

# Sound POS

## User Guide

Version 1.9

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## 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:



### 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	<p>Back Office- There are 2 environments users can login to Demo, Production.</p> <p>Reseller Demo:  <a href="https://demo.seamlesscommerce.com/Reseller/ResellerEntrance/Login">https://demo.seamlesscommerce.com/Reseller/ResellerEntrance/Login</a></p> <p>Reseller Production:  <a href="https://portal.seamlesscommerce.com/Reseller/ResellerEntrance/Login">https://portal.seamlesscommerce.com/Reseller/ResellerEntrance/Login</a></p> <p>Store Demo:  <a href="https://demo.seamlesscommerce.com/StoreAdmin/OfflineLogin/Login">https://demo.seamlesscommerce.com/StoreAdmin/OfflineLogin/Login</a></p> <p>Store Production:  <a href="https://portal.seamlesscommerce.com/StoreAdmin/Admin/">https://portal.seamlesscommerce.com/StoreAdmin/Admin/</a></p>
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 LMI 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
<i>Cash Discount</i>	Provides a discount for transactions where Cash payment type is selected

## Quick Reference for Initial Set-up

### Store Setup

1. [Merchant Information](#)
2. [Receipt Setup](#)
3. [Taxes](#)
4. [Categories](#)
5. [Products \(Inventory\)](#)
  - a. [Add Attributes \(if Applicable\)](#)
  - b. [Add Modifiers \(if Applicable\)](#)
  - c. [Price Levels](#)
  - d. [Discounts](#)
6. [Employee Setup](#)
  - a. [Roles](#)
  - b. [Users](#)

### [Configuration:](#)

7. [Payment Methods](#)
8. [Special Pricing](#)
9. [Price Levels](#)
10. [Cash Discount](#)
11. [Age Verification](#)

### Sale Process:

- [Product](#)
  - [Lookup](#)
  - [Add New](#)

### [How to Complete A Sale](#)

- [Customers](#)
- [Refunds](#)
- [Voids](#)
- [Edit](#)
- [Manual Entry](#)
- [Discounts](#)
- [Save/ Recall Transactions](#)
- [Tax Exemptions](#)

### [Pay/In Out](#)

### [End of Day and Reporting](#)

- [Adding Tips](#)
- [Reporting](#)

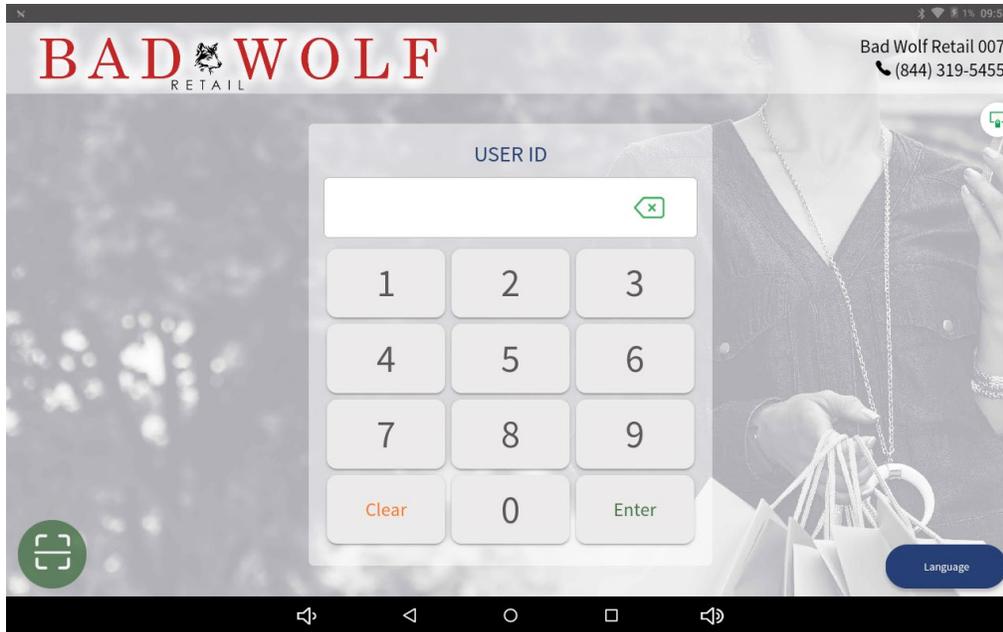
[Gift Cards](#)

[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:

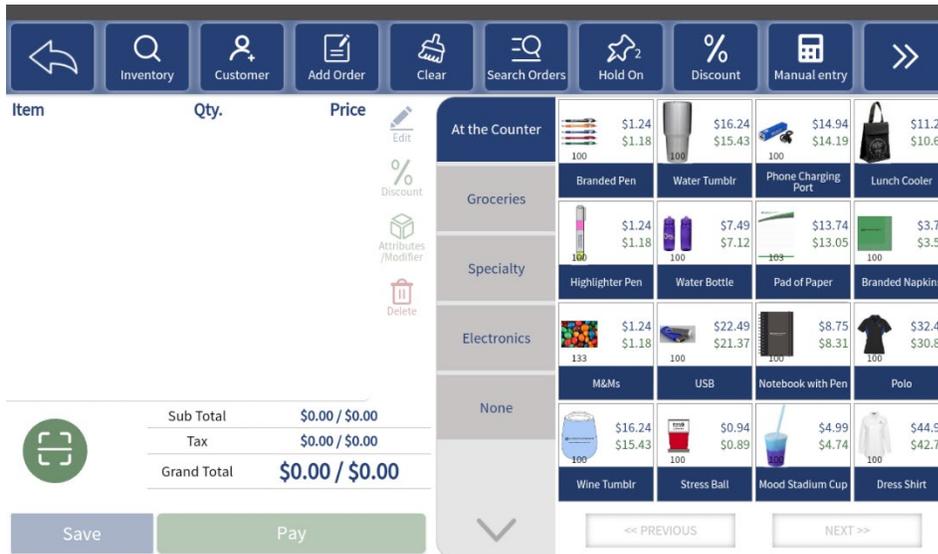
- [Sales](#) - Operations are related to the sale and return of products.
- [Reports](#) - View all the reports of the store, including transaction details report, inventory change report, employee sales report, customer purchase report, sales tax report.
- [Pay In/ out](#) - View the Pay in and Pay 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:



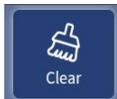
**Inventory:** Select **Inventory** from the ribbon to quickly look up or add products to the inventory



**Customer:** Select **Customer** from the ribbon to quickly look up or add Customer



**Add Order:** Select **Add Order** from the ribbon to take phone order



**Clear:** Select **Clear** from the ribbon to Clear the transaction



**Search Order:** Select **Search Orders** from the ribbon to search orders



**Hold:** Select **Hold On** from the ribbon to continue with previously saved transaction



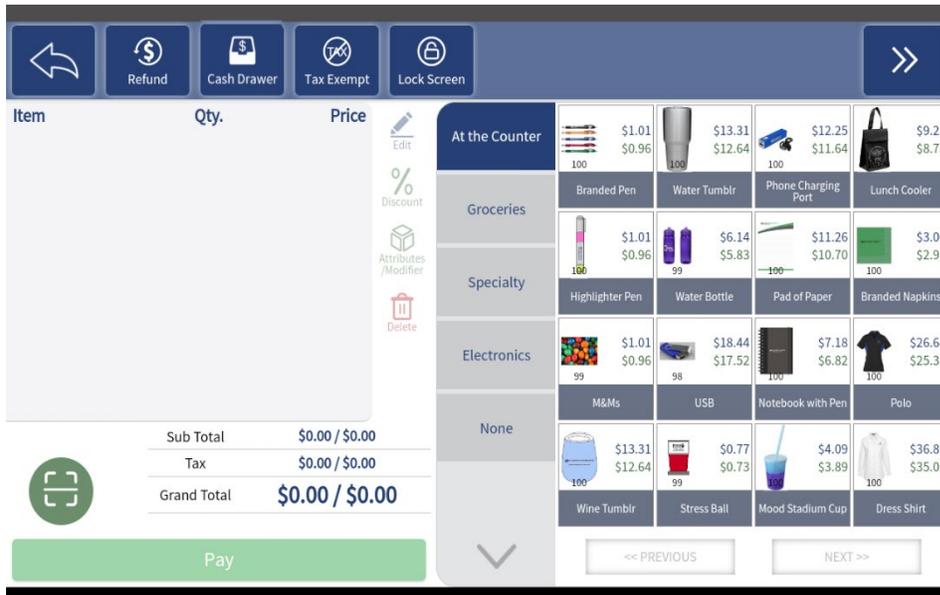
**Discount:** Select , from the ribbon to provide a discount to entire Cart



**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 Taxrate 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](#))

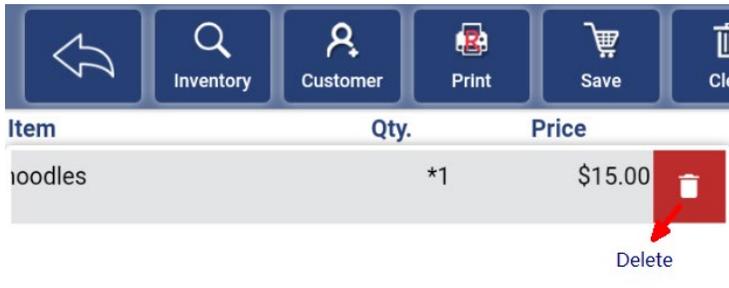
**Popular:** In this mode, select the desired operation such as Edit, Discount, Attributes can be achieved by sliding the single item in the shopping cart to the right, or sliding left to Delete

- **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:

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

**Delete:**

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

**Edit:**

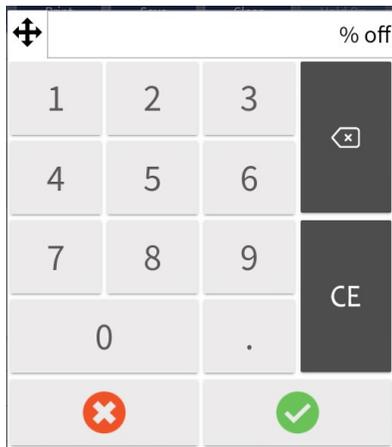


Select on Field to Edit:

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

- Select  "Cancel" to return to previous screen

**Discount:**

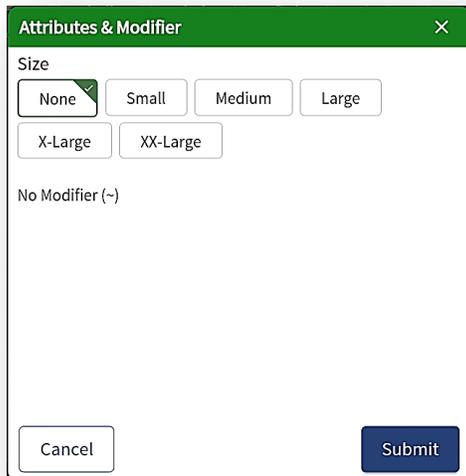


Using Keypad input desired discount for selected item

To proceed select 

To return to previous screen Select 

**Attributes/ Modifiers-**



The image shows a dialog box titled "Attributes & Modifier" with a close button (X) in the top right corner. Under the heading "Size", there are six buttons: "None" (which is selected and has a green checkmark), "Small", "Medium", "Large", "X-Large", and "XX-Large". Below the size options, there is a section labeled "No Modifier (-)" which is currently empty. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Submit" on the right.

To Select Attribute/ Modifier

\*Single Selection Example: Size

- None
- Small
- Medium
- Large
- XLarge
- XXLarge

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

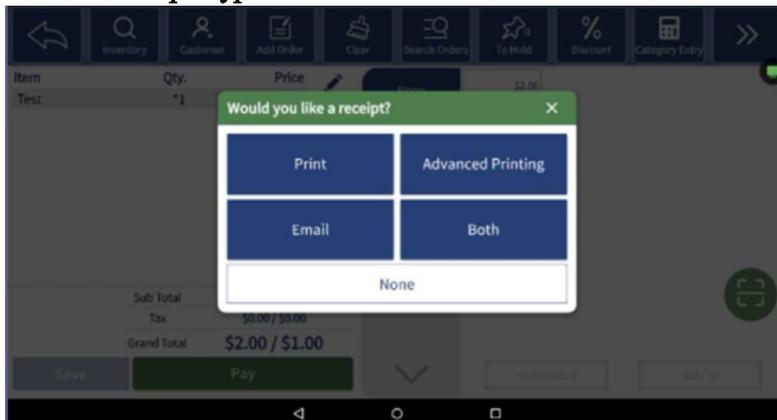
- From the Sales Screen, select **Pay** “Pay” to bring up payment selection screen where payment type can be selected.  
\*See screenshot below for more detail.

The screenshot displays the payment selection interface. At the top, it shows the Grand Total as \$52.30 / \$49.68 and the Balance Due as \$49.68. The 'Payment' section is highlighted in orange and contains several payment method options: Cash (selected), EBT SNAP (\$0.00), EBT Voucher (\$0.00), EBT Cash, Credit Card, Fleet Card, Debit Card, Gift Card, Local Gift Card, and Loyalty. Below the payment methods, there is a checkbox for 'Include the tip'. The 'Split Void' section offers preset amounts: \$1.00, \$5.00, \$20.00, \$50.00, \$100.00, and \$50.00. A numeric keypad is located on the right side of the screen, and a 'Pay' button is at the bottom right.

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

<b>Grand Total:</b>		\$52.30 / \$49.68	<b>Balance Due:</b>		\$49.68
Payment	Orig.	\$45.04	\$49.68		
	Tax	\$7.26			
	<b>Grand Total</b>	<b>\$52.30</b>			
<b>Cash Price :</b>					
Detail	Orig.	\$42.79			
	Tax	\$6.89			
	<b>Grand Total</b>	<b>\$49.68</b>			
Split Void					

CE		<
1	2	3
4	5	6
7	8	9
0		.

Cancel Pay

## Split Void

When a customer only provides partial payment for a transaction.

- From Payments Screen select “Split Void”

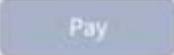
“Split Void” can be used to Void out any previously used payment types.

The screenshot shows a payment screen with the following elements:

- Grand Total:** \$52.30 / \$49.68
- Balance Due:** \$44.68
- Payment Method:** CASH \$5.00
- Buttons:** Void, Cancel, Pay
- Navigation:** Payment, Detail, Split Void (highlighted in orange)
- Calculator:** A numeric keypad with CE, a back arrow, and digits 0-9.

