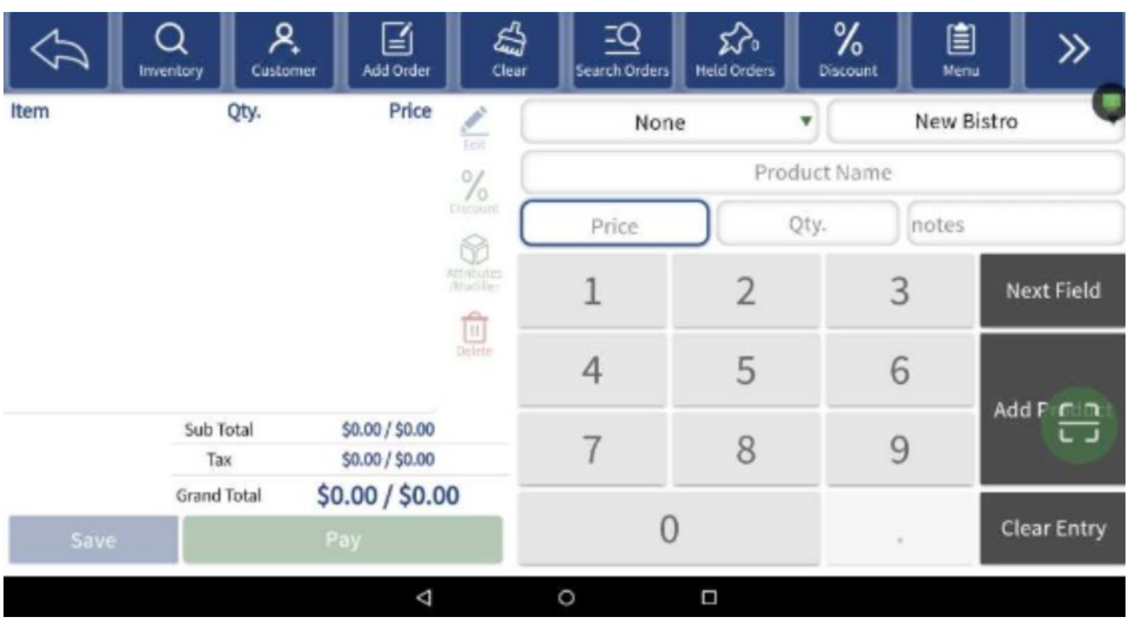
1. Select  “Sales” from Main Menu:

2. Select "Category Entry”, from the ribbon to add a new Category.

Enter



Enter the Category, Tax Category, Product Name, Price, Qty and Notes



Category Entry: Field will default to Price

- • Enter Price using keypad

To tab to Next Field Select "*Next Field*" or select on desired field to edit

- • Product Name
- • QTY
- Notes
- Select Category Using the Drop down selection in top right corner
- • Taxes: Default Tax Rate can be set. (See Tax Categories)

Once desired fields have been completed Select *"Add Product".*

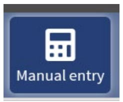
- • The product which has been created will appear in the cart.

To clear all fields, select "*Clear Entry,*", all fields will go back to default values

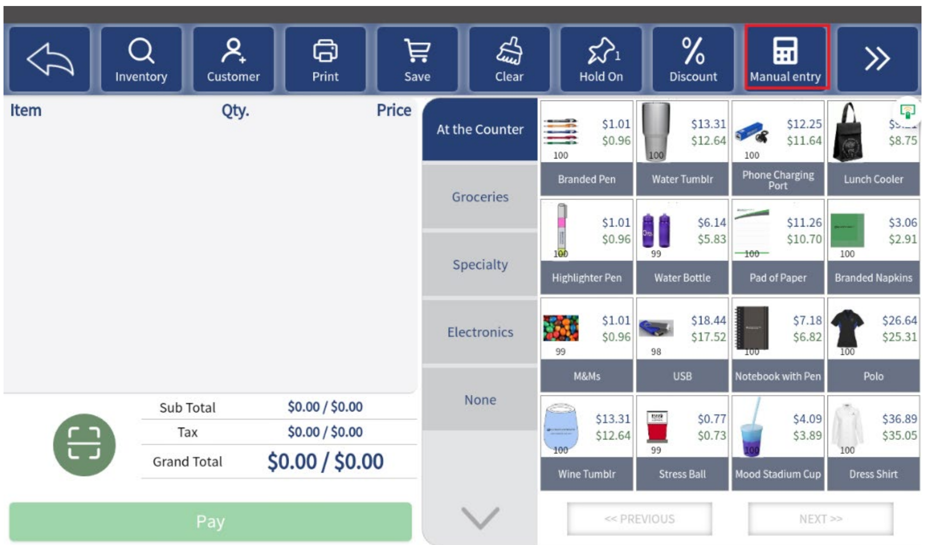
Manual Entry:

1. Select 

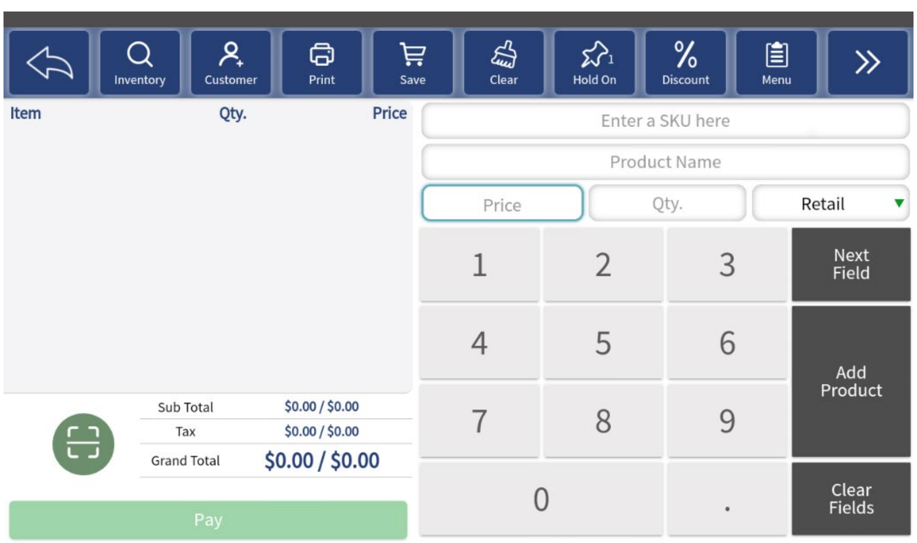
"Sales" from Main Menu:

2. Select 

"Manual Entry", from the ribbon to add products that are not displayed in the menu to the shopping cart.



Enter the SKU, Product Name, Price, Qty, and assign a Tax Category other than *Default Tax Category (ex. Retail).*



Manual Entry: Field will default to Price

- Enter Price using keypad

To tab to Next Field Select "*Next Field*" or select on desired field to edit

- SKU
- Product Name
- QTY
- Taxes: Default Tax Rate can be set. (See Tax Categories)

Once desired fields have been completed Select *"Add Product".*

- The product which has been created will appear in the cart.

To clear all fields, select "***Clear Fields,***", all fields will go back to default values.

Refund

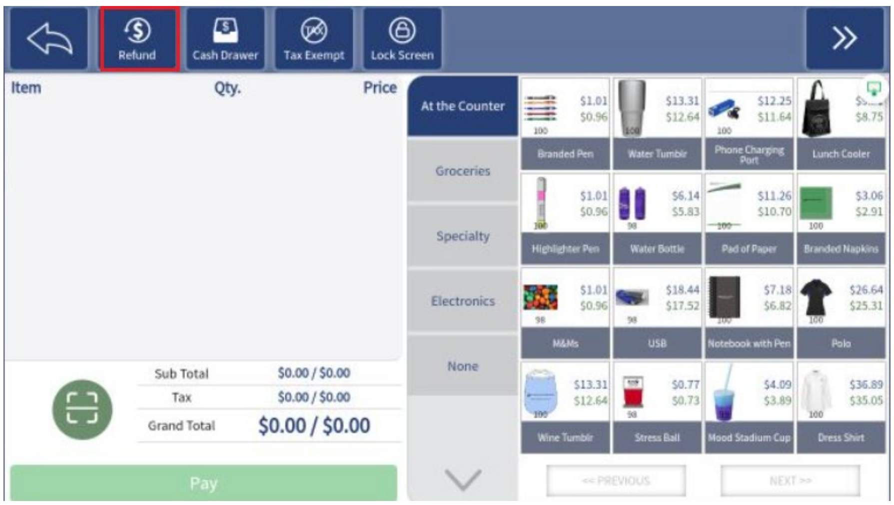
1. Select 

"Sales" from Main Menu:

2. Select 

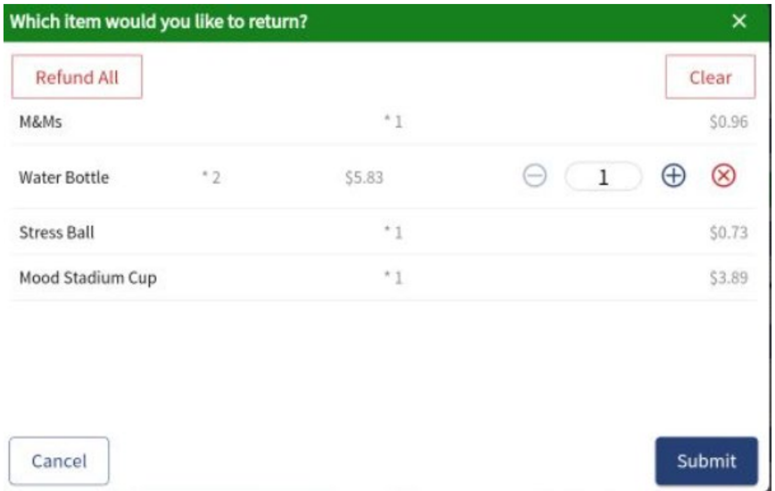
, from the ribbon to initiate Refund

When permissioned Users can complete directly from Sales Screen



Enter Transaction #:

Manually enter the invoice number and select "Submit" or use the scanner to scan the barcode of the ticket, Product selection will appear.



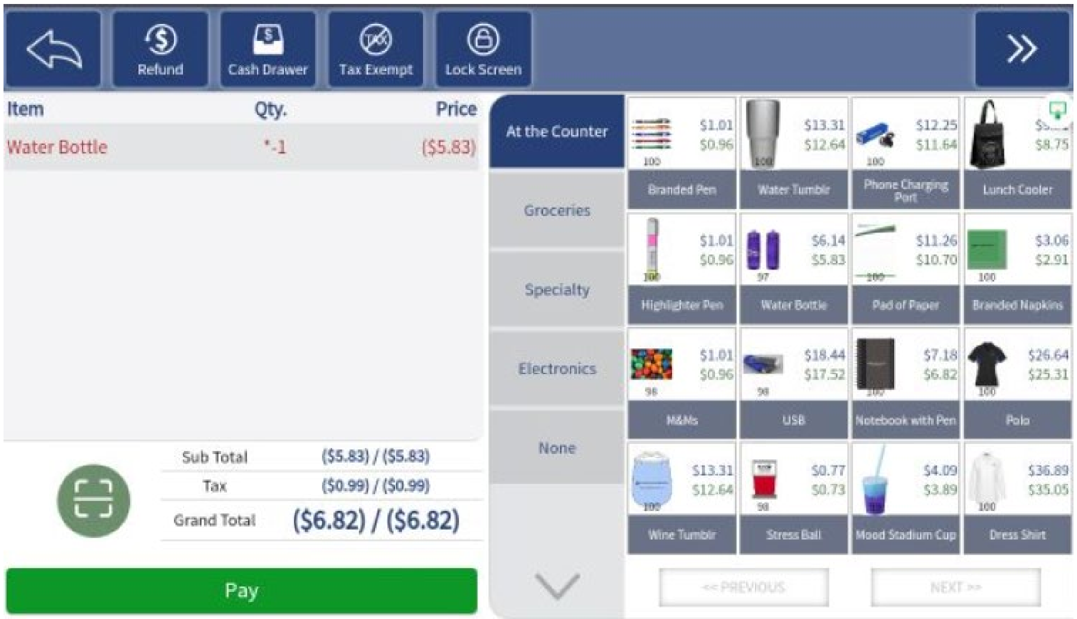
Use to increase number of that line product to be refunded

Use to decrease number of that line product to be refunded

Use to remove single line product to be refunded

After making selecting of product to be refunded, select to enter the shopping cart

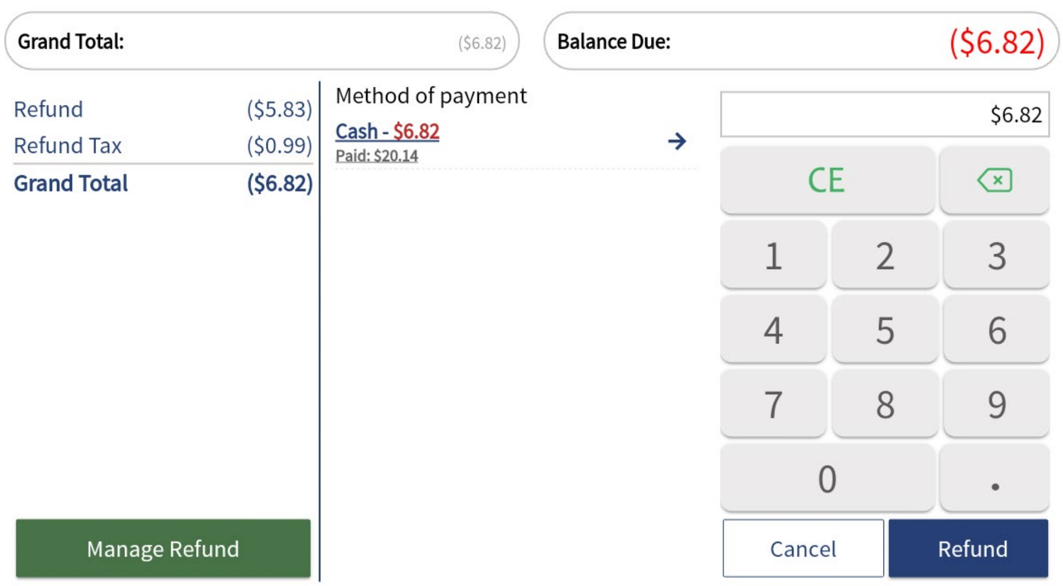
SOUNDPAYMENTS
Integration Made Easy



Choose to continue shopping or Select Pay, will refund.

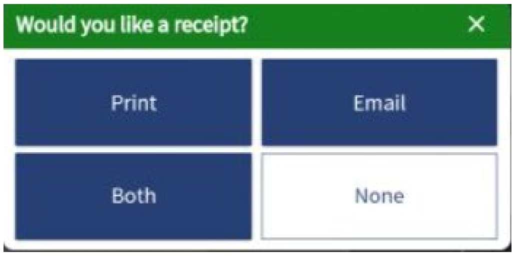
After Selecting Pay, enter the Refund payment page.

- Verify the amount is correct



Select Refund "Refund" to successfully refund.

Select Receipt Type:



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

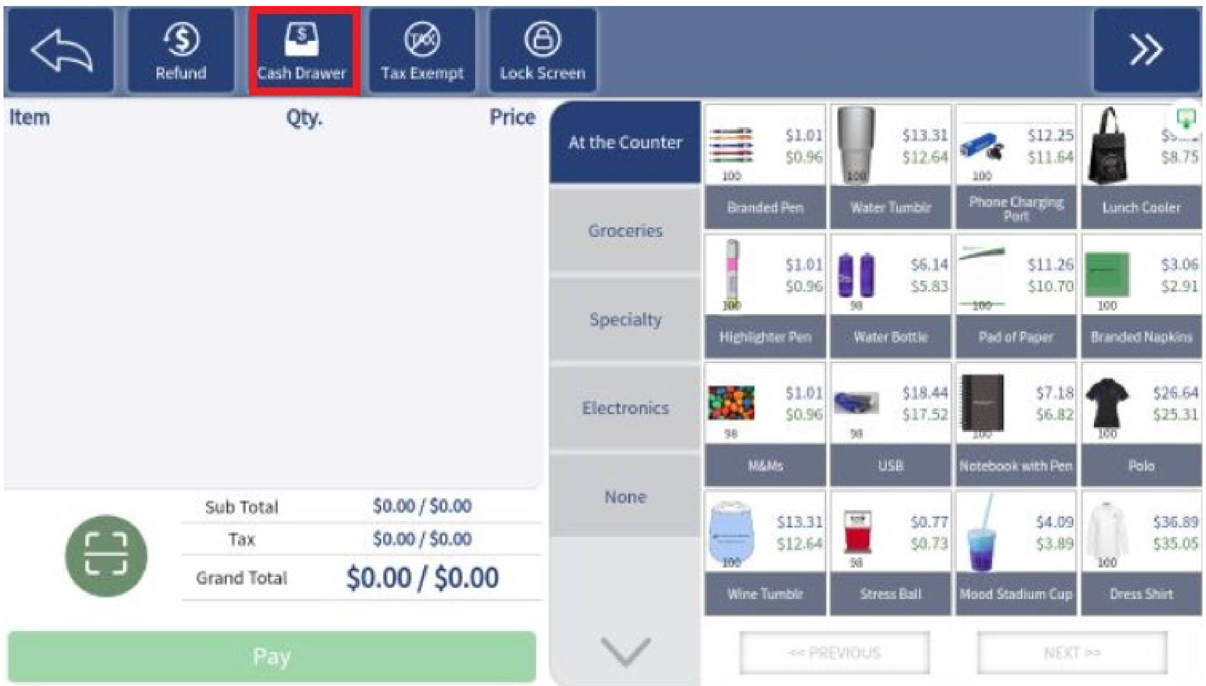
Cash Drawer:

1. Select 

“Sales” from Main Menu:

2. Select on 

, from the ribbon to open the cash drawer.



Tax Exempt:

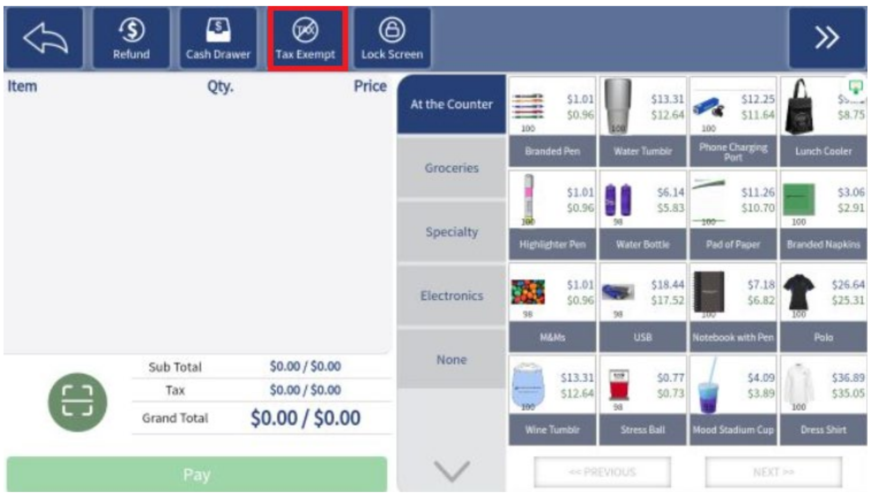
1. Select 

"Sales" from Main Menu

2. Select 

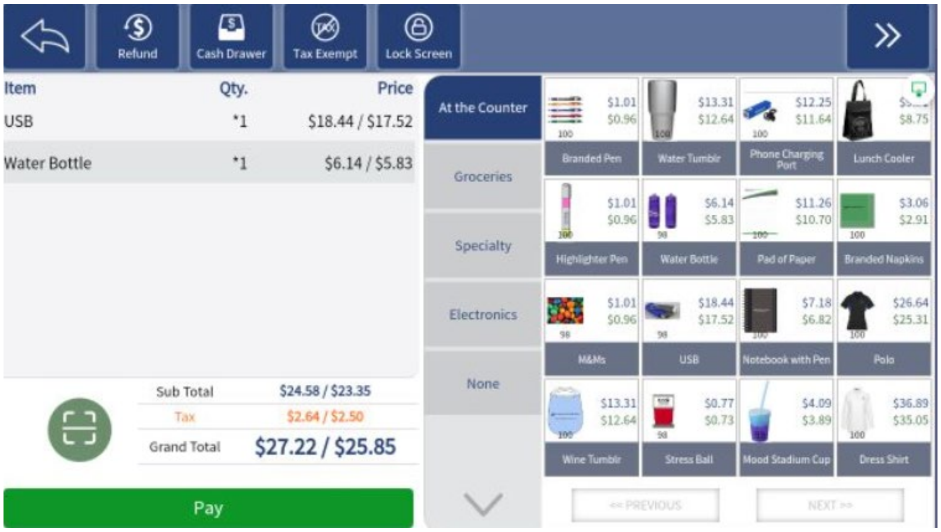
"Tax Exempt", from the ribbon, Select Tax which to exempt/ remove.

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



Then choose which tax is exempt to the current order

*Taxes color will change



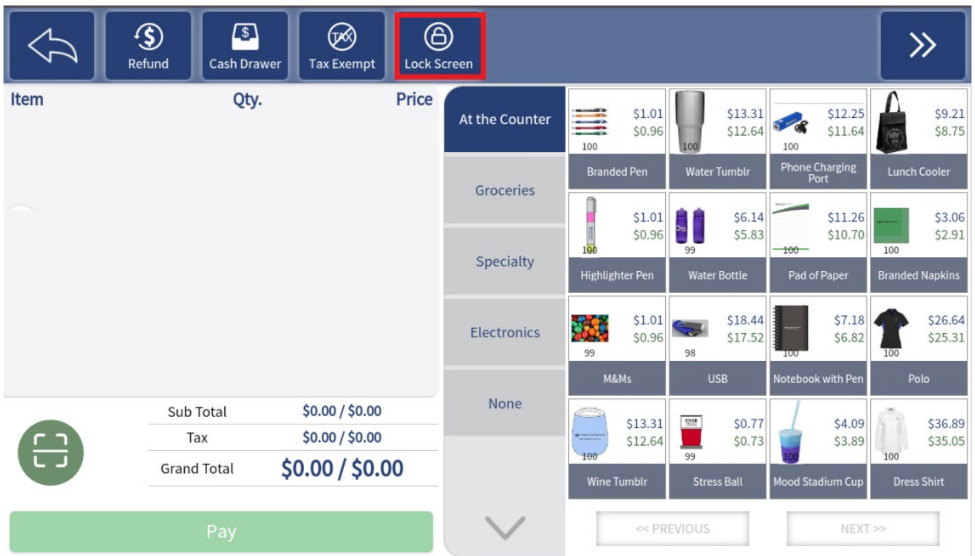
Lock Screen

1. Select 

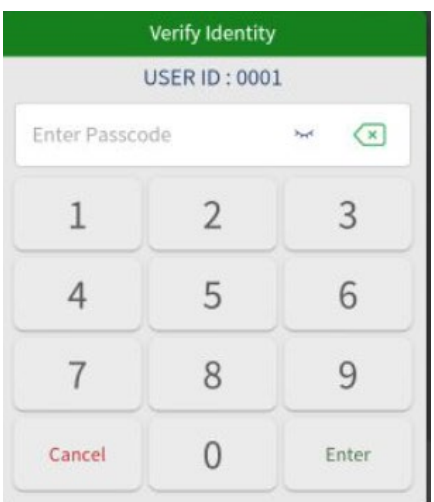
"Sales" from Main Menu

2. Select on 

to "Lock Screen", from ribbon *Only user who selected Lock Screen will be able to unlock.



...requiring password entry as shown below:



Reports:

1. Select 

“Reports” from the Main Menu

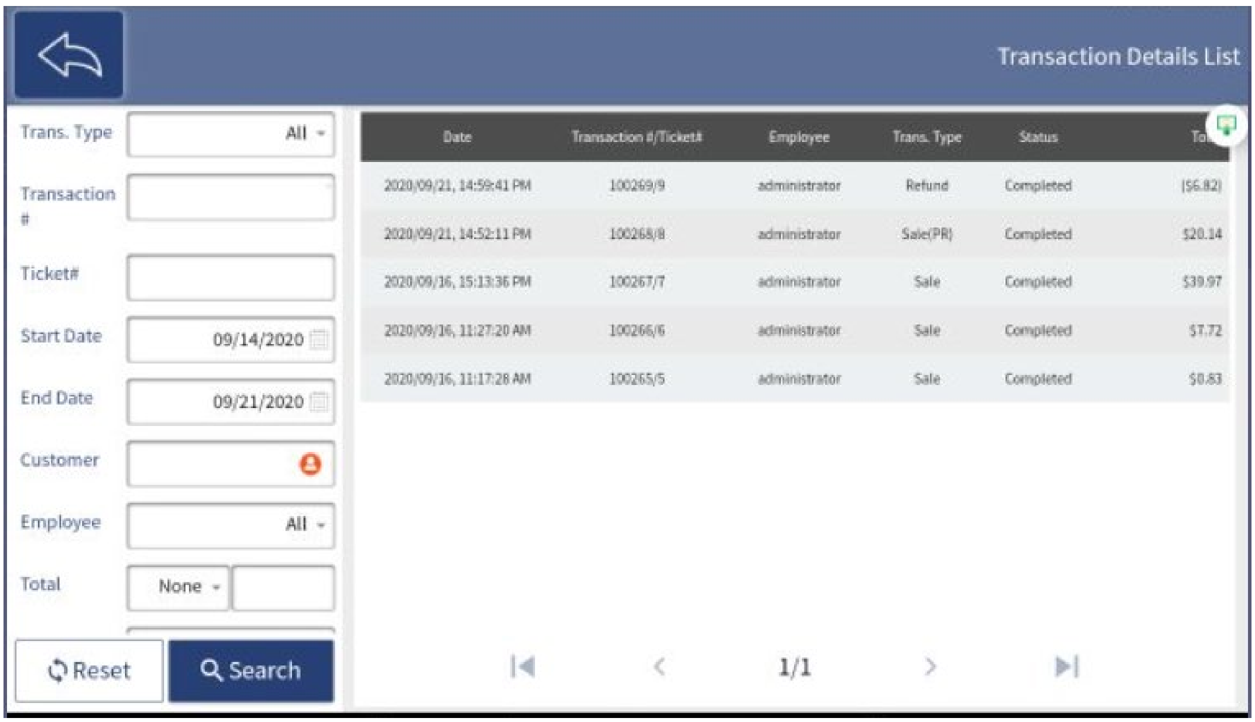
- Transaction Details: Shows the Transaction details record of the store
- Transaction Report: Shows all the Transaction records of the store, and visually see the Order Info, Item, Qty, Discount and other information of the order.
- Inventory Sales Report: Shows the inventory change records for products in the store.
- Employee Sales Report: Employee Sales Report: This page shows the employee sales record of the store.
- Customer Sales Report: Shows the customer purchase record of the store
- Sales Tax Report: Shows the tax records of the store.
- Category Report: Shows the sales reports for each category of the store.
- Payment Report: Shows Payment type collected by Employee
- Tip Report: Report provides Tip Amount by Employee
- Inventory Report: Report Provides a list of all products in inventory
- Batch Report: Report provides detail on Batches completed
- Void Report: Report provides detail on Voids performed by Employee
- Emailed Reports: Reports on any emailed reports requested

Transaction Details:

1. Select  "Reports" from Main Menu

2. Select  "Transaction Details", This report provides Transaction type, Employee, Date, Status of a transaction, and Total

Filters Available on the left side of the page



- Transaction Type
  - Sales
  - Refund
  - Sale/Refund
  - Refund/Sale
  - Sale (R)- Sale Refund
  - Sale (V)- Sale Void
  - Void
  - Sale (PR)- Partial Refund
- Transaction #

- Timeframe
  - Start Date
  - End Date
- Customer
- By employee
- Total
- Status
  - Pending
  - Completed

Select 

"Search", to Search

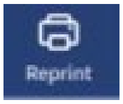
Select 

"Reset", to clear Fields

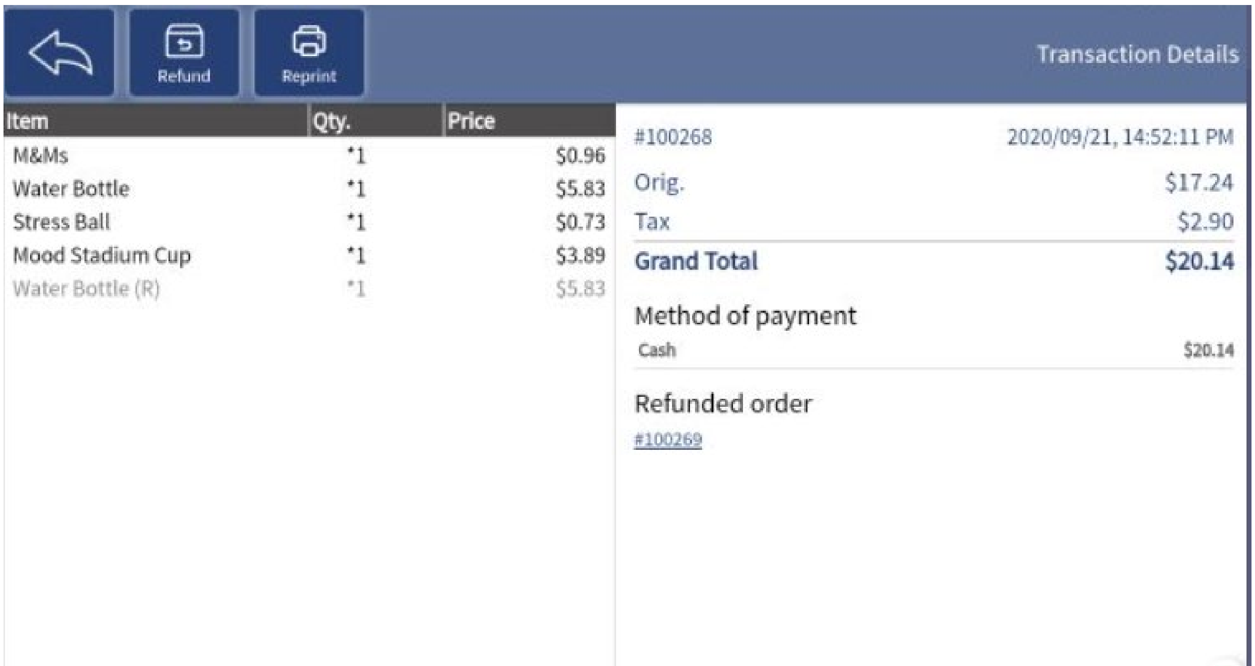
Select on a record in the list on the left to go to its details page.

Select 

"Refund", from the ribbon to refund the products in the order.

Select 

"Reprint", from the ribbon to get a copy of the selected transaction



Issue a Refund or Void from Transaction Details

1. Select 

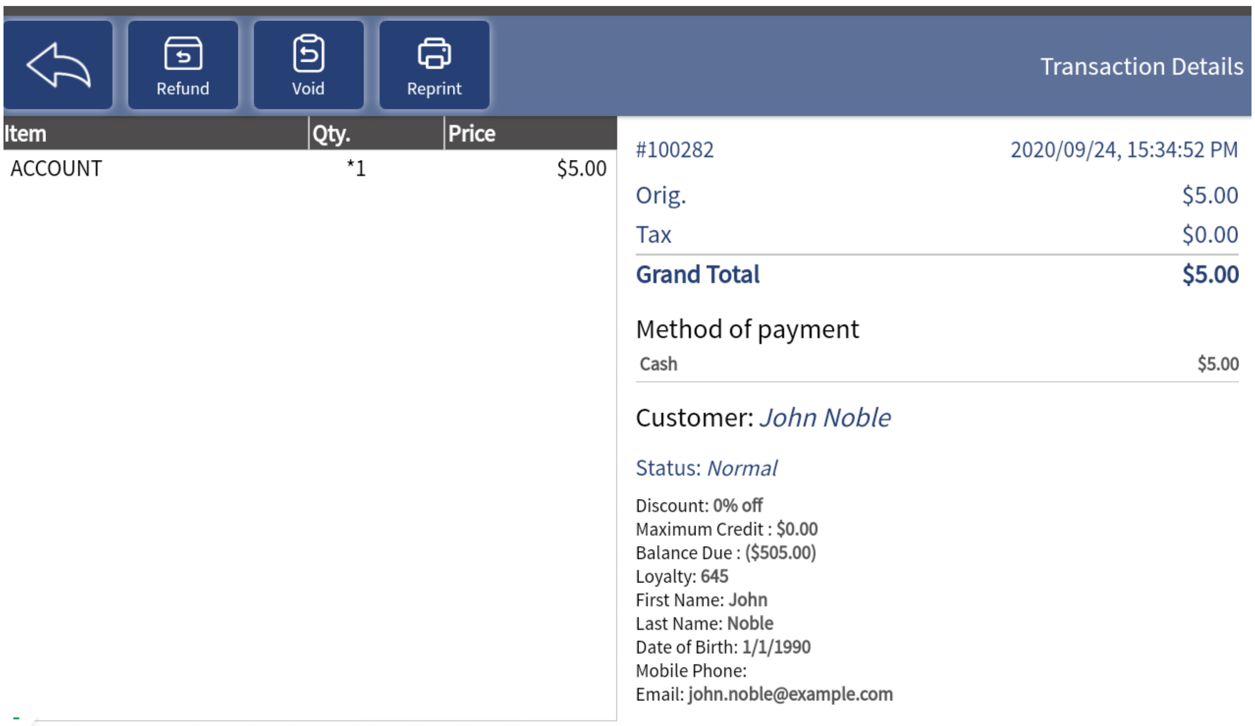
“Refund”, from the ribbon

2. Select 

“Void”, from the ribbon

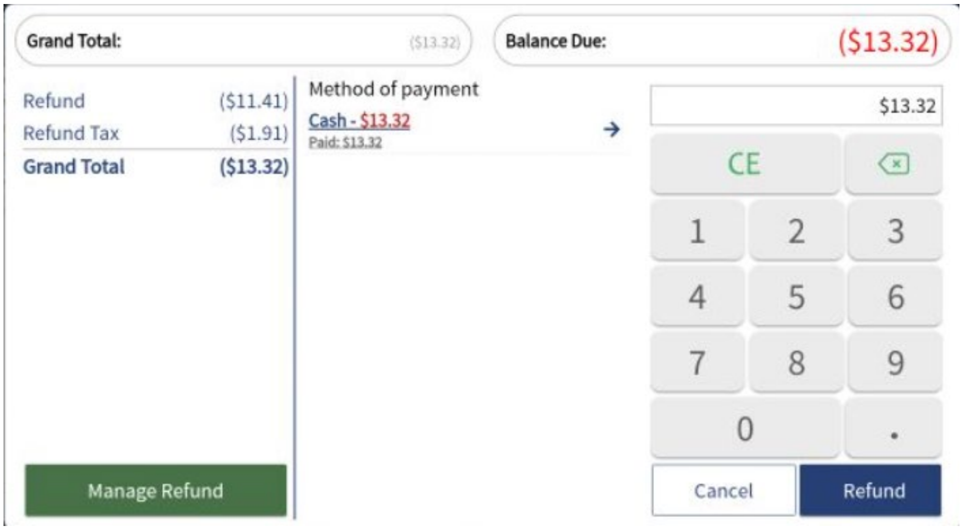
Select the item on the 

”Transaction details” report which requires a refund or Void



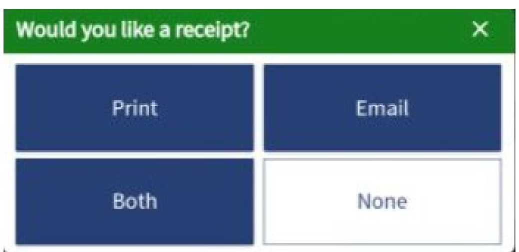
Notes:

- **Refund One:** Select one of the products rows for a refund.
- **Refund Line:** Select the products in the selected row (line) for a refund.
- **Refund All:** Select all products in the entire order for a refund.