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

**Search** ×

SKU

Category  All ▾

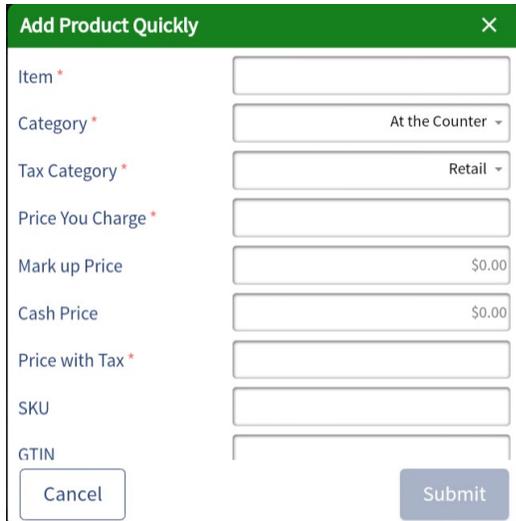
Item

Price Level  -- ▾

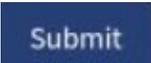
Short Name

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)

Camera Scanner

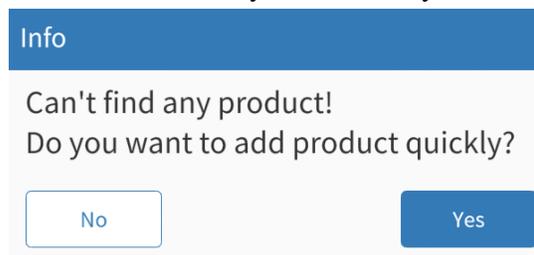


Sound POS can use the Onboard Camera



- 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***

**Add Product Quickly** ×

Item \*

Category \*

Tax Category \*

Price You Charge \*

Mark up Price

Cash Price

Price with Tax \*

SKU

GTIN

\*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](#)

**Search Customer** ✕

Name

Phone

Price Level  All -

Notes

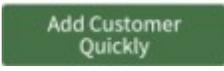
To search Customers, enter desired criteria:

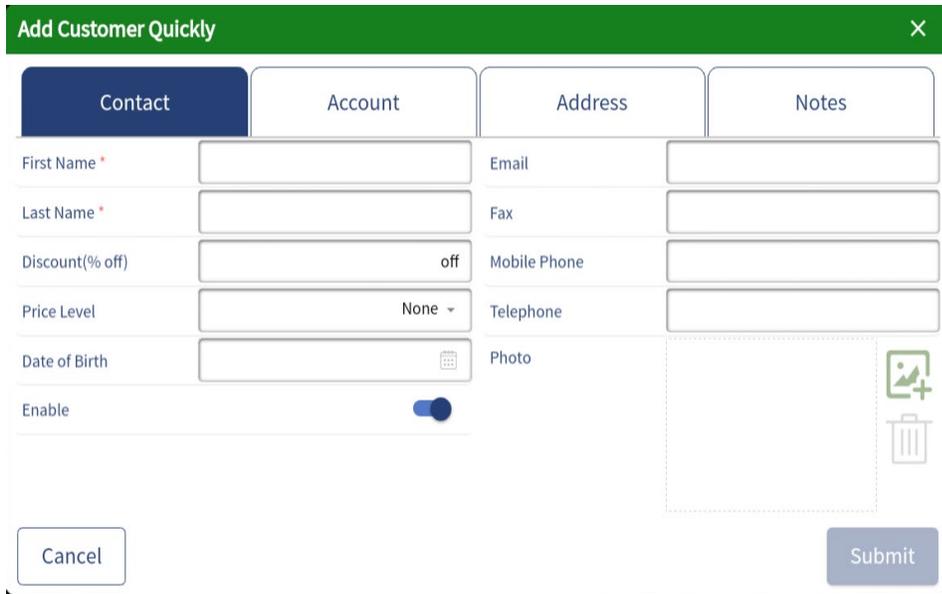
- Name
- Phone
- Price Level

Select  "Search", to Search

Select  "Reset", to clear Fields

## Add a New Customer

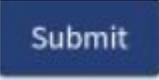
Select  "Add Customer Quickly"



### Tabs

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](#)

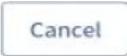
## Print

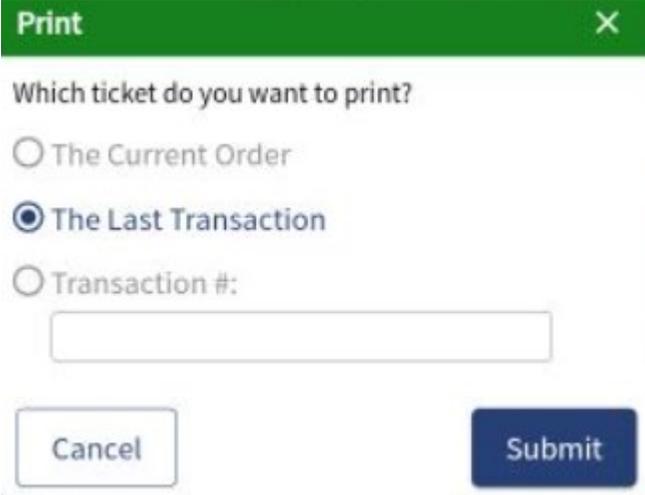
1. Select  "Sales" from Main Menu:
2. Select  "Print", from the ribbon to Print transaction

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



**Print** ×

Which ticket do you want to print?

The Current Order

The Last Transaction

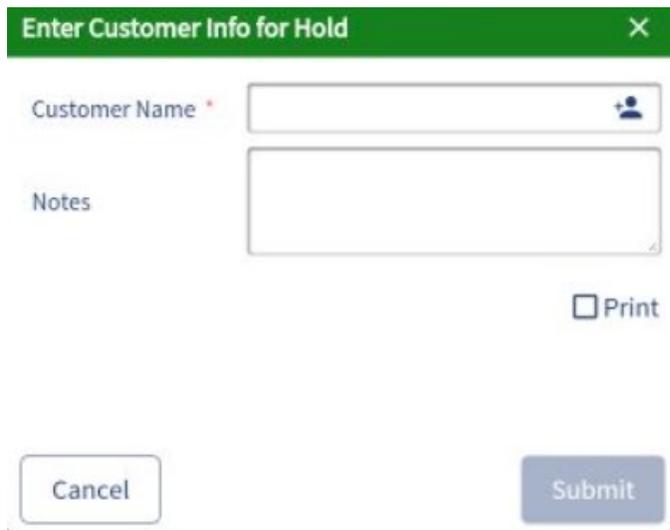
Transaction #:

Save:

1. Select  “Sales” from Main Menu:

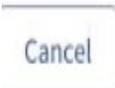
2. Select  “Save”, to Save the shopping cart and move it to **Hold On**. [See Hold On](#)

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:

**Search Customer** ×

Name

Phone

Price Level  All ▾

Notes

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

**Search Customer** ×

 John Noble  
5555555555

**John Noble**  
Discount: 0% off  
Maximum Credit: \$0.00  
Balance Due: -\$500.00  
Loyalty: 639  
Price Level: Member  
First Name: John  
Last Name: Noble  
Date of Birth: 1/1/1990  
Telephone: 5555555555  
Mobile Phone:  
Email: john.noble@example.com

Select  "Choose" to proceed

Optional

- Insert Notes
- Print

**Enter Customer Info for Hold** ✕

Customer Name \*  

Notes

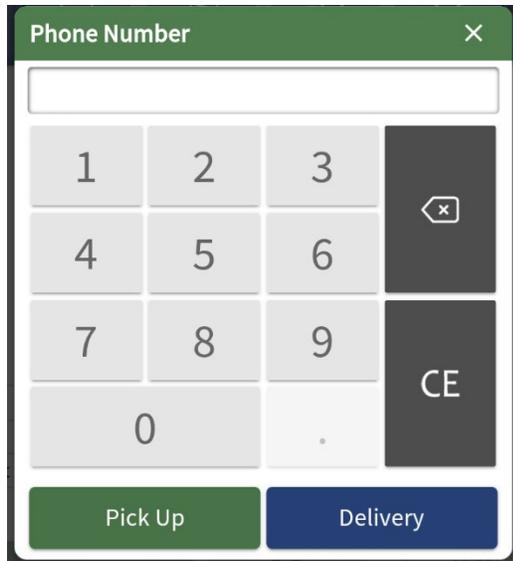
Print

## Add Order

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



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



Phone Number ×

1 2 3 ⌫

4 5 6 ⌫

7 8 9 CE

0 .

### 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.

Delete

Are you sure to clear the current order?

Selecting  "Yes" will clear cart

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

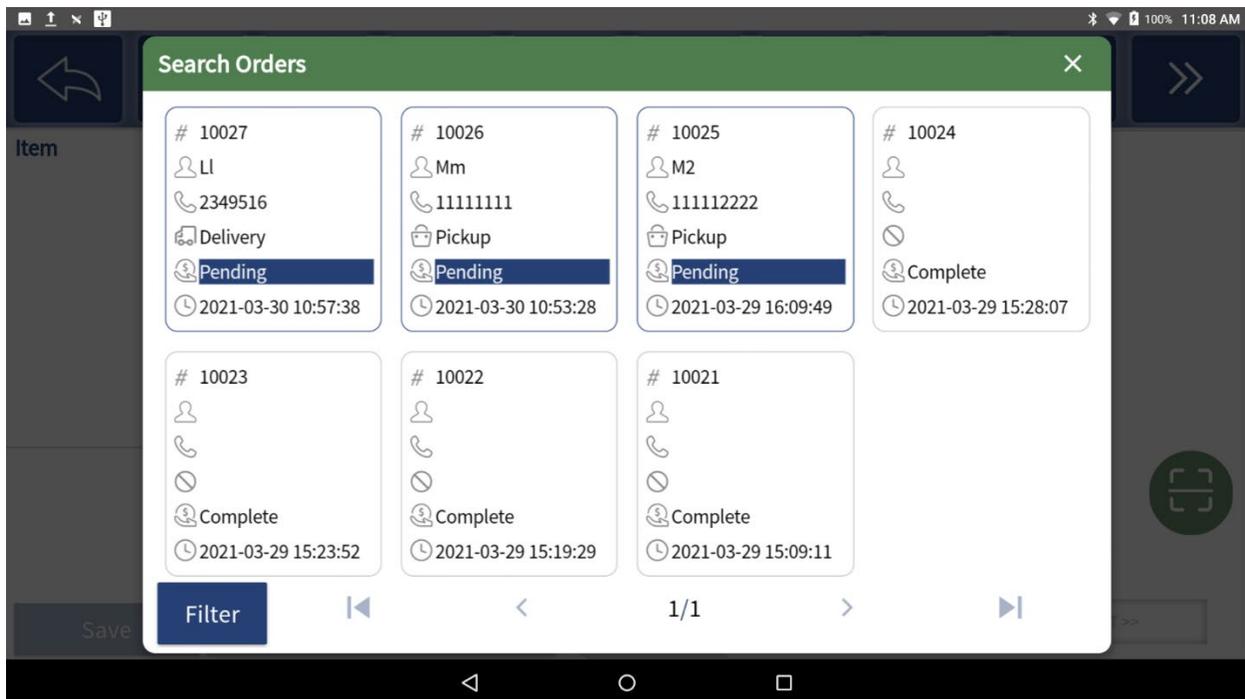
## Search Orders



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

**Search Orders** ×

Phone Number

Ticket #

Order Type  ▾

Table number

Status  ▾

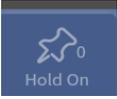
Start Date

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

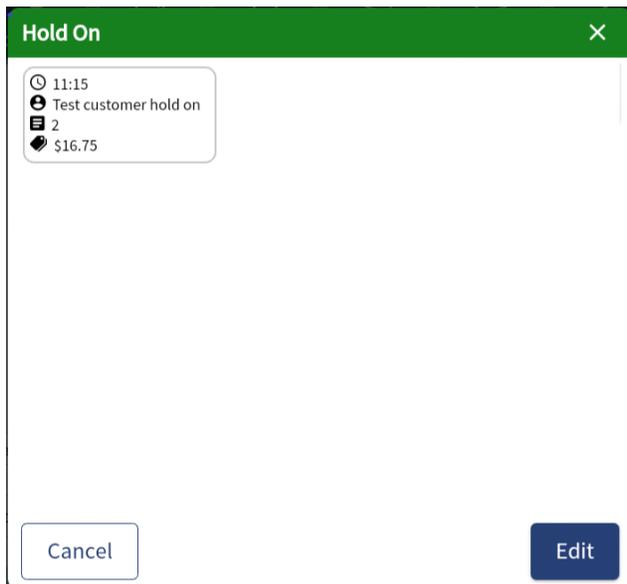
**HINT:** For locations with multiple devices, saved orders can be retrieved from any device, but **ALL** devices must have synced to the cloud. If a saved order cannot be found, Sync the corresponding devices, See section on Settings.

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

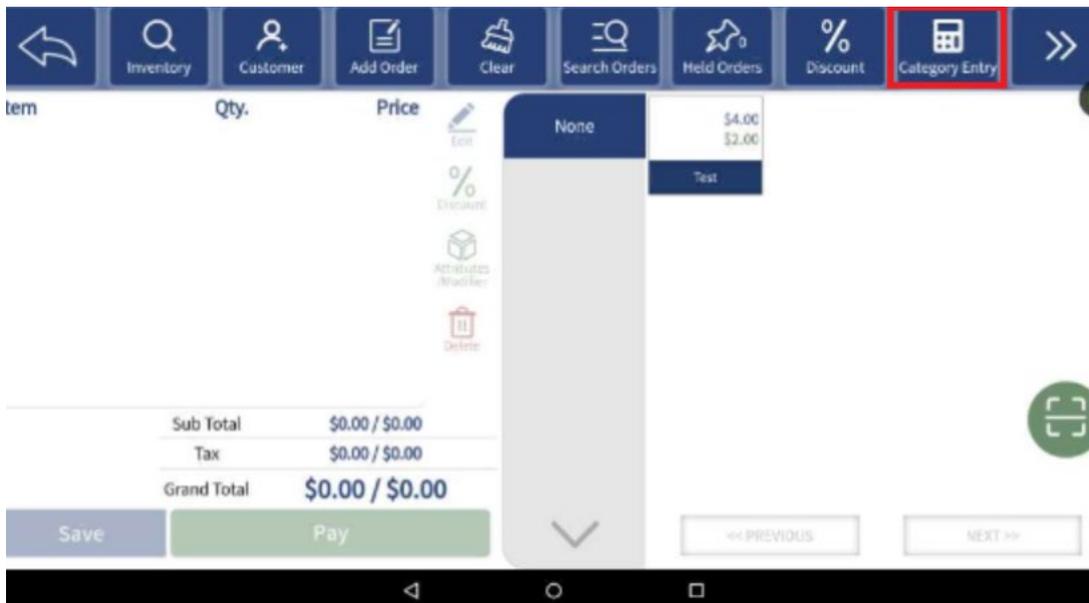
Select  to go back to Sale Screen

## Category Entry:

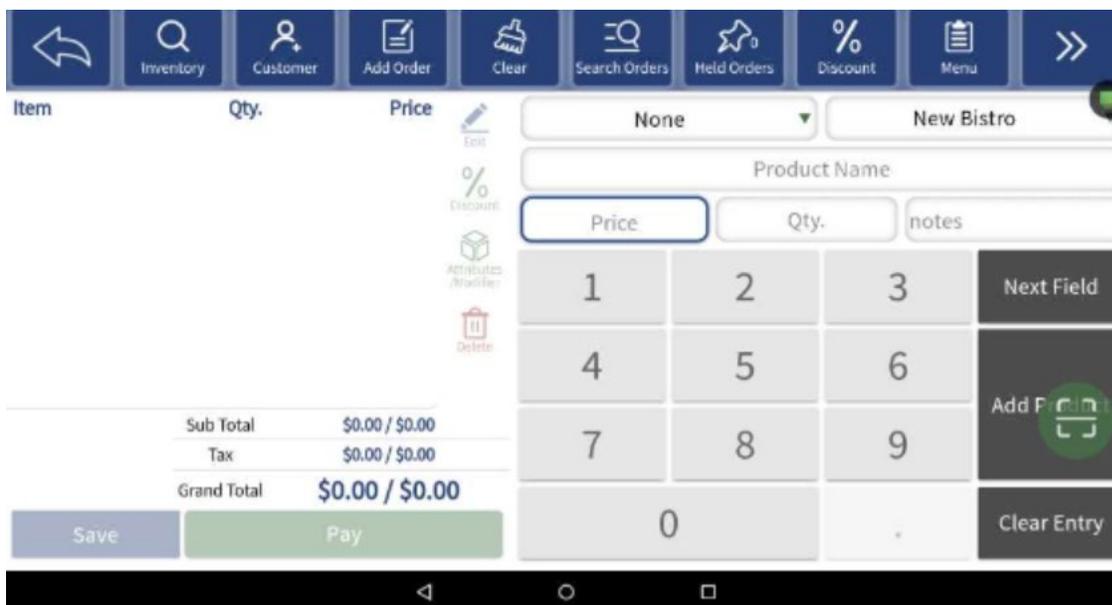
1. Select  "Sales" from Main Menu:

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](#))

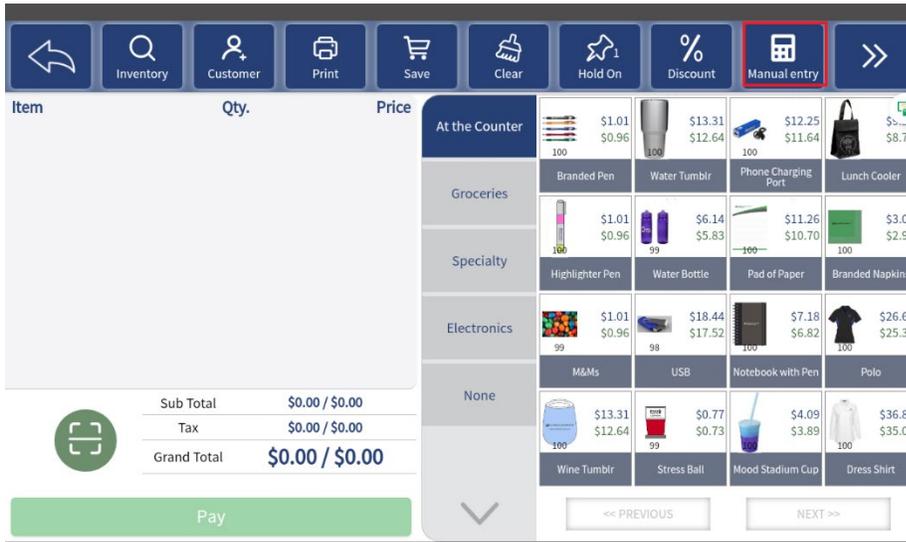
Once desired fields have been completed Select “*Add Product*”.

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

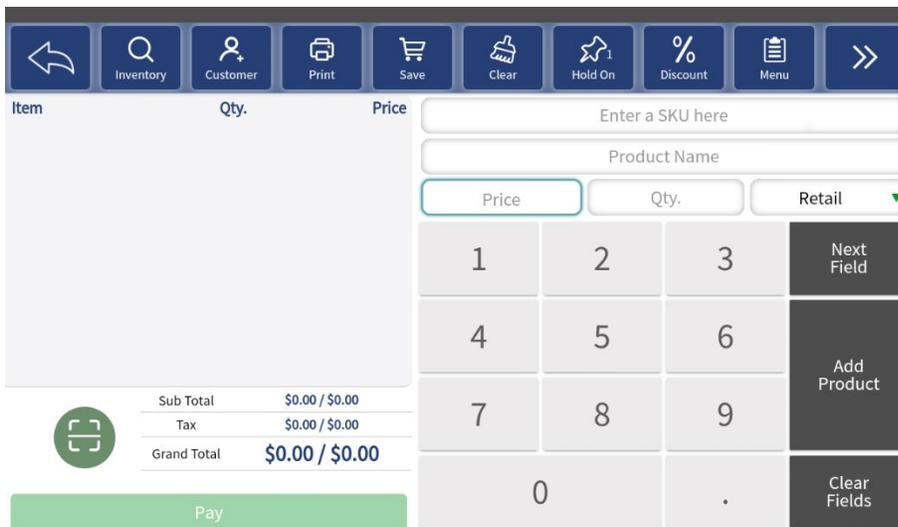
To clear all fields, select “*Clear Entry*,” all fields will go back to default values

**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.

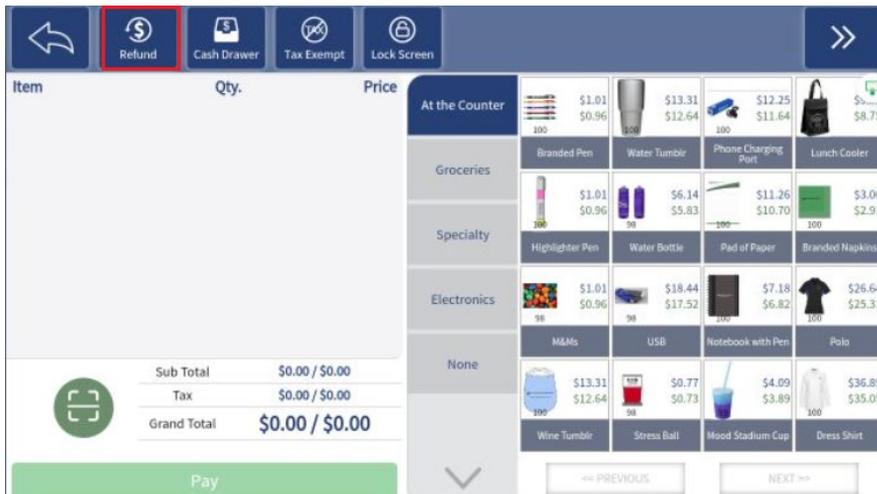
To clear all fields, select “Clear Fields,” all fields will go back to default values.

## 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.

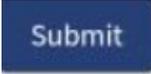
Which item would you like to return? ×

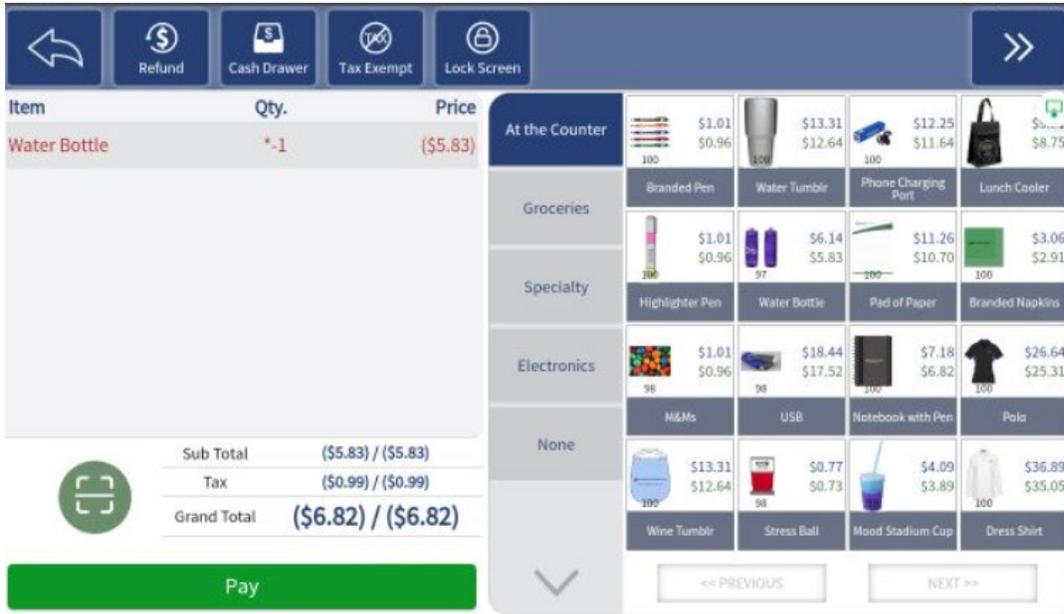
M&Ms	* 1	\$0.96			
Water Bottle	* 2	\$5.83	⊖	1	⊕ ⊗
Stress Ball	* 1	\$0.73			
Mood Stadium Cup	* 1	\$3.89			

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



Choose to continue shopping or Select , will refund.

After Selecting , enter the Refund payment page.

- Verify the amount is correct

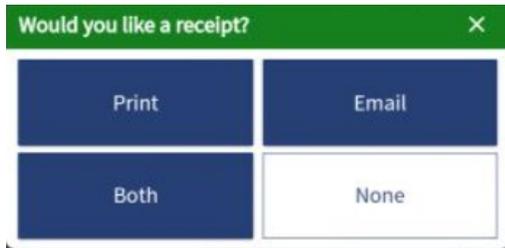
<b>Grand Total:</b>	(\$6.82)	<b>Balance Due:</b>	<b>(\$6.82)</b>
Refund	(\$5.83)	Method of payment	\$6.82
Refund Tax	(\$0.99)	<b>Cash - \$6.82</b>	
<b>Grand Total</b>	<b>(\$6.82)</b>	<small>Paid: \$20.14</small>	





Select  "Refund" to successfully refund.

Select Receipt Type:



The image shows a dialog box with a green header bar containing the text "Would you like a receipt?" and a close button (X). Below the header, there are four buttons arranged in a 2x2 grid. The top-left button is dark blue with the text "Print". The top-right button is dark blue with the text "Email". The bottom-left button is dark blue with the text "Both". The bottom-right button is white with a thin border and the text "None".

*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 Cash Drawer, from the ribbon to open the cash drawer.

Item	Qty.	Price
<b>At the Counter</b>		
Branded Pen	100	\$1.01 / \$0.96
Water Tumbler	100	\$13.31 / \$12.64
Phone Charging Port	100	\$12.25 / \$11.64
Lunch Cooler	100	\$8.75
<b>Groceries</b>		
Highlighter Pen	100	\$1.01 / \$0.96
Water Bottle	98	\$6.14 / \$5.83
Pad of Paper	100	\$11.26 / \$10.70
Branded Napkins	100	\$3.06 / \$2.91
<b>Specialty</b>		
<b>Electronics</b>		
M&Ms	98	\$1.01 / \$0.96
USB	98	\$18.44 / \$17.52
Notebook with Pen	100	\$7.18 / \$6.82
Polo	100	\$26.64 / \$25.31
<b>None</b>		
Wine Tumbler	100	\$13.31 / \$12.64
Stress Ball	98	\$0.77 / \$0.73
Mood Stadium Cup	100	\$4.09 / \$3.89
Dress Shirt	100	\$36.89 / \$35.05

Sub Total: \$0.00 / \$0.00

Tax: \$0.00 / \$0.00

**Grand Total: \$0.00 / \$0.00**

**Pay**

Tax Exempt:

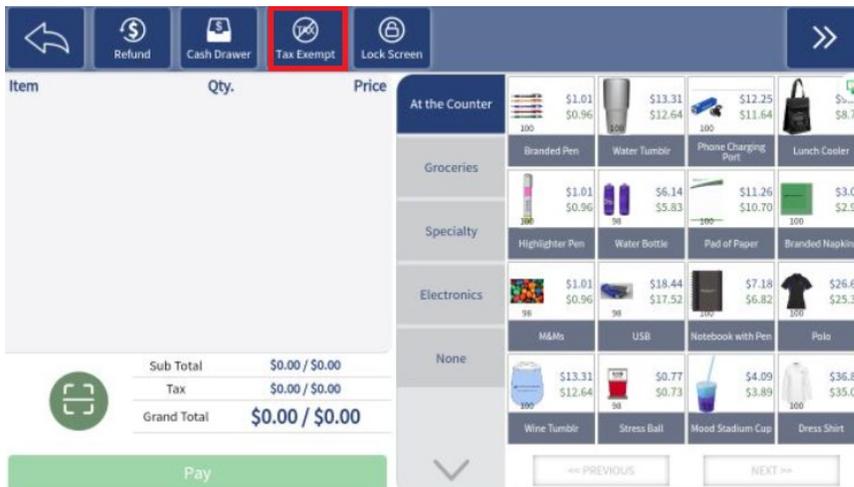


1. Select “Sales” from Main Menu



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

The screenshot displays the Sound Payments POS interface. At the top, there are navigation icons for Refund, Cash Drawer, Tax Exempt, and Lock Screen. The main area is divided into a transaction summary on the left and a product grid on the right.

Item	Qty.	Price
USB	*1	\$18.44 / \$17.52
Water Bottle	*1	\$6.14 / \$5.83
Sub Total		\$24.58 / \$23.35
Tax		\$2.64 / \$2.50
Grand Total		\$27.22 / \$25.85

The product grid is organized into categories:

- At the Counter:** Branded Pen (\$1.01 / \$0.96), Water Tumbler (\$13.31 / \$12.64), Phone Charging Port (\$12.25 / \$11.64), Lunch Cooler (\$8.75).
- Groceries:** Highlighter Pen (\$1.01 / \$0.96), Water Bottle (\$6.14 / \$5.83), Pad of Paper (\$11.26 / \$10.70), Branded Napkins (\$3.06 / \$2.91).
- Specialty:** Highlighter Pen (\$1.01 / \$0.96), Water Bottle (\$6.14 / \$5.83), Pad of Paper (\$11.26 / \$10.70), Branded Napkins (\$3.06 / \$2.91).
- Electronics:** M&Ms (\$1.01 / \$0.96), USB (\$18.44 / \$17.52), Notebook with Pen (\$7.18 / \$6.82), Polo (\$26.64 / \$25.31).
- None:** Wine Tumbler (\$13.31 / \$12.64), Stress Ball (\$0.77 / \$0.73), Mood Stadium Cup (\$4.09 / \$3.89), Dress Shirt (\$36.89 / \$35.05).

At the bottom, there is a green "Pay" button and navigation buttons for "PREVIOUS" and "NEXT".