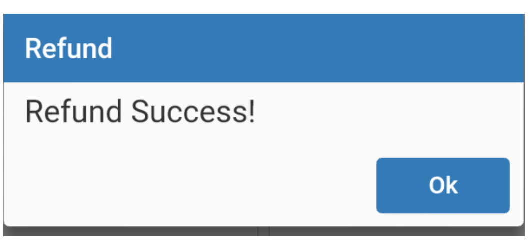
Select  "Refund"

Select Receipt Type:



- Print- Prints Receipt
- Email- Emails Receipt, will bring up Enter Email Address Screen
- Both- Will both Print, will bring up Enter Email Address Screen
- None- No Receipt

Refund successful confirmation



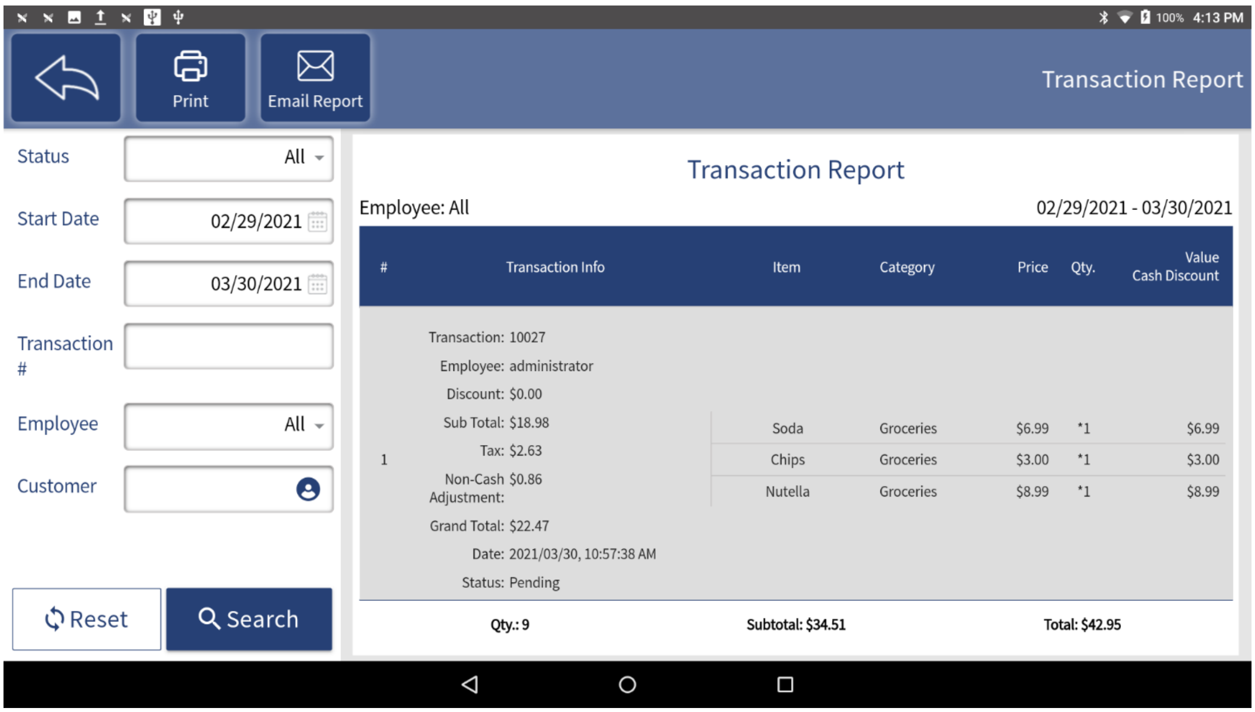
Transaction Report:

1. Select 

“Reports” from Main Menu

2. Select 

”Transaction Report”, This report provides information on Invoice number, Employee, Discounts, Sub Total, Tax, Grand Total, Sale Date and timestamp, Item, Category, Price, Qty, and Value



Filter Available: on the left side of the page

- Timeframe
  - Start Date
  - End Date
- Employee

Select 

”Search”, to Search

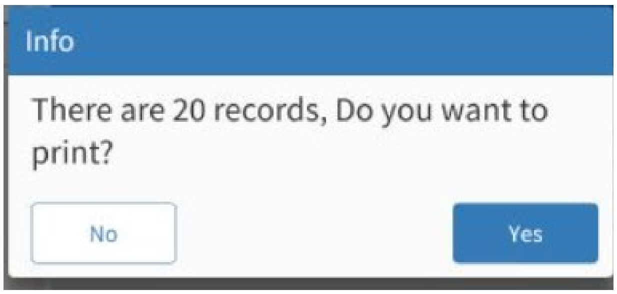
Select 

”Reset”, to clear Fields

To Print Transaction Report

Select 

"Print", from the ribbon, Info with number of records along with Print confirmation will appear
The # of Transactions will be displayed

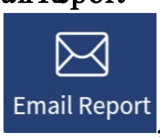


1. Select 

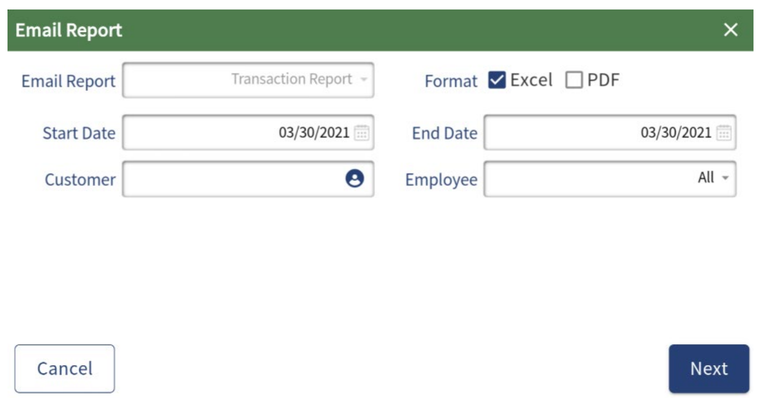
"Yes" to Print
2. Select 

"No" not to print

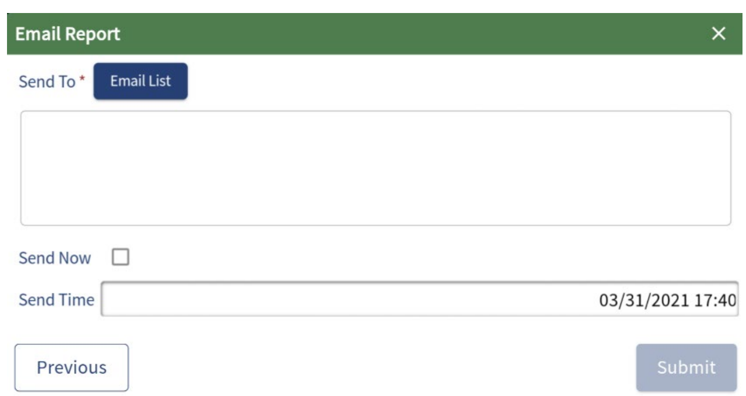
To Email Report

Select 

, from the ribbon,
select the criteria for the report, hit "Next"



enter any information for the body of the email
Select "Send Now" or unselect to schedule for a future date and time.
Select "Submit"



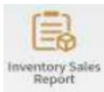
Hint: If Submit is unavailable it is because no email address has been set up, See Maintenance section for more information on how to set up an email address.

NOTE: The Transactions Report is the only report available for emailing and cannot be scheduled for recurring emails at this time.

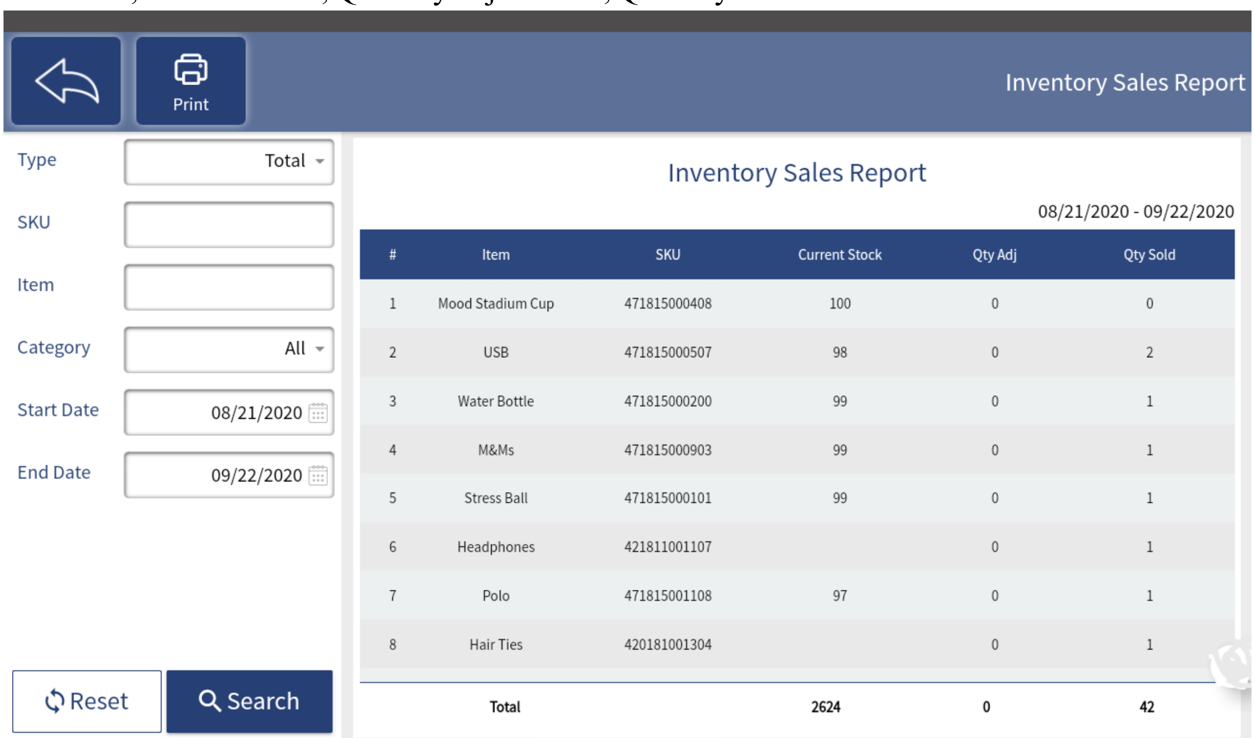
Inventory Sales Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Inventory Sales Report", This report includes information on Item, SKU, Attributes, Current Stock, Quantity Adjustment, Quantity Sold



#	Item	SKU	Current Stock	Qty Adj	Qty Sold
1	Mood Stadium Cup	471815000408	100	0	0
2	USB	471815000507	98	0	2
3	Water Bottle	471815000200	99	0	1
4	M&Ms	471815000903	99	0	1
5	Stress Ball	471815000101	99	0	1
6	Headphones	421811001107		0	1
7	Polo	471815001108	97	0	1
8	Hair Ties	420181001304		0	1
	Total		2624	0	42

Available Filters: on the left side of the page

- Type
  - Total
  - Detail
- SKU
- Item
- Category
- Timeframe
  - Start Date
  - End Date

Select 

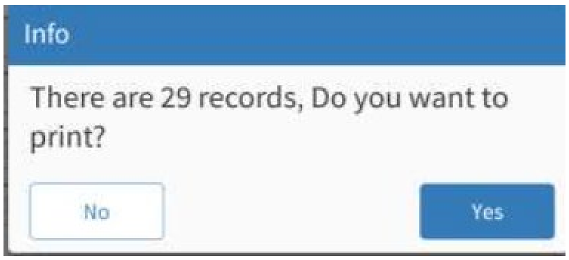
"Search", to Search

Select 

"Reset", to clear Fields

Select 

"Print", from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

Ex.

Item: <USB Mouse>
SKU: <4218110010008>
Current Stock: 100
QTYAdj: 0
QTYSold: 1

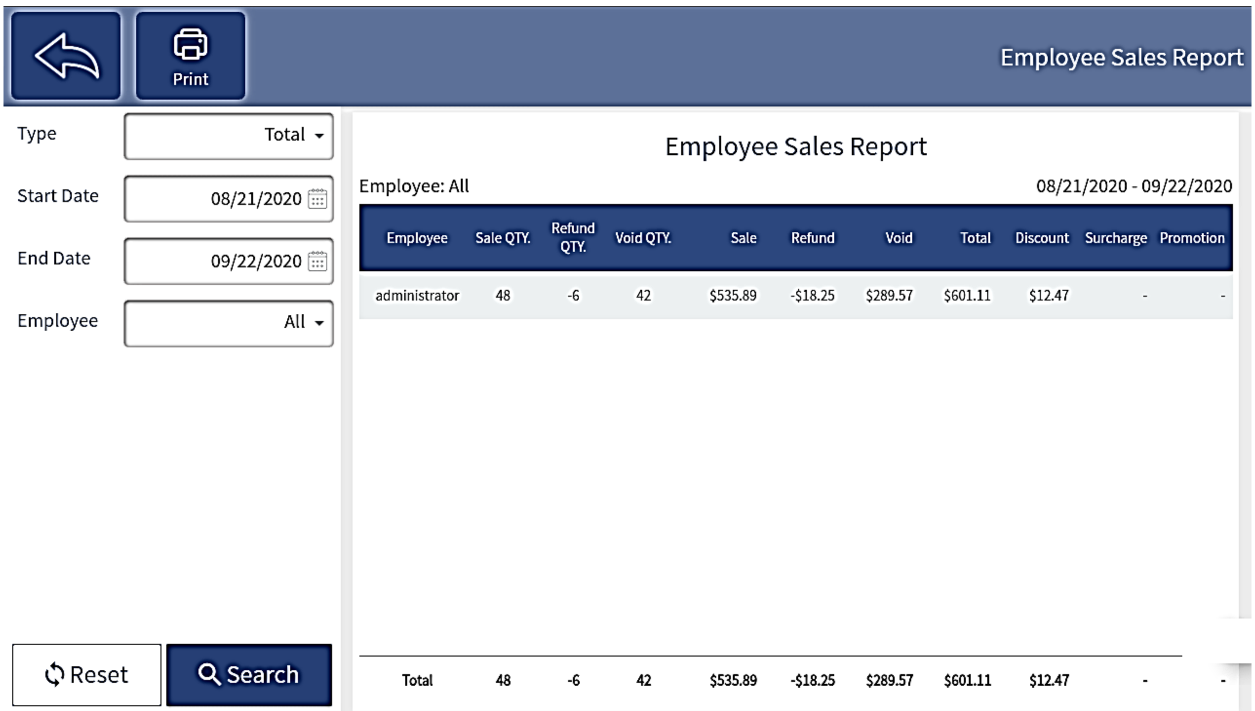
Employee Sales Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Employee Sales Report", This report includes information on Employee Sales. Sale Amount, Sale Quantity, Refunds, Discounts, and Promotions



Available Filters: on the left side of the page

- Type
  - Total
  - Detail
- Timeframe
  - Start Date
  - End Date
- Employee

Select 

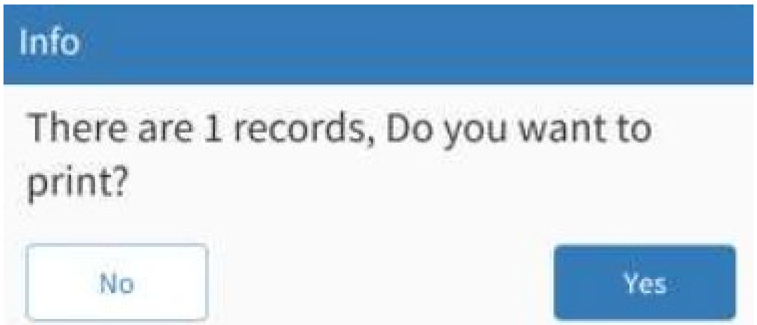
"Search", to Search

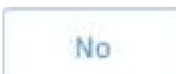
Select 

"Reset", to clear Fields

Select 

Print, from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

Employee Sales Report Example:

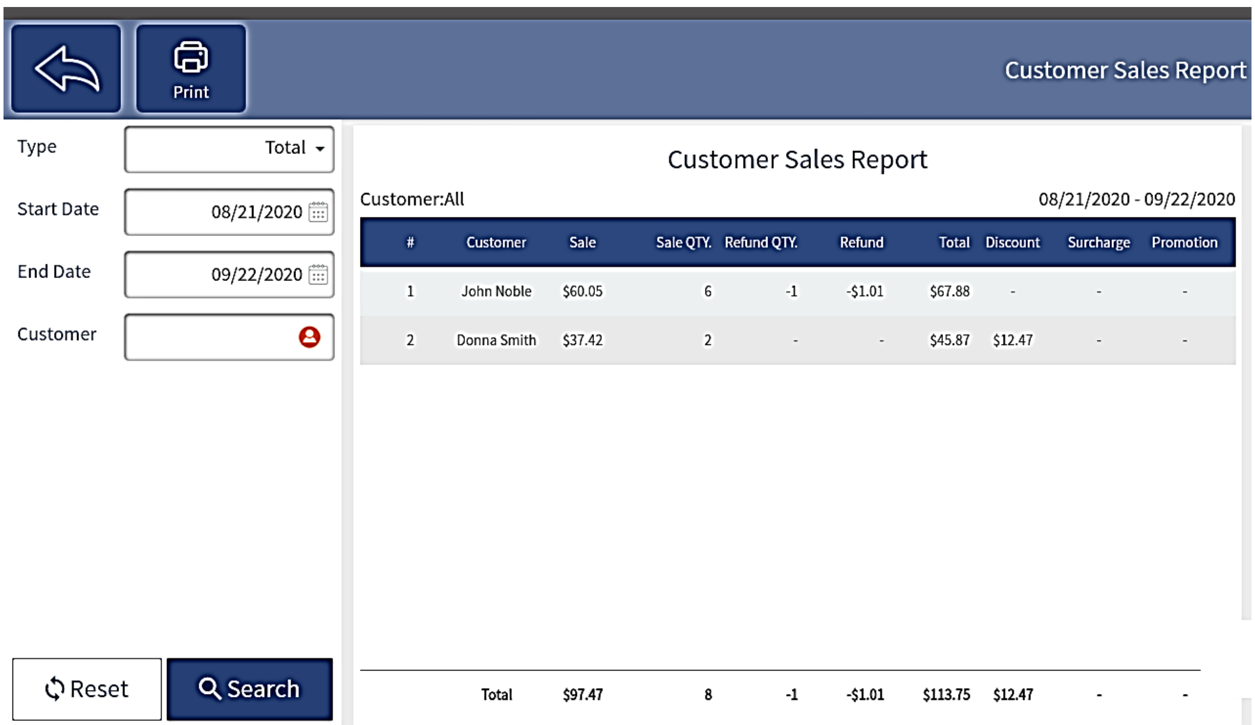
Start Date: 2020-08-21
End Date: 2020-09-22
Employee: All

Employee: Administrator
Sale QTY: 48
Refund QTY: 6
Void QTY: 0
Sale: $535.89
Refund: ($18.25)
Void: 0.00
Total: 601.11
Discount: $12.47
Surcharge
Promotion

Customer Sales Report:

1. Select  "Reports" from Main Menu

2. Select  "Customer Sales Report", This report includes information on Customer Purchases including Customer Name, Sale Amount, Sale Quantity, Refund, Discounts, Promotions.



#	Customer	Sale	Sale QTY.	Refund QTY.	Refund	Total	Discount	Surcharge	Promotion
1	John Noble	$60.05	6	-1	-$1.01	$67.88	-	-	-
2	Donna Smith	$37.42	2	-	-	$45.87	$12.47	-	-
	Total	$97.47	8	-1	-$1.01	$113.75	$12.47	-	-

Available Filters: on the left side of the page

- Type
  - Total
  - Detail
- Timeframe
  - Start Date
  - End Date
- Customer

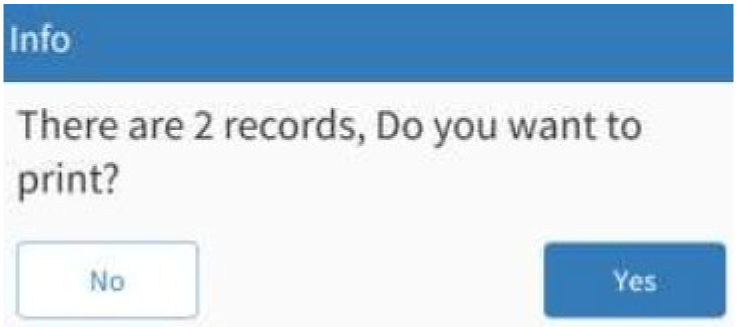
Select  "Search", to Search

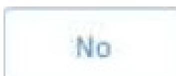
Select 

"Reset", to clear Fields

Select 

"Print", from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

Customer Sales Report Example.

Customer: John Noble

- Sale: $60.00
- Sale QTY: 6
- Refund QTY: 1
- Refund: (1.01)
- Total: $67.88
- Discount: $0.00
- Surcharge: $0.00
- Promotion: $0.00

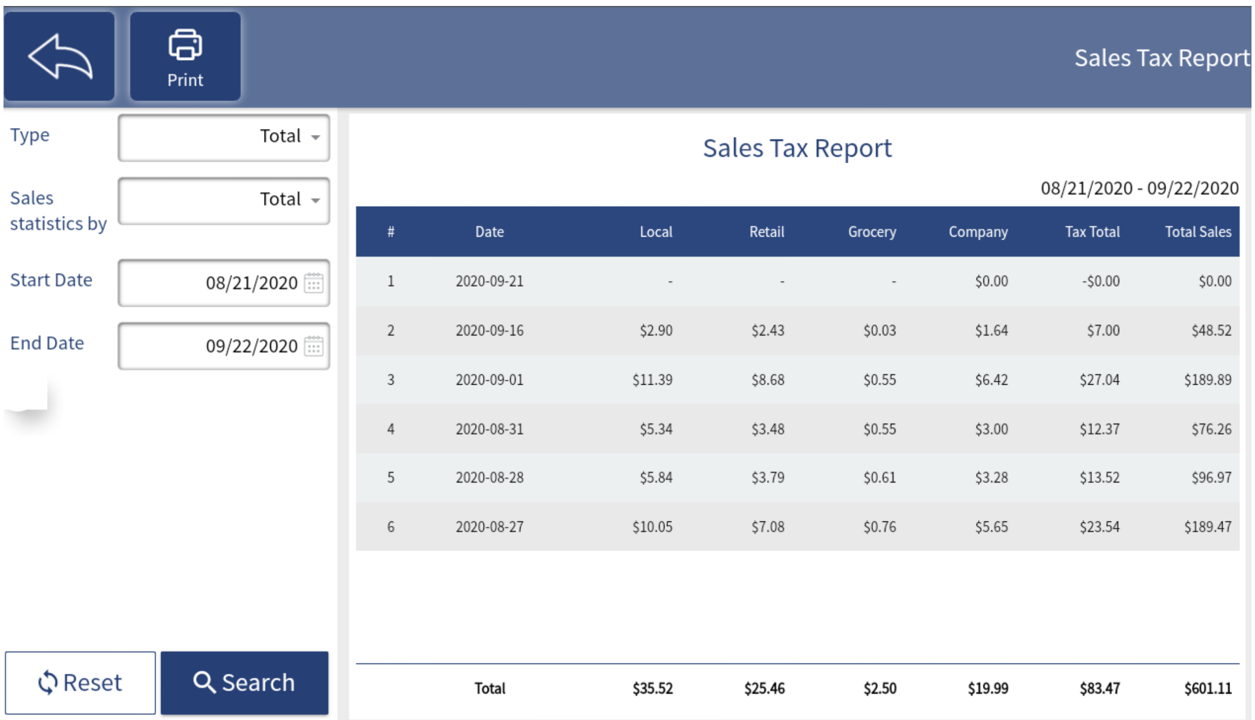
Sales Tax Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Sales Tax Report", This report includes all Sales Taxes Collected. Included in the report are Date, All Tax Categories Total Taxes Collected, Total Sales



#	Date	Local	Retail	Grocery	Company	Tax Total	Total Sales
1	2020-09-21	-	-	-	$0.00	-$0.00	$0.00
2	2020-09-16	$2.90	$2.43	$0.03	$1.64	$7.00	$48.52
3	2020-09-01	$11.39	$8.68	$0.55	$6.42	$27.04	$189.89
4	2020-08-31	$5.34	$3.48	$0.55	$3.00	$12.37	$76.26
5	2020-08-28	$5.84	$3.79	$0.61	$3.28	$13.52	$96.97
6	2020-08-27	$10.05	$7.08	$0.76	$5.65	$23.54	$189.47
	Total	$35.52	$25.46	$2.50	$19.99	$83.47	$601.11

Available Filters: on the left side of the page

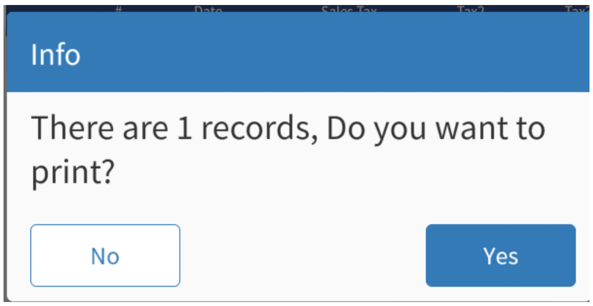
- Type
  - Total
  - Detail
- Sales statistics by
  - Total
  - Taxes
- Timeframe
  - Start Date
  - End Date

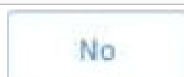
Select  "Search", to Search

Select  "Reset", to clear Fields

Sales Tax Report Print Info Screen:

Select  "Print", from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select  "No"

To **Submit** select  "Yes

Ex Sales Tax Total Report

<Date/Time>

Start Date: 2020-06-24

End Date: 2020-09-24

Date: 2020-09-24

Local: $14.62

Retail: $12.47

Grocery: $0.03

Company: $8.24

Tax Total: $35.36

Total Sales: $249.32

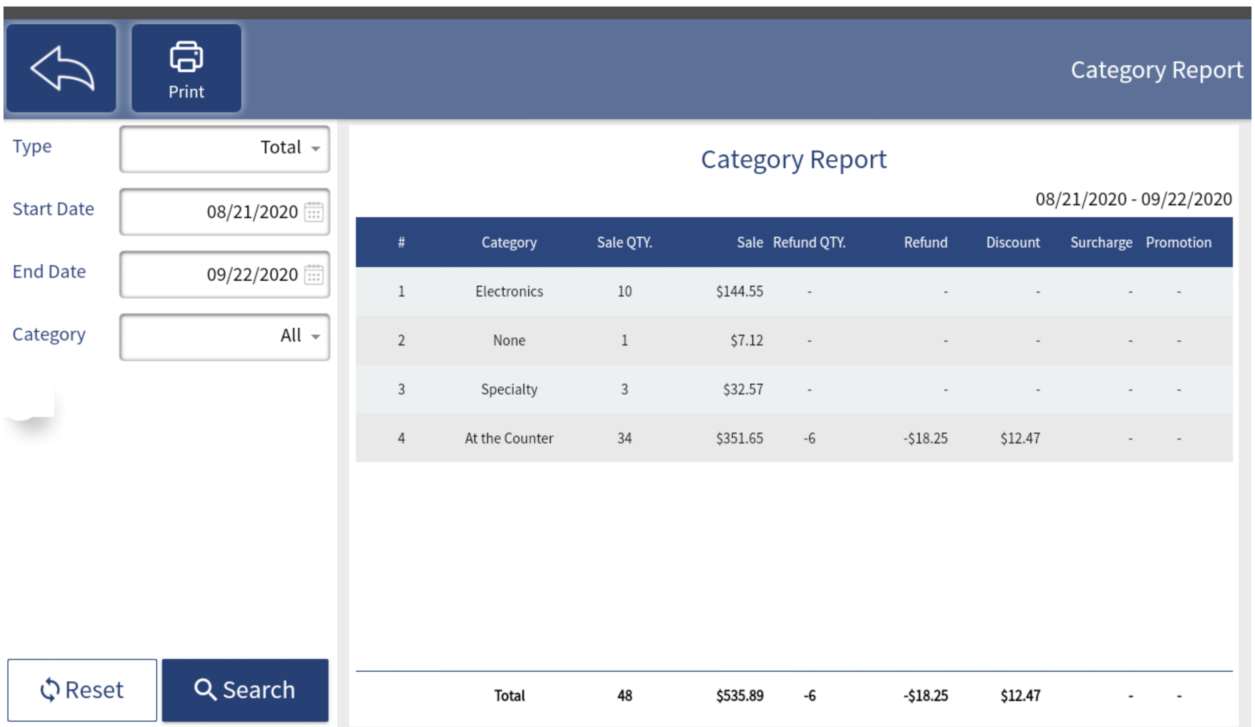
Category Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Category Report", This report provides all Category within given timeframe by employee along with information about Transaction number, voided by, Item, Price, Quantity, Username.



#	Category	Sale QTY.	Sale	Refund QTY.	Refund	Discount	Surcharge	Promotion
1	Electronics	10	$144.55	-	-	-	-	-
2	None	1	$7.12	-	-	-	-	-
3	Specialty	3	$32.57	-	-	-	-	-
4	At the Counter	34	$351.65	-6	-$18.25	$12.47	-	-
	Total	48	$535.89	-6	-$18.25	$12.47	-	-

Available Filters: on the left side of the page:

1. Type
    a. Total
    b. Detail
2. Timeframe
    a. Start Date
    b. End Date
3. Category

Select 

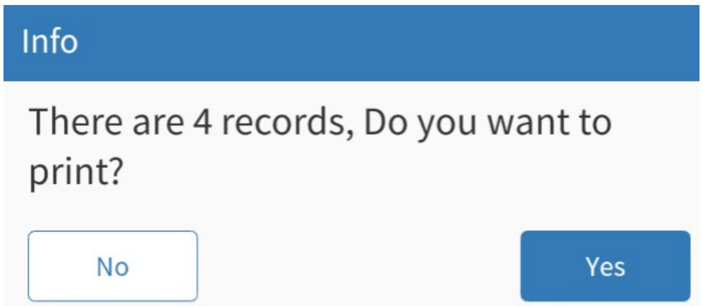
"Search", to Search

Select 

"Reset", to clear Fields

Select 

"**Print",** from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

Category Total Report Example:09-22-2020- 13:56:22
Start Date 2020-08-11
End Date 2020-09-22
Category: All

Category: Electronics
Sale: 10
Refund QTY: 0
Refund $0.00
Discount $0.00
Surcharge $0.00
Promotion $0.00

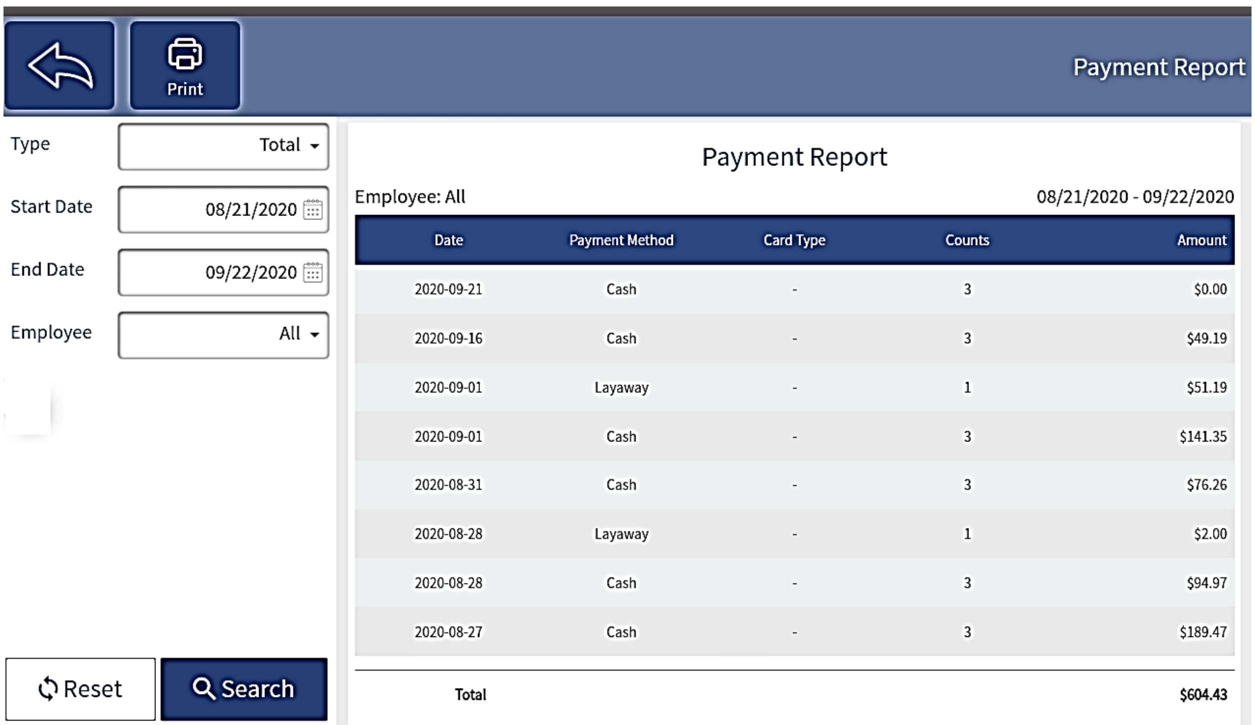
Payment report:

1. Select 

"Reports" from Main Menu

2. Select 

"Payment Report", This report Provides Total or Detail information for timeframe by employee information, which is available in this report includes Date, Payment Method, Card Type, Count, and Amount.



Available Filters: on the left side of the page:

- Type
  - Total
  - Detail
- Timeframe
  - Start Date
  - End Date
- Employee

Select 

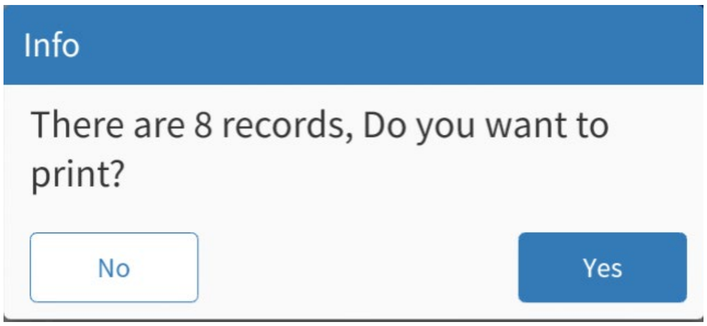
"Search", to Search

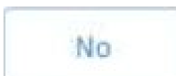
Select 

”Reset”, to clear Fields

Select 

”Print”, from the ribbon Info with number of records along with Print confirmation will appear.



To **Cancel** select 

”No”

To **Submit** select 

“Yes

Payment Report Example:

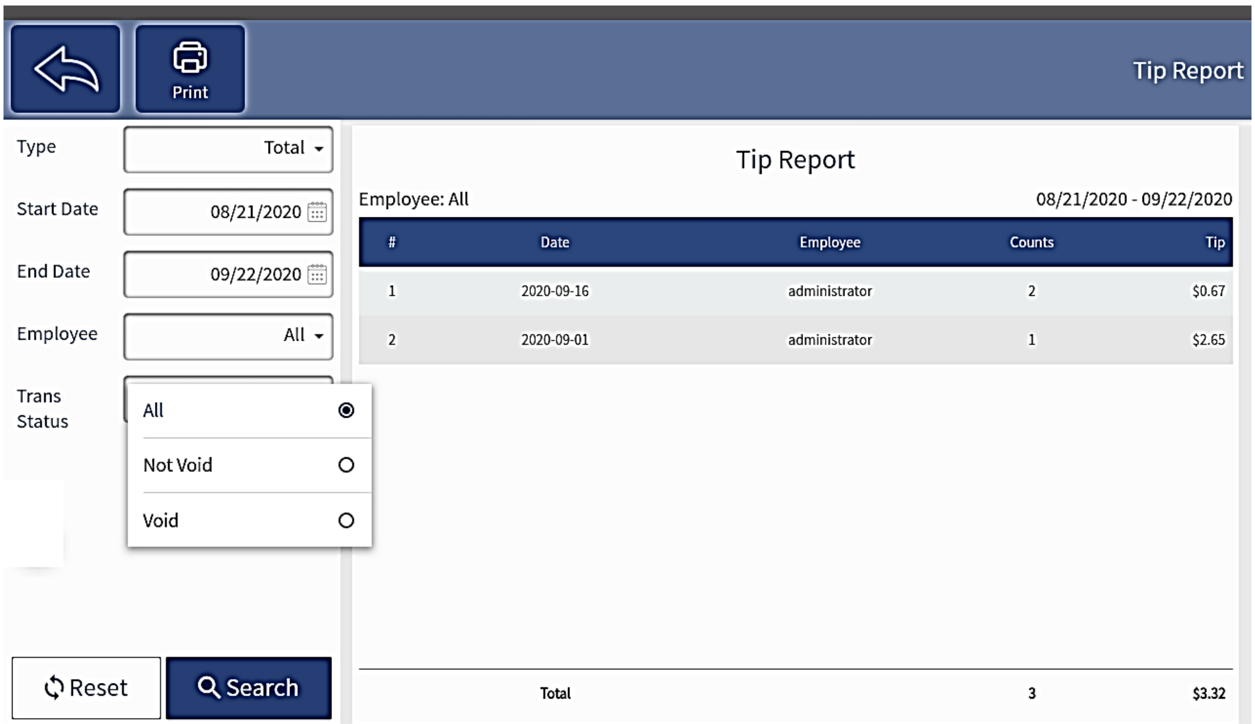
09-22-2020 13:30:01
Start Date: 2020-08-21
End Date: 2020-09-22
Employee: All

Date: 2020-09-01
Pay Method: Credit
Card Type: Visa
Counts: 1
Amount: $51.00

Tip Report:

1. Select  "Reports" from Main Menu

2. Select  "Tip Report", This report provides Total or Detail information for timeframe by employee and Transaction status. Along with Tip amount.



Available Filters: on the left side of the page:

- Type
  - Total
  - Detail
- Timeframe
  - Start Date
  - End Date
- Employee
- Transaction Status
  - Not Void
  - Void

Select 

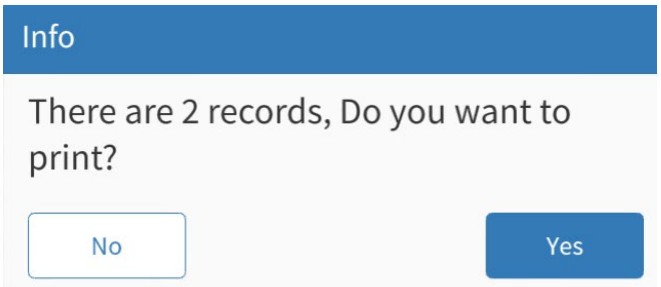
"Search", to Search

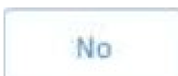
Select 

"Reset", to clear Fields

Select 

"Print", from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

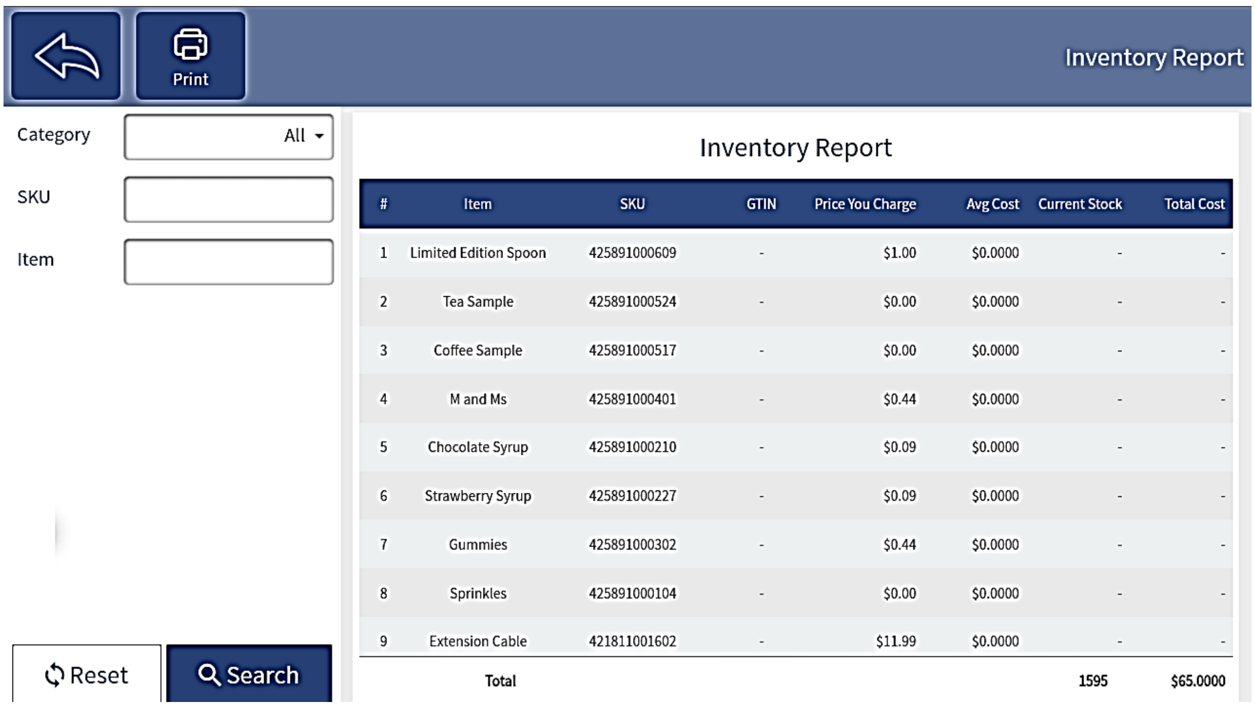
Inventory Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Inventory Report", This report provides information by Category, SKU, Item. For all items in inventory.



#	Item	SKU	GTIN	Price You Charge	Avg Cost	Current Stock	Total Cost
1	Limited Edition Spoon	425891000609	-	$1.00	$0.0000	-	-
2	Tea Sample	425891000524	-	$0.00	$0.0000	-	-
3	Coffee Sample	425891000517	-	$0.00	$0.0000	-	-
4	M and Ms	425891000401	-	$0.44	$0.0000	-	-
5	Chocolate Syrup	425891000210	-	$0.09	$0.0000	-	-
6	Strawberry Syrup	425891000227	-	$0.09	$0.0000	-	-
7	Gummies	425891000302	-	$0.44	$0.0000	-	-
8	Sprinkles	425891000104	-	$0.00	$0.0000	-	-
9	Extension Cable	421811001602	-	$11.99	$0.0000	-	-
	Total					1595	$65.0000

Available Filters: on the left side of the page:

- Category
- SKU
- Item

Select 

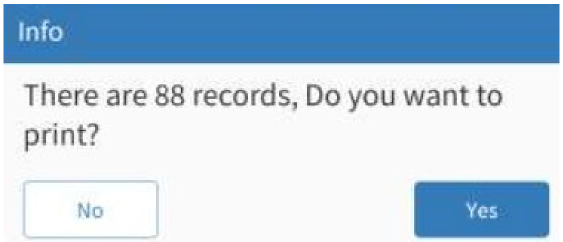
"Search", to Search

Select 

"Reset", to clear Fields

Select 

"Print", from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

"No"

To **Submit** select 

"Yes

Inventory Report Example

Category: All

Item: Tea Sample
SKU: 42589100524
GTIN:
Price You Charge: $5.00
Avg Cost: $0.75
Current Stock: 100
Total Cost: $0.75

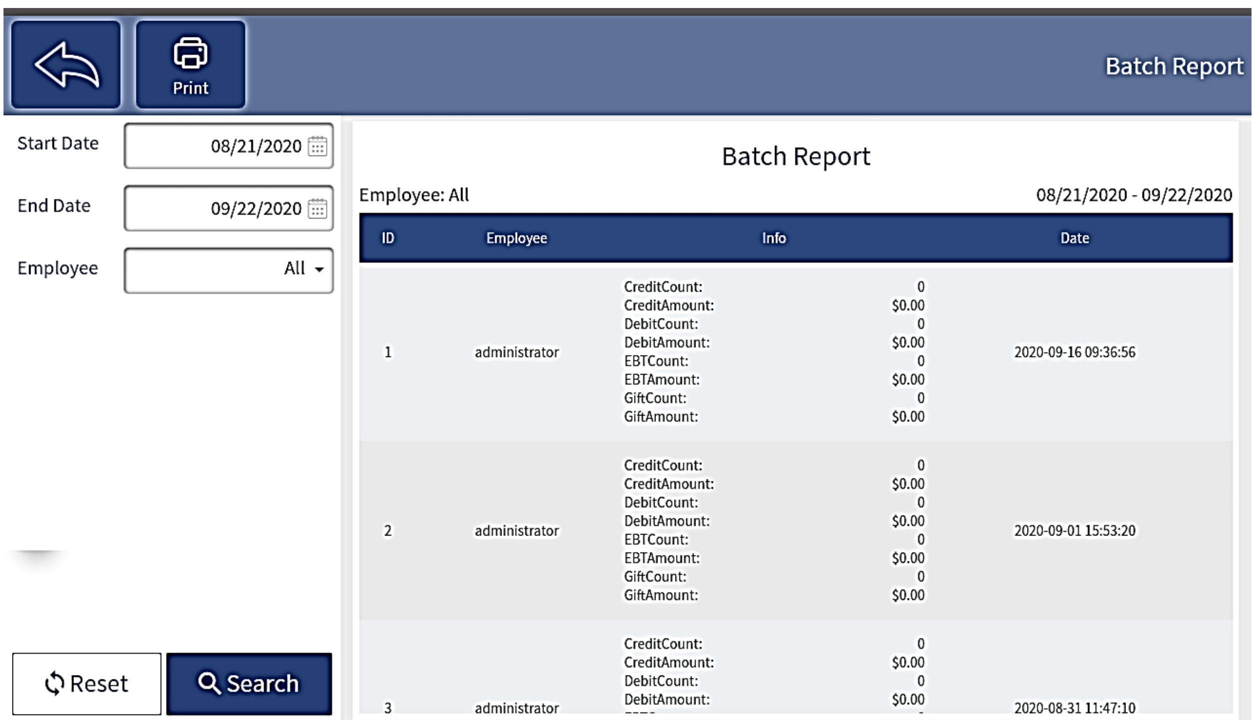
Batch Report:

1. Select 

"**Reports**" from Main Menu

2. Select 

"**Batch Report**", This report provides all batches within given timeframe by employee along with information about Transactions Count, Transaction Amount, Debit Count, Debit Amount, Gift Card Count Gift Card Amount, and Date.



Available Filters: on the left side of the page:

- Timeframe
  - Start Date
  - End Date
- Employee

Select 

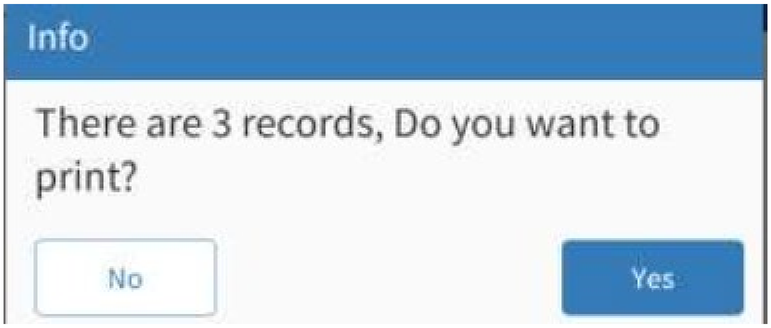
"Search", to Search

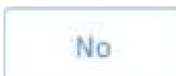
Select 

"Reset", to clear Fields

Select 

”Print”, from the ribbon Info with number of records along with Print confirmation will appear



To **Cancel** select 

”No”

To **Submit** select 

“Yes

Batch Report Example:

Start Date:
End Date:
Employee

ID:	11
Employee:	Administrator
	Credit Count: Credit Count :2
Info	Credit Amount: Credit Amount: $5.00
	Debit Count: 0Debit Count: 0
	Debit Amount: $0.00Debit Amount: $0.00
	EBT Count: 0EBT Count: 0
	EBT Amount: $0.00EBT Amount: $0.00
	Gift Count: 0Gift Count: 0
	Gift Amount: $0.00Gift Amount: $0.00
Date	2020-09-16-09:36:56

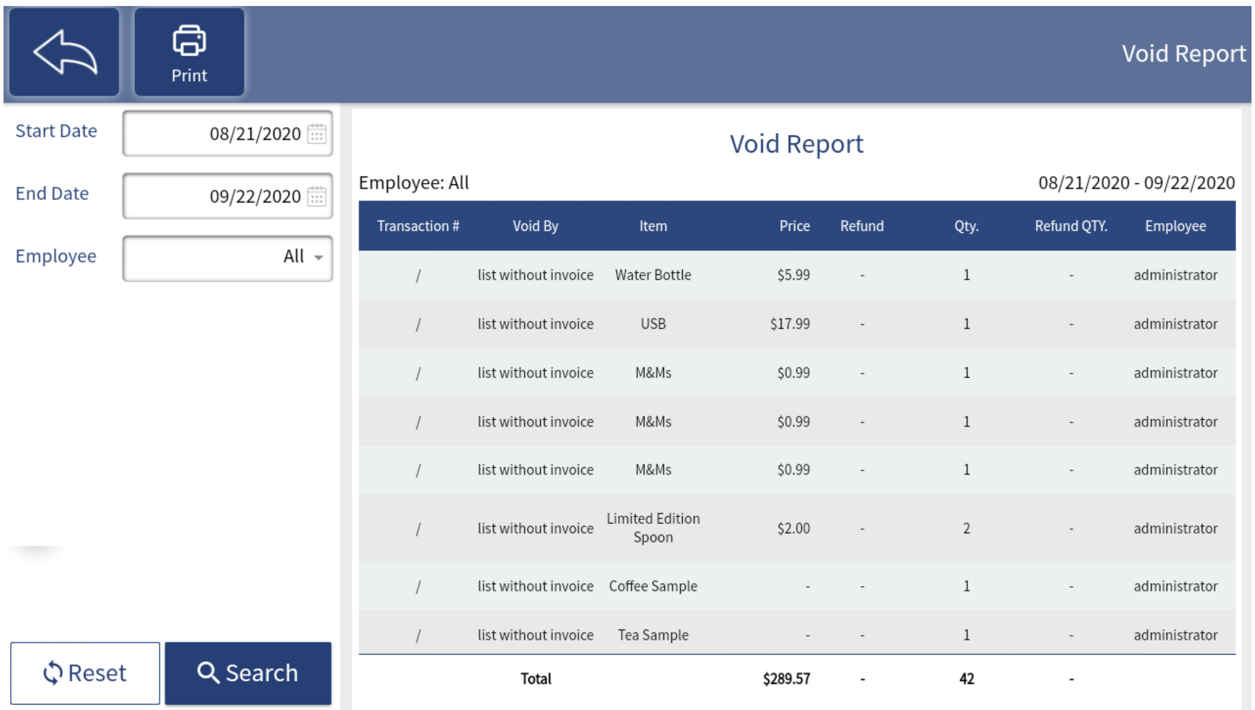
Void Report:

1. Select 

"Reports" from Main Menu

2. Select 

"Void Report", This report provides all Voids within given timeframe by employee along with information about Transaction number, voided by, Item, Price, Quantity, Username



Transaction #	Void By	Item	Price	Refund	Qty.	Refund QTY.	Employee
/	list without invoice	Water Bottle	$5.99	-	1	-	administrator
/	list without invoice	USB	$17.99	-	1	-	administrator
/	list without invoice	M&Ms	$0.99	-	1	-	administrator
/	list without invoice	M&Ms	$0.99	-	1	-	administrator
/	list without invoice	M&Ms	$0.99	-	1	-	administrator
/	list without invoice	Limited Edition Spoon	$2.00	-	2	-	administrator
/	list without invoice	Coffee Sample	-	-	1	-	administrator
/	list without invoice	Tea Sample	-	-	1	-	administrator
	Total		$289.57	-	42	-	

Available Filters: on the left side of the page:

- Timeframe
  - Start Date
  - End Date
- Employee

To view the desired report:

Select 

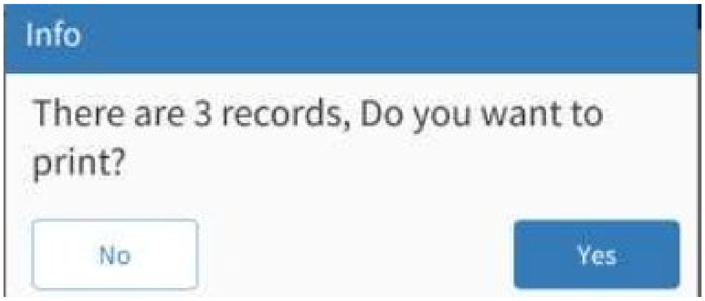
"Search", to Search

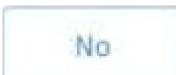
Select 

"Reset", to clear Fields

Select 

”Print”, from the ribbon Info with number of records along with Print confirmation will appear



To Cancel select 

”No”

To Submit select 

“Yes

Example **Void Report**:

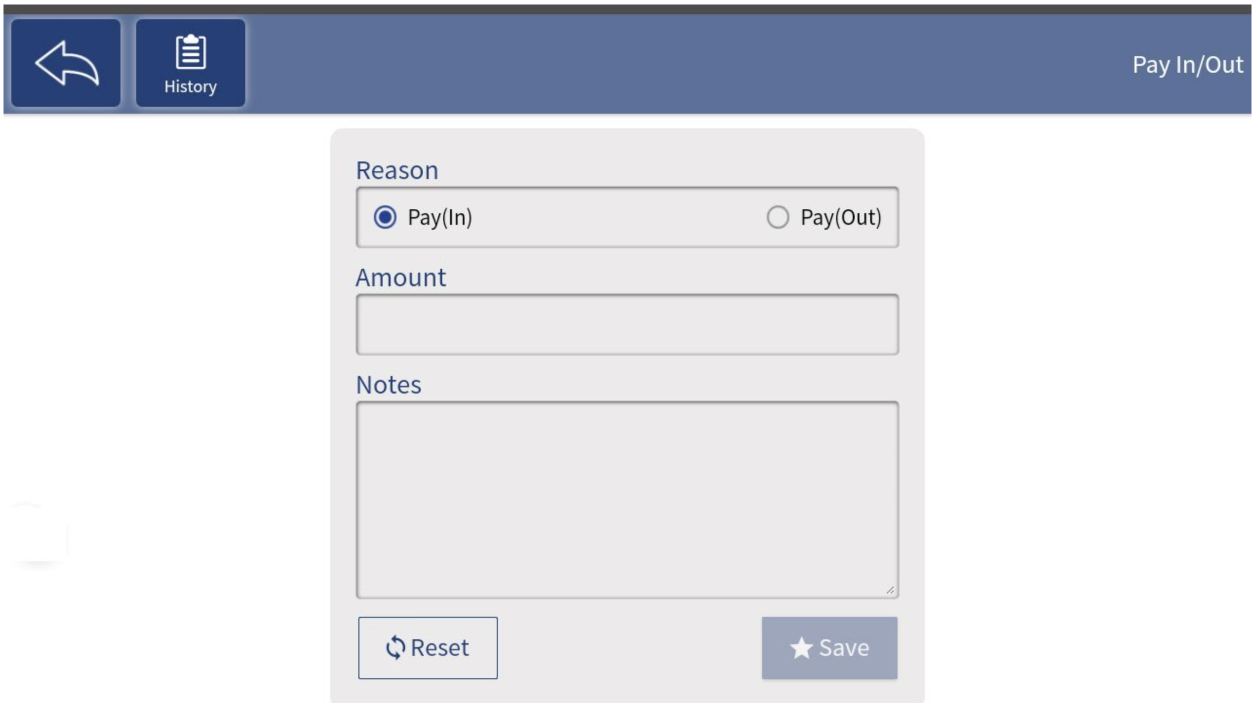
Start Date
End Date
Employee

Transaction # 1

Void By:	Admin
Item:	Cup
Price:	$2.00
Refund:	$0.00
Qty:	1
Refund Qty:	0
Employee:	administrator

Pay In/Out:

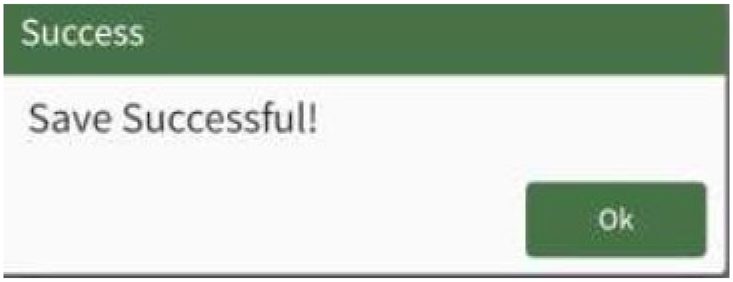
1. Select  "Pay In/Out" from Main Menu, Logs the movement of funds into and out of the cashbox.



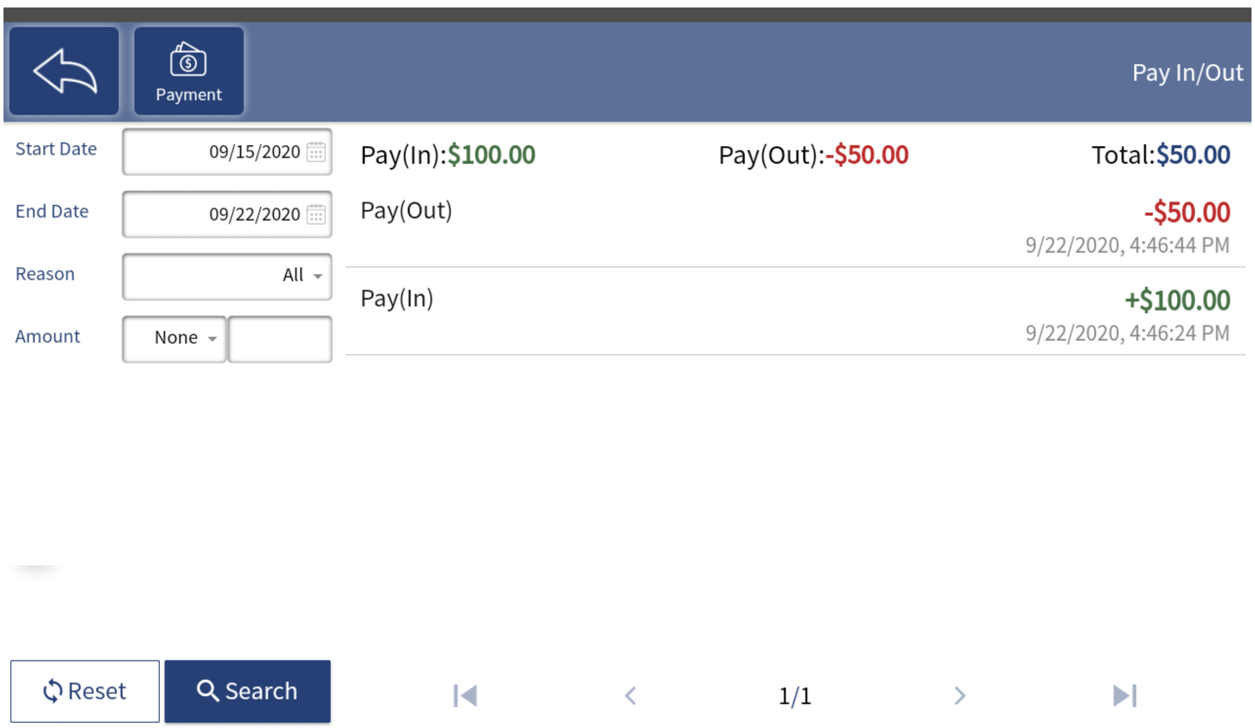
At the top of the right side, enter specific conditions to query the required revenue and expenditure records.

- Specify reason Pay (In) or Pay (Out) for the income and expenditure
- Enter the amount
- optionally fill in the notes
- Select  "Save" to add a store's income and expenditure record

Success Screen



Select  "History", from the ribbon to view Pay (In) or Pay (Out), To view previous Pay In/Out history.



Available Filters: on the left side of the page:

- Timeframe
  - Start Date
  - End Date
- Reason
  - All
  - Pay (In)
  - Pay (Out)

- Amount

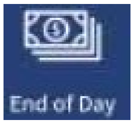
Select 

"Search", to Search

Select 

"Reset", to clear Fields

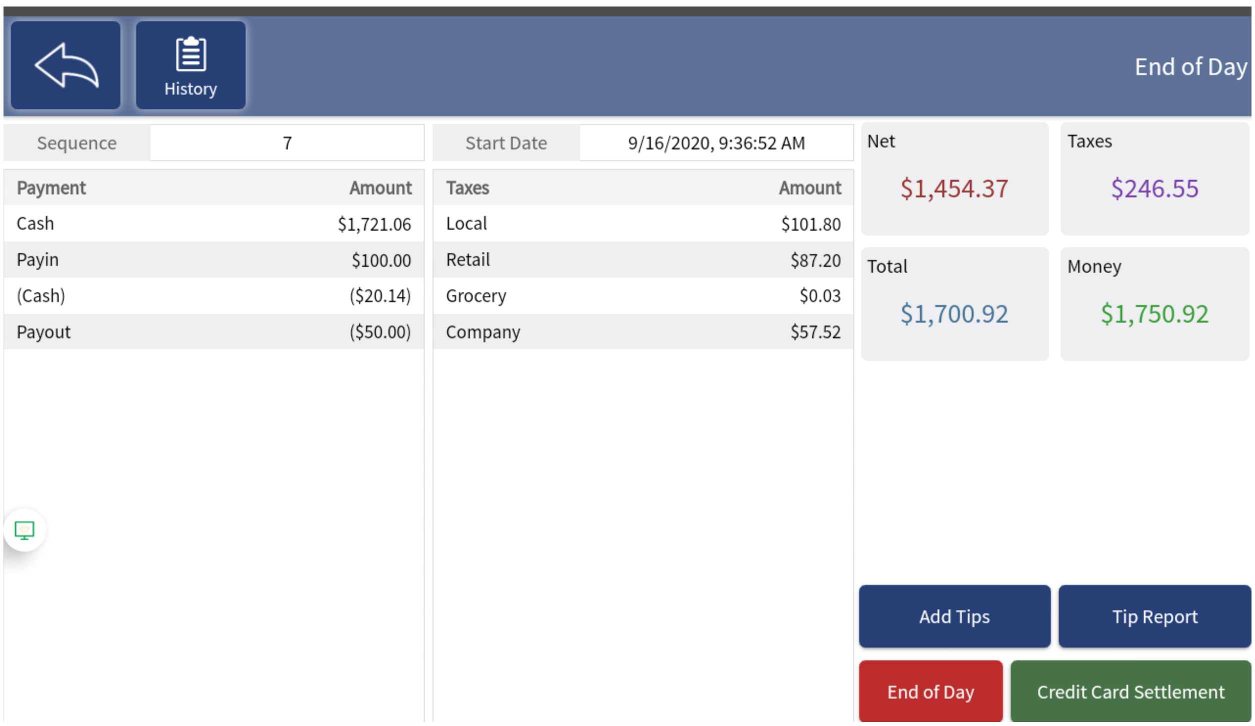
End of Day:

Select 

"End of Day", from the ribbon Displays information on payments and taxes collected along with Totals:

Available options include:

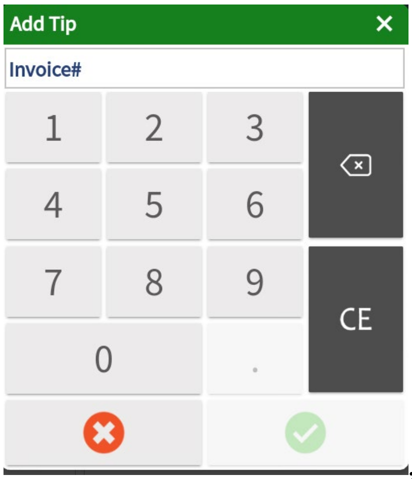
- **Add Tips:** Add any tips to transactions
- **Tip Report:** View Report of all tips received
- **End of Day:** Provide detail on end of day and settle all transactions
- **Credit Card Settlement:** Provide detail on end of day and **<u>Only Settle Credit Cards</u>**



Add Tips:

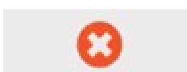
After selecting 

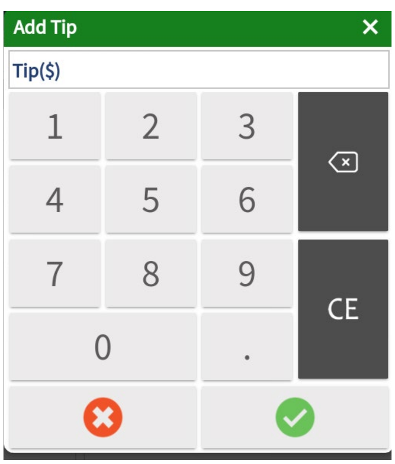
"Add Tips" button, Prompt to enter the correct invoice number and the amount of the tip to be added in the pop-up window.



,

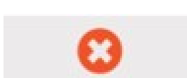
Select after the input is completed.

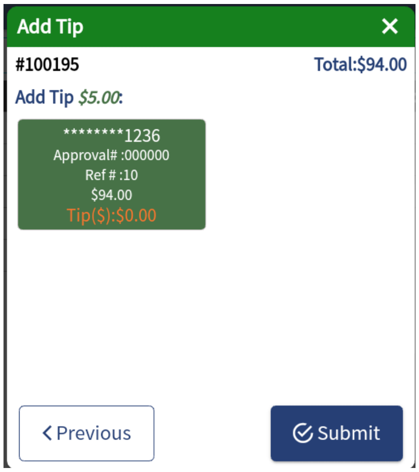
To Cancel select 

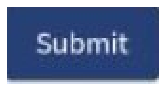


Enter the Amount of the Tip

Select after the input is completed.

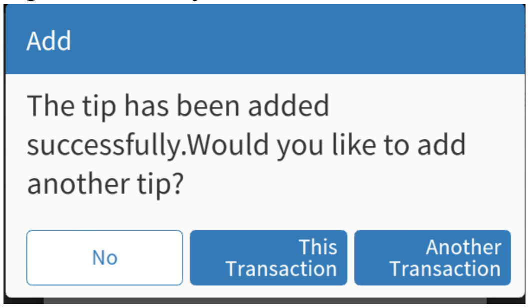
To Cancel select 



Select the order on this page and Select 

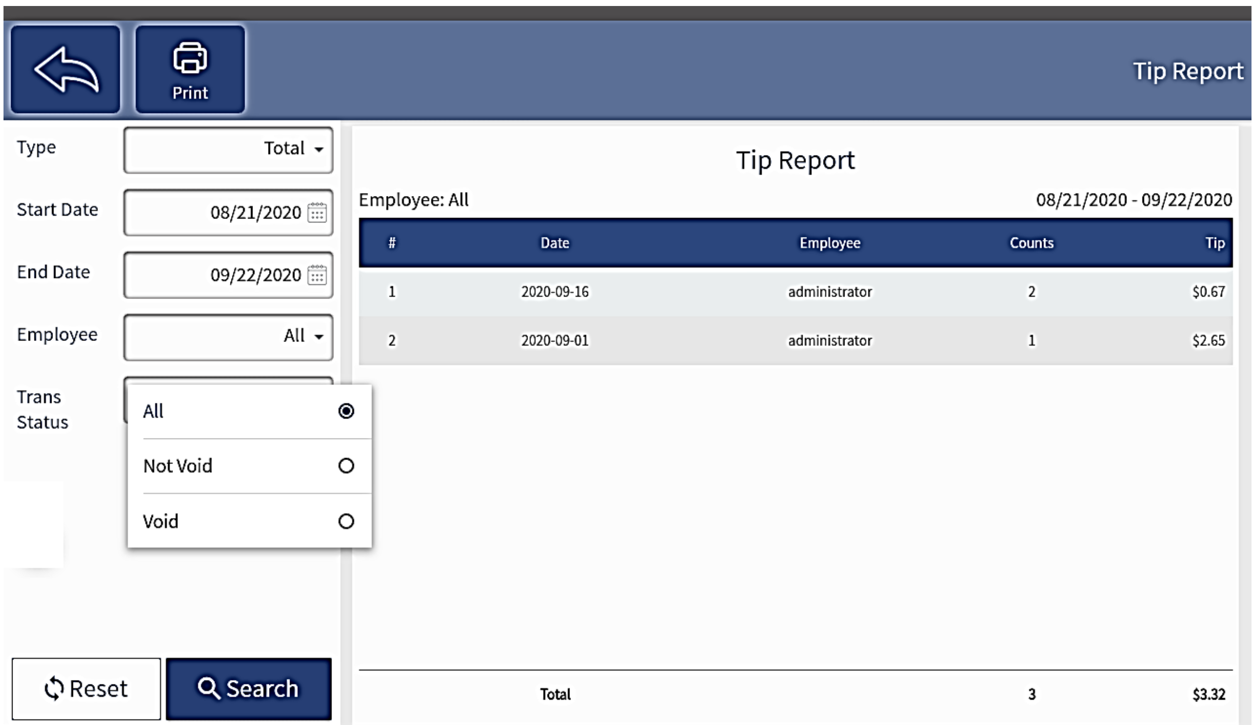
"Submit" to successfully add the tip.
*Cash Tips must be added at time of Sale

Tip successfully added Confirmation screen:



Tip Report:

Report provides Total or Detail information for timeframe by employee and Transaction status. Along with Tip amount.