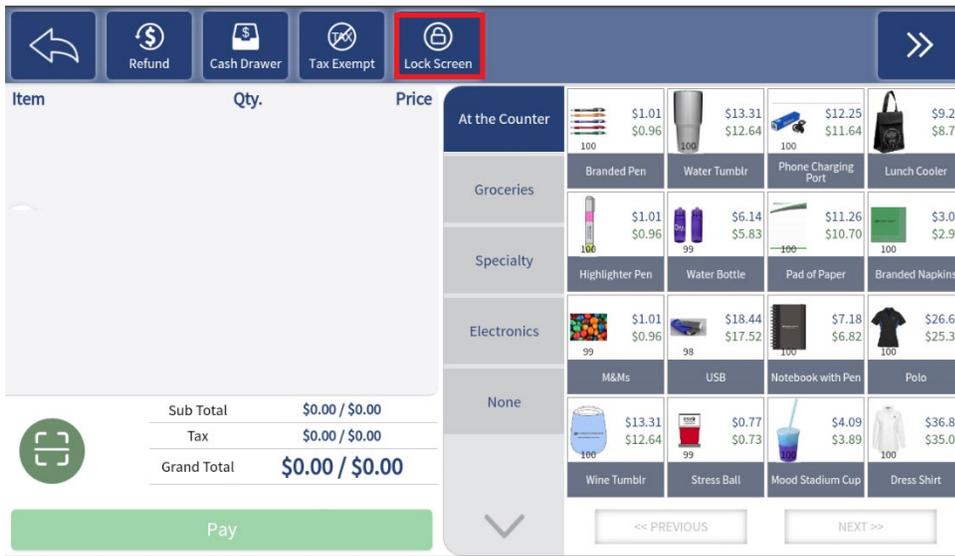
Lock Screen



1. Select “Sales” from Main Menu



2. Select on “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

The screenshot shows the 'Transaction Details List' interface. On the left, there are several filter fields: 'Trans. Type' (set to 'All'), 'Transaction #' (empty), 'Ticket#' (empty), 'Start Date' (09/14/2020), 'End Date' (09/21/2020), 'Customer' (empty), 'Employee' (set to 'All'), and 'Total' (set to 'None'). At the bottom left are 'Reset' and 'Search' buttons. The main table displays the following data:

Date	Transaction #/Ticket#	Employee	Trans. Type	Status	Total
2020/09/21, 14:59:41 PM	100269/9	administrator	Refund	Completed	(\$6.82)
2020/09/21, 14:52:11 PM	100268/8	administrator	Sale(PR)	Completed	\$20.14
2020/09/16, 15:13:36 PM	100267/7	administrator	Sale	Completed	\$39.97
2020/09/16, 11:27:20 AM	100266/6	administrator	Sale	Completed	\$7.72
2020/09/16, 11:17:28 AM	100265/5	administrator	Sale	Completed	\$0.83

- 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

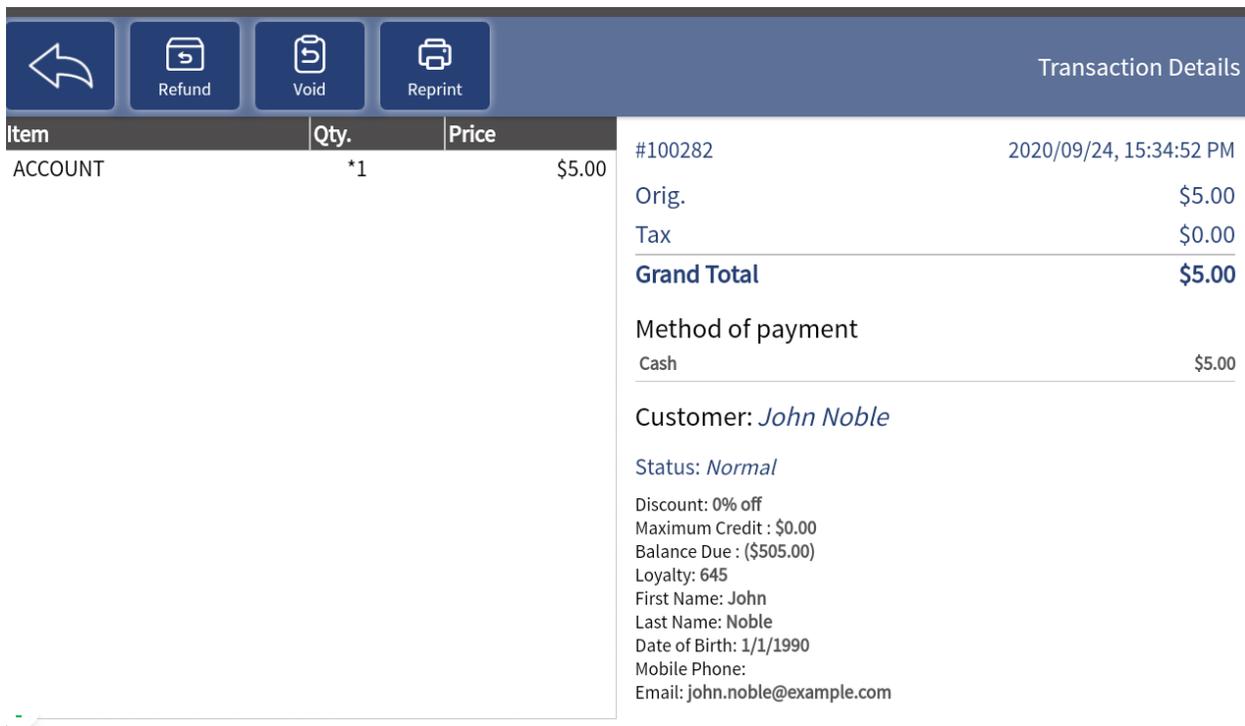
			Transaction Details	
Item	Qty.	Price	#100268	2020/09/21, 14:52:11 PM
M&Ms	*1	\$0.96	Orig.	\$17.24
Water Bottle	*1	\$5.83	Tax	\$2.90
Stress Ball	*1	\$0.73	<b>Grand Total</b>	<b>\$20.14</b>
Mood Stadium Cup	*1	\$3.89	<b>Method of payment</b>	
Water Bottle (R)	*1	\$5.83	Cash	\$20.14
			<b>Refunded order</b>	
			<a href="#">#100269</a>	

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



Item	Qty.	Price		
ACCOUNT	*1	\$5.00	#100282	2020/09/24, 15:34:52 PM
			Orig.	\$5.00
			Tax	\$0.00
			<b>Grand Total</b>	<b>\$5.00</b>
			Method of payment	
			Cash	\$5.00
			Customer: <i>John Noble</i>	
			Status: <i>Normal</i>	
			Discount: 0% off	
			Maximum Credit : \$0.00	
			Balance Due : (\$505.00)	
			Loyalty: 645	
			First Name: John	
			Last Name: Noble	
			Date of Birth: 1/1/1990	
			Mobile Phone:	
			Email: john.noble@example.com	

*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.

<b>Grand Total:</b> (\$13.32)		<b>Balance Due:</b> (\$13.32)
Refund (\$11.41)	Refund Tax (\$1.91)	<b>Grand Total (\$13.32)</b>
Method of payment		\$13.32
Cash - <b>\$13.32</b>		
Paid: \$13.32		

Manage Refund

CE		<x
1	2	3
4	5	6
7	8	9
0	.	
Cancel	Refund	

Select Refund "Refund"

Select Receipt Type:

Would you like a receipt?
×

Print	Email
Both	None

- 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

**Refund**

Refund Success!

Ok

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

The screenshot shows the Transaction Report interface. On the left, there are filter fields for Status (All), Start Date (02/29/2021), End Date (03/30/2021), Transaction #, Employee (All), and Customer. At the top, there are buttons for Print and Email Report. The main area displays a transaction summary for Employee: All, dated 02/29/2021 - 03/30/2021. The summary includes Transaction: 10027, Employee: administrator, Discount: \$0.00, Sub Total: \$18.98, Tax: \$2.63, Non-Cash Adjustment: \$0.86, and Grand Total: \$22.47. Below this is a table of items:

#	Transaction Info	Item	Category	Price	Qty.	Value
1	Transaction: 10027 Employee: administrator Discount: \$0.00 Sub Total: \$18.98 Tax: \$2.63 Non-Cash Adjustment: \$0.86 Grand Total: \$22.47 Date: 2021/03/30, 10:57:38 AM Status: Pending	Soda	Groceries	\$6.99	*1	\$6.99
		Chips	Groceries	\$3.00	*1	\$3.00
		Nutella	Groceries	\$8.99	*1	\$8.99

At the bottom of the table, it shows Qty.: 9, Subtotal: \$34.51, and Total: \$42.95. There are also 'Reset' and 'Search' buttons at the bottom left of the interface.

Filter Available: on the left side of the page

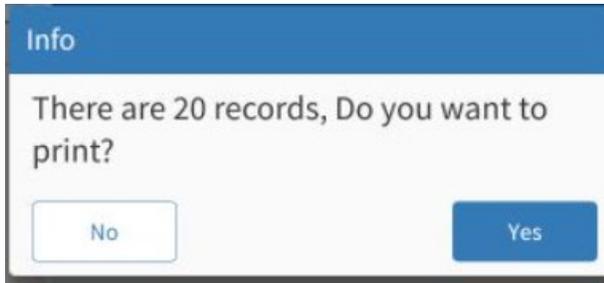
- Timeframe
  - Start Date
  - End Date
- Employee

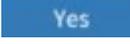
Select "Search", to Search

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  "Email Report", 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

←
Print
Inventory Sales Report

Type

SKU

Item

Category

Start Date

End Date

Inventory Sales Report

08/21/2020 - 09/22/2020

#	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

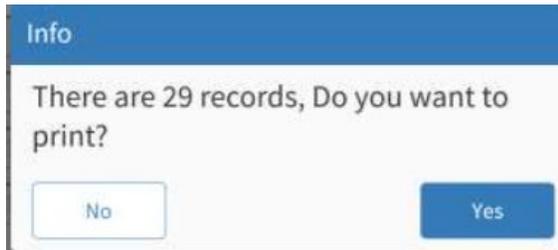
Available Filters: on the left side of the page

- 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

←
Print
Employee Sales Report

Type:

Start Date:

End Date:

Employee:

**Employee Sales Report**

Employee: All 08/21/2020 - 09/22/2020

Employee	Sale QTY.	Refund QTY.	Void QTY.	Sale	Refund	Void	Total	Discount	Surcharge	Promotion
administrator	48	-6	42	\$535.89	-\$18.25	\$289.57	\$601.11	\$12.47	-	-
<b>Total</b>	<b>48</b>	<b>-6</b>	<b>42</b>	<b>\$535.89</b>	<b>-\$18.25</b>	<b>\$289.57</b>	<b>\$601.11</b>	<b>\$12.47</b>	<b>-</b>	<b>-</b>

↻ Reset
🔍 Search

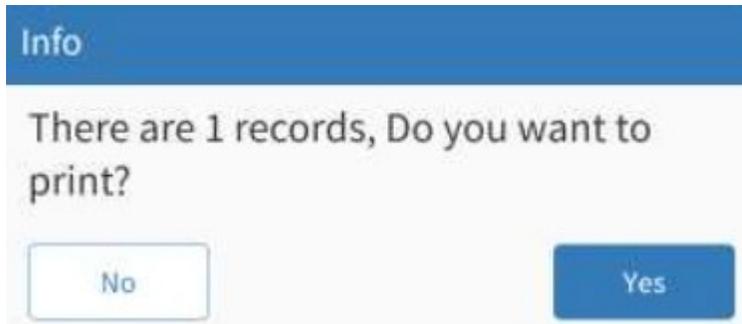
Available Filters: on the left side of the page

- 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.

←
Print
Customer Sales Report

Type

Start Date

End Date

Customer

### Customer Sales Report

Customer: All 08/21/2020 - 09/22/2020

#	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	-	-

↺ Reset
🔍 Search

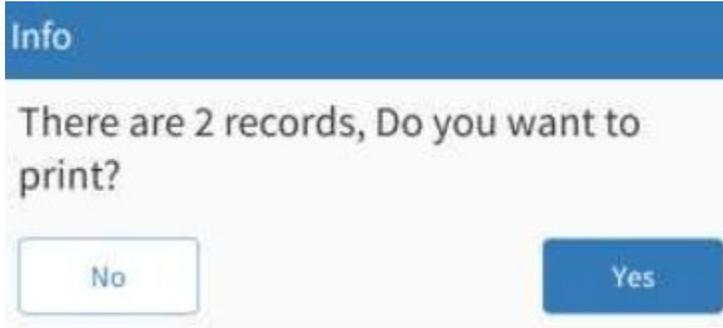
Available Filters: on the left side of the page

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

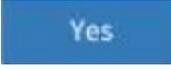
Select 🔍 Search "Search", to Search

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

Sales Tax Report

 Print

Type: Total

Sales statistics by: Total

Start Date: 08/21/2020

End Date: 09/22/2020

Sales Tax Report

08/21/2020 - 09/22/2020

#	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
<b>Total</b>		<b>\$35.52</b>	<b>\$25.46</b>	<b>\$2.50</b>	<b>\$19.99</b>	<b>\$83.47</b>	<b>\$601.11</b>

Reset
 Search

Available Filters: on the left side of the page

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

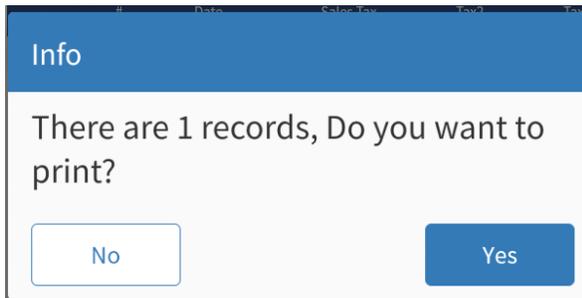
Select  "Search", to Search

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 Report

Type:

Start Date:

End Date:

Category:

08/21/2020 - 09/22/2020

#	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	-	-
<b>Total</b>		<b>48</b>	<b>\$535.89</b>	<b>-6</b>	<b>-\$18.25</b>	<b>\$12.47</b>	<b>-</b>	<b>-</b>

Reset
 Search

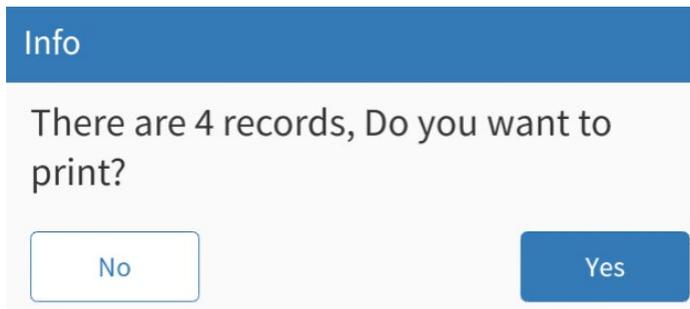
Available Filters: on the left side of the page:

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

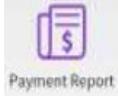
Surcharge \$0.00

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.

←
Print
Payment Report

Type: Total

Start Date: 08/21/2020

End Date: 09/22/2020

Employee: All

**Payment Report**

Employee: All 08/21/2020 - 09/22/2020

Date	Payment Method	Card Type	Counts	Amount
2020-09-21	Cash	-	3	\$0.00
2020-09-16	Cash	-	3	\$49.19
2020-09-01	Layaway	-	1	\$51.19
2020-09-01	Cash	-	3	\$141.35
2020-08-31	Cash	-	3	\$76.26
2020-08-28	Layaway	-	1	\$2.00
2020-08-28	Cash	-	3	\$94.97
2020-08-27	Cash	-	3	\$189.47
<b>Total</b>				<b>\$604.43</b>

↻ Reset
🔍 Search

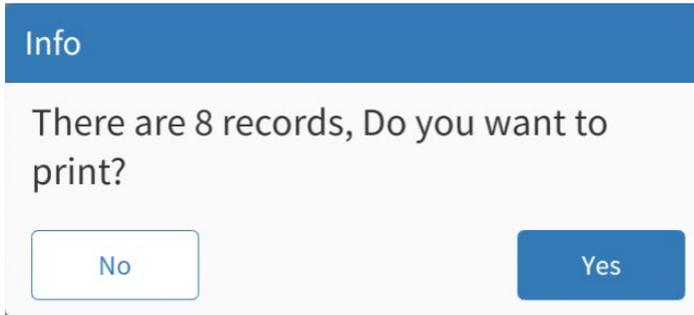
Available Filters: on the left side of the page:

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

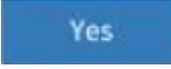
Select 🔍 Search "Search", to Search

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

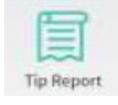
---

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.