Available Filters: on the left side of the page:

- Type
  - Total
  - Detail
- Timeframe
  - Start Date
  - End Date
- Employee
- Transaction Status
  - Not Void

- Void

Select 

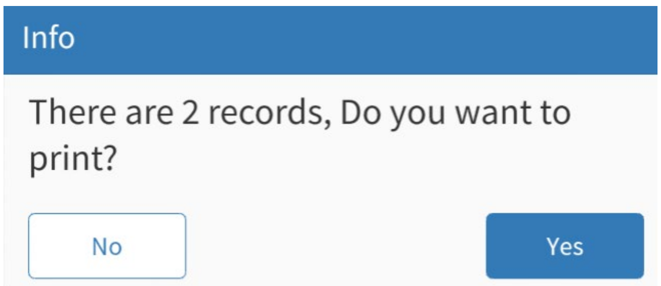
”Search”, to Search

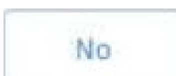
Select 

”Reset”, to clear Fields

Select 

”Print”, from the ribbon Info with number of records along with Print confirmation will appear



To Cancel select 

”No”

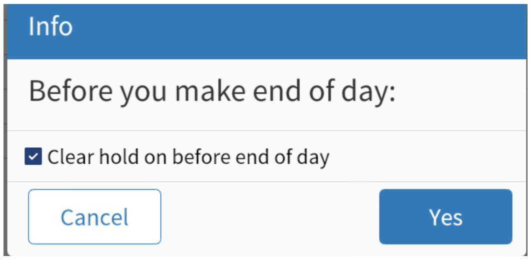
To Submit select 

“Yes

End of Day:

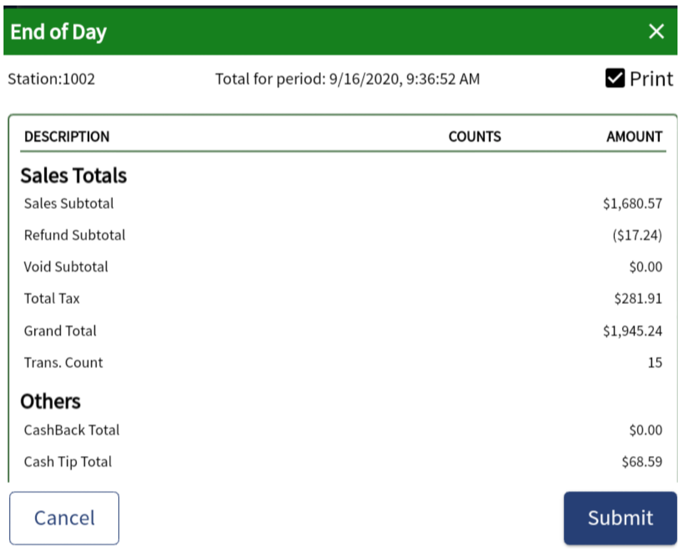
After selecting, End of Day a prompt to perform Clear hold on before end of day will appear.

*Please Note: Clear all Hold on records before end of day selected by default.



Select “Yes” or “Cancel”

Batch report will display all the sales details from the last End of Day to the present.



” Print” is selected by default

Users can choose to unselect ”Print” if they choose

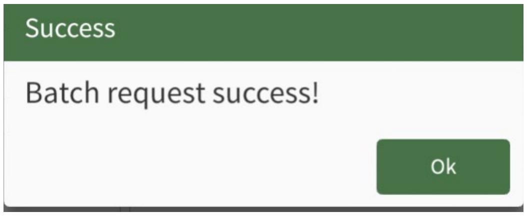
Select ”Cancel” to return to previous Screen

Select “Submit” to run Batch

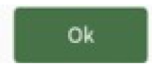
Confirmation Screen will appear select “OK”

Credit Card Settlement:

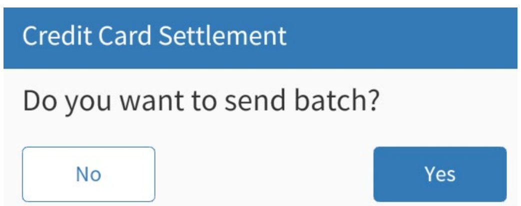
After selecting Credit Card Settlement button, you will be reminded if you want Send Batch.



Prompt: will read "Batch Request Success!"

Confirm by selecting 

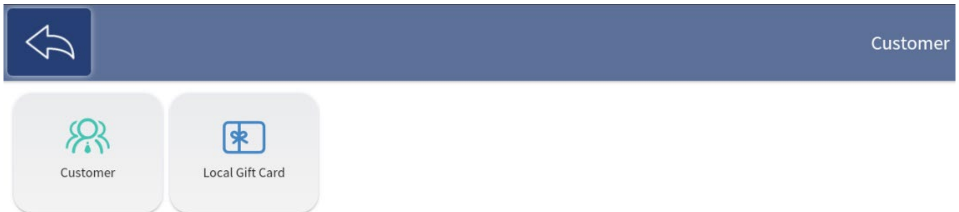
At the same time, the details of the Batch Settlement will be printed.

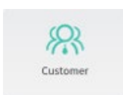


Customer:

1. Select Customer 

From Main Menu



Customer 

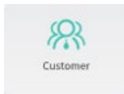
Shows all the Customers which have been created for the store.

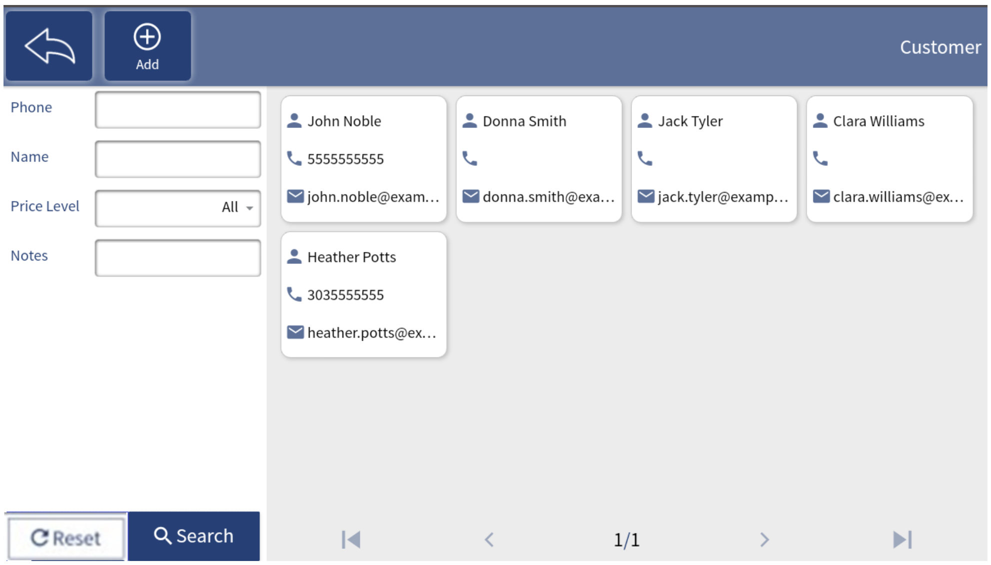
Local Gift Card 

: Allows for reloading of Local (Virtual Gift card)

Customer:

1. Select Customer  From Main Menu

2. Select on  "Customer"



Search for Customers by entering the appropriate information on the left side of the screen. Select on an existing Customer on the right side, and you will be taken to the Customer details page. (See Customer Details Details)

Search:

Available Filters are:

- Phone
- Name
- Price Level
- Notes

- Once user has entered desired criteria select  "Search"

- Customers which meet desired criteria will be displayed for selection
- Select on Customer

To Reset:

Select  "Reset" will clear out the search fields.

Add New Customer:

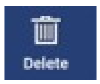
1. Select 

"Add", from the ribbon to add a New customer

Customer Details:

Save: Select 

"Save", from the ribbon to save changes after editing, adding, and deleting Customers.

Delete: Select 

"Delete", from the ribbon to *Delete* this Customer.

Tabs

Contact: This tab displays general information about the Customer, such as Name, Discount, Price Level, contact information etc.

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

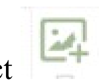
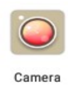
History: This tab shows the purchase record for this Customer.

Address: This tab allows for the customers address information to be captured as well as edited.

Notes: This tab displays the Notes for this Customer. This is free form information text field about that customer. This information can be edited within any of the Customer Screens.

Contact:

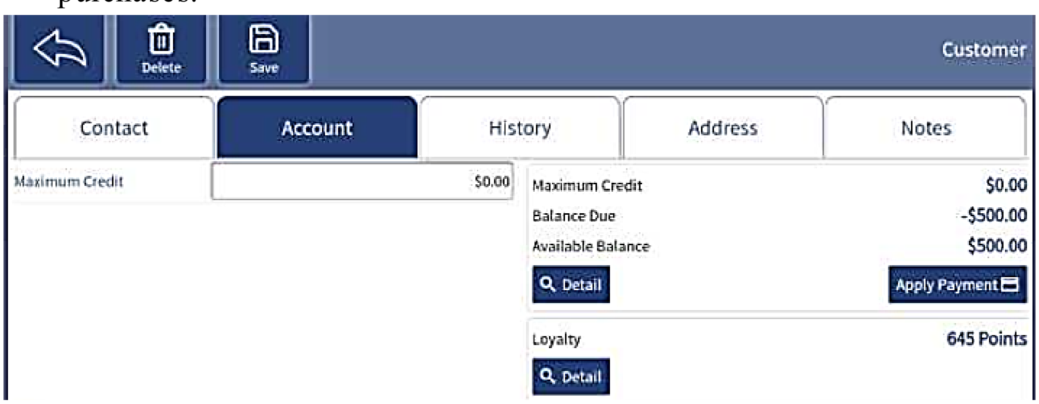
- First Name: Unique system name for customer

- Last Name: Unique system name for customer
- Discount %off: Customer specified discount amount
- Price Level: Customers associated Price Level
- Date of Birth: Customers DOB
- Enable: Enable Customer
- Email: Unique email address
- Fax: Fax Number
- Mobile Phone: Mobile Contact number
- Telephone: Phone Number
- Photo image:
    - Customer Photo image can be taken directly from the POS select  , Add "Photo" icon
    - Select 

, Camera Icon- Front facing camera will be turned on
        - Take Photo image

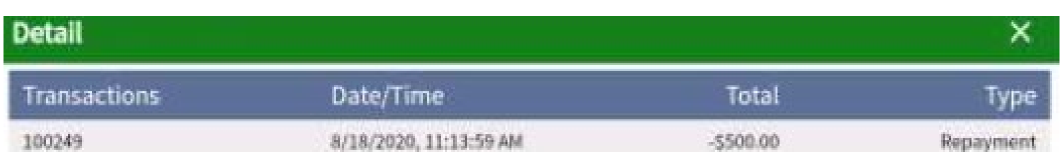
Account:

- **Maximum Credit**- Assigned in store value or House Account Credit value which can be determined by permissioned user. For purchases to be paid back later.
- **Loyalty-** Amount of Loyalty points that a customer has on their account accrued through purchases.



Select on 

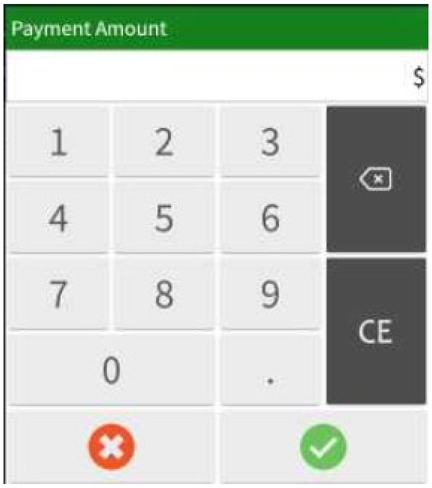
; Detail for information on Account



Balance Due:

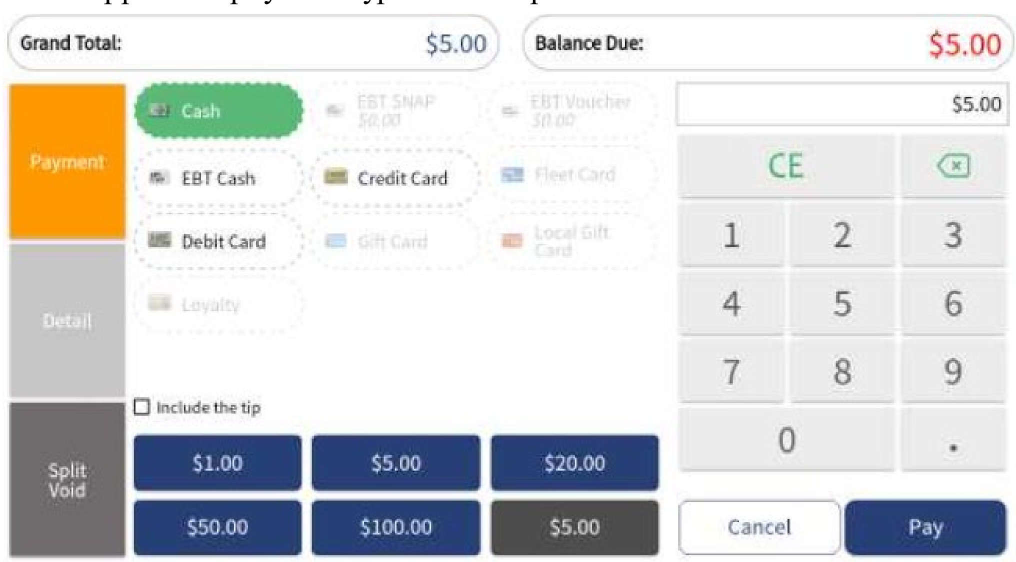
Select on 

"Apply Payment" to apply payment to outstanding balance

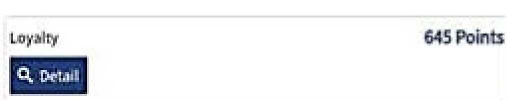


- Enter Payment Amount to Be applied.

Payment Screen will be presented:
Select applicable payment type and complete transaction



Loyalty:

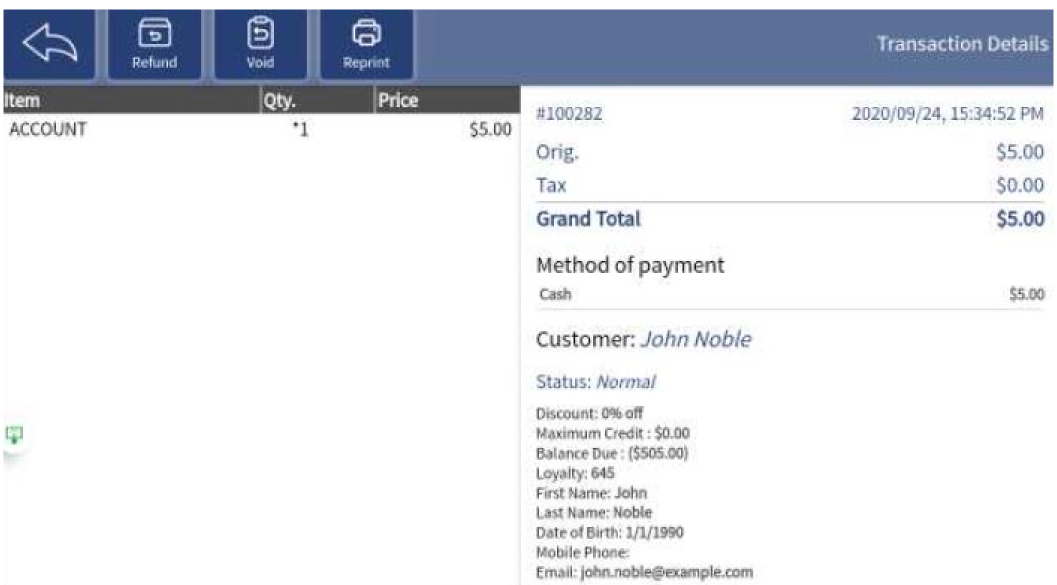


Select on 

"Detail" to view information on accured Loyalty Points

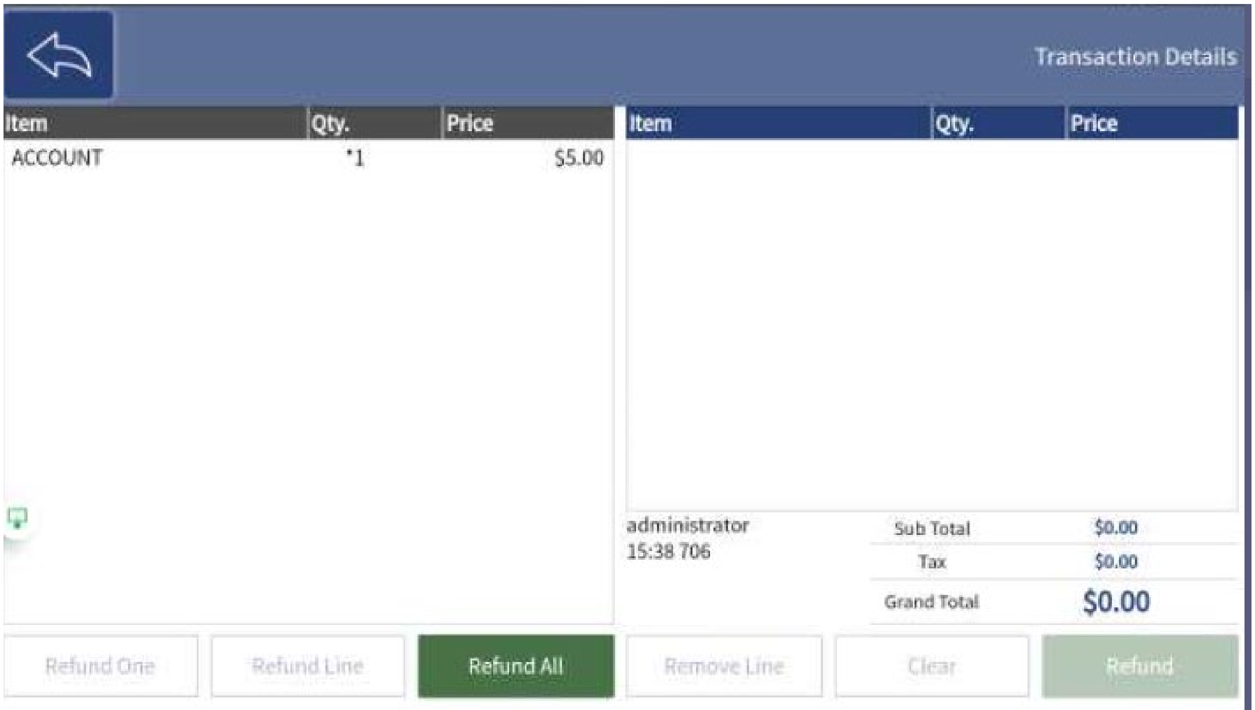
History:

Select on any transaction within History to bring up the transaction



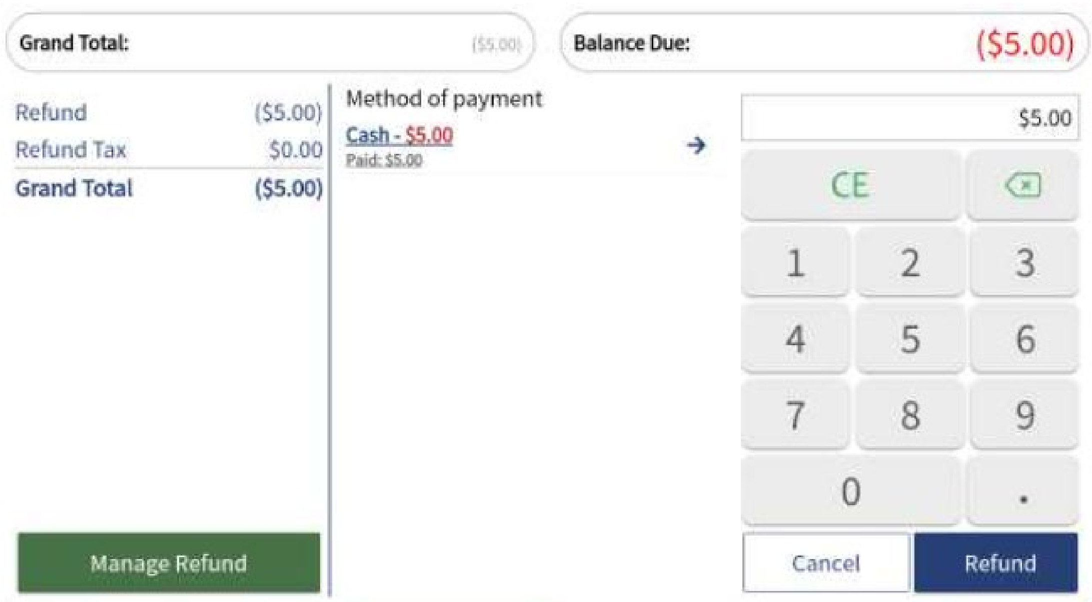
Refund on selected transaction from History:

Select  "Refund", from the ribbon to begin refund process



To complete refund, select options:

- Refund One- Refunds 1 of single line item selected
- Refund Line- Refunds entire line
- Refund All- Refunds All items
- Remove Line-Remove line item from Refund
- Clear- Clear Refund
- Refund- Refunds



Permissioned users can select  "Manage Refund"

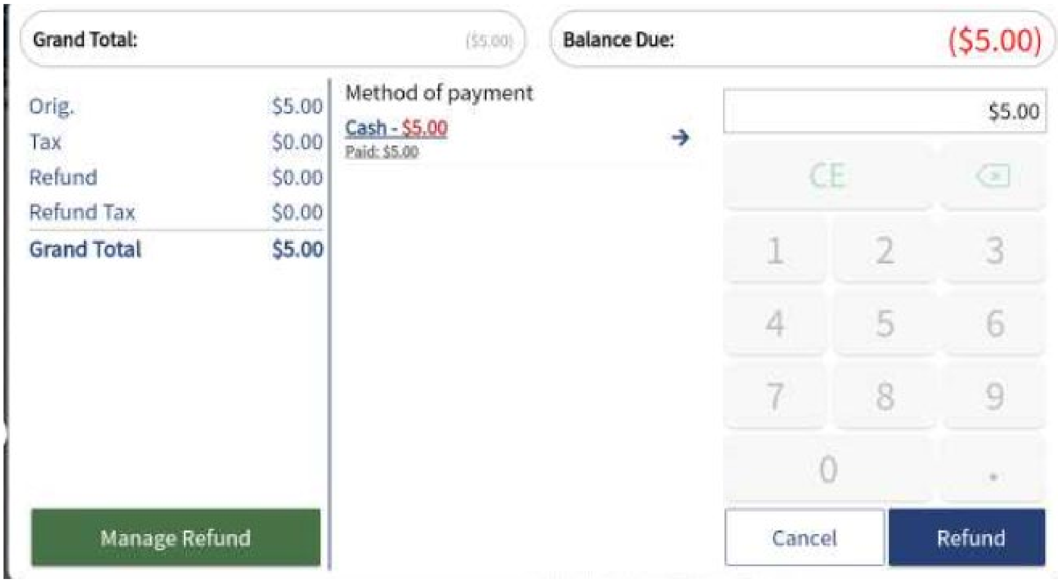
Choose another payment method for refund, Returns to Payments Screen

Select  "Cancel", Returns to Transaction Details

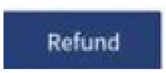
Select  "Refund", Refunds transaction

Void a Transaction

- From the *Transaction Detail Report*, Select on Transaction to be Voided
- Select  "Void", from the ribbon to begin Void process



Select  "Cancel", Returns to Transaction Details

Select  "Refund", Voids Transaction

Select  "Reprint Transaction", from the ribbon to get a printed copy of the transaction.

Address:

Enter information as provided by customer

- Address Line1:
- Address Line2:
- City:
- State/Province:
- Zip/Post Code:
- County:

Notes:

Insert any important notes or information on this customer

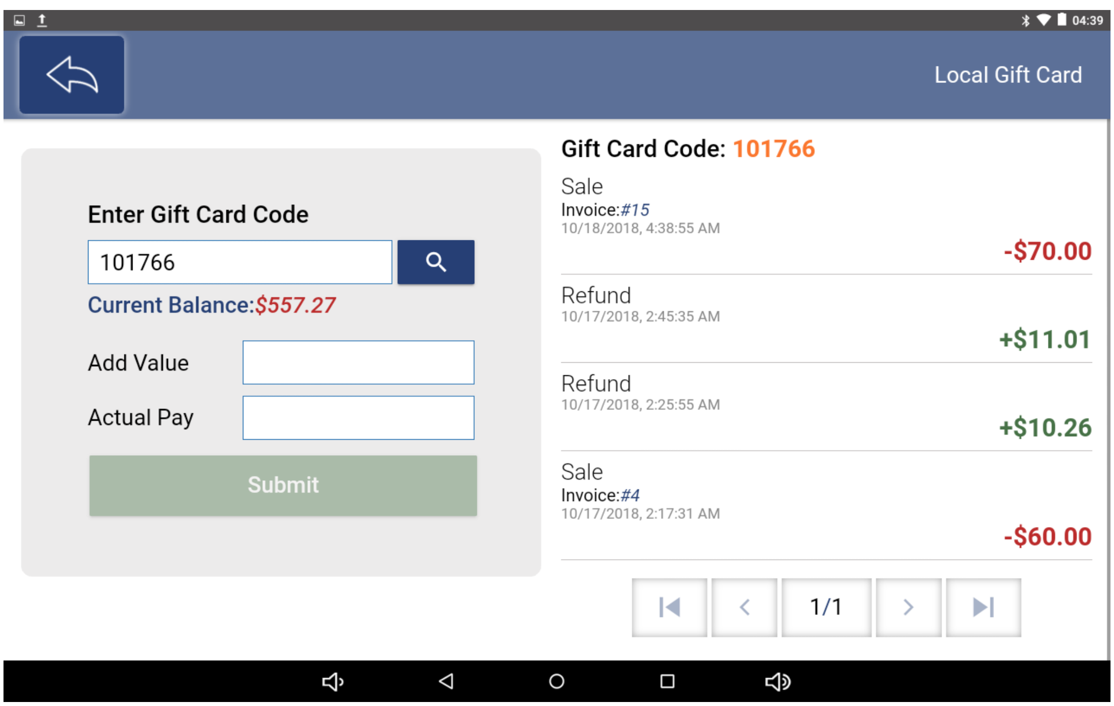
Local Gift Card:

Select 

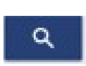
"Customers" From Main Menu

Select 

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



Enter the correct Gift Card Code

Select  search

Result:

- Current Balance: Displays the Cash Value of the Gift Card
- Display the Gift Cards purchase history on the right.

Add Value- Recharge with additional value, this value will be added to the existing value of the Gift Card
Actual Pay- The amount the customer is paying for the Local Gift card

Select 

Submit to make the Payment

After the Payment is completed, the recharge will be successful
Receipt with balance will print.

Inventory

1. Select 

"Inventory" from the Main Menu

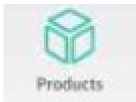
Settings such as Products, Categories, Inventory Movement, Attributes, Taxes and Tax Categories can be adjusted in this module.

Products: Add item to inventory or Modify Existing Items
Categories: Add Categories or Modify Existing
Inventory Movement: Move inventory from one location to another
Attributes: Add New Attributes and define attribute Combinations
Taxes: Edit Tax Name and Tax Rate
Tax Categories: Add New Tax Category, Delete Tax Category (See Tax Categories)
Modifier Groups: Add created item modifiers to a group

Products:

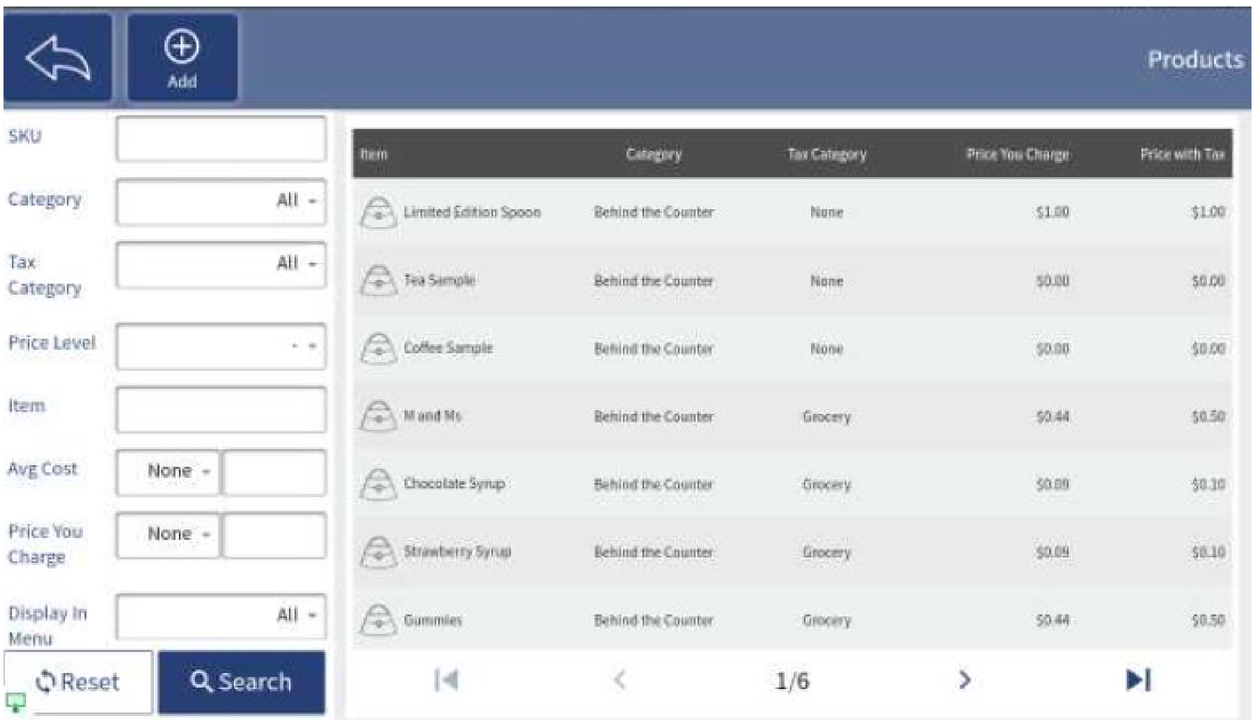
2. Select 

"Inventory" from the Main Menu

3. Select 

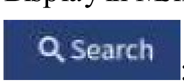
"Products", This page displays the Products list of the store.

Users can Search Select existing item or Add new item.



Available Search Filters:

- SKU
- Category
- Tax Category
- Price Level
- Item
- Avg Cost
- Price you Charge
- Display in Menu

Search 

: Provides compiled Item list of all item meeting your search criteria

Reset Reset Clears all fields

To Add a new product

Select Add. from the ribbon, the products Screen will be displayed

General Tab Required Fields: General: displays general information about the Item:

- Item
- Tax Category
- Price you Charge
- Category
- Inventory Tracking
- Display in Menu

Once required fields have been completed select Save "Save

Optional Fields

1. Avg Cost
2. EBT Eligible
3. Restricted Age

Optional Tabs

- **More:** Additional information about the product
    - SKU
    - GTIN
    - Short Name
    - Notes
    - Image
    - Sale by weight
    - Is Modifier
    - Modifier Group
    - Modifier
- **Attributes** Tab: shows the attributes and attributes combination information for the item.
    - Attributes
    - Attribute Combinations
- **Level** Tab: Apply Price Level Discount to item and Enable or Disable
    - Set Price Level

.

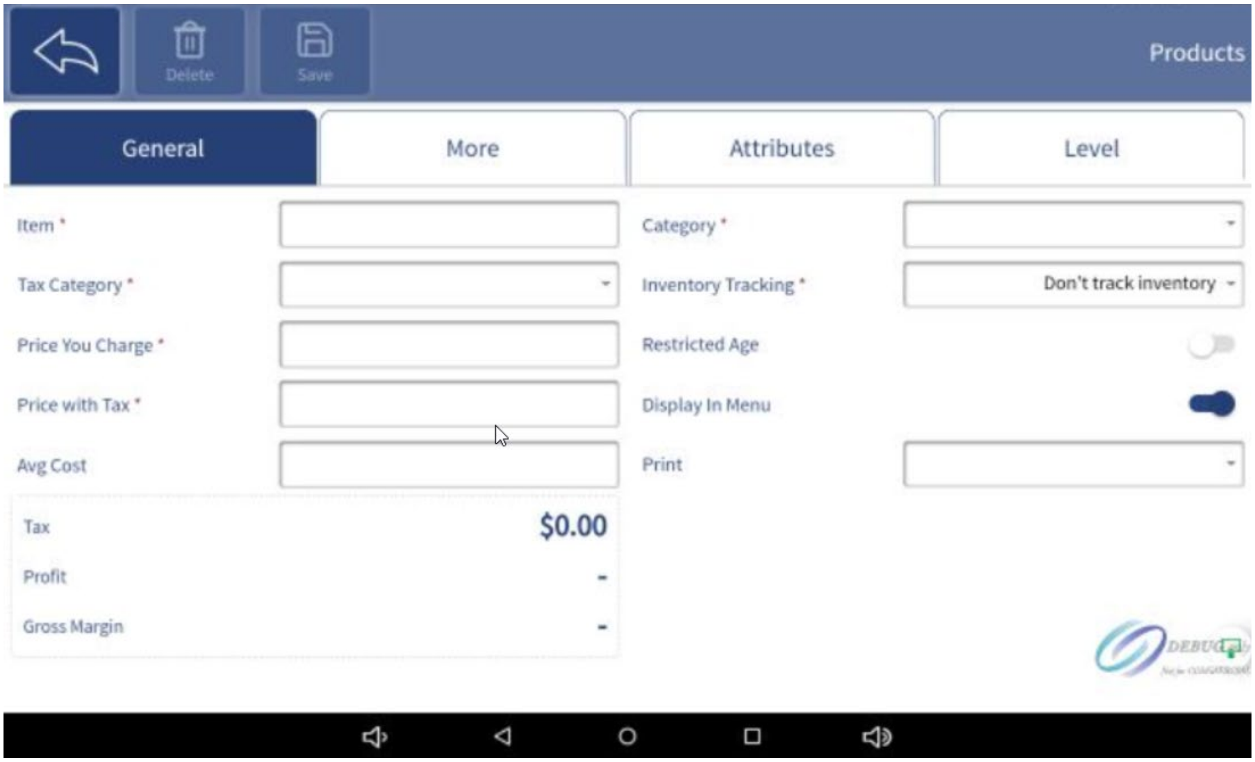
Notes:

By Default, Taxes are calculated on Subtotal provided.

*Refer to Back Office Manual page 5 where product information can be Exported or Imported.

Products Tabs:

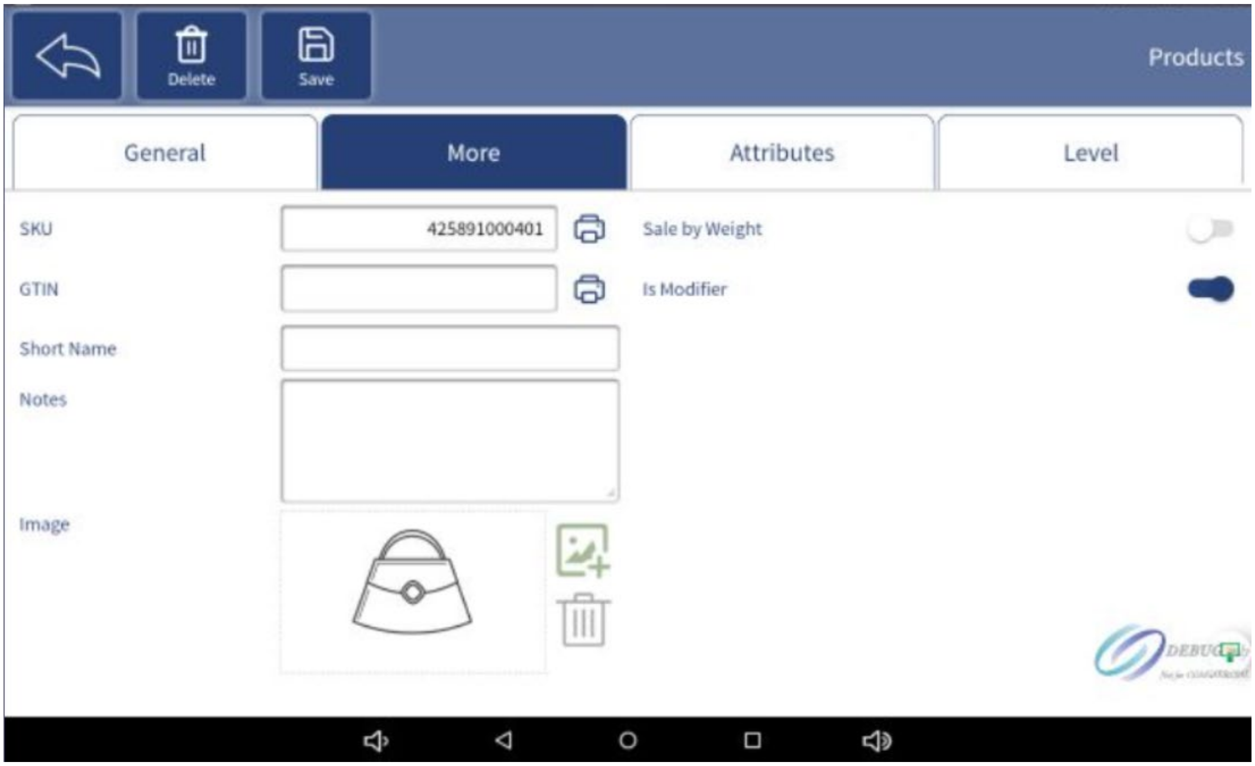
- General
- More
- Attributes
- Level



General:

- Item- Name given to the product
- Tax Category- Assigned applicable Taxes to this item
- Price You Charge- Pre-Tax Price
- Markup Price:
- Cash Price- Price with Cash Discount Enabled
- Price with Tax - Calculated for user based upon Tax Category selected
- Avg Cost:
- Tax:
- Category- Classification of the item
- Inventory Tracking-
    - Don't Track Inventory (Default)
    - Track
    - Track by Attributes
- EBT Eligible
- Restricted Age
- Display in Menu
- Print– Determines the printer (internal or external) used for a separate itemized receipt

More:



- **SKU**- Stock Keeping Unit
  - Optional: if a label printer is connected, clicking the printer icon will print a barcode to the label printer.
- **GTIN**- Global Trade Item Number
  - Optional: if a label printer is connected, clicking the printer icon will print a barcode to the label printer.
- **Short Name**- Compound word/ Abbreviation of unique identification name to that item
- **Notes:**
- **Image:**
  - Photo image can be taken directly from the POS select , Add Image icon
  - Select Camera , Camera Icon
    - Take Photo image
- **Sale by Weight**- Enable/ Disabled – When enabled Price will reflect a single unit.
  - Example: Users can enter in the fraction unit which is being sold.
    - 1 lb. @$2.00

  - 1/2lb entered in as decimal of 0.5 lb @ $2.00lb= $1.00
- **Is Modifier**- Mark Item as Modifier
- **Display in Menu** Enable/ Disable- When enabled item will be visible within the Menu.
- **EBT Eligible** Enable/ Disable- Item qualifies for EBT when EBT is selected payment type the amount will be applied for this selected item.
- **Image**- Users can upload a Photo image of the item

To Create Item Modifier:

- Select 

"Inventory" from the Main Menu
- Select 

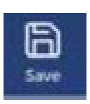
"Products", will bring you to Products
- Select 

"Add", from the ribbon to begin process of creating Item Modifier
- Input Required information into 

"General" Tab
  - Item name
  - Assign Category
  - Assign TAX Category
  - Optional
    - Track inventory
    - Unselect 

"Display in Menu"
- Select 

"More" Tab
- Select 

"Is Modifier"
- Select 

"Save", from the ribbon to Save

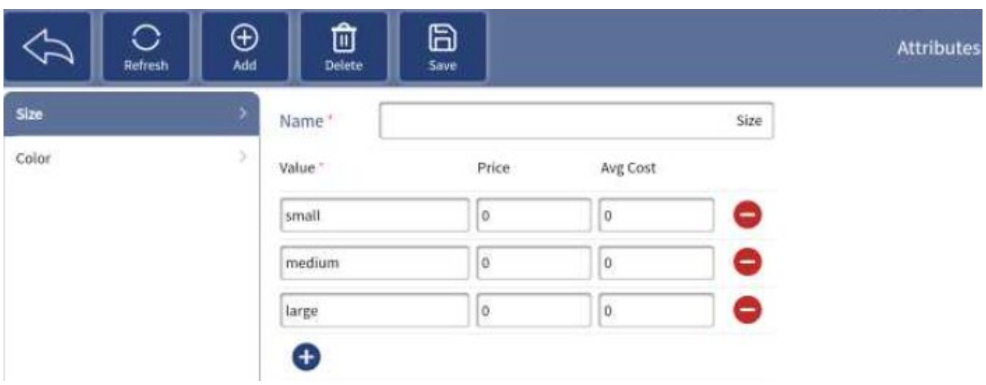
*Note: Modifiers are not normally displayed within the menu however Sound POS does offer the flexibility if user wants the ability to add a modifier and display this modifier in the Menu.

Attributes:

*Note: *Only Attributes that have been defined can be added*

Add new attribute:

1. From the Main Menu, Select Inventory
2. Select Attributes
3. Select  "Edit"



4. Select Add  , from the ribbon to begin process of adding new attribute
5. Insert Name into Field (*Required)
6. Set Values
7. Name
8. Price
9. Avg Cost
10. Select Save

Edit Attributes

- Select 

Modify existing Attributes

- Modify Value
- Modify Price

To Remove Value, select "- "and attribute will be removed

Edit Combinations:

Select possible combinations

If item is dependent upon combination, this must be marked as "Is Required"

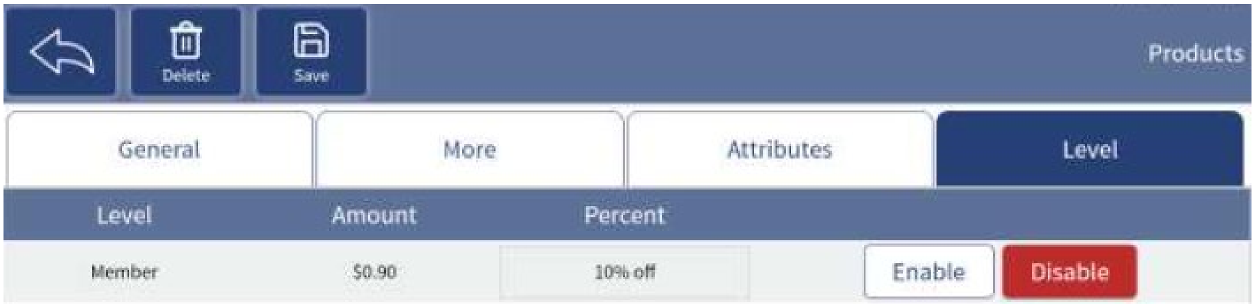
Attribute Example:

- Product:
    - Shirts
- Colors
    - Blue
    - Green
    - Yellow
- Sizes
    - Medium
    - Large
- Combinations
    - Medium Green Shirts
    - Large Yellow Shirts
    - Large Green Shirts

Please refer to Appendix A for more information about how Attribute prices are applied.

Level:

Enable/ Disable Price Level Assigned to this product



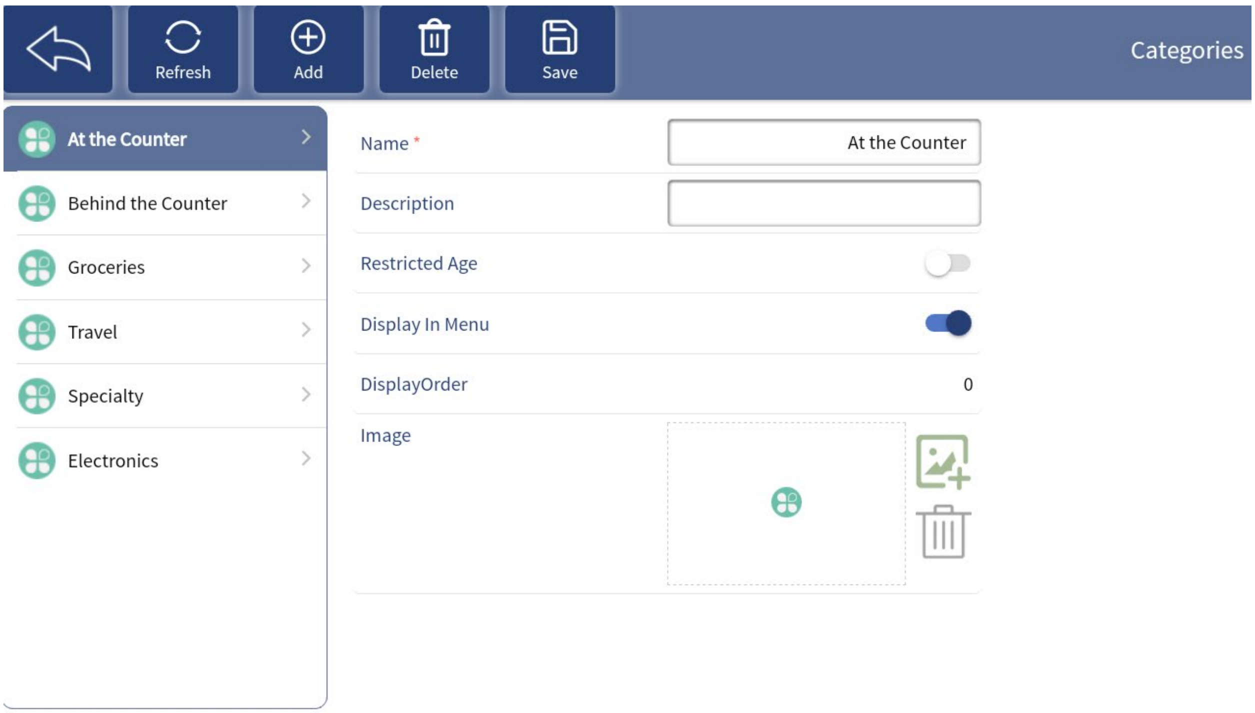
Notes:

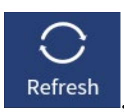
Price Levels can be set onto products for customers who have (Members=Price Level) set. Will receive a discount off that product

Categories:

1. Select  "Inventory" from the Main Menu
2. Select  "Categories", from "Inventory"

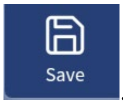
This page displays and allows you to manage Categories list



Refresh: Select , from the ribbon to refresh the current Categories list.

Add: Selecting "Add", from the ribbon to create a new "Category" of products by.

- Enter the required name of the Category
- Description (optional)
- Enable Display in Menu (optional)
- Upload Photo image

- Upload Photo image through selection of Picture
- Delete Photo image through Trash
- Select 

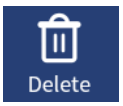
., from the ribbon to Save

Add Photo image:
Photo image can be taken directly from the POS

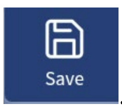
- Select  , Add Image icon
- Select 

, Camera Icon
- Take Photo image

Delete:

1. Select, Category from the list on the left
2. Select 

"Delete", from the ribbon to *Delete*.

Save: Select 

, from the ribbon to save changes after editing, adding, and deleting Categories.

Note:
*A Category which has products in it cannot be deleted. Products must be removed from Category.

Inventory Movement:

1. Select 

"Inventory" from the Main Menu

2. Select 

"Inventory Movement"

- **Manage inventory**
    - If the product is moved from one location to another and Item is not tracked. Prompt will display that this is a non-tracked item do you want to move item out of inventory.
    - Select the item in the list on the right, or select inventory lookup 

, from the ribbon

Stock: Located In the upper right-hand corner.

Filter the products in the store according to the quantity of stock
Insert criteria in search fields

- (=) - Search all stock which meets x number and x Tracking
    - Tracking

- Track
- Track by Attributes

- (≤) - Less than or equal to Stock which meets x Number and x Tracking
- (≥) - Greater than or equal to Stock which meets x Number and x Tracking

Set Date of Inventory Movement

Manage the inventory of your products according to the following steps: (Lower left-hand corner)

1. Select the product
2. Set the Date for the movement:
   - Select the Date
3. Set the Quantity:
   - Select  will increase integer in field by 1
   - Select  will decrease integer in field by 1
   - Select  will clear or reset integer in field

Set the Reason for the movement

- (In) Purchase
- (Out) Movement

Select 

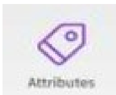
will clear all products being entered from cart

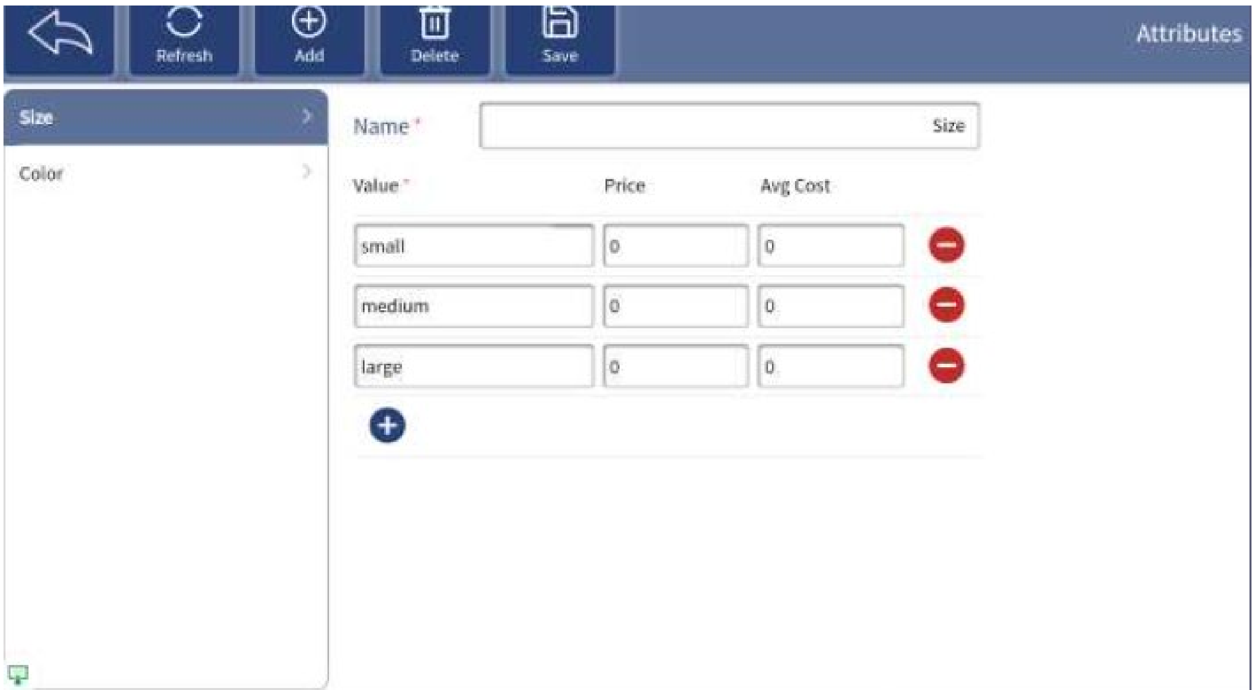
Select 

will confirm changes being entered.

Attributes:

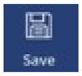
Select  "Inventory" from the Main Menu

Select  "Attributes", This page displays and allows for management of Attributes list.

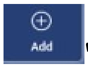


Add New Attributes

- Select "+"
- Provide Name
- Provide Value
- Provide Price
- Remove unwanted attribute:
- Select "- "Attribute will be removed
- Refresh: Refresh the current Attributes list.

Save: Select 

, from the ribbon to save changes after editing, adding, and deleting Attributes.

Add: Select 

"Add". from the ribbon to Add a "Value" to the item

Enter

1. Required name
2. Value and price of the Category.

Save: Select 

"Save", from the ribbon to *Save*.

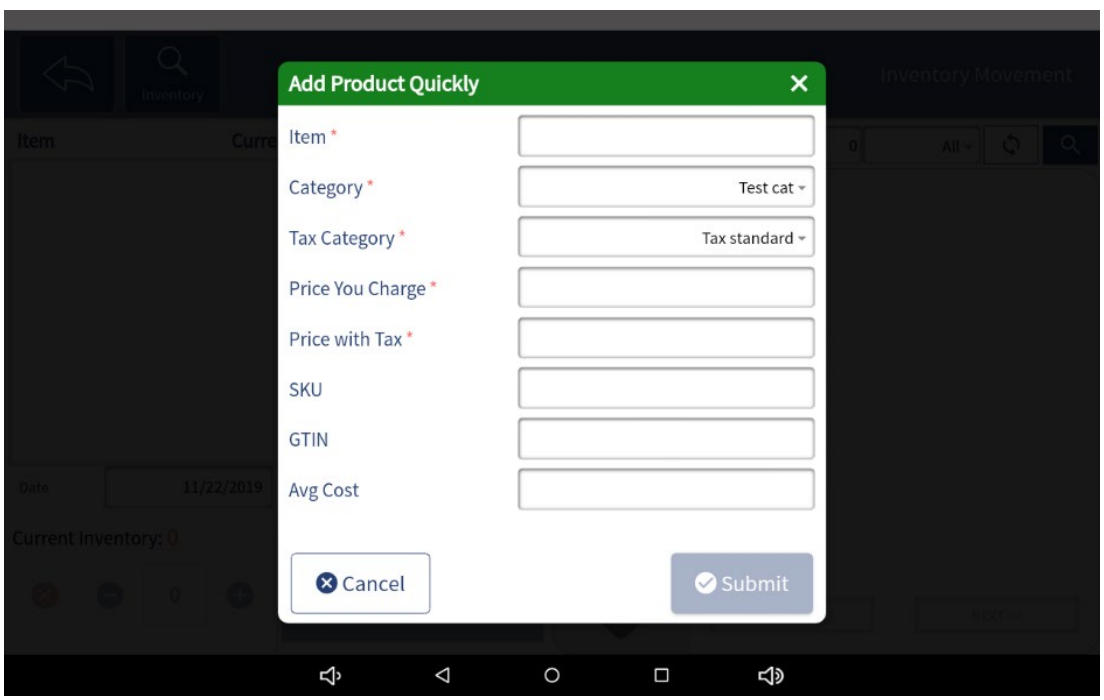
Delete:

- Select an Attributes in the list on the left
- Select 

"Delete", from the ribbon to *Delete*
- Select 

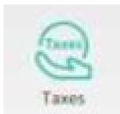
, from the ribbon to save the changes.

***Note:** Please refer to Appendix A for more on how Attribute prices are applied.*



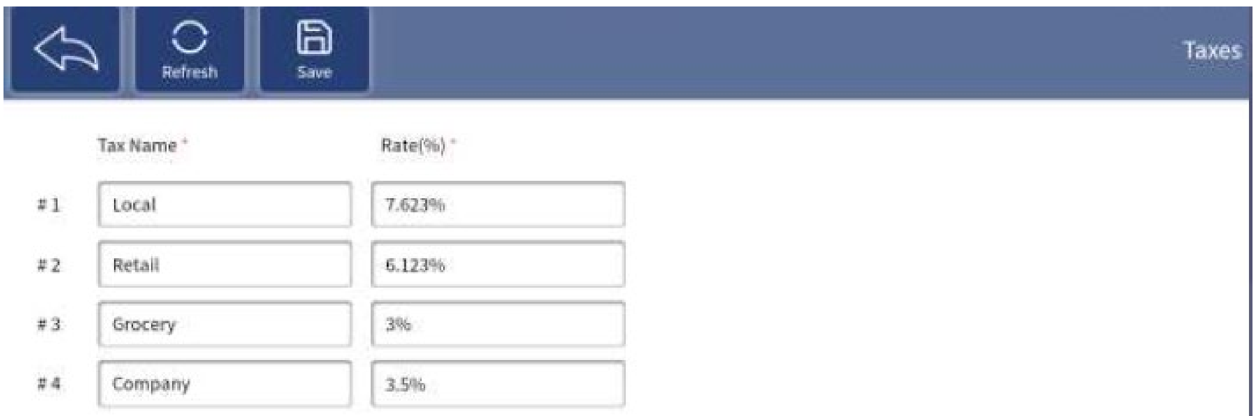
Taxes:

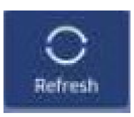
1. Select 

"Inventory" from the Main Menu
2. Select 

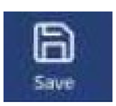
"Taxes", This page is used to Change Tax Names, along with tax amounts.

Note: Tax Categories cannot be changed in this menu.



Refresh: Select 

, from the ribbon to refresh the current Taxes list.

Save: Select 

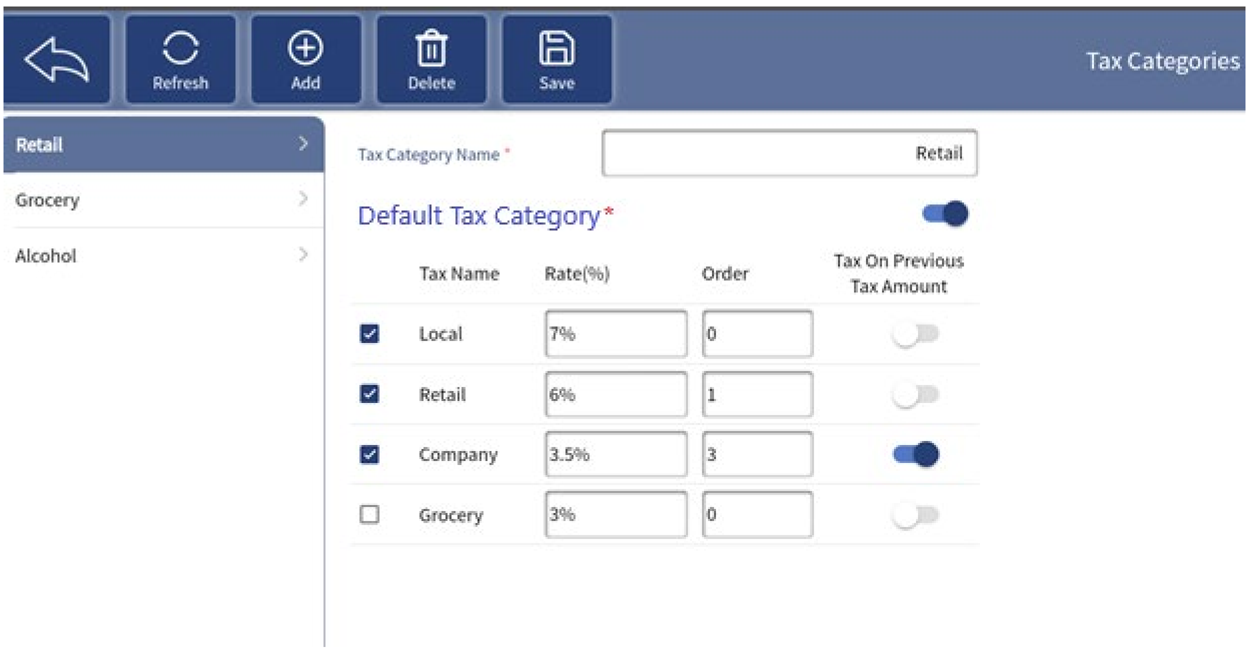
, from the ribbon after making any edits to Save

Tax Categories:

1. Select  "Inventory" from the Main Menu

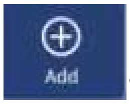
2. Select  "Tax Categories", This page displays the Tax Categories list of the store.

   Tax Categories allow On-demand tax decisions, enabling accurate rates and product taxability. Tax categories breaks down Local, State, and applicable Village taxes which are set to be collect



- **Tax Category Name:** Provide name for the tax category which you want to create
- ***Default Tax Category:** Set Default Tax Category (Only one can be active at a given time)
- **Select checkbox:** To apply this Tax Name to the tax Category
- **Rate %:** Define the rate at which this Tax name will be added to the products within the checkout. E.g. 6.25, not .0625
- **Order:** Set the Order of Taxes
- **Tax on Previous Tax Amount:** Includes previously applied tax rates when calculating this tax
- **Refresh:** Refresh the current Tax Categories list.

Save: Select  "Save", from the ribbon to Save changes

Add: Select  "Add", from the ribbon to Add a Tax Category for an item

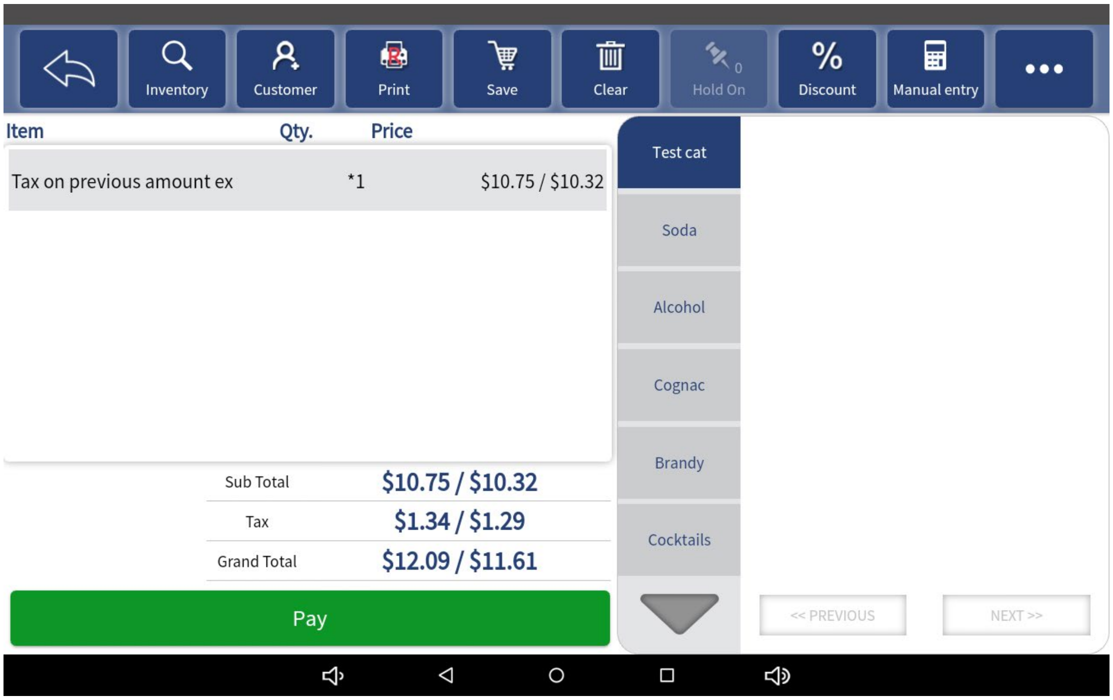
- First enter the correct Tax Category Name
- Check the desired Tax
- Select  "Save", from the ribbon to Save.

***Delete*:**

1. Select a Tax Category in the list on the left
2. Select  "Delete', from ribbon to *Delete*
3. Select  "Save", from the ribbon to Save the changes.

***Notes*:** When adding a new Tax Category

1. Insert "Tax Category Name"
2. Select Tax Names to be applied
3. Input Rate: "as percentage" That is, 6.5 instead of .065.
4. If Applicable, Enable Tax on Previous Tax amount
5. Example
6. Tax on Previous Tax Amount: Includes previously applied tax rates when calculating this tax



Example:

Item: $10.00

Tax Rate 1 ('Tax on previous amount' disabled): 10%
Tax Rate 2 ('Tax on previous amount' disabled): 20%
Tax Rate 3 ('Tax on previous amount' enabled): 10%
Tax Rate 1 (10% of original item price) = $1.00
$10.00 + $1.00 = $11.00
Tax Rate 2 (20% of original item price) = $2.00
$11.00 + $2.00 = $13.00
Tax Rate 3 (10% on current item price) = $1.30
$13.00 + $1.30 = 14.30

Modifier Groups:

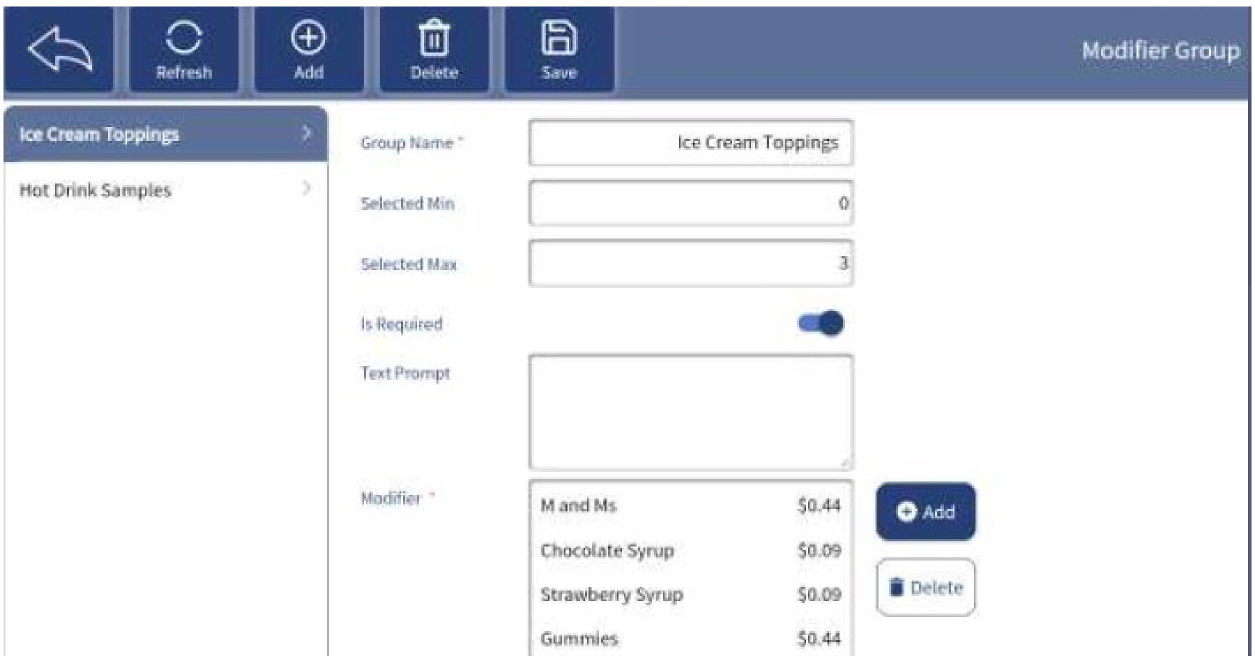
1. Select 

"Inventory" from the Main Menu

2. Select 

"Modifier Groups", from "Inventory" Menu. To combine individual modifiers into a Group for a more fluid user experience to add modifiers to selected items.

*Group Modifiers can only assign modifiers which have already been created in Product Setup and flagged for *Modifier*



Select 

"Refresh", from the ribbon

To Add New Modifier Group

1. Select Add 

, from the ribbon
2. Enter Group Name (*Required Field)
3. Set Min/Max Selection amounts
4. Mark if Required

5. Enter Text Prompt
6. Add Modifier which have been set as Modifiers in product setup

To Delete Modifier

1. Select Save 

,from the ribbon to *Save*
2. Select 

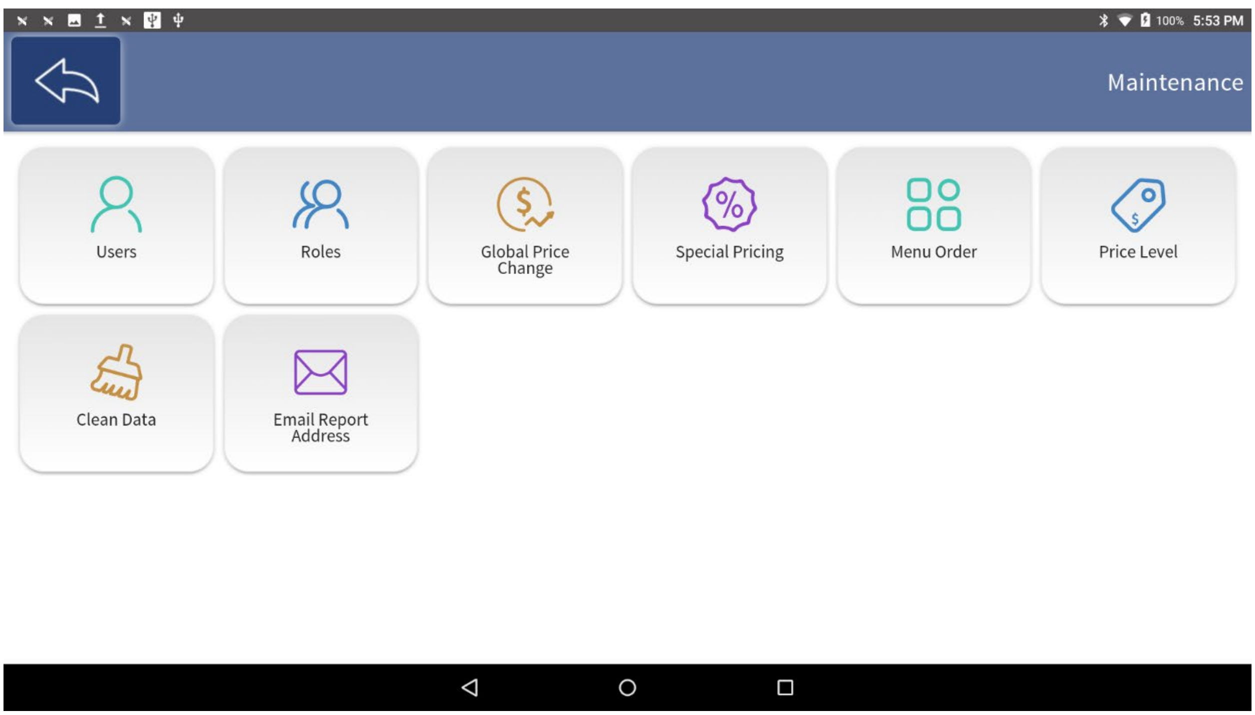
"Delete", from the ribbon To *Delete* Modifier Group

Maintenance:

1. From Main Menu Select 

"Maintenance"

- **Users** - Manage the store's User accounts for Employees.
- **Roles** - Define user access based upon selection of permissions.
- **Global Price Change** - Change the price of all or selected groups of products by amount, rounding, percentage.
- **Special Pricing** - Manage various promotions for store products.
- **Menu Order** - Allows the user to select the order products or categories are displayed within the Sales Screen.
- **Price Level** - Allows the user to set a reason or code as to why that individual is receiving a discount.
- **Clean Data** - Allows permissioned users to reset ticket number, reset logs, clear transactions.
- **Email Report Address** – set up email addresses to receive email reports



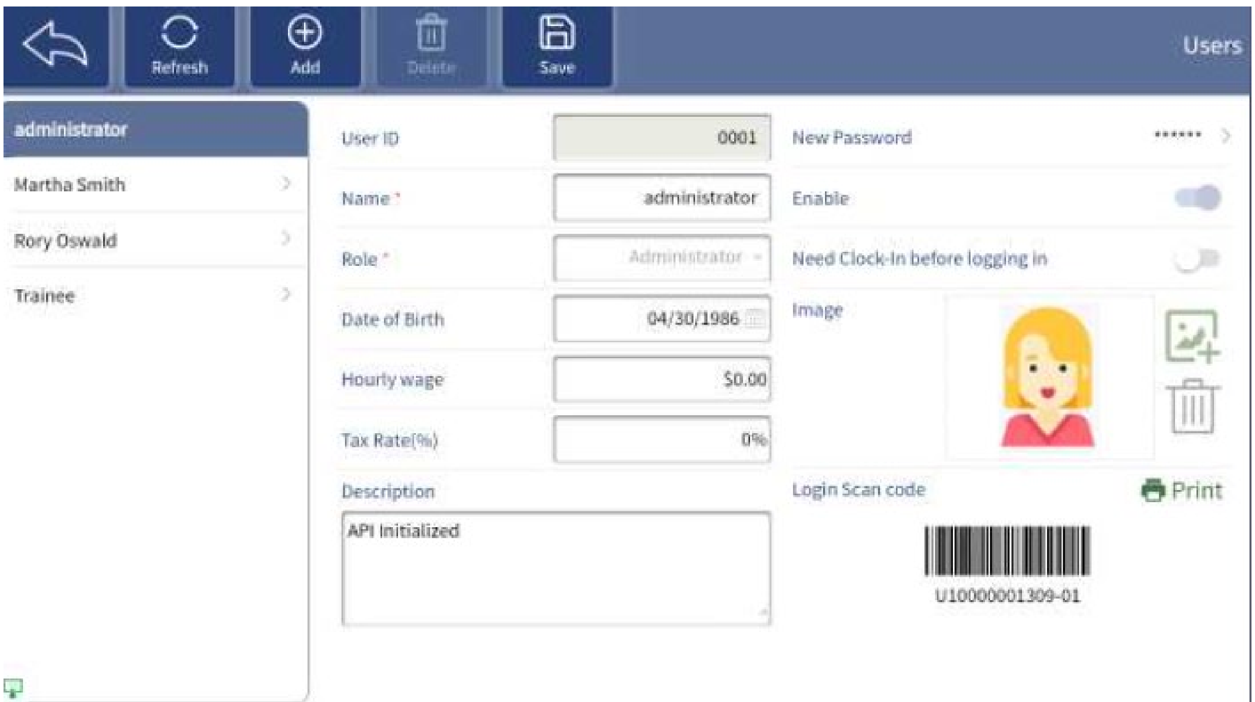
Users:

1. Select 

"Maintenance Menu"

2. Select 

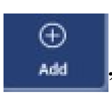
"Users", Update information and permissions existing users, or create new ones.