←
Print
Tip Report

Type: Total ▾

Start Date: 08/21/2020

End Date: 09/22/2020

Employee: All ▾

Trans Status: All

Not Void

Void

**Tip Report**

Employee: All 08/21/2020 - 09/22/2020

#	Date	Employee	Counts	Tip
1	2020-09-16	administrator	2	\$0.67
2	2020-09-01	administrator	1	\$2.65
<b>Total</b>			<b>3</b>	<b>\$3.32</b>

↺ Reset
🔍 Search

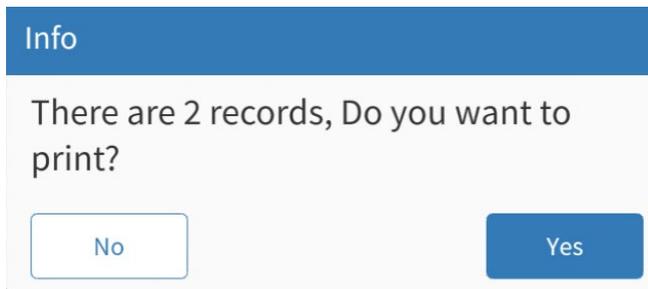
Available Filters: on the left side of the page:

- 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.

Inventory Report

 Print

Category

SKU

Item

### Inventory Report

#	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

Reset
 Search

Available Filters: on the left side of the page:

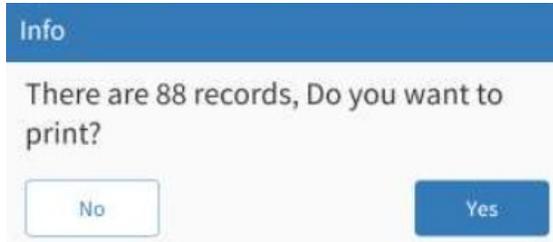
- Category
- SKU
- Item

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.

←
Print
Batch Report

Start Date

End Date

Employee

**Batch Report**

Employee: All 08/21/2020 - 09/22/2020

ID	Employee	Info	Date
1	administrator	CreditCount: 0 CreditAmount: \$0.00 DebitCount: 0 DebitAmount: \$0.00 EBTCCount: 0 EBTAmount: \$0.00 GiftCount: 0 GiftAmount: \$0.00	2020-09-16 09:36:56
2	administrator	CreditCount: 0 CreditAmount: \$0.00 DebitCount: 0 DebitAmount: \$0.00 EBTCCount: 0 EBTAmount: \$0.00 GiftCount: 0 GiftAmount: \$0.00	2020-09-01 15:53:20
3	administrator	CreditCount: 0 CreditAmount: \$0.00 DebitCount: 0 DebitAmount: \$0.00	2020-08-31 11:47:10

↺ Reset
🔍 Search

Available Filters: on the left side of the page:

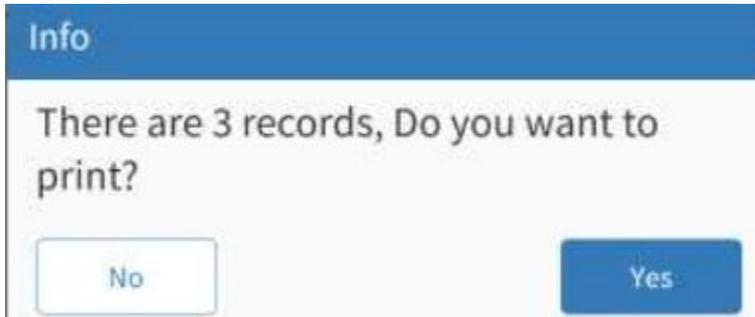
- Timeframe
  - Start Date
  - End Date
- Employee

Select **“Search”**, to Search

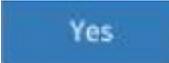
Select **“Reset”**, to clear Fields



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

Void Report

Start Date

End Date

Employee

**Void Report**

Employee: All 08/21/2020 - 09/22/2020

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	-	

Reset
 Search

Available Filters: on the left side of the page:

- Timeframe
  - Start Date
  - End Date
- Employee

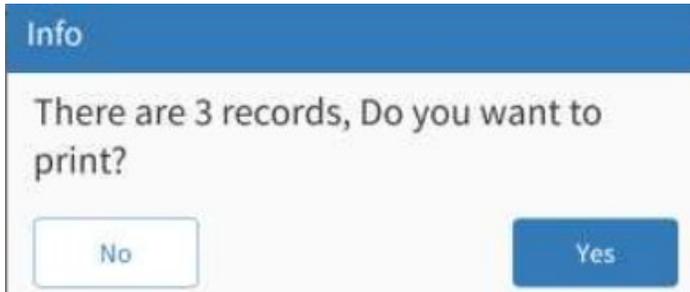
To view the desired report:

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

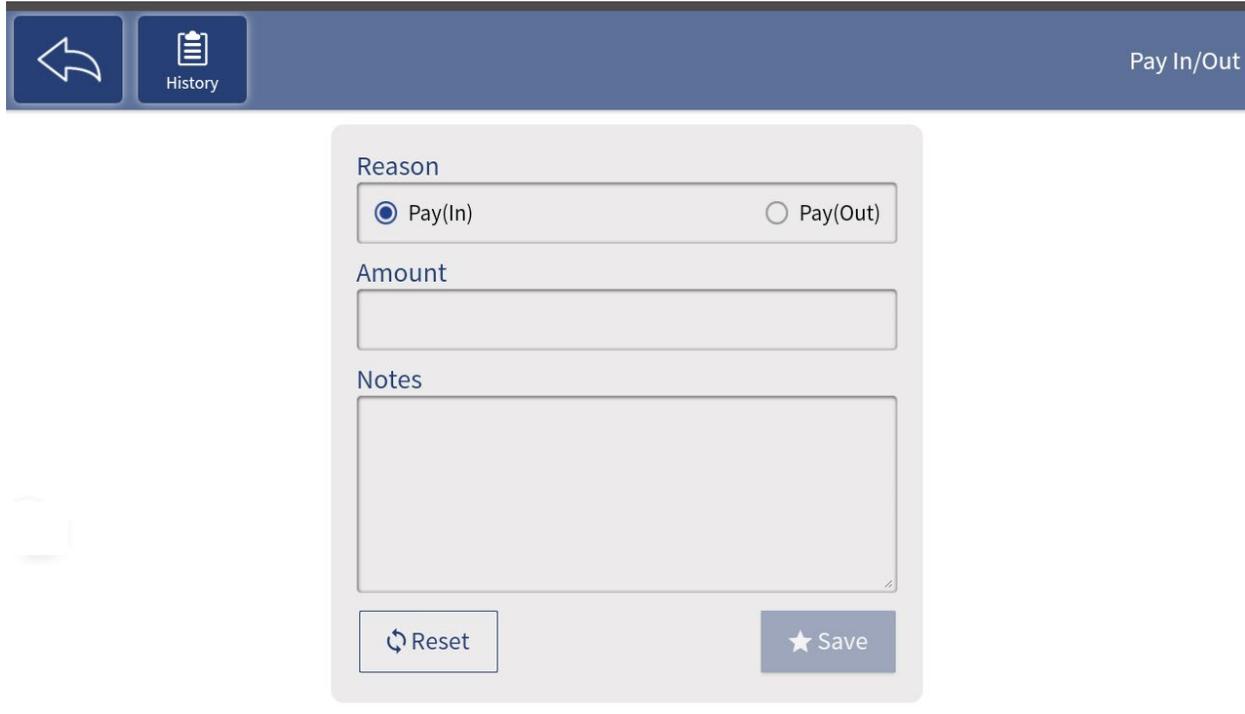
Refund Qty: 0

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.

				Pay In/Out
Start Date	09/15/2020	Pay(In): <b>\$100.00</b>	Pay(Out): <b>-\$50.00</b>	Total: <b>\$50.00</b>
End Date	09/22/2020	Pay(Out)		<b>-\$50.00</b>
Reason	All			9/22/2020, 4:46:44 PM
Amount	None	Pay(In)		<b>+\$100.00</b>
				9/22/2020, 4:46:24 PM

◀
<
1/1
>
▶

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** “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 Only Settle Credit Cards

←
History
End of Day

Sequence	7	Start Date	9/16/2020, 9:36:52 AM	Net	Taxes
Payment	Amount	Taxes	Amount	\$1,454.37	\$246.55
Cash	\$1,721.06	Local	\$101.80		
Payin	\$100.00	Retail	\$87.20	Total \$1,700.92	Money \$1,750.92
(Cash)	(\$20.14)	Grocery	\$0.03		
Payout	(\$50.00)	Company	\$57.52		

Add Tips

Tip Report

End of Day

Credit Card Settlement

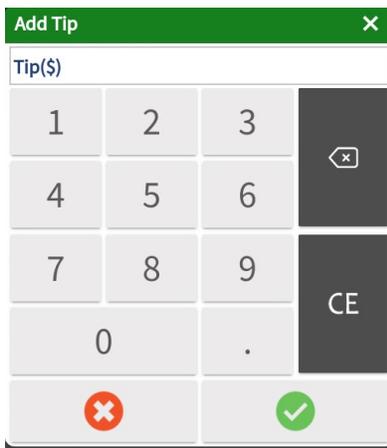
Add Tips:

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.

The image shows a pop-up window titled "Add Tip" with a close button (X) in the top right corner. Below the title bar is a text input field labeled "Invoice#". Below the input field is a numeric keypad with buttons for digits 1-9, 0, and a decimal point (.). To the right of the keypad are three buttons: a backspace button (left arrow with X), a "CE" button, and a confirmation button (green checkmark). At the bottom of the keypad are two buttons: a cancel button (red X) and a confirmation button (green checkmark).

Select  after the input is completed.

To Cancel select 



The image shows a pop-up window titled "Add Tip" with a close button (X) in the top right corner. Below the title bar is a text input field labeled "Tip(\$)". Below the input field is a numeric keypad with buttons for digits 1-9, 0, and a decimal point (.). To the right of the keypad are three buttons: a backspace button (left arrow with X), a "CE" button, and a confirmation button (green checkmark). At the bottom of the keypad are two buttons: a cancel button (red X) and a confirmation button (green checkmark).

Enter the Amount of the Tip

Select  after the input is completed.

To Cancel select 

**Add Tip** ✕

#100195 Total:\$94.00

Add Tip *\$5.00:*

\*\*\*\*\*1236  
Approval# :000000  
Ref # :10  
\$94.00  
Tip(\$):\$0.00

< Previous ✔ Submit

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:

Add

The tip has been added successfully. Would you like to add another tip?

No
This Transaction
Another Transaction

Tip Report:

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

←
Print
Tip Report

Type: Total

Start Date: 08/21/2020

End Date: 09/22/2020

Employee: All

Trans Status: All

Employee: All 08/21/2020 - 09/22/2020

#	Date	Employee	Counts	Tip
1	2020-09-16	administrator	2	\$0.67
2	2020-09-01	administrator	1	\$2.65
<b>Total</b>			<b>3</b>	<b>\$3.32</b>

Reset
Search

Available Filters: on the left side of the page:

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

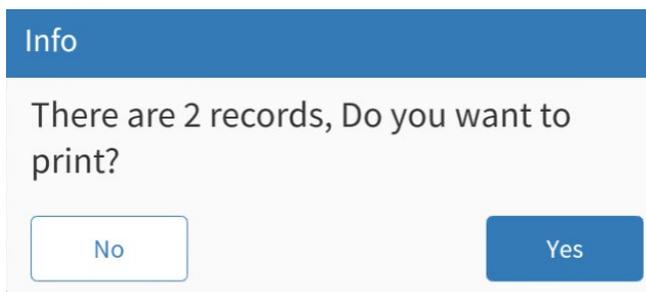
○ Void

Select  "Search", to Search

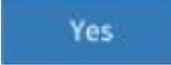
Select  "Reset", to clear Fields

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** “Yes” or **Cancel** “Cancel”

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

DESCRIPTION	COUNTS	AMOUNT
<b>Sales Totals</b>		
Sales Subtotal		\$1,680.57
Refund Subtotal		(\$17.24)
Void Subtotal		\$0.00
Total Tax		\$281.91
Grand Total		\$1,945.24
Trans. Count	15	
<b>Others</b>		
CashBack Total		\$0.00
Cash Tip Total		\$68.59

”Print”  Print is selected by default

Users can choose to unselect  Print, ”Print” if they choose

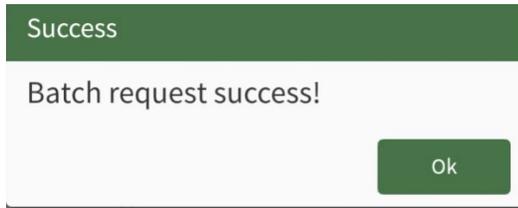
Select **Cancel** ”Cancel” to return to previous Screen

Select **Submit** ”Submit” to run Batch

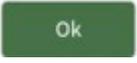
Confirmation Screen will appear select **Ok** “OK”

**Credit Card Settlement:**

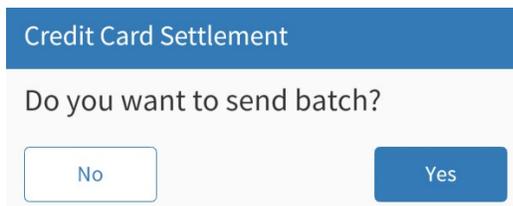
After selecting Credit Card Settlement button, you will be reminded if you want Send Batch.



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



---

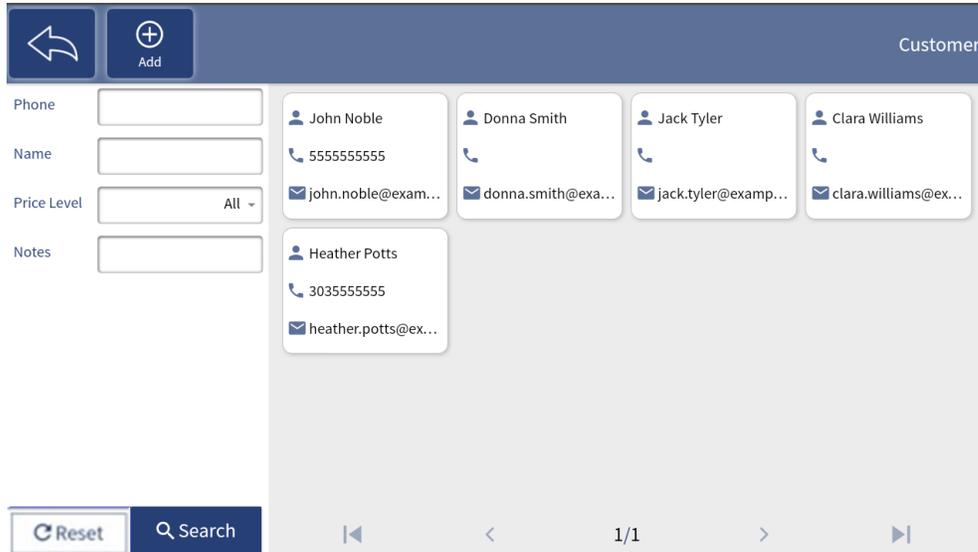
Customer  Shows all the Customers which have been created for the store.