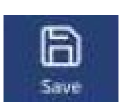


Select 

, from the ribbon to "Refresh" the current Users list.

To Add a User:

1. Select 

"Add", from the ribbon to add new user to store.
   a. Enter required Name and Role for the User
   b. Other information can be optionally filled,
2. Select 

"Save", from the ribbon to Save.

To Delete a User:

1. Select a User in the list on the left
2. Select 

"Delete", from the ribbon to delete User.

To Save:

1. Select 

"Save", from the ribbon will save changes.

New Password: Select this button to change the login password for the selected User.
Print: To print out the Login Scan Code of the selected User.

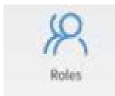
- Select Print 

- Barcode will be printed.
- User can then use barcode which has been printed to clock in/clock out.

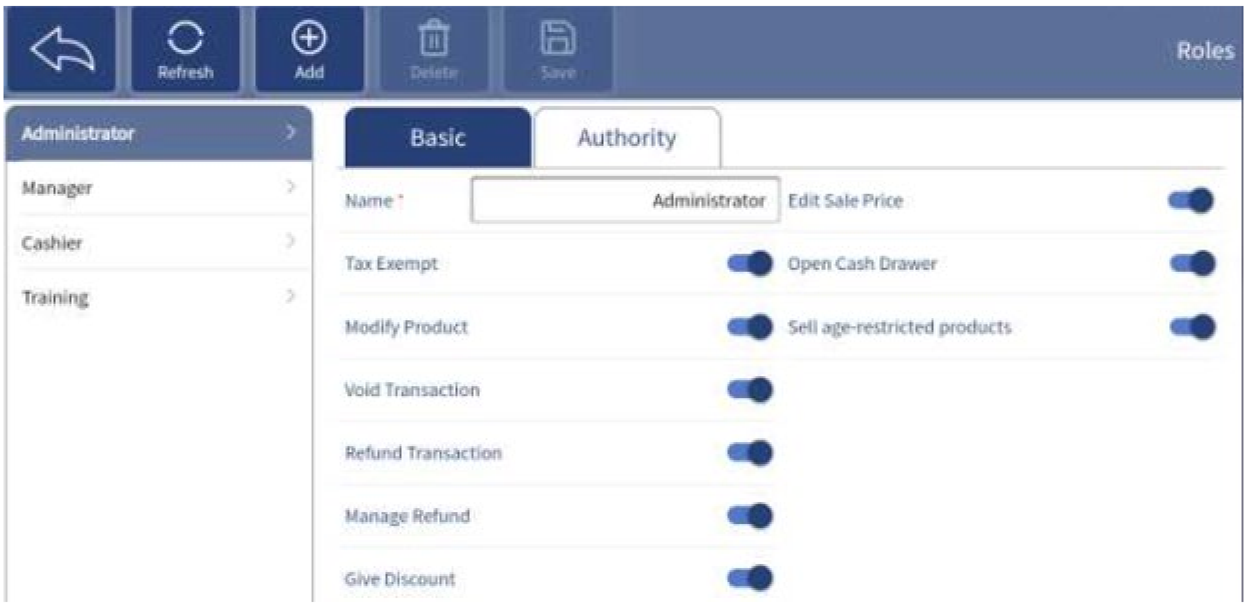
Note:
*User ID is generated by system and cannot be reused once deleted.

Roles:

1. Select 

"Maintenance Menu"
2. Select 

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



Basic:

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

- Name
- Tax Exempt
- Modify Product
- Void Transaction
- Refund Transaction
- Manage Refund
- Give Discount
- Edit Sale Price
- Open Cash Drawer
- Sell Age Restricted Products

Add new Role.

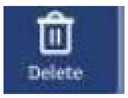
1. Enter the required name,
2. Choose the appropriate permissions and authority
3. Select 

"Save", from the ribbon to save.

Refresh: Select 

"Refresh", from the ribbon to refresh the current Roles list.

Delete:

- Select a Role in the list on the left
- Select 

"Delete", from the ribbon to delete.

Save: Select 

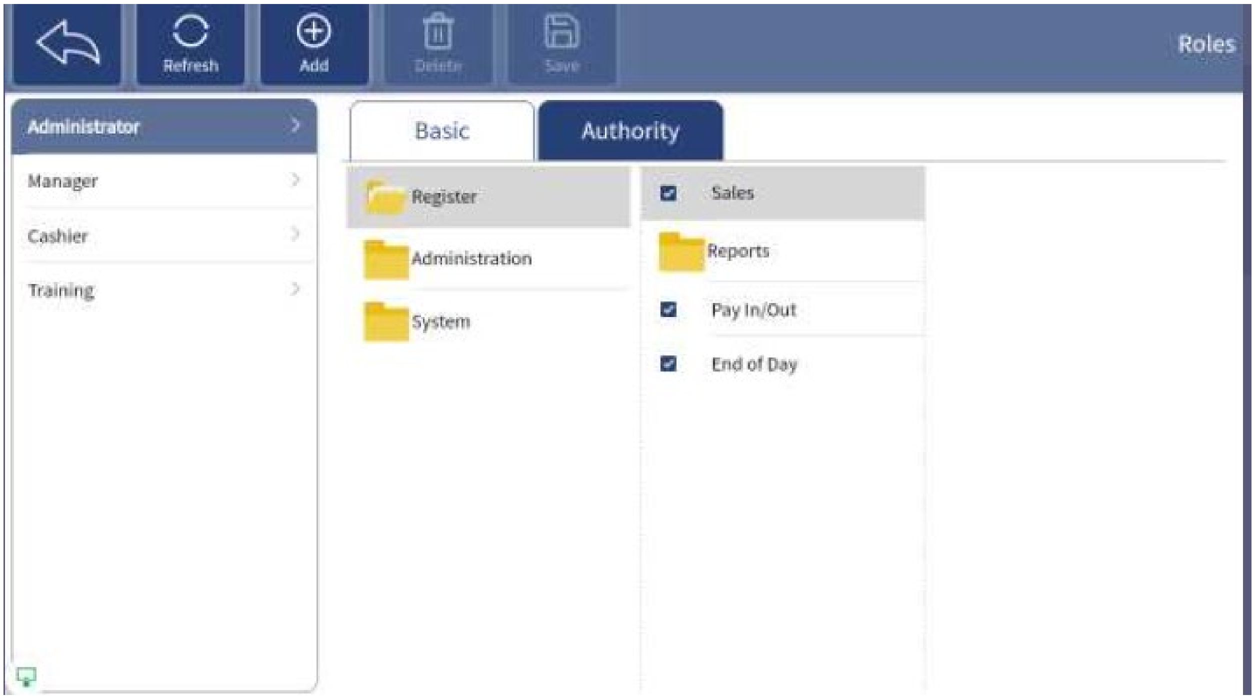
"Save", from the ribbon to save changes made to Roles.

***Note:** Any Modifications to Roles requires a* 

"Save"; otherwise it will revert to previous values

Authority:

Tab allows the Administrator access to permission the entire tree of the system. Administrators can provide permissions or change permissions to any role. Ensuring that each user has the appropriate level of access.



Ex. Changes can be made to the Main Menu screen of that User. If the Administrator decides that this user will have access only to Sales, this is where that can be provisioned.

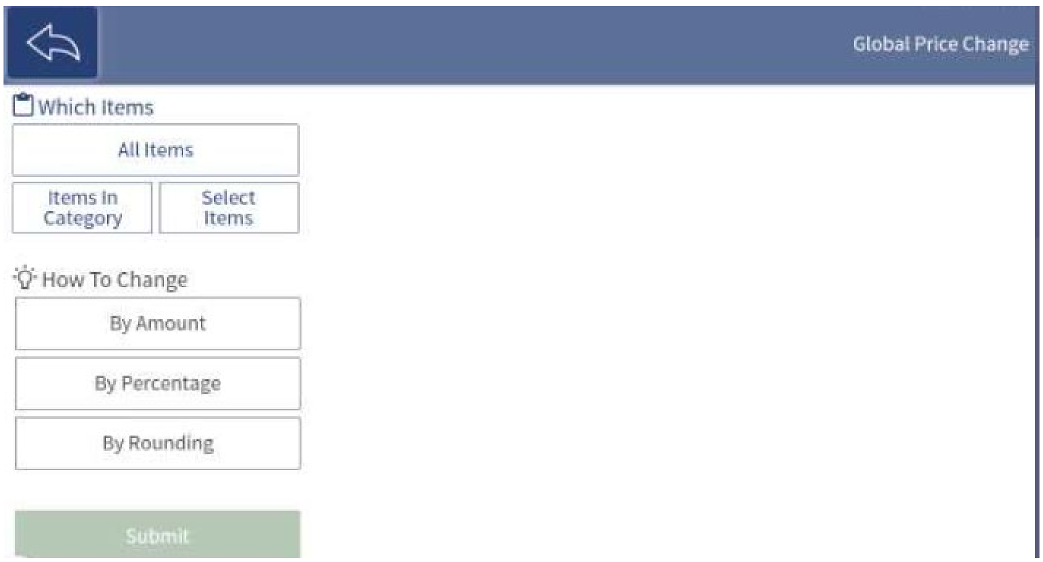
Global Price Change:

1. Select 

"Maintenance", from the Main Menu

2. Select 

"Global Price Change", To easily change prices for all items, items within Category, or Select Items by Amount, Percentage or Rounding.



Select which item you want to adjust the price on

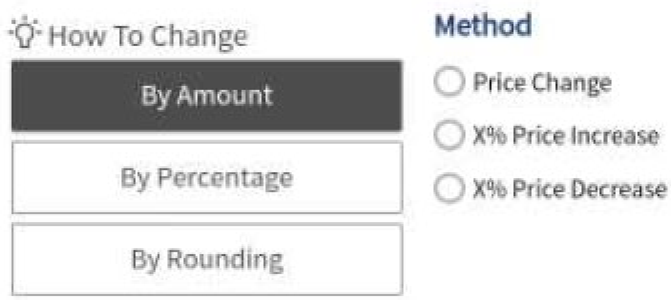
- Which Products
  - All Products
  - Products in Category
  - Select Products
- Select How to Change.
  - By Amount
  - By Percentage
  - By Rounding

All Products: Price changes for all products in the store.

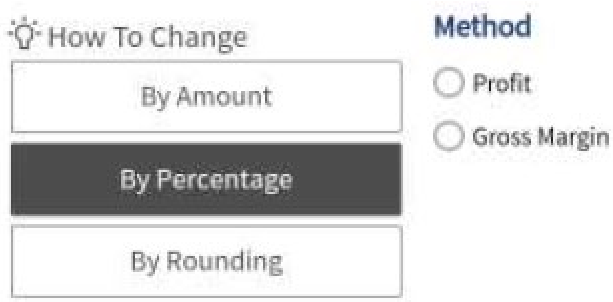
Products in Category: Price changes for products in a specific category in the store.
Select Products: Price changes for specific products in the store.

How to Change:

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



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

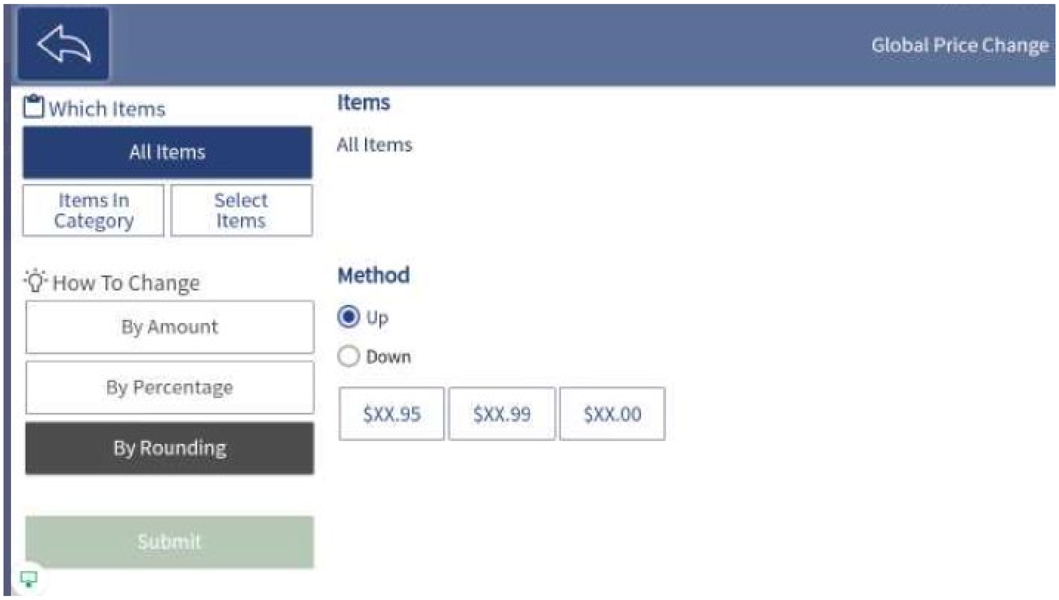


By Rounding: Set the price of the item to the format of XX99 or XX95.


How To Change
By Amount
By Percentage
By Rounding
Method
Up
Down

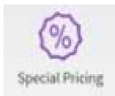
Example:

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



Special Pricing:

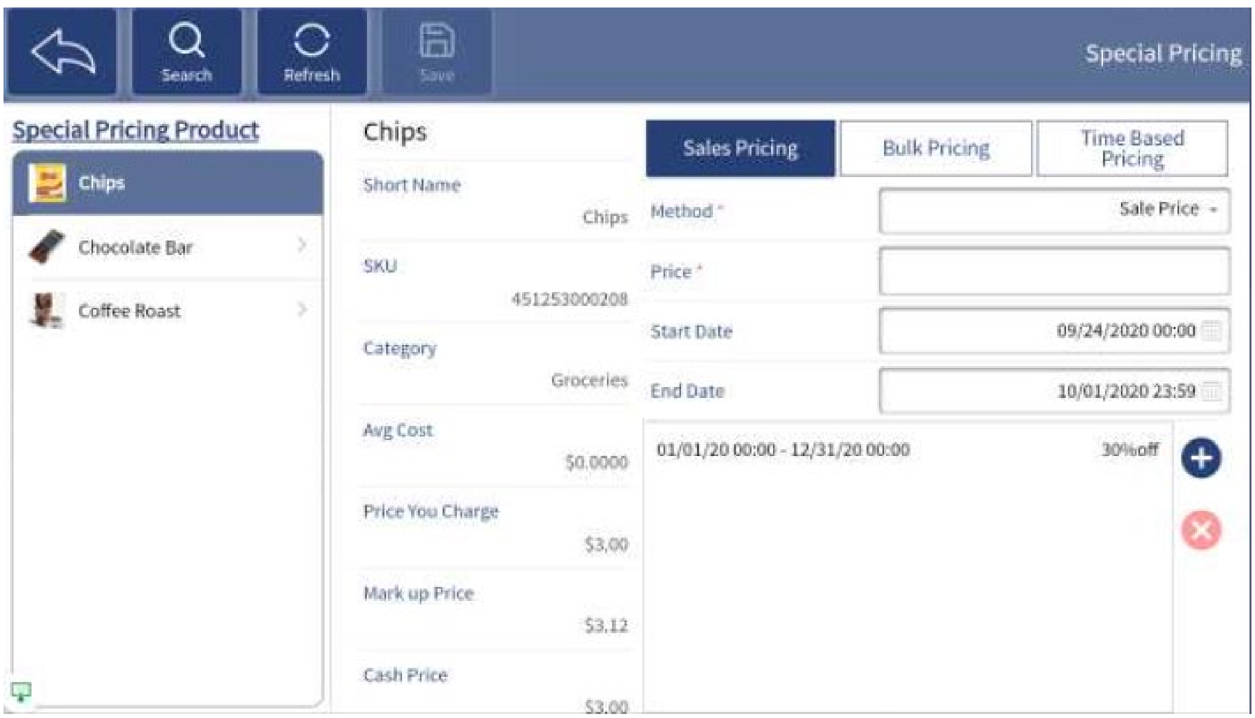
1. Select 

”Maintenance Menu”, from the Main Menu
2. Select 

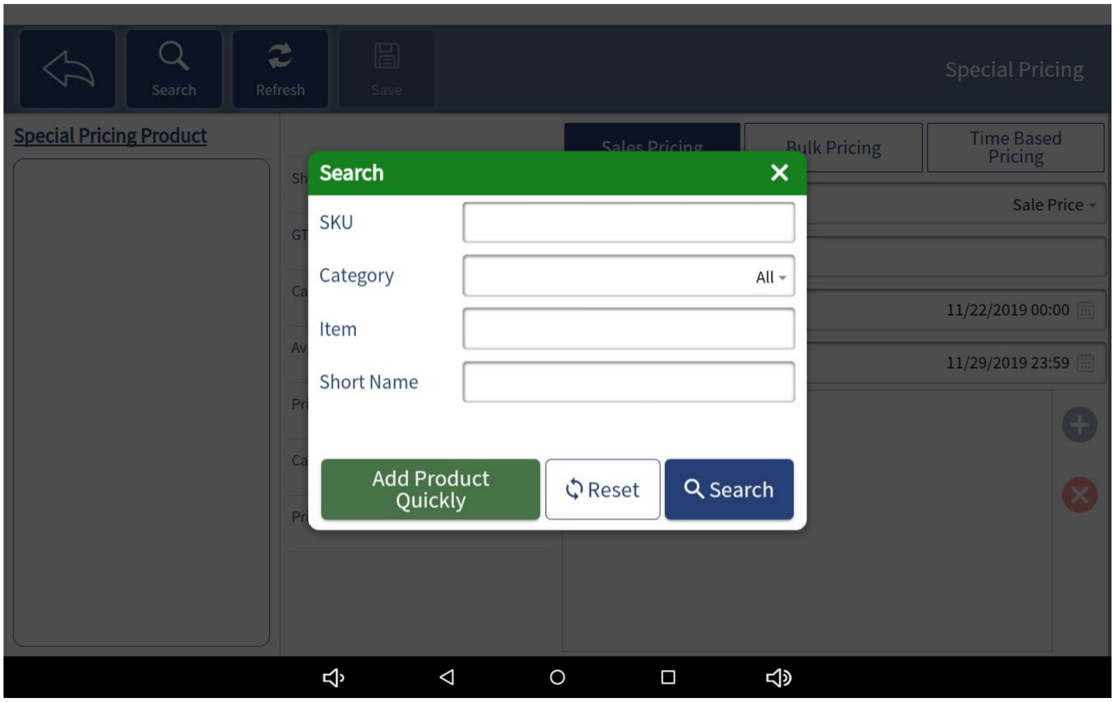
“Special Pricing”, Offers a different price to customers for a particular product according to several criteria, such as quality, quantity, the time frame of purchase and type of customer.

Search: Select 

“Search”, from the ribbon to find an item and set up a promotion method for it.



Add Product Quickly is also available:

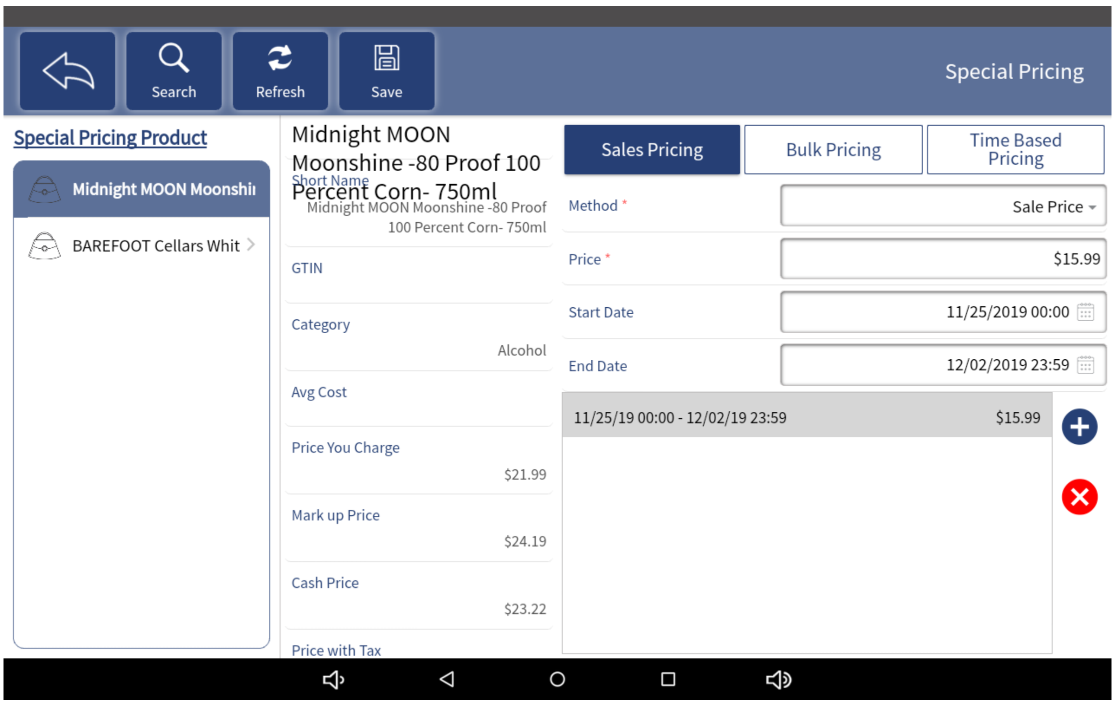


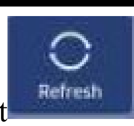
Please refer to **Appendix A** of this document for more about how Special Pricing interacts with other discounts.

Sale Pricing:

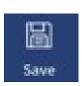
Defines a timeframe with a beginning and an end for a product
Example: Provide a lower price on Product for a defined period

1. Select Sale Pricing Tab
2. Set Method:
1. Sale Price
2. Percentage
3. Define Value
4. Enter Start Date- When will this Sale Start
5. End Date-When will this Sale End



Refresh: Select 

"Refresh", from the ribbon to refresh Special pricing page to verify any changes that have been made.

Save: Select 

"Save", from the ribbon to save changes after modifying Special Pricing product.

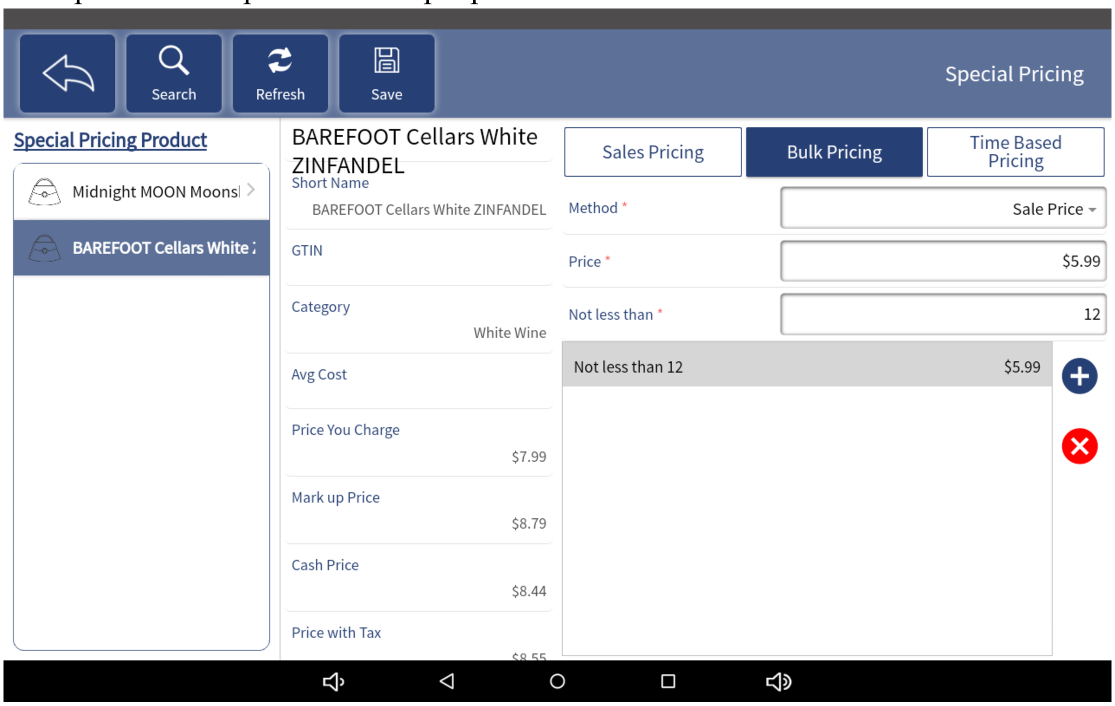
- "+" Button- Adds new special pricing variables set additional criteria variable. With "+" Set new variables for same product.

Example-

- Product 1 on sale for 3 days @x prices
- Product 1 on sale for different period of time @x price
- Product 1 on sale for a different period of time @y price
- Red “x” Button- Removes special pricing criteria set for special pricing to occur. Removing special pricing for that product.
    - Example: Removal of Variable
    - Product 1 on sale for 3 days @x prices
    - Product 1 on sale for different period of time @x price

Bulk Pricing:

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



Method:

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

Variable:

- Sale: Price
- Percentage: Percent
- Not Less than: Value which is set to receive Bulk pricing

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

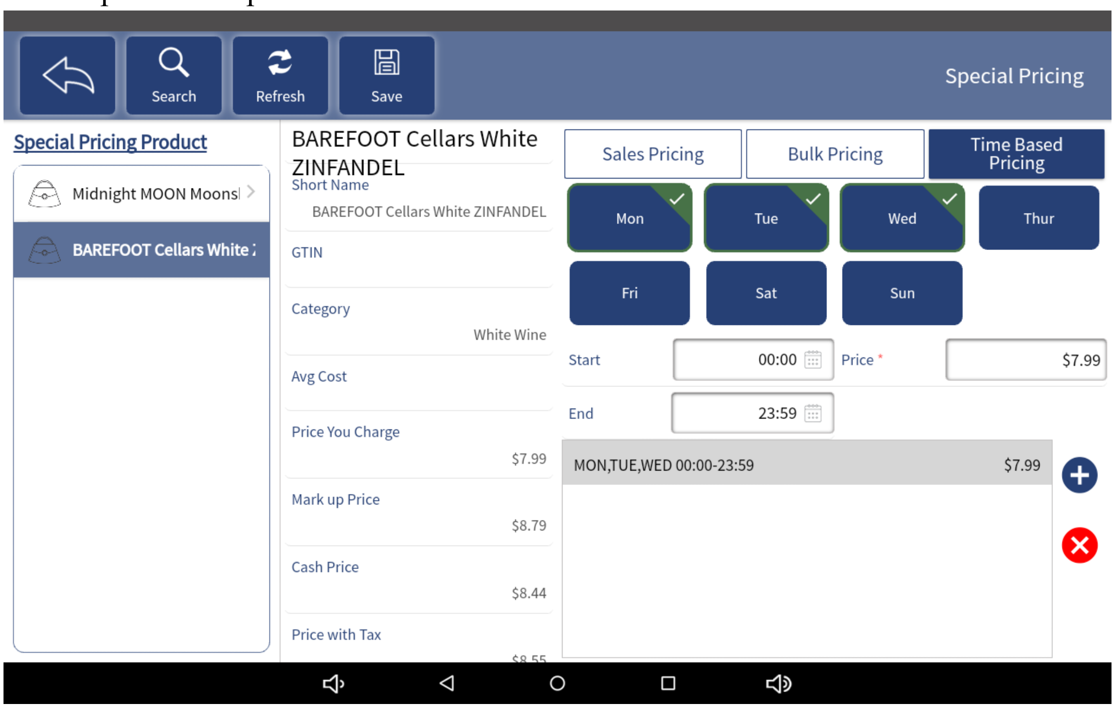
Example:

If (x/QTY) is meet bulk pricing is applied, if less then (x/QTY) no bulk pricing.

- Purchase 10 x pay x price
- Purchase 15 x pay y price
- Purchase 25 x pay z price
    - **Red "x" Button**- Removes special pricing criteria set for special pricing to occur. Removing special pricing for that product.
- In this example remove:
    - Purchase 10 x pay x price
    - Purchase 15 x pay y price

Time Based Pricing:

Set the promotion price for the item based on time.



Short Name- Item Selected from Search

Select Days of the week that Time Based Pricing will be active

Mon-Monday

Tue- Tuesday

Wed- Wednesday

Thur-Thursday

Fri- Friday

Sat- Saturday

Sun- Sunday

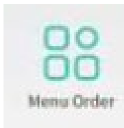
Start Time- Select Time

End Time- Select Time

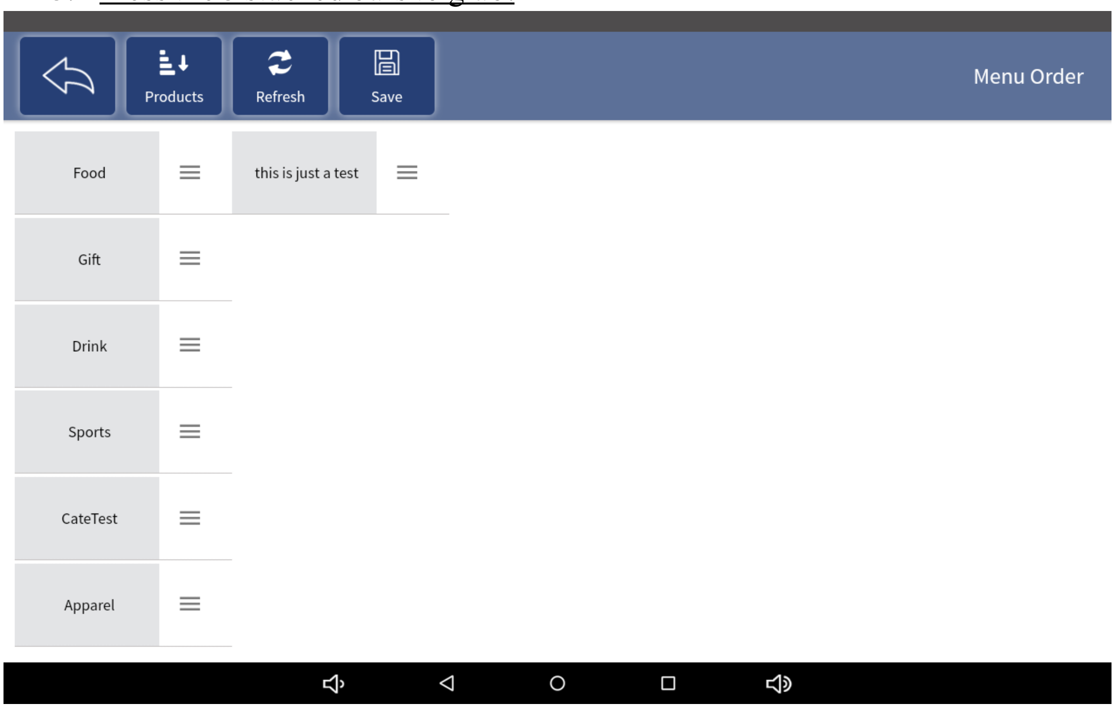
Price - Set price for product selected during this Time-Based Pricing

Menu Order:

1. Select 

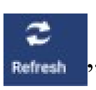
"Maintenance", from the Main Menu
2. Select 

"Menu Order", To Position the menu order by *grabbing* (long press 3-seconds) the Categories in the list on the left or grab on the item icon under the selected Category, then freely move its position on the Menu.
3. <u>Press the 3 stacked bars to grab.</u>

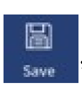


Products: Select 

"Products", from the ribbon to toggle to Product Menu Order

Refresh: Select 

"Refresh", to refresh the current Menu Oder.

Save: Select 

"Save", from the ribbon After the move is complete, to Save

Change how products are displayed in the menu:

- Select on products by *grabbing* (long press 3-seconds) to move and move it to desired position.

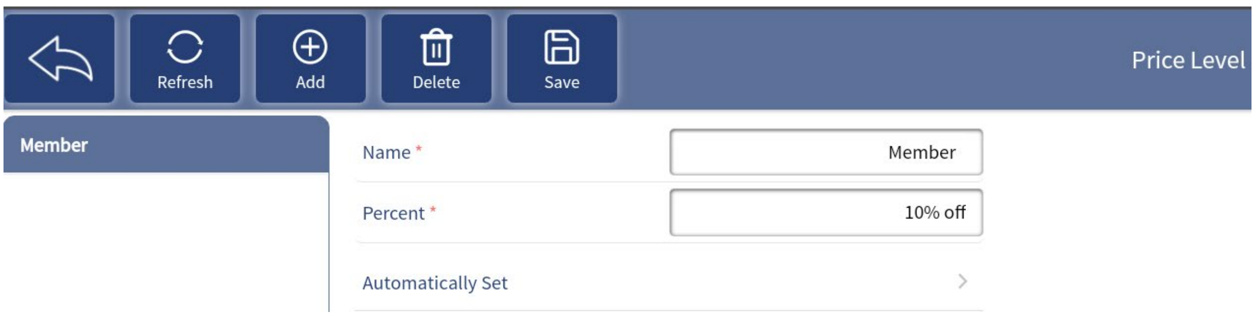
Price Level:

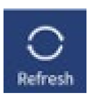
1. Select 

"Maintenance", from the Main Menu
2. Select 

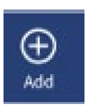
"Price Level", allows the user to set a reason code as to why that individual is receiving a discount.

Examples include Veteran, Senior, Family/Friend



Refresh: Select 

"Refresh", from the ribbon to refresh the current Price Level list.

Add: Select 

"Add", from the ribbon to add additional Price Level.

Delete:

1. Select on Price Level to be deleted
2. Select 

"Delete", from the ribbon to delete.

Save: Select 

"Save", from the ribbon to save changes after modifying Price Level.

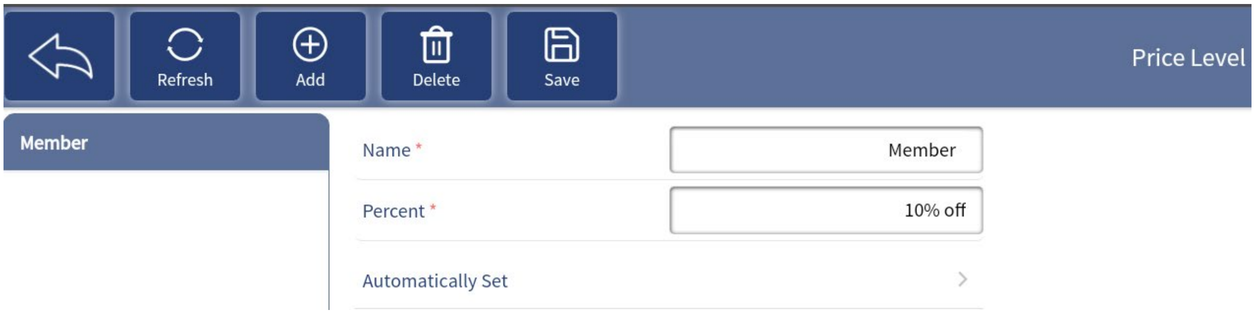
Add a "Price Level":

1. Select 

"Maintenance Menu", from the ribbon

2. Select 

"Add", from the ribbon



Enter:

- **Name** * Required
- **Percent** * Required

Select 

to **save.**

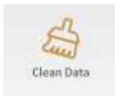
Notes: For Price Level to be active on product.

- Price Level Status on the product must be enabled on the product **Level** tab.
    - Automatically Set
        - All Product
        - Categories
        - Price Range
- Customer must be assigned a permissioned Price Level Customer must be Selected within the Sales Screen before selecting pay with "Sales"
- Customer price level discount will be applied.
- Please refer to Appendix A for more about how Price Level discounts are applied.

Clean Data:

1. Select 

"Maintenance Menu"

2. Select 

"Clean Data", Purges existing inventory and all data listed within the account

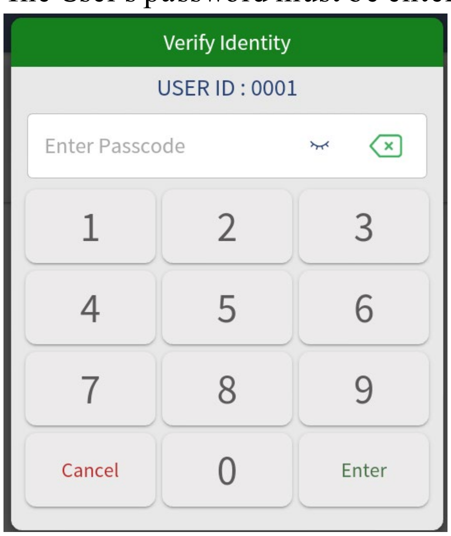
Note:

This Task will log date and timestamp along with user into Backoffice. Cannot be undone.

Clean Data can be used to

1. Clean Transactions
2. Reset Ticket Numbers
3. Clean Logs
4. Reset All Data

The User's password must be entered before continuing.



Selections:

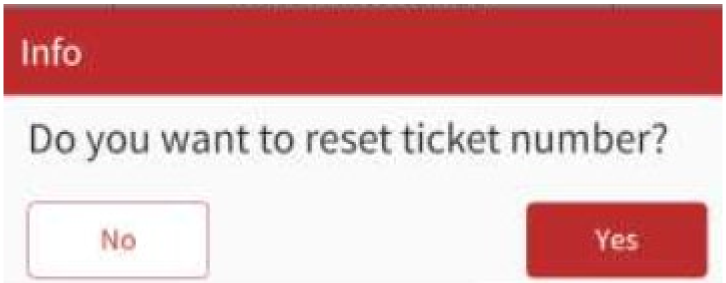
5. Clean Transaction
6. Reset Ticket Number
7. Clean Log
8. Reset All Data

Clean Transaction:

After selecting the start and end time, select Clean to clear the transaction record for this time period.

Select Cancel "Cancel" will go back to previous screen

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



Select  **"Yes"** will Reset ticket number

Select  **"No"** will return to Clean Data Screen

Clean Log:

Allows permissioned user to clean logs going back

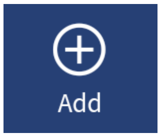
1. A Week
2. A month
3. X Days Ago

Select  **"Cancel"** will go back to previous screen

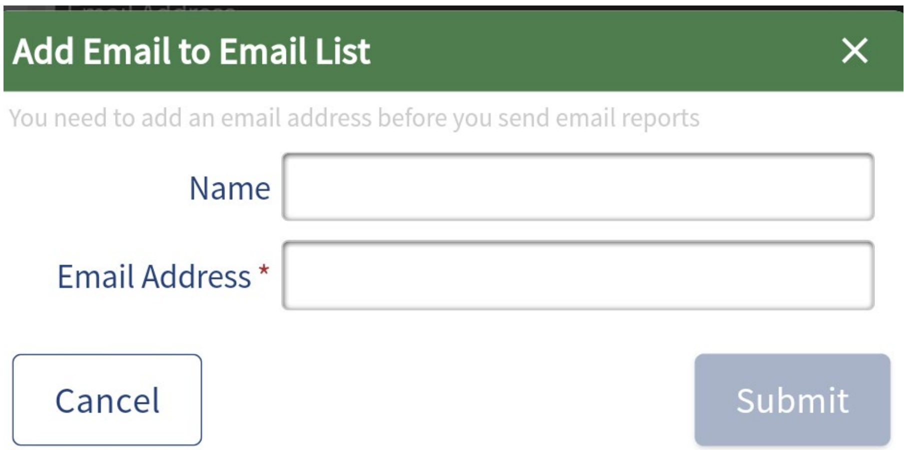
Select  **"Clean"** will perform request., will purge data and log date timestamp along with user into Backoffice. Cannot be undone.

Email Reports

To enable email of reports, the email address must be set up.

Select 

enter the information

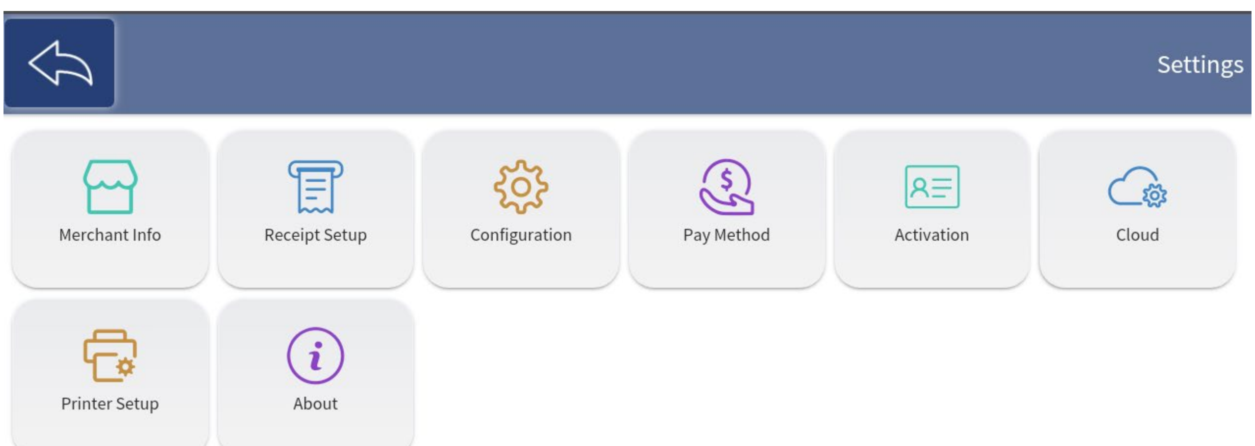


submit

Settings

1. *Select*  *"Settings" From the Main Menu*

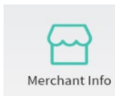
- Merchant Info- This page displays information about the store, such as Merchant Name, Phone Number, Logo, and Address. Please refer to provisioning user roles and permissions within Back Office User Guide (See page 25, Add a new POS Role) for additional information on access.
- Receipt Setup - Modify the settings for receipts.
- Configuration - Modify system settings such as Sale Screen Mode, Screensaver, Exit System When Idle, etc. Please refer to provisioning user roles and permissions within Back Office Portal (see pages 19, POS Configuration, 86 Configuration Settings) for additional information on access.
- Pay Method - Enable and enter values for Cash Discount, Markup, Cash Back, set accepted Payment Types which will appear on Pay screen and if those payment types will be applicable for Cash Discount.
- Activation - Upon initialization Activate/ Reactivate Device if not already active
- Cloud - This page allows you to set the **"Sync with Cloud Every"**. Time set where the POS communicates to the Back Office Portal to update information and synchronize.
- About - View information about the software, such as "Copyright Information", "Software License Agreement" and Version Updates



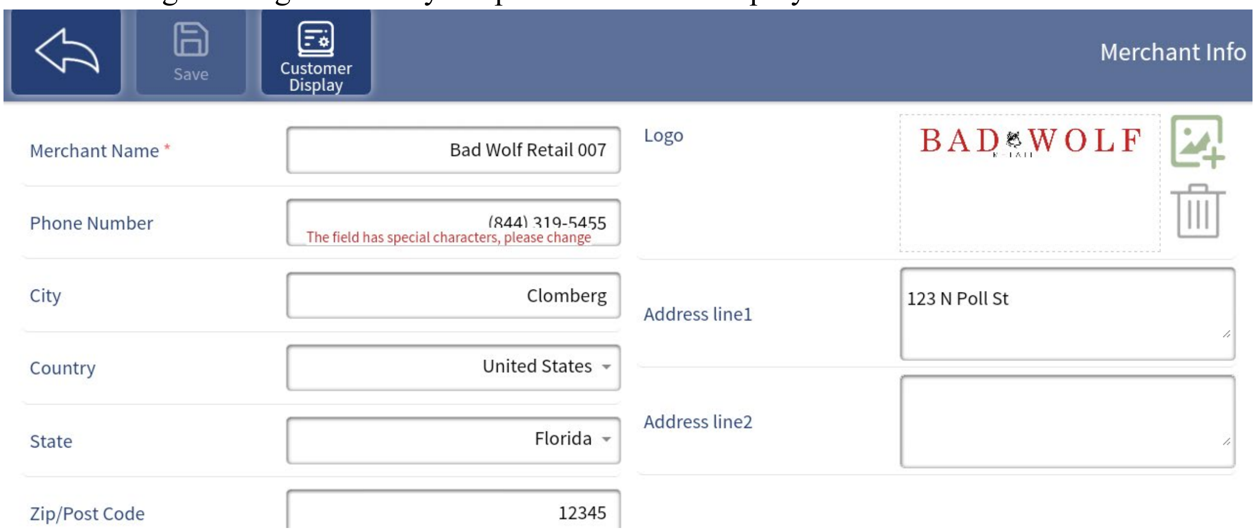
Merchant Info

1. *Select* 

"Settings" from the Main Menu

2. Select 

"Merchant Info", Merchant information will be displayed and can be changed along with ability to update Customer Display will be available.



Note: Fields marked with "*" are required

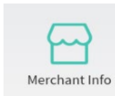
Save: Save changes after editing Merchant Info. Select 

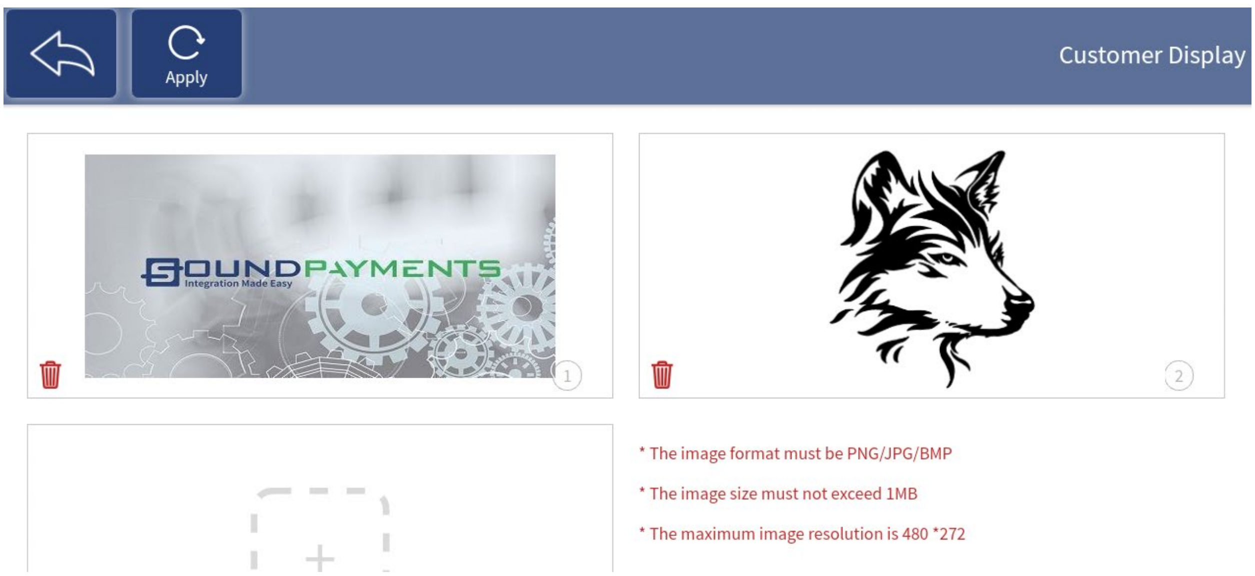
- If **Save** is not selected, previous values will remain and not be overwritten.

Customer Display: Tap 

to Configure the Customer Display

Customer Display:

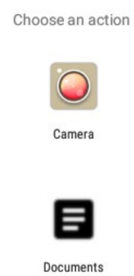
1. *Select*  *"Settings" From Main Menu*
2. Select  "Merchant Info"
3. Select  "Customer Display", Customer Display Screen will come up. Users can edit existing uploaded images as well as add new ones.



- **Apply:** Select  above to view changes without saving them
  - Users can see the changes prior to exiting Customer Display Menu.
    - The picture will be displayed in the customer display.
  - **Save:** Save changes after editing Merchant Info.
- Select 
  - If **Save** is not selected, previous values will remain and not be overwritten.

To upload Image

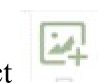
Select



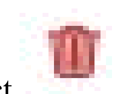
Options are:

- Camera
- Documents

To use on board Camera to take picture image:

1. Customer Photo image can be taken directly from the POS select  , **Add "Photo"** icon
2. **Select** 

, Camera Icon - Front facing camera will be turned on
    - Take Photo image

To Delete a previously uploaded image, select  **"Delete"**

*Pictures can be uploaded from a USB or from **Back Office Portal.**

- Recommendation
    - The Image format must be PNG/JPG/ BMP
    - Must not exceed 1MB
    - Size 480*272

Please refer to **Backoffice User Guide** for additional information on **"Customer Display Logo". (Pg. 19 section 6.c)" Quick Reference link to Sound HUB"**

Receipt Setup:

1) *Select* 

"Settings" From Main Menu

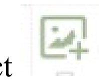
2) Select 

"Receipt Setup", Users are provided options to:

1. Display the logo on the receipt
2. Add a tip line
3. Request for barcode to be printed on receipt
4. Set number of copies which are printed
5. Set the number of refund copies which print
6. Provide ability to email receipts
7. Update header/ footer data.

- **Template:** two receipt templates are available
    - The difference is Template 2 does not display the price per item on the receipt
- **Logo:** When Enabled, select "Upload a logo".
    - The receipt logo can be loaded from the Back Office Portal.
    - The image selected will print at the top center of the ticket.

To Use on board Camera to take picture image:

- Customer Photo image can be taken directly from the POS select  , Add "Photo" icon
- Select  , Camera Icon- Front facing camera will be turned on
  - Take Photo image

- **Tip Line:** When Enabled, a tip line will be printed on receipt
- **Barcode:** When Enabled, a barcode will print out at the bottom of the receipt.
  - This barcode can be scanned to recall transactions.
- **Copy:** Set the number of tickets to print.
  - **Default:** Set to (1)
    - *Note*: If set to 0 **NO** copy will print
- **Refund Copy:** Set number of refund tickets to print
  - **Default:** Set to (1)
    - *Note*: If set to 0 **NO** refund ticket will print
- **Header:** Tap the + button to add a message at the top of the receipt. Multiple lines may be added. Text alignment can be set for each line.
- **Footer:** Select the **Footer** tab:
  - Tap the + button to add a message at the top of the receipt. Multiple lines may be added. Text alignment can be set for each line.
- **Save:** Select Save changes after editing Merchant Info.
  - If **Save** is not selected, previous values will remain and not be overwritten. Screen will prompt, "There are unsaved changes, Discard change?"

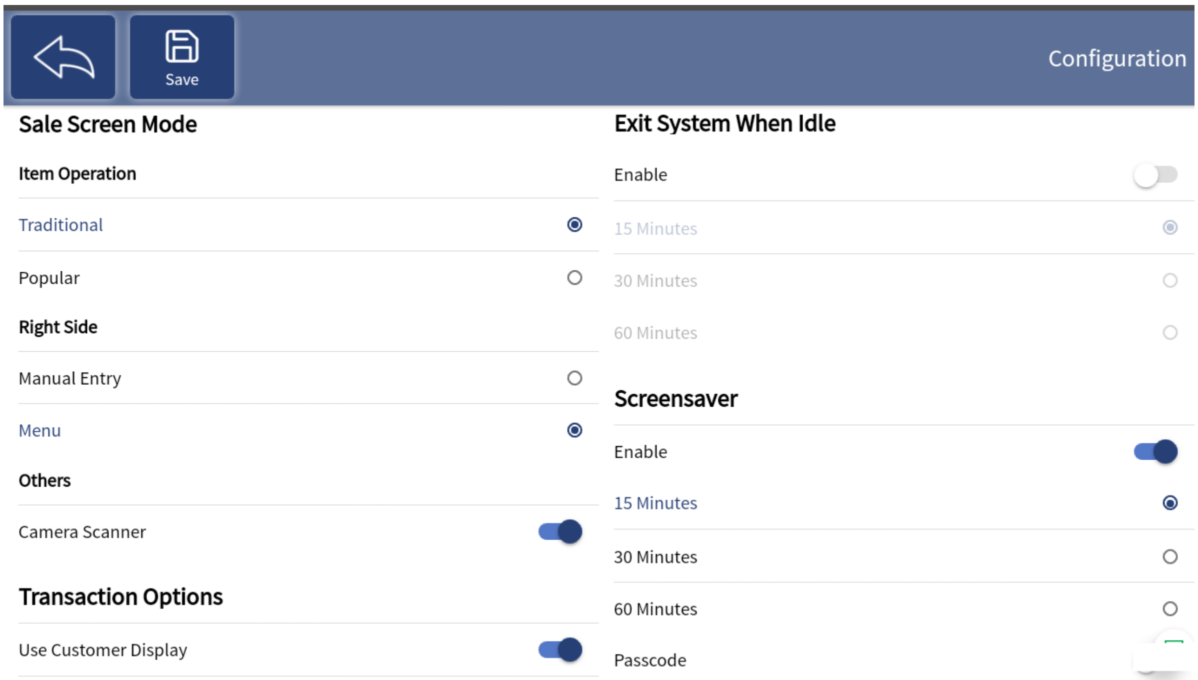
Configuration:

1. *Select* 

"Settings" From Main Menu

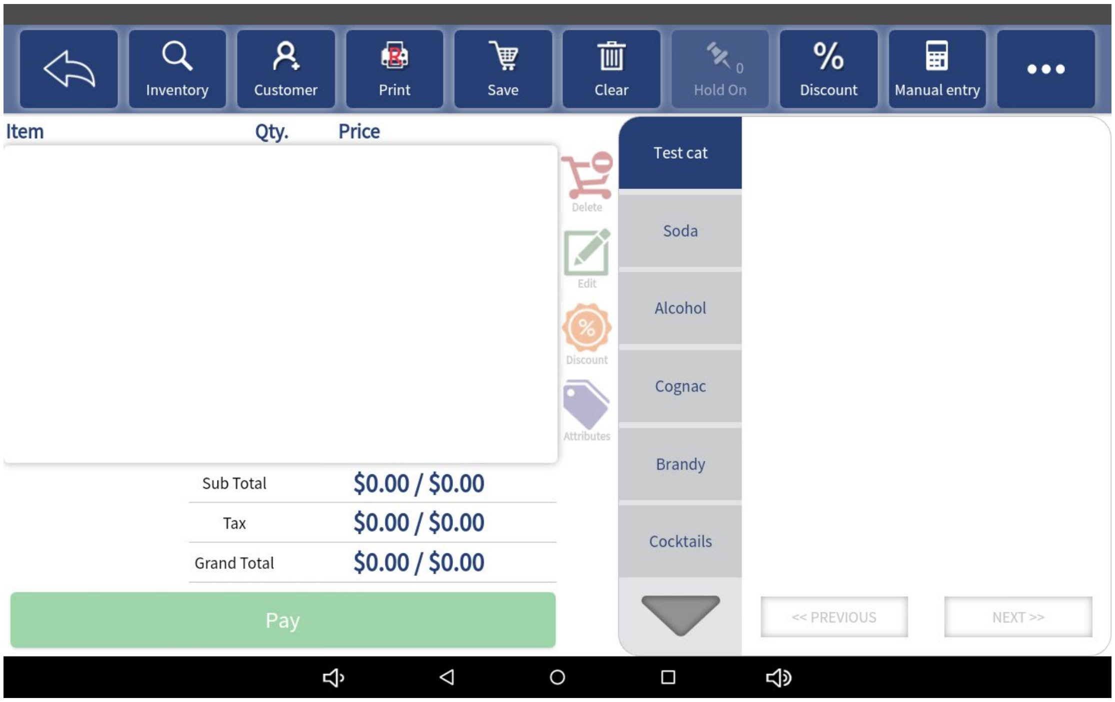
2. *Select* 

"Configuration", to set Single line item Operation, Enable Exit System When Idle, Set Screensaver timeout, Enable Camera Scanner, Set The default Right Side, Set Transaction Operations, and App Settings.

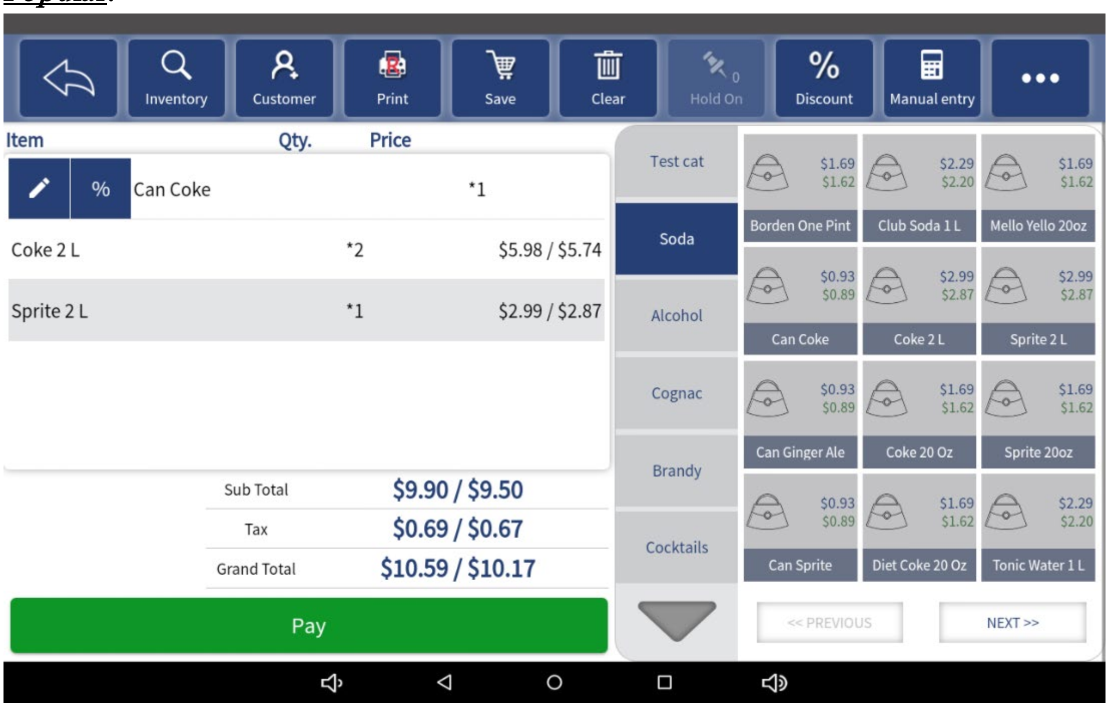


- **Single Line Item Operation:** Select how individual products can be modified, deleted, edited, discounted. (See Example on next page)
  - *Traditional:* In this mode, icons for operations such as Delete, Edit, Discount, and Attributes appear in a small column positioned in the middle of the page. (See Sales)
  - *Popular:* In this mode, select the desired operation such as Edit, Discount, and Attributes by **sliding the single item in the shopping cart right**, or **sliding left to Delete.** (See Sales)

Traditional:



Popular:



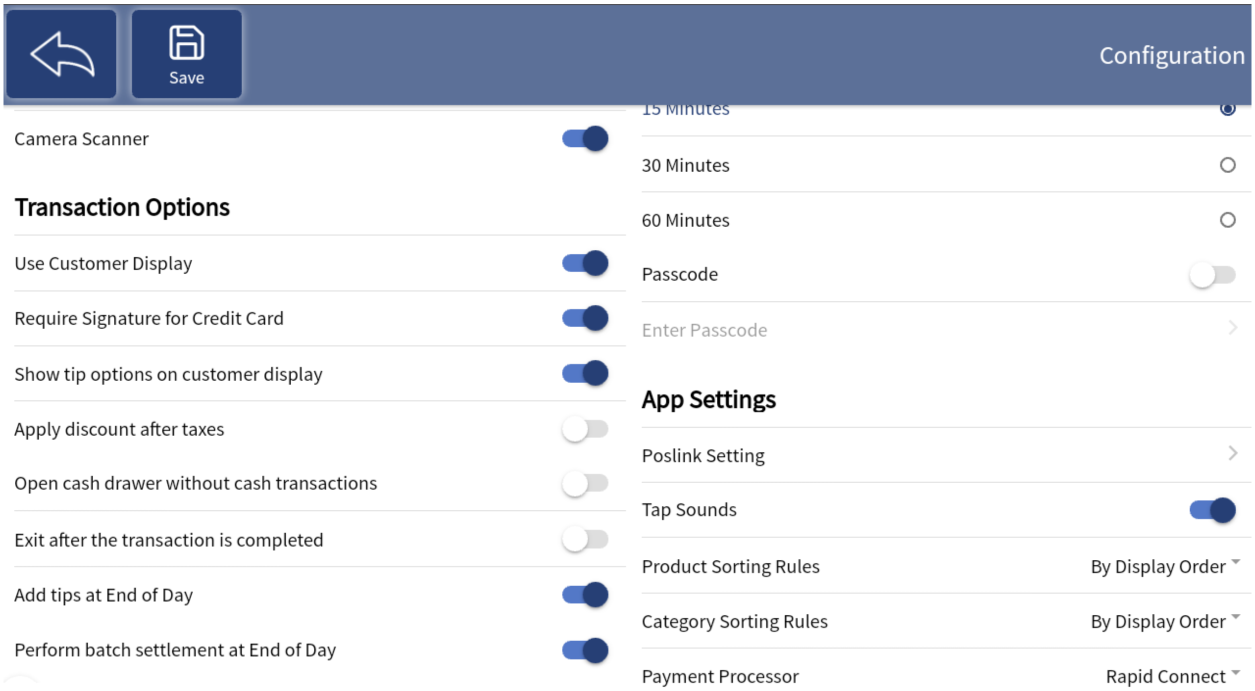
Settings > Configuration screen "Right Side" section

- **Right Side hand side:** Within the Configuration page, there are two settings by default, "**Menu**" or "**Manual Entry**".

- *Manual Entry: Set the right side to the mode of the Manual Entry by default. (See Sales)*
    - *Menu: Set the right side to the mode of Menu by default. (See Sales)*
- *Others:*
    - Camera Scanner: Turn Camera Scanner on
- **Exit System When Idle:** *Log out automatically after a period of idle time. If enabled, a suitable time must be selected.*
- **Screensaver:** Enable on and select a suitable time period
    - **Passcode:** *Set a password which are used to enter the system during screen saver.*

Slide the Settings>Configuration Screen upwards on unit

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



- **App Settings section shown above**:
  - **POSLink Settings:** (Settings should remain as default)
    - **Comm Type:** USB
    - **Poslink timeout time recommend >60s:** 90s
    - **Serial Port:** Com1
    - **MAC address**
    - **Enable Proxy: Off**
  - **Tap Sounds***:* The system's touch screen sound is turned on.
  - **Product Sorting Rules:** *(Options Below)*
    - *By Display Order*
    - *By Creation Time*
    - *By Name*
  - **Category Sorting Rules***:* *(Options Below)*
    - *By Display Order*
    - *By Creation Time*
    - *By Name*
  - **Payment Processor***:*

***Notes:** After completing the changes, select* 

to save all changes. Re-login is forced and is required for these settings to take effect.

Pay Method:

1. *Select* 

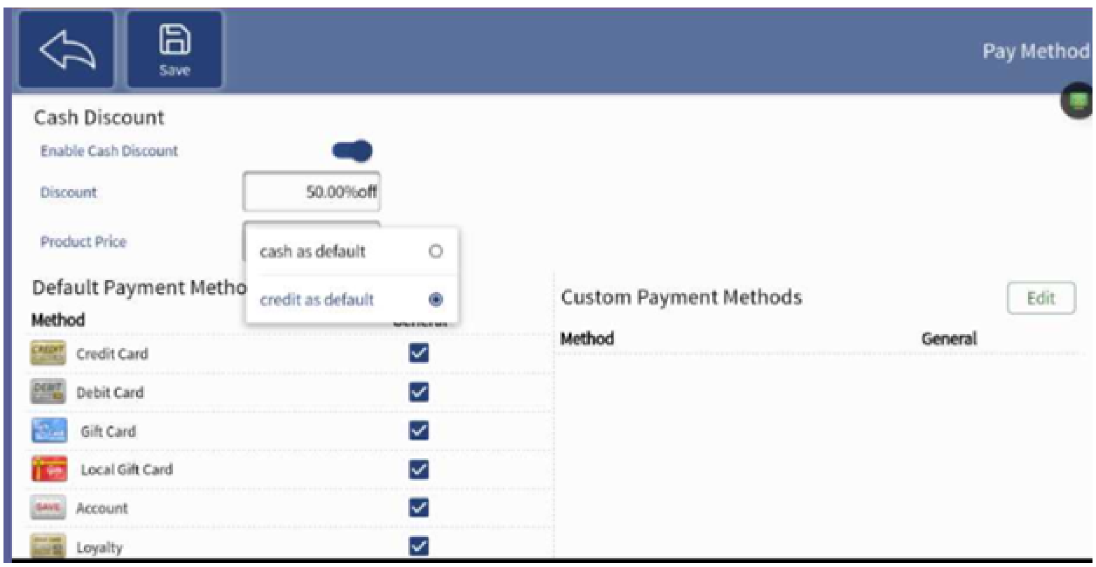
"Settings" *From Main Menu*

2. *Select* 

"Pay Method", change payment types accepted

NOTE: Cash Discounts can be edited in the POS. for up charging up to 3% for use of credit card. See Seamless Manual to edit in the Back Office.

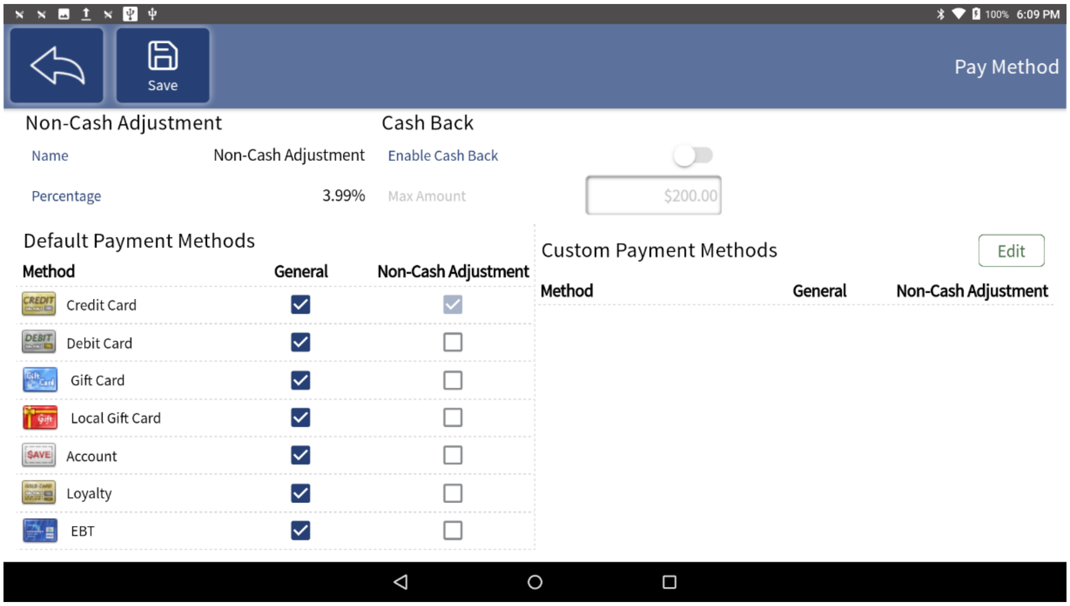
- ***Cash Discount***: Enable/Disable, when *Enabled* enter the percentage Cash Discount.
  - Please reference Appendix A for more about how Cash Discount is applied.



- ***Cash Back:*** Enable/ Disable, when Enabled enter the maximum Amount of Cash Back to be allowed.
  - Cash As default- Defaults the price to the Cash price on the Sales and inventory screens
  - Credit As default- Defaults to the credit price on the Sales and inventory screens

- ***Pay Method***:
  Default Method of Payment:
  - General: When checkbox is selected payment type will appear as an available payment selection upon checkout.
  - Cash Discount: When checkbox is selected, Cash Discounting will be applied

Note: Custom Payment Methods can be configured for selection in the Back Office User Manual. Please reference the Back Office User Guide for additional information.



- ***Cash Back:*** Enable/ Disable, when *Enabled* enter the maximum Amount of Cash Back to be allowed.
    - EMV Pin Required
    - EBT Pin Required

Pay Method:

- **Default Method of Payment:**
    - ***General:*** When checkbox is selected payment type will appear as an available payment selection upon checkout.
    - ***Cash Discount:*** When checkbox is selected, Cash Discounting will be applied

Note: *Custom Payment Methods can be configured for selection in the Back Office User Manual. Please reference the Back Office User Guide for additional information.*

Activation:

1) *Select* 

"Settings" *From Main Menu*

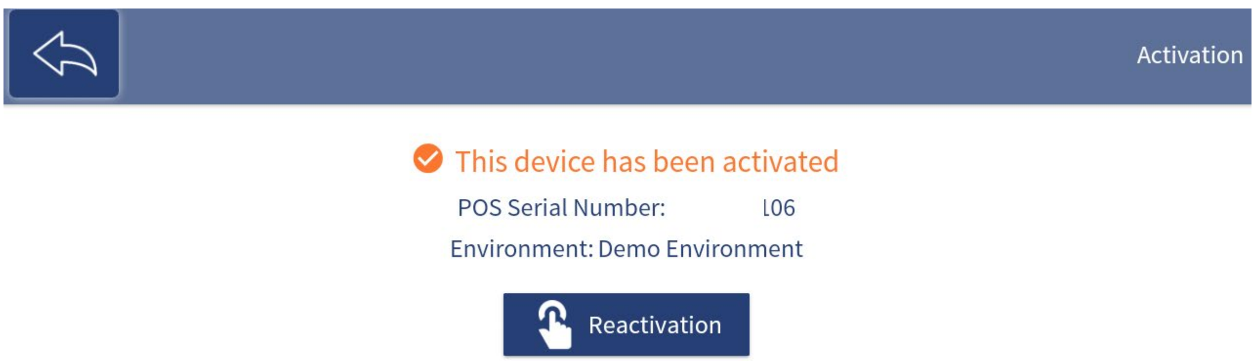
2) *Select* 

"Activation",

If the local POS has been activated. The page will display "This device has been activated." and display the Serial Number (SN) of the local POS.
If the local POS has <u>not</u> been Activated.