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**

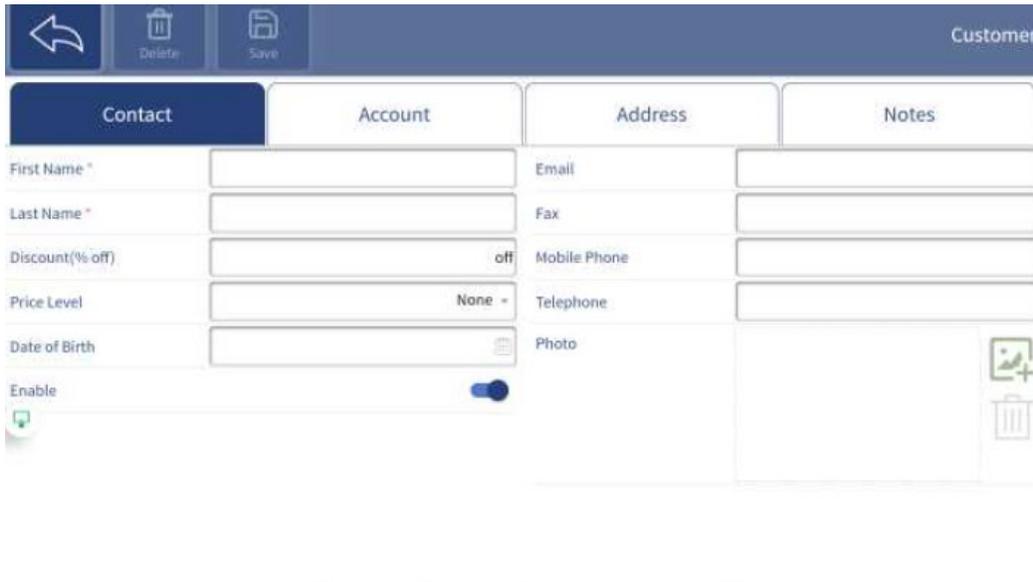
**Contact:** This tab displays general information about the Customer, such as Name, Discount, Price Level, contact information etc.

**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	Account	Address	Notes
First Name *		Email	
Last Name *		Fax	
Discount(% off)	off	Mobile Phone	
Price Level	None -	Telephone	
Date of Birth		Photo	
Enable	<input checked="" type="checkbox"/>		

***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.

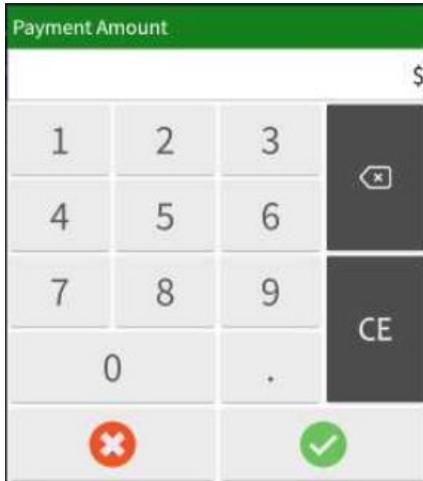
Contact	Account	History	Address	Notes
Maximum Credit	<input type="text" value="\$0.00"/>	Maximum Credit		\$0.00
		Balance Due		-\$500.00
		Available Balance		\$500.00
		<a href="#">Detail</a>		<a href="#">Apply Payment</a>
		Loyalty		645 Points
		<a href="#">Detail</a>		

Select on  ; Detail for information on Account

Detail			
Transactions	Date/Time	Total	Type
100249	8/18/2020, 11:13:59 AM	-\$500.00	Repayment

Balance Due:

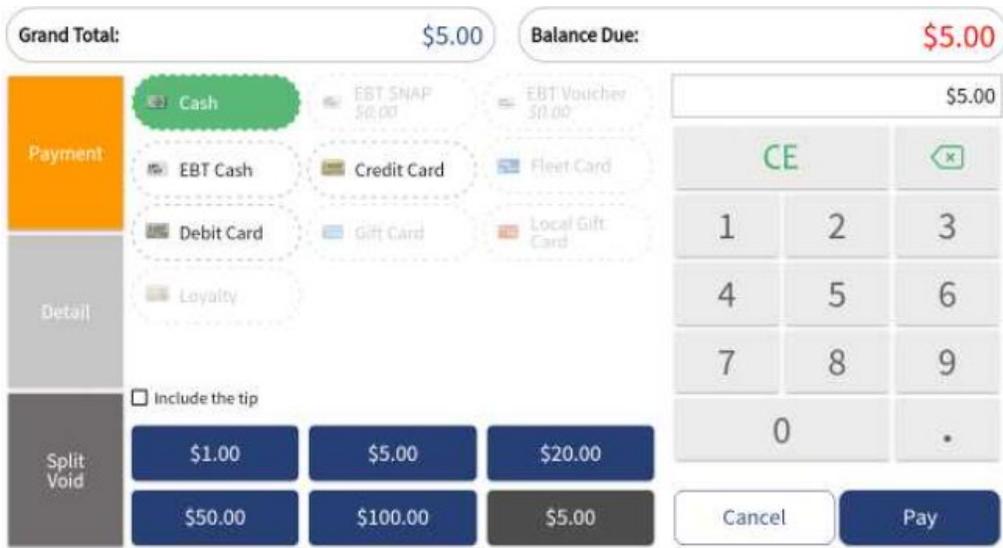
Select on **Apply Payment** “Apply Payment” to apply payment to outstanding balance



- Enter Payment Amount to Be applied.

Payment Screen will be presented:

Select applicable payment type and complete transaction



Loyalty:



Select on **Detail** “Detail” to view information on accrued Loyalty Points

Transactions	Date/Time	Points	Type
100281	9/24/2020, 2:20:51 PM	6	Sale add
	9/4/2020, 3:06:00 PM	6	Sale add
	9/4/2020, 10:51:11 AM	6	Sale add
100259	8/31/2020, 11:33:07 AM	-1	Sale refund
100257	8/31/2020, 11:28:52 AM	3	Sale add
100255	8/28/2020, 9:53:16 AM	3	Sale add
100243	8/7/2020, 10:51:07 AM	5	Sale add
100235	7/24/2020, 2:55:17 PM	17	Sale add

*History:*

Date	Transaction #/Ticket#	Trans. Type	Total
2020/09/24, 15:34:52 PM	100282/20	Sale	\$5.00
2020/09/24, 14:20:27 PM	100281/19	Sale	\$64.88
2020/08/31, 11:32:52 AM	100259/33	Refund	-\$1.18
2020/08/31, 11:28:26 AM	100257/31		\$31.57

Select on any transaction within History to bring up the transaction

Item	Qty.	Price	Transaction Details	
ACCOUNT	*1	\$5.00	#100282	2020/09/24, 15:34:52 PM
			Orig.	\$5.00
			Tax	\$0.00
			<b>Grand Total</b>	<b>\$5.00</b>
			<b>Method of payment</b>	
			Cash	\$5.00
<b>Customer: John Noble</b>				
Status: Normal				
Discount: 0% off				
Maximum Credit : \$0.00				
Balance Due : (\$505.00)				
Loyalty: 645				
First Name: John				
Last Name: Noble				
Date of Birth: 1/1/1990				
Mobile Phone:				
Email: john.noble@example.com				

Refund on selected transaction from History:



Select “Refund”, from the ribbon to begin refund process

Item	Qty.	Price	Item	Qty.	Price
ACCOUNT	*1	\$5.00			

administrator 15:38 706	Sub Total	\$0.00
	Tax	\$0.00
	<b>Grand Total</b>	<b>\$0.00</b>

Buttons: Refund One, Refund Line, **Refund All**, Remove Line, Clear, Refund

*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

<b>Grand Total:</b> (\$5.00)		<b>Balance Due:</b> (\$5.00)	
Refund	(\$5.00)	Method of payment	\$5.00
Refund Tax	\$0.00	Cash - <del>\$5.00</del>	
Grand Total	(\$5.00)	Paid: \$5.00	

<b>Manage Refund</b>		Cancel	Refund
----------------------	--	--------	--------

Permissioned users can select **Manage Refund** “Manage Refund”

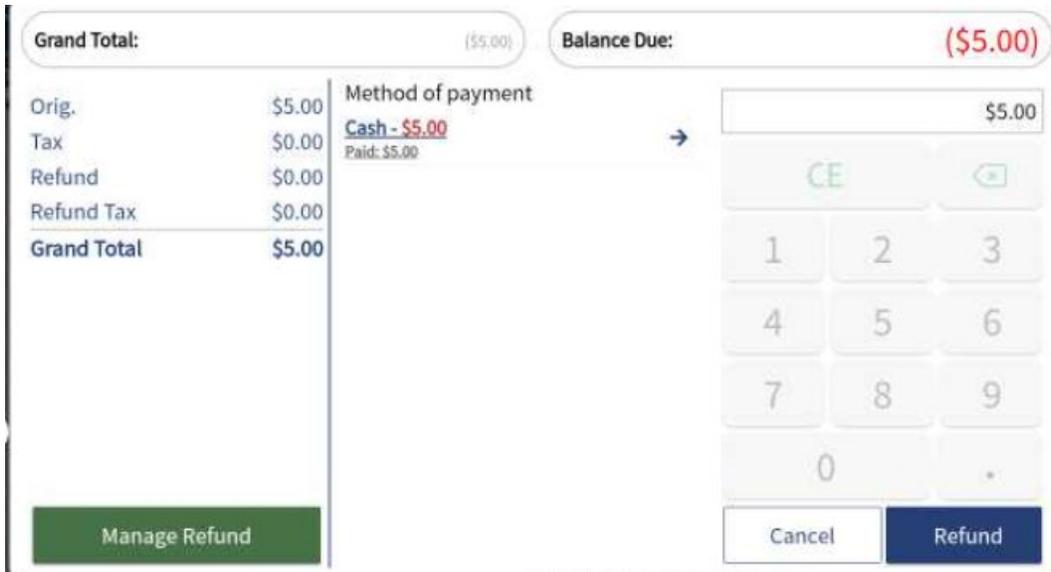
Choose another payment method for refund, Returns to Payments Screen

Select **Cancel** “Cancel”, Returns to Transaction Details

Select **Refund** “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



Grand Total:	(\$5.00)	Balance Due:	(\$5.00)
Orig.	\$5.00	Method of payment	\$5.00
Tax	\$0.00	Cash - \$5.00	
Refund	\$0.00	Paid: \$5.00	
Refund Tax	\$0.00		
Grand Total	\$5.00		

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:

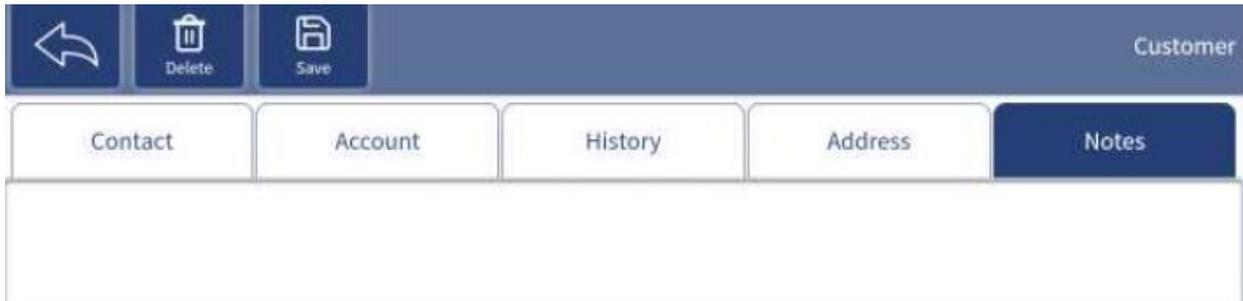
Customer				
Contact	Account	History	Address	Notes
Address Line1				
Address Line2				
City				
State/Province				
Zip/Post Code				
Country				

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



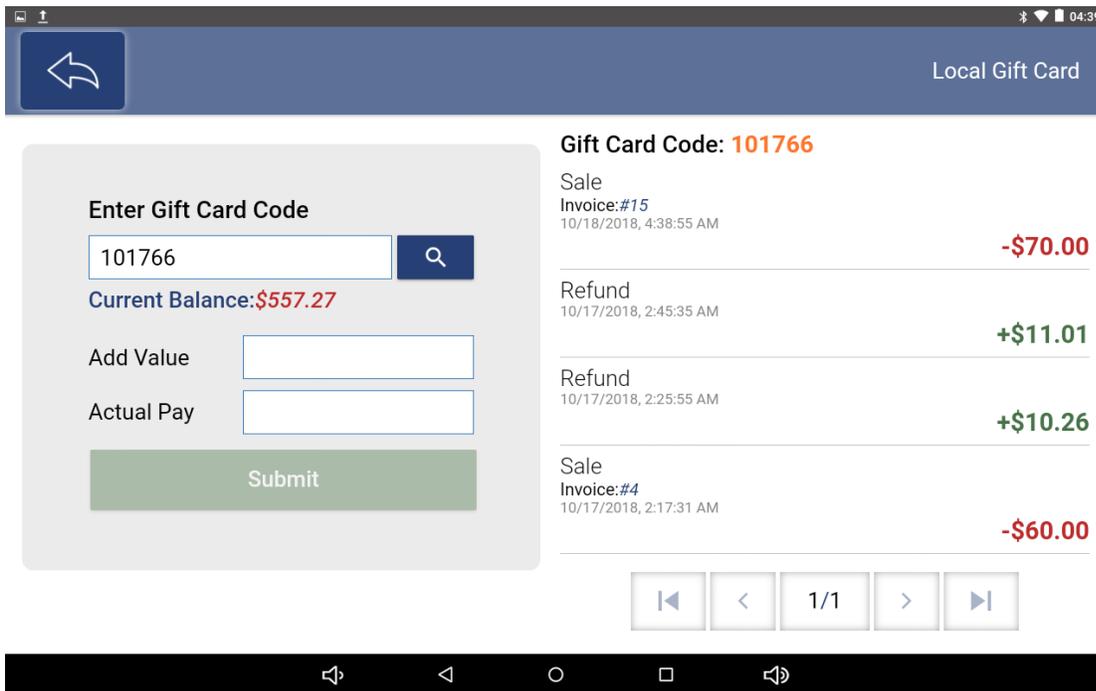
**Local Gift Card:**



Select **Customer** "Customers" From Main Menu



Select **Local Gift Card** "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.

Item	Category	Tax Category	Price You Charge	Price with Tax
Limited Edition Spoon	Behind the Counter	None	\$1.00	\$1.00
Tea Sample	Behind the Counter	None	\$0.00	\$0.00
Coffee Sample	Behind the Counter	None	\$0.00	\$0.00
M and Ms	Behind the Counter	Grocery	\$0.44	\$0.50
Chocolate Syrup	Behind the Counter	Grocery	\$0.09	\$0.10
Strawberry Syrup	Behind the Counter	Grocery	\$0.09	\$0.10
Gummies	Behind the Counter	Grocery	\$0.44	\$0.50

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  Clears all fields

To Add a new product

Select  from the ribbon, the products Screen will be displayed



The screenshot shows the 'Products' screen with the 'General' tab active. The ribbon at the top includes 'Back', 'Delete', and 'Save' buttons. The 'General' tab contains the following fields:

Field	Value/Type
Item *	Text input
Tax Category *	Dropdown menu
Price You Charge *	Text input
Mark up Price	Text input
Cash Price	Text input
Price with Tax *	Text input
Avg Cost	Text input
Category *	Dropdown menu
Inventory Tracking *	Dropdown menu (Don't track inventory)
EBT Eligible	Toggle switch (Off)
Restricted Age	Toggle switch (Off)
Display In Menu	Toggle switch (On)
Tax	\$0.00

**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"

### 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

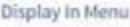
*More:*



- **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 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 TAXCategory
  - 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*

Attribute Name	Mandatory	Value	Price
Size	No	Small	\$0.00 / \$0.00
		Medium	\$0.00 / \$0.00
		Large	\$0.00 / \$0.00
		X-Large	\$0.00 / \$0.00
		XX-Large	\$0.00 / \$0.00

Size:Small		Size:Medium	
SKU	471815001016	SKU	471815001023
Override Price	-	Override Price	-
Stock	0	Stock	0

Size:Large		Size:X-Large	
SKU	471815001030	SKU	471815001047
Override Price	-	Override Price	-
Stock	0	Stock	0

*Add new attribute:*

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

Value	Price	Avg Cost
small	0	0
medium	0	0
large	0	0

4. Select  , 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

Level	Amount	Percent	
Member	\$0.90	10% off	<input type="button" value="Enable"/> <input type="button" value="Disable"/>

*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

A screenshot of the "Categories" management page. At the top is a dark blue ribbon with icons for Back, Refresh, Add, Delete, and Save. Below the ribbon is a list of categories on the left: "At the Counter", "Behind the Counter", "Groceries", "Travel", "Specialty", and "Electronics". The "At the Counter" category is selected, and its details are shown on the right: Name (At the Counter), Description, Restricted Age (toggle off), Display In Menu (toggle on), DisplayOrder (0), and Image (upload and delete icons).

Refresh: Select "Refresh", 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
- ( $\leq$ ) - Less than or equal to Stock which meets x Number and x Tracking
- ( $\geq$ ) - 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.

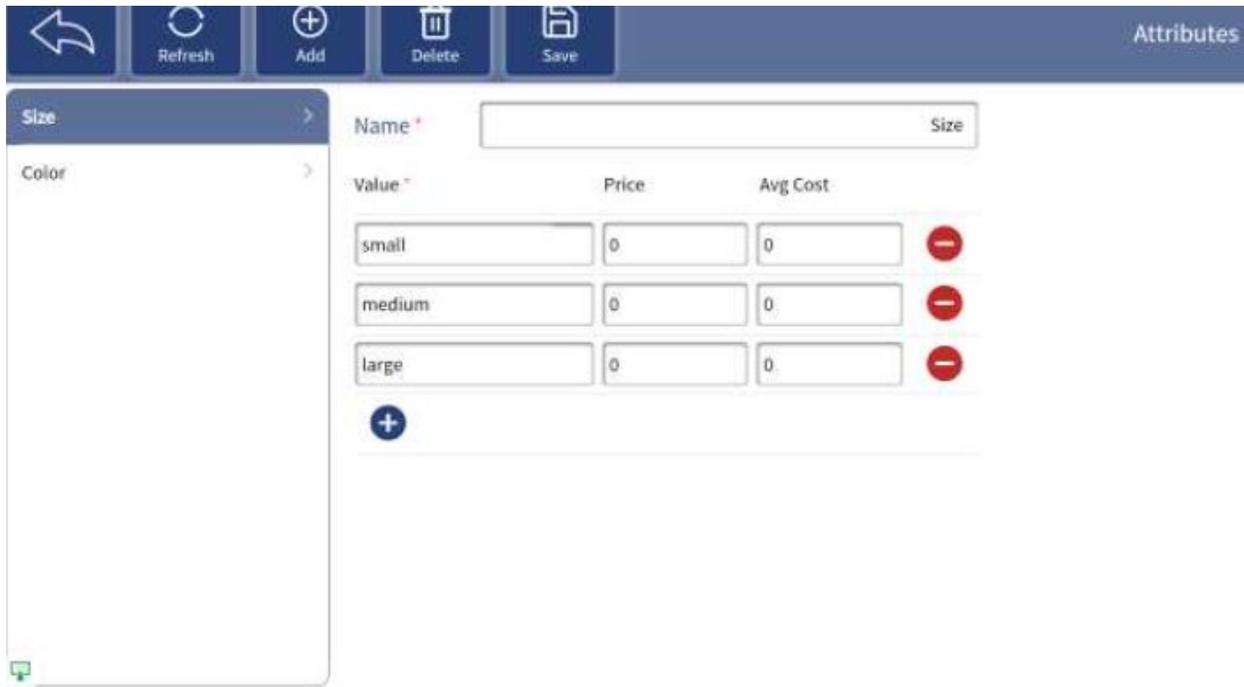
Attributes:



Select “Inventory” from the Main Menu



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

A screenshot of the 'Attributes' management page. At the top, there is a dark blue header bar with navigation icons: a back arrow, a refresh icon, an add icon (+), a delete icon (trash), and a save icon. The title 'Attributes' is on the right. Below the header, there is a sidebar on the left with a search bar and a list of categories: 'Size' and 'Color'. The main content area shows a table with columns for 'Name', 'Value', 'Price', and 'Avg Cost'. There are three rows of attributes: 'small', 'medium', and 'large'. Each row has input fields for 'Value', 'Price', and 'Avg Cost', all containing the number '0'. To the right of each row is a red minus sign (-) for deletion. Below the table is a blue plus sign (+) for adding a new attribute.

**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

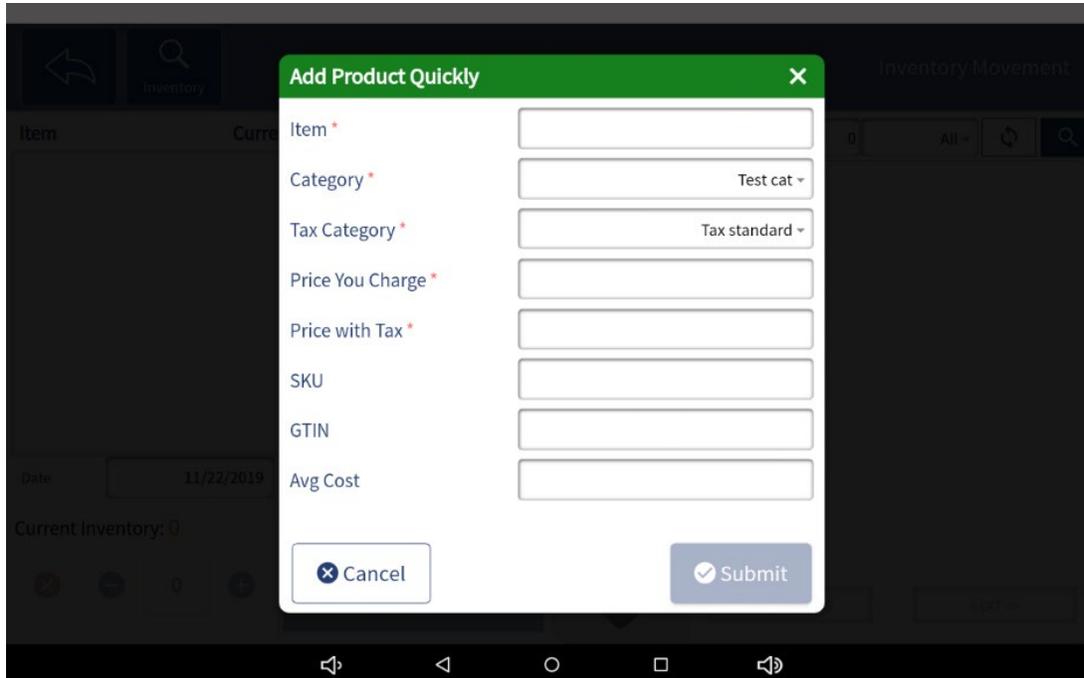
1. Required name
2. Value and price of the Category.

**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.*



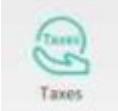
The screenshot shows a mobile application interface with a dark theme. A central dialog box titled "Add Product Quickly" is open. It has a green header bar with a close button (X). The dialog contains the following fields and controls:

- Item \***: A text input field.
- Category \***: A dropdown menu with "Test cat" selected.
- Tax Category \***: A dropdown menu with "Tax standard" selected.
- Price You Charge \***: A text input field.
- Price with Tax \***: A text input field.
- SKU**: A text input field.
- GTIN**: A text input field.
- Avg Cost**: A text input field.
- Buttons**: "Cancel" (with a close icon) and "Submit" (with a checkmark icon) are located at the bottom of the dialog.

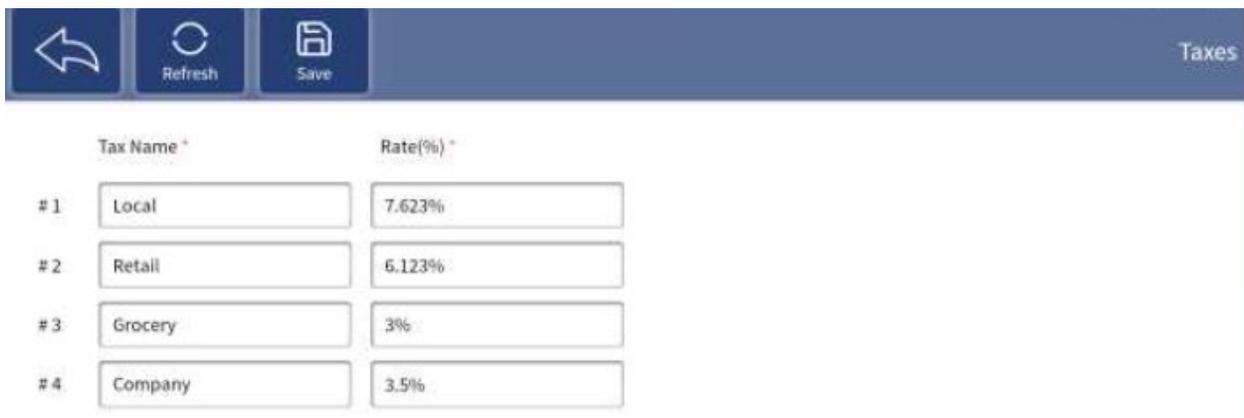
The background shows a dimmed view of the application's main screen, including a search bar, a date field (11/22/2019), and a "Current Inventory: 0" indicator.

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.*



The screenshot shows the 'Taxes' ribbon with three buttons: a back arrow, a 'Refresh' button with a circular arrow icon, and a 'Save' button with a floppy disk icon. Below the ribbon is a table with two columns: 'Tax Name' and 'Rate(%)'. The table contains four rows of data.

	Tax Name *	Rate(%) *
# 1	Local	7.623%
# 2	Retail	6.123%
# 3	Grocery	3%
# 4	Company	3.5%

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 Name	Rate(%)	Order	Tax On Previous Tax Amount
<input checked="" type="checkbox"/> Local	7%	0	<input type="checkbox"/>
<input checked="" type="checkbox"/> Retail	6%	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Company	3.5%	3	<input checked="" type="checkbox"/>
<input type="checkbox"/> Grocery	3%	0	<input type="checkbox"/>

- **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 Taxname 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



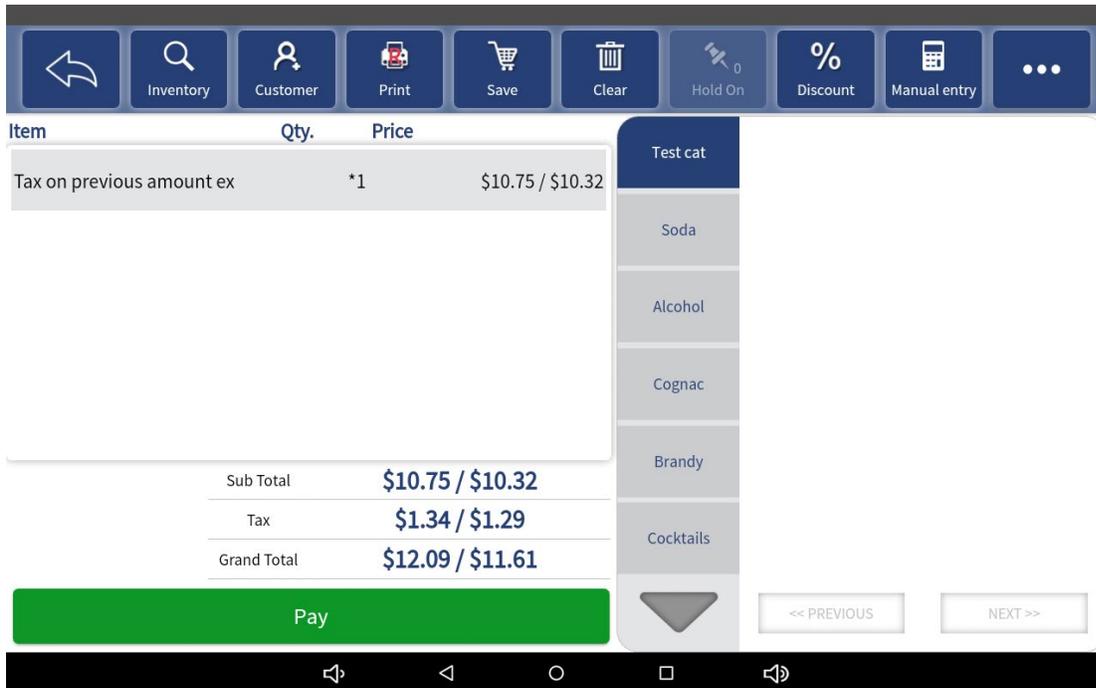
2. Select "Delete", from ribbon to *Delete*



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*

Modifier *	Price
M and Ms	\$0.44
Chocolate Syrup	\$0.09
Strawberry Syrup	\$0.09
Gummies	\$0.44