- The page will be display "This device is not activated"
- Select 

on upper left corner.



Cloud:

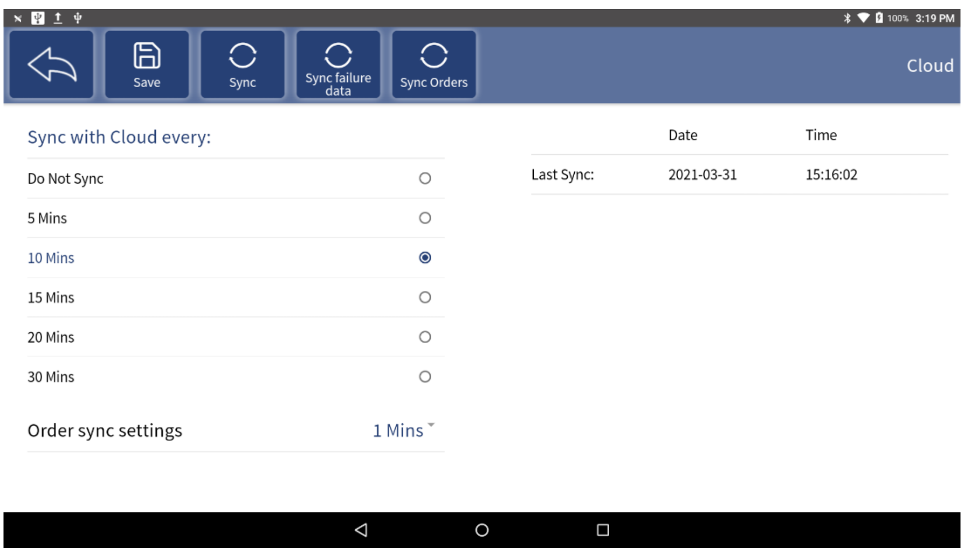
1. *Select*  "Settings" *From the Main Menu*
2. Select  "Cloud", and Set Sync with Cloud Every: 5/ 10/ 15/ 20 minutes or "Do not Sync"

Sync **-** Request communication to the Back-Office Portal to update information and synchronize.

Save: After selecting the time, select  **"Save"** above to complete the setting.

Back Office Notes:

* Select "Do Not Sync" means the Store is required to sync the POS to the Back Office manually.



Sync: starts synchronization to the cloud immediately.

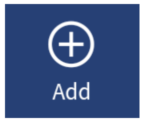
Sync Failure Data: will continue syncing data that has been flagged as errors.

If the POS receives clear error information from the cloud (except for network reasons), the data will not be synchronized. At this point, the data will be set to incorrect data and will not be synchronized during automatic synchronization.

Sync Orders: will sync saved orders only to the cloud (sync orders can be set to synchronize at a different time interval from the cloud sync)

Printer Setup:

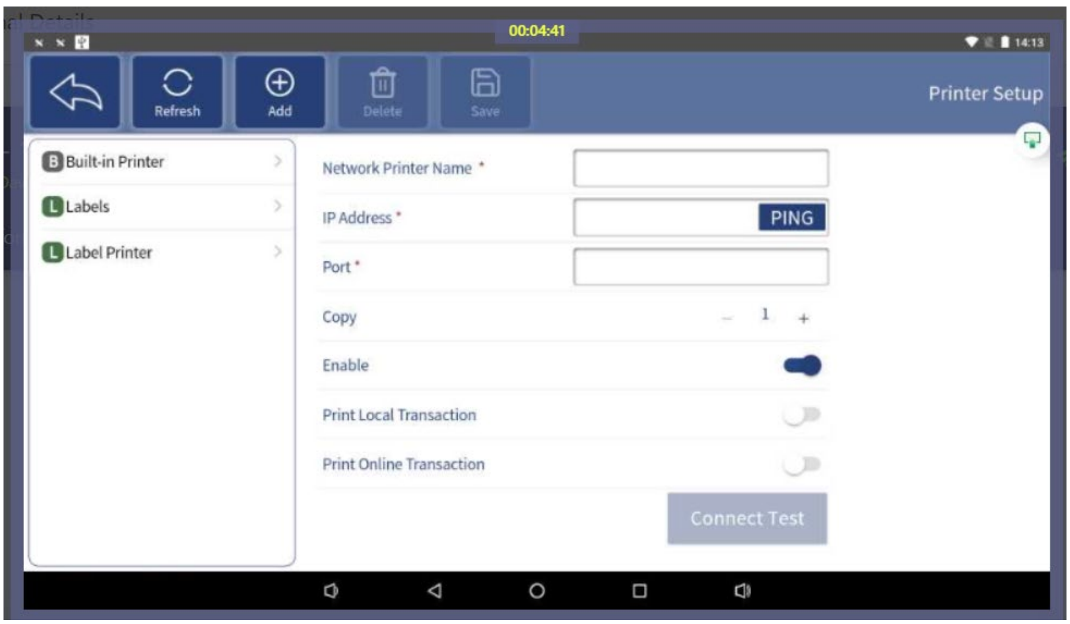
Default screen allows you to rename your built-in printer on this screen for easier identification.

1. To Add a printer, select 

2. Select type of printer to add:

Network Printers:

Network Printers are receipt printers that are on the same local network as the POS Terminal and must support Epson ESC protocol. For a list of compatible printers created by Epson please go to:
https://reference.epson-biz.com/modules/ref_escpos/index.php?content_id=73



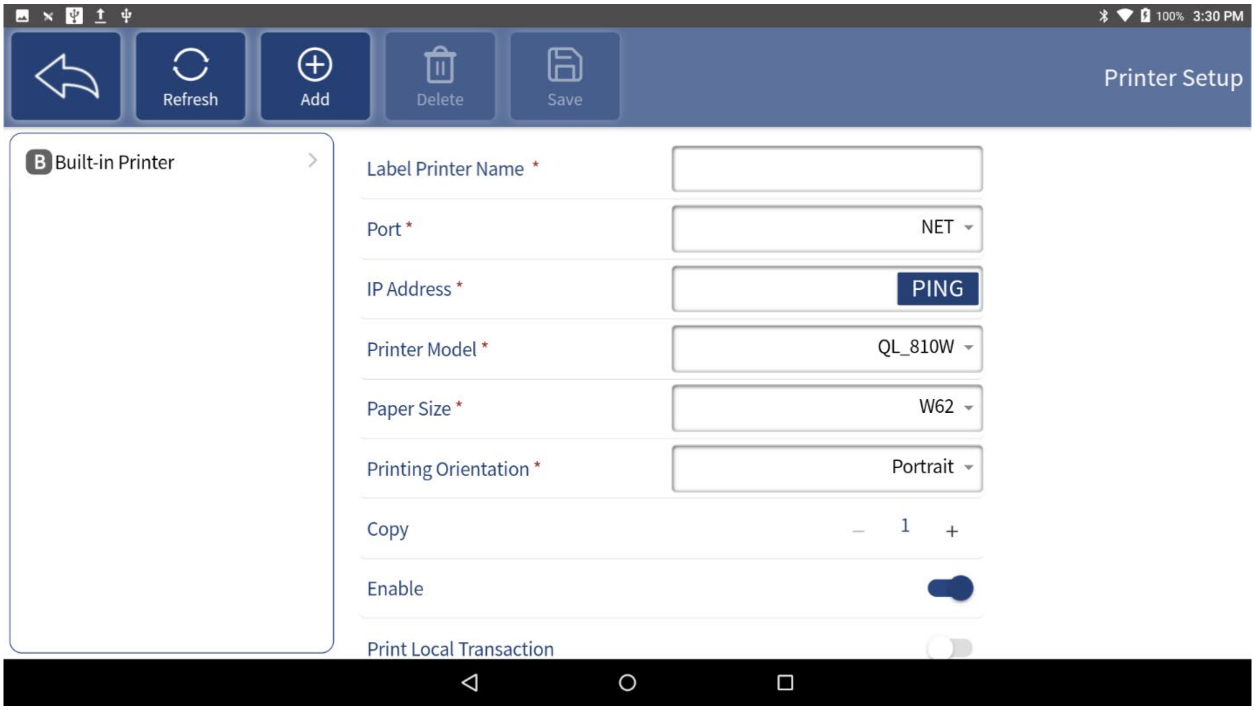
Setup Steps:

- Enter the IP address and port for connection
  - If you do not know the port, try 9100
  - (Optional) Select Ping
- Select Connection Test
  - If Applicable Enable "Print Local Transaction"
- Select Save

NOTE: Sound Payments is unable to troubleshoot network connectivity issues.

Label Printers:

Label printers support is the Brother 8 label printer series. The only option that is available to be selected is the QL_810W.



Set-up Steps:

- Name the printer
- Enter the IP address
  - (Optional) Select Ping
- Select paper size
- Select printer orientation
- Select number of copies to print
- Select Connection test
  - If Applicable Enable "Print Local Transaction"
- Select Save

NOTE: Sound Payments is unable to troubleshoot connectivity issues.

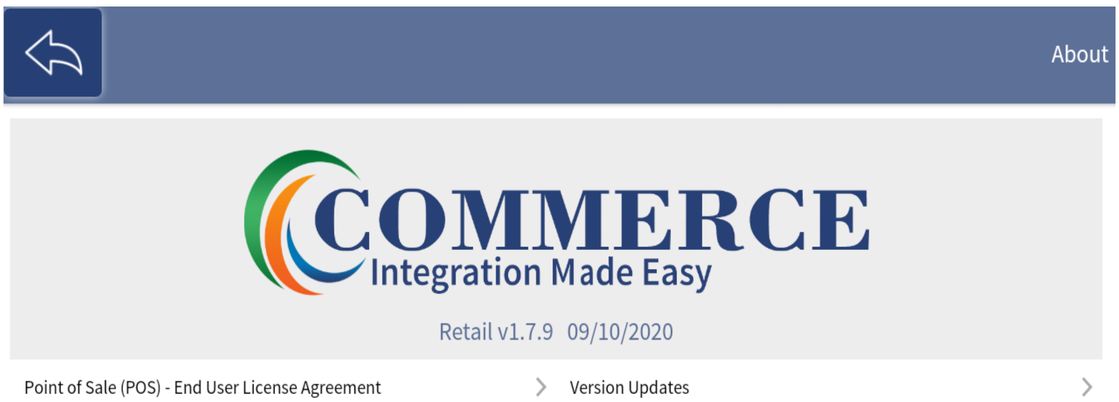
About

1. *Select* 

"Settings" *From Main Menu*

2. *Select* 

"About", will display Information on Version and Information on Select Version Updates, to view patch notes.

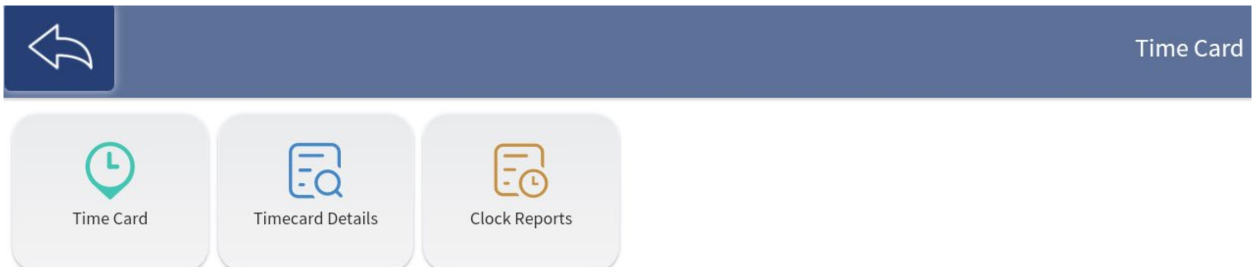


Timecard:

Select 

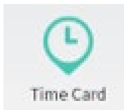
"Time Card" from Main Menu

- Timecard: to Clock In, Clock Out, go on Break
- Timecard Detail: Permissioned users can view information on Employees and perform timeclock management
- Clock Reports: Permissioned users can view reports on employees and get printouts of Timeclock



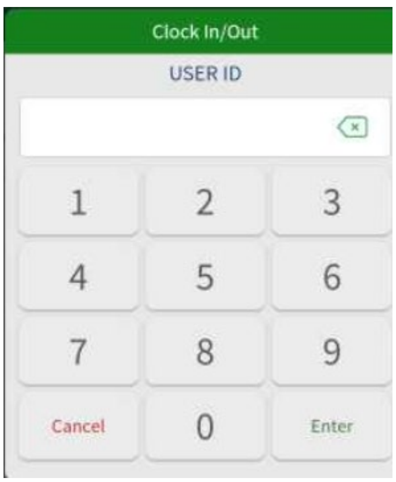
Timecard:

1. Select 

"Time Card" from the Main Menu
2. Select 

"Time Card", To Clock In, Clock Out, go on Break, view My Clock Time

Before the user punches the card, they need to log in to confirm their identity.
Enter User ID:



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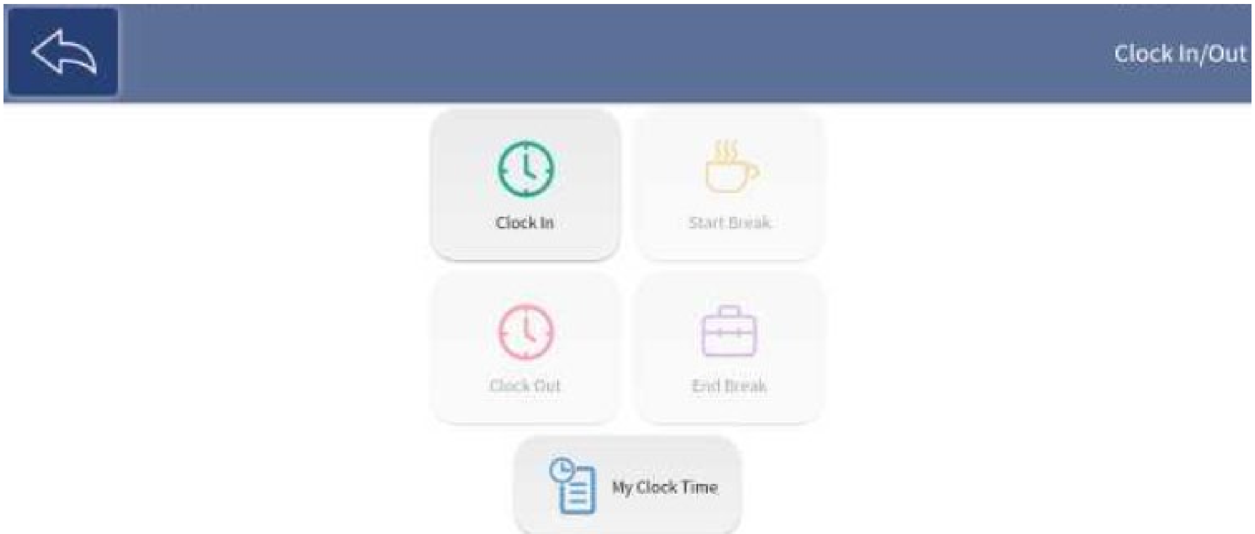
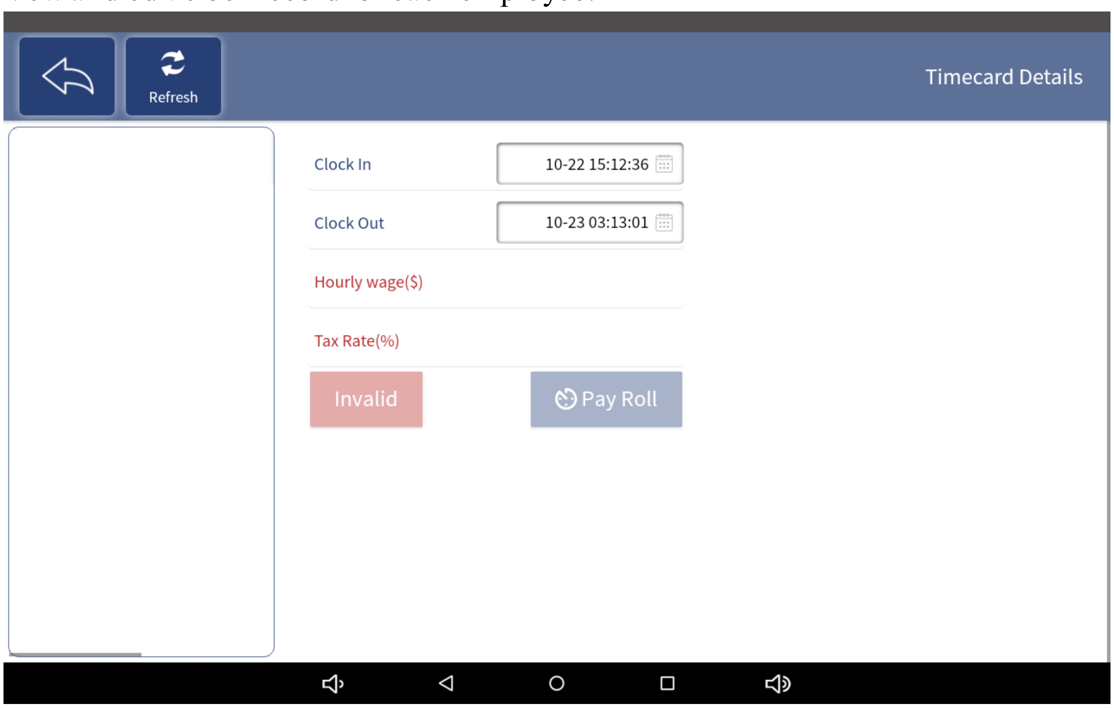
Clock In: Record the time that employee started working.

- **Start Break:** Record the time that employee started break.
- **End Break:** Record the time that employee ended break.
- **Clock Out:** Record the time that employee left work.
- **My Clock Time:** Report of hours worked based upon filters provided by the user.



Timecard Detail:

View and edit clock record for each employee.

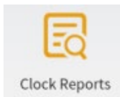


Invalid: Mark Timecard period as Invalid. Only Administrator has permissions by default to enable additional users to have access to **Invalid.** The Administrator must configure the Role.

Pay Roll: Pay the employee for the time. The information provided here is based on the information provided in the back office for each employee.

Clock Reports:

1. Select 

“Time Card” from the Main Menu
2. Select 

“Clock Reports”, This page shows all the clock records for all employees.

Display Data based upon Start Date/ End Date

Refresh: Select 

to renew page

Print: Select 

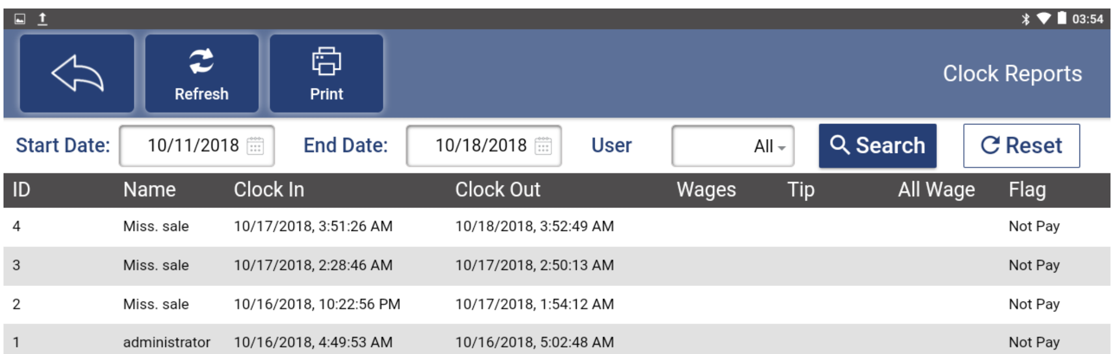
, Prints out based upon variables provided and what has been displayed.

Search: Based upon criteria provided in fields provides report. Select 

. To provide on screen report

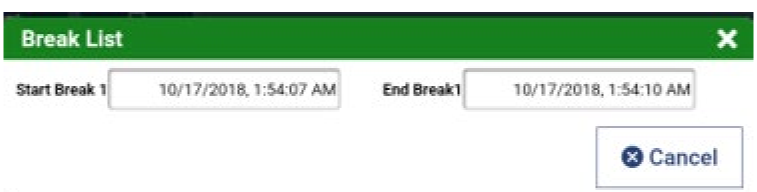
Reset: Select 

to Clear all values previously input in search fields.



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

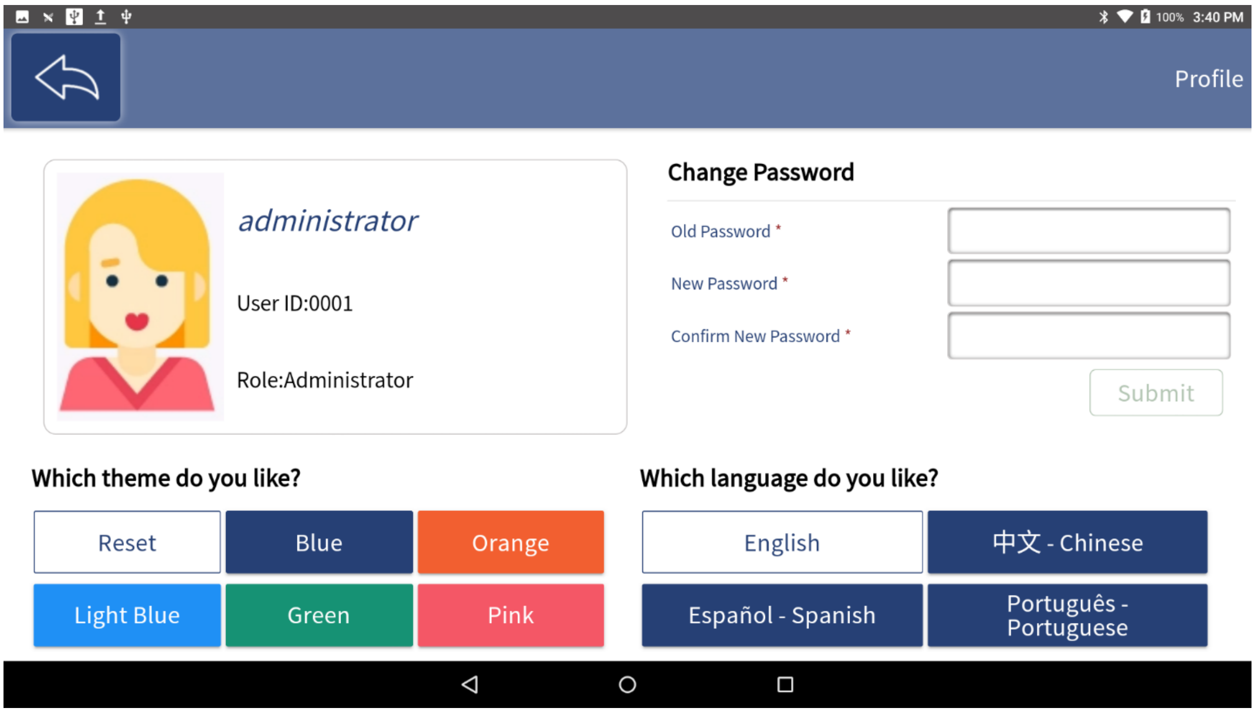
Select on any record to view the Break time.



. JG>AD:

Select 

"Profile" from Main Menu, to set personalized profile settings such as preferred language and change Password



Set Employee Preferred Language

- English
- Chinese
- Spanish
- Portuguese

To Change Password

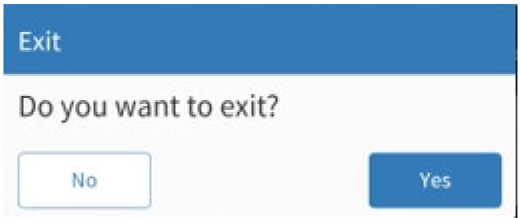
- Input Old Password
- Set New Password
- Confirm New Password

Select a theme

Log Out

1. Select 

"Log Out" From Main Menu



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

Select 

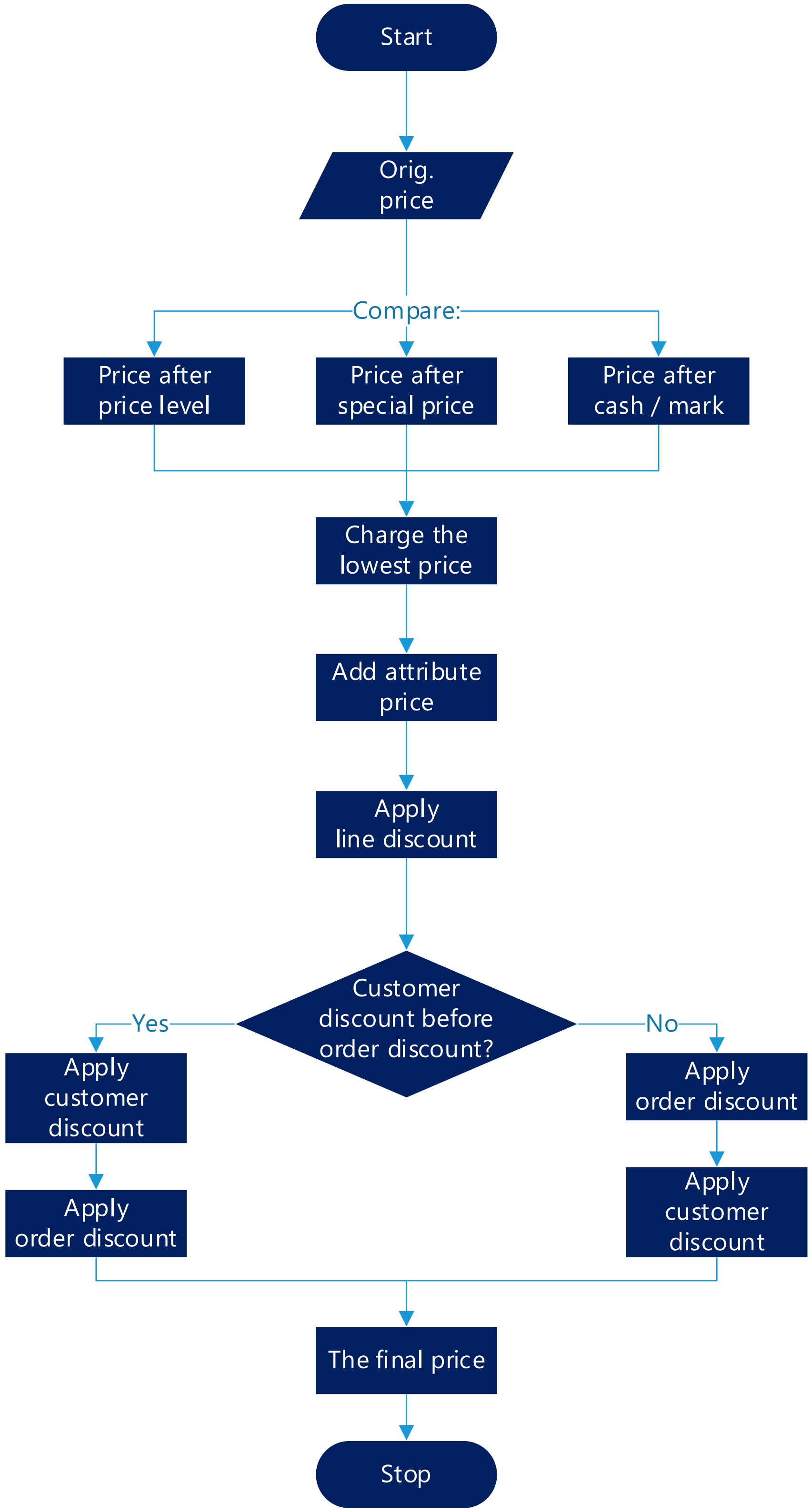
"Yes" will exit back to login screen immediately after confirmation.

Select 

"No" user will cancel out of that screen and be presented with the Main Menu.

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

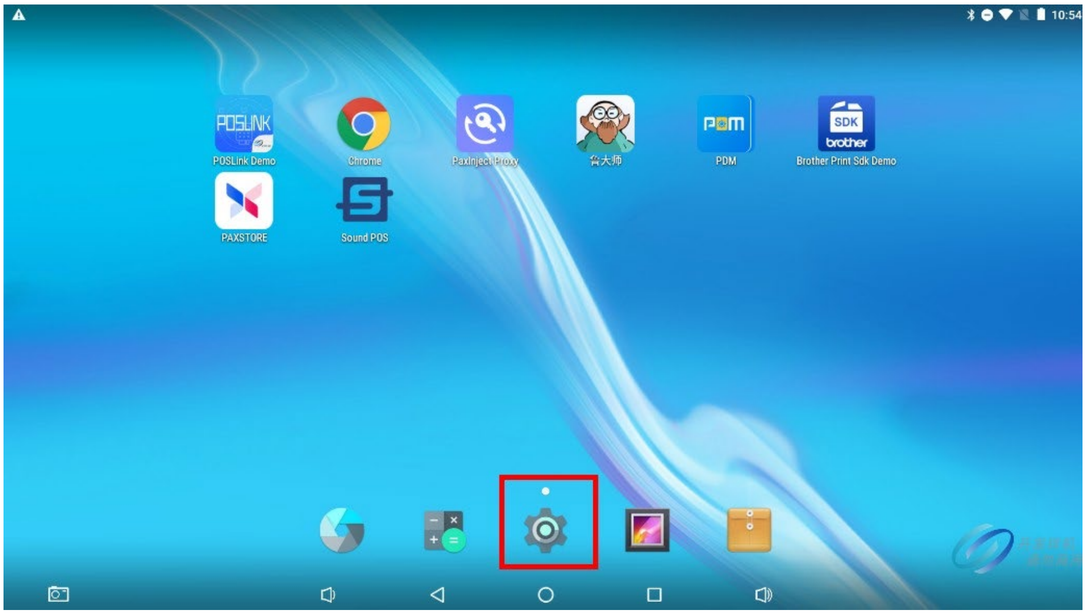
Appendix A – Pricing



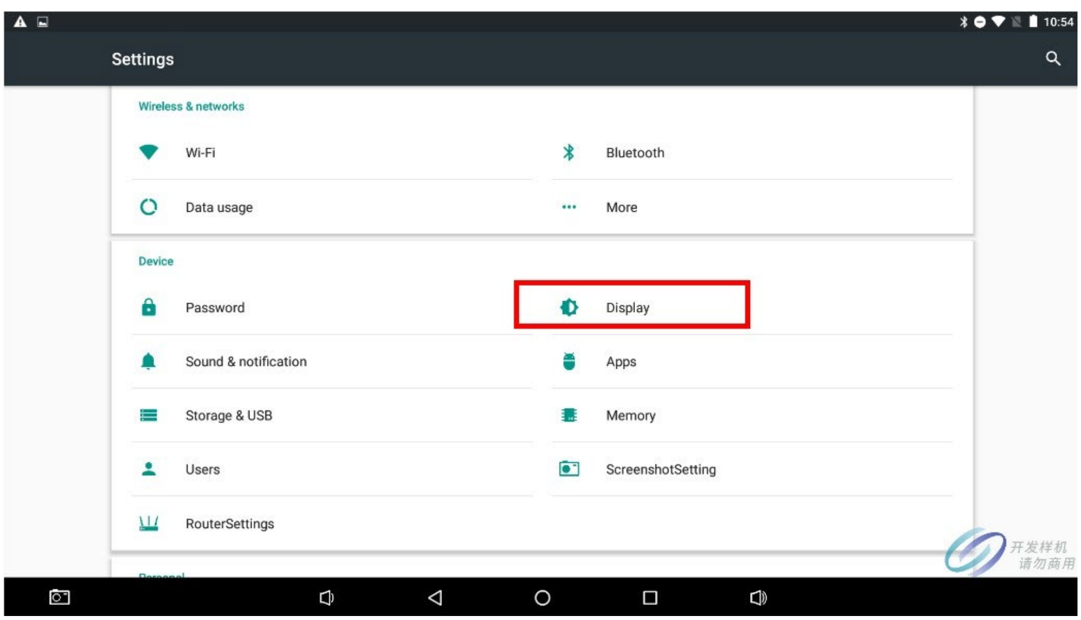
Appendix B – E800 Secondary Screen

Pre-requisite: Images for the secondary display must be uploaded in the Seamless Commerce back office, See Appendix A – in the Seamless Commerce User manual

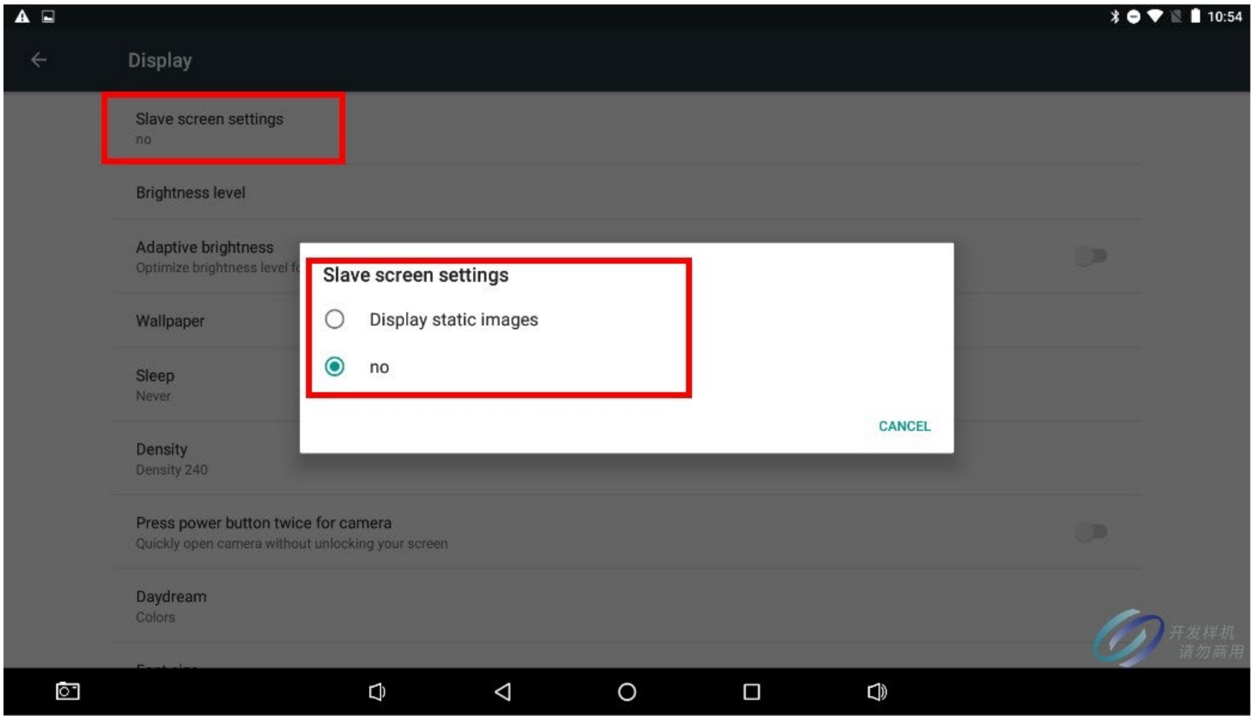
1. Enter it the Android Settings on the E800



2. Select Display



3. Under “Slave screen settings”, select “No”



4. Log into Sound POS, go to Configuration, enable “Second Screen”