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*

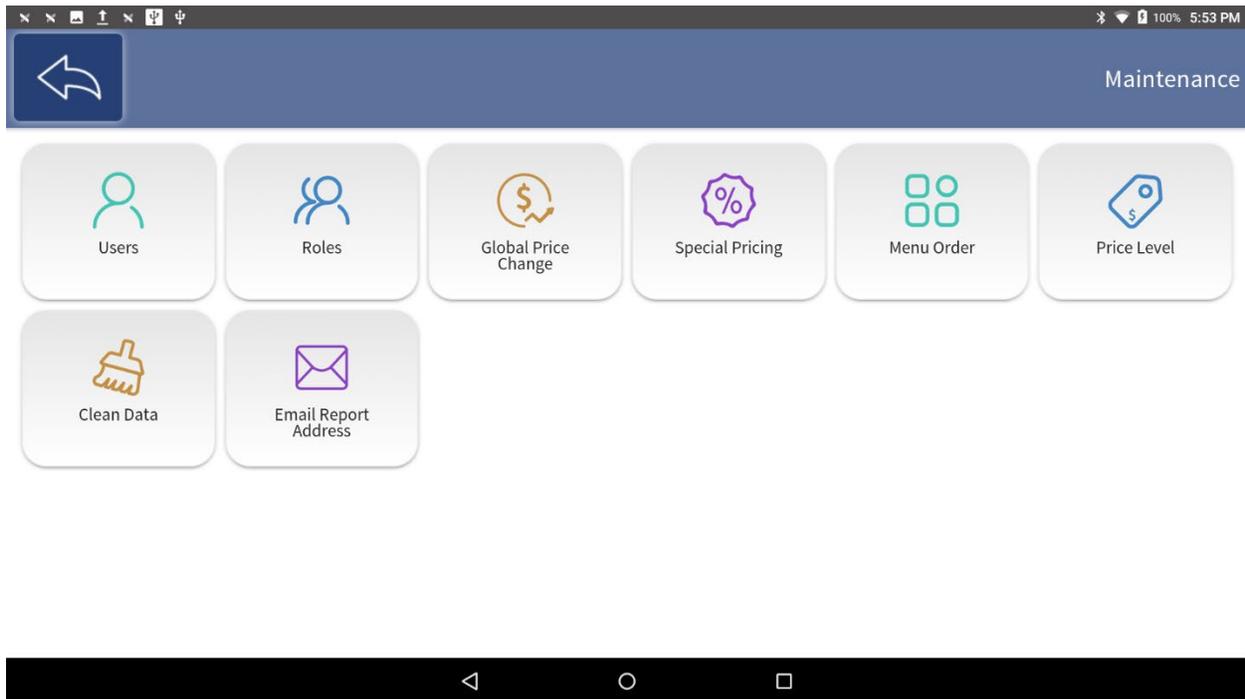
2. Select , from the ribbon To *Delete* Modifier Group

## Maintenance:



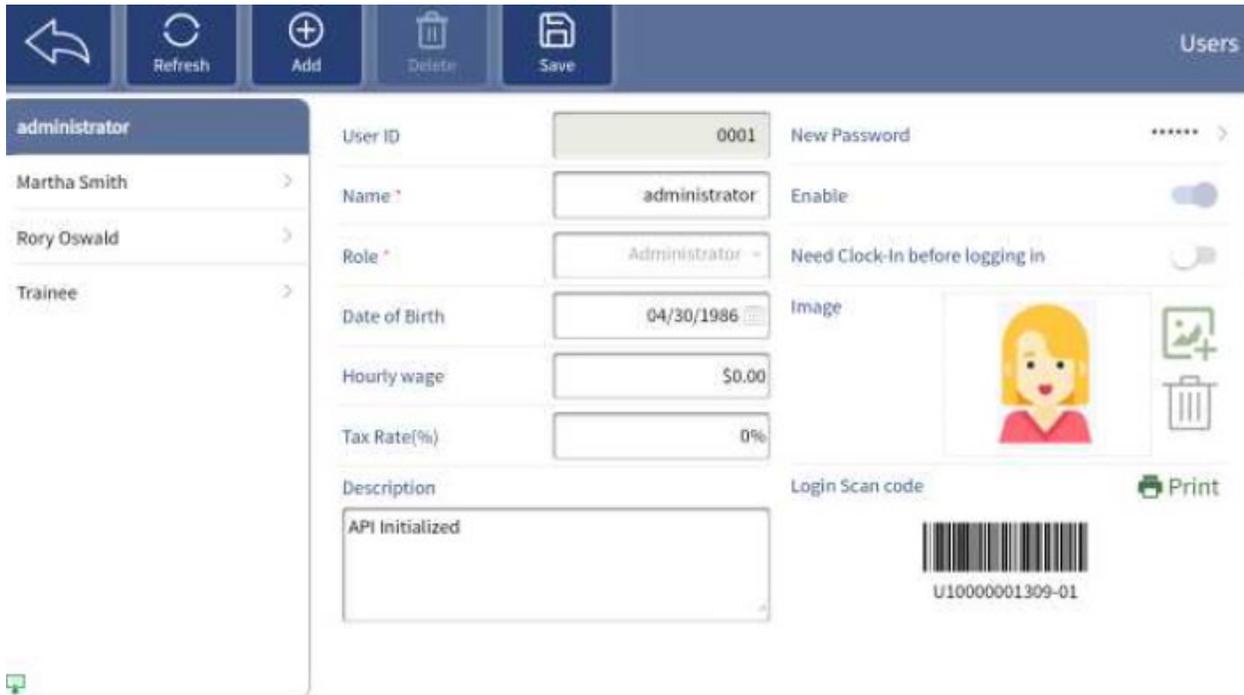
1. From Main Menu Select “Maintenance”

- **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.

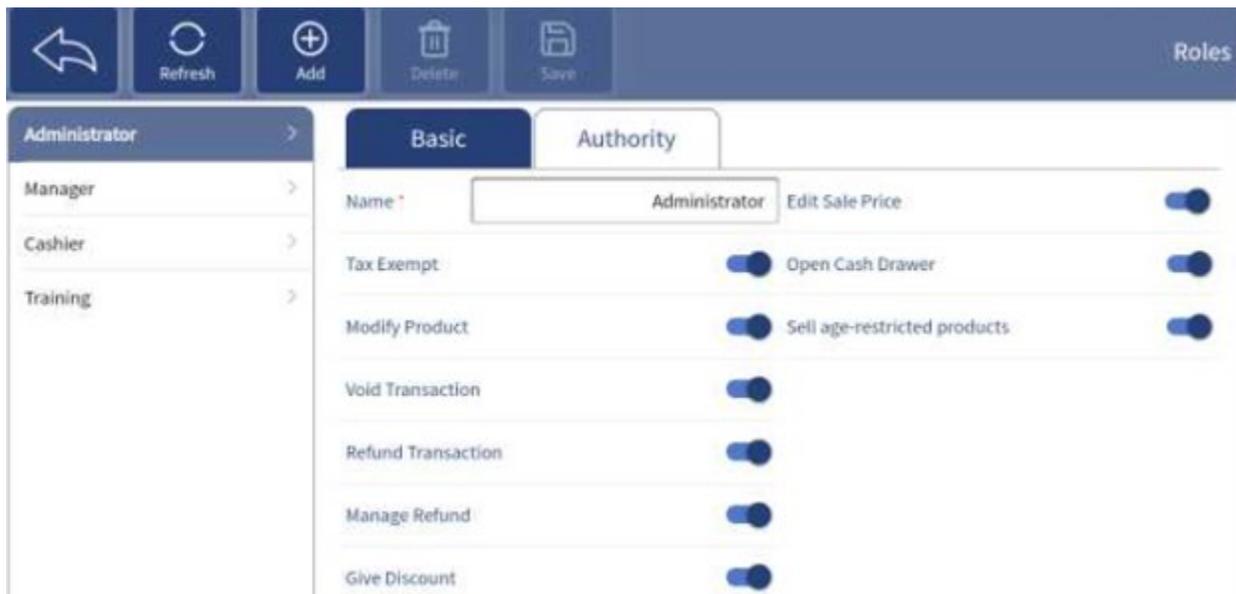
- Select Print 
- Barcode will be printed.
- User can then use barcode which has been printed to clock in/clock out.

*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.



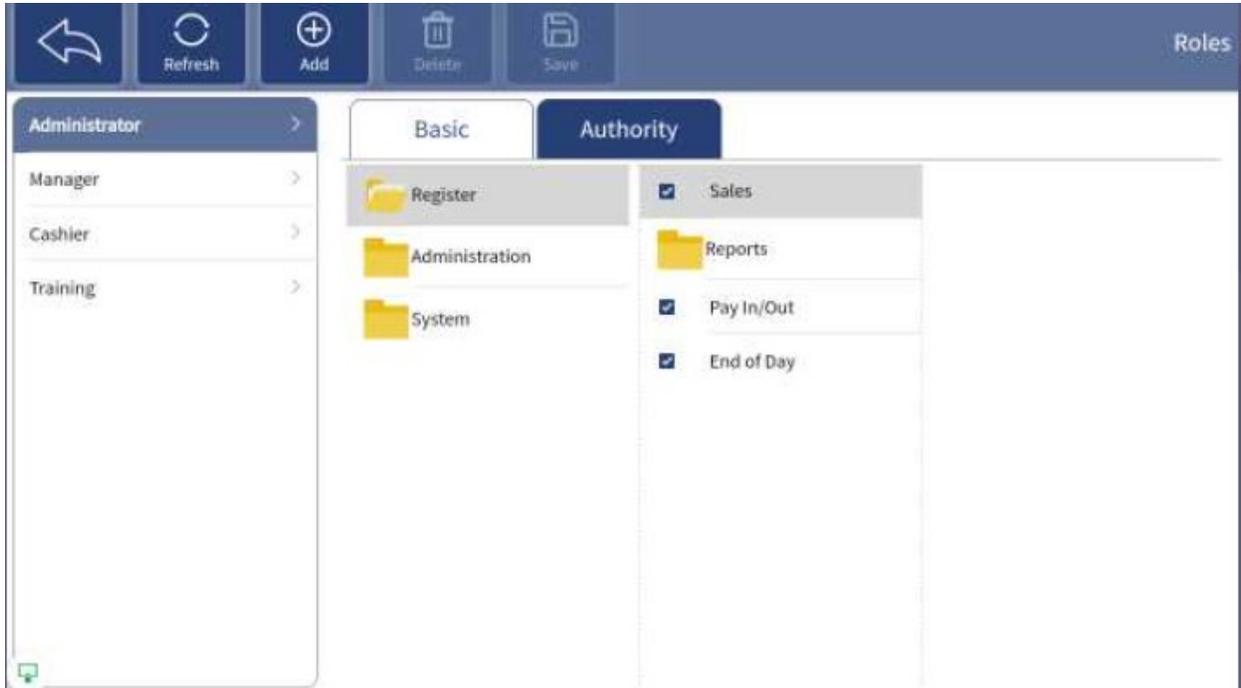
**Save:** Select "Save", from the ribbon to save changes made to Roles.



*\*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.

A screenshot of the 'Global Price Change' web interface. The page has a dark blue header with a back arrow on the left and the title 'Global Price Change' on the right. Below the header, there are two sections: 'Which Items' and 'How To Change'. The 'Which Items' section contains three buttons: 'All Items', 'Items in Category', and 'Select Items'. The 'How To Change' section contains three buttons: 'By Amount', 'By Percentage', and 'By Rounding'. At the bottom of the form is a green 'Submit' button.

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.

Which Items

All Items

Items In Category    Select Items

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

Which Items    Items

All Items    Category

Items In Category    Select Items

How to Change:

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

How To Change    Method

By Amount     Price Change

By Percentage     X% Price Increase

By Rounding     X% Price Decrease

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

How To Change    Method

By Amount     Profit

By Percentage     Gross Margin

By Rounding

**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.

The screenshot shows a web interface for 'Global Price Change'. At the top right, the title 'Global Price Change' is displayed. On the left, there is a navigation menu with a back arrow icon. The main content area is divided into two columns. The left column has a section titled 'Which Items' with a dropdown menu currently set to 'All Items'. Below this are two buttons: 'Items in Category' and 'Select Items'. The right column has a section titled 'Items' with a dropdown menu also set to 'All Items'. Below this is a section titled 'Method' with two radio buttons: 'Up' (which is selected) and 'Down'. Under the 'Up' radio button, there are three input fields containing the text '\$XX.95', '\$XX.99', and '\$XX.00'. At the bottom of the left column, there is a 'Submit' button. A small monitor icon is visible at the bottom left of the interface.

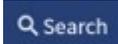
Special Pricing:



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.

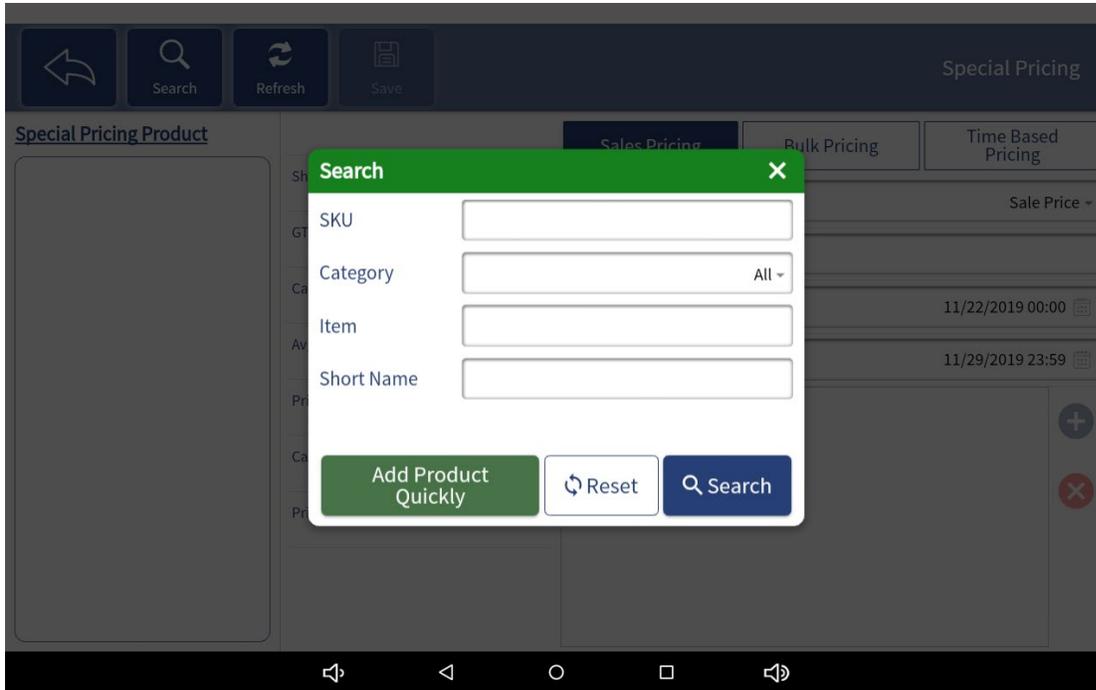


Search: Select "Search", from the ribbon to find an item and set up a promotion method for it.

The screenshot shows the 'Special Pricing' interface for a product named 'Chips'. The interface includes a navigation bar with icons for back, search, refresh, and save. The main content area is divided into a left sidebar for product selection and a main form for pricing details. The sidebar lists 'Chips', 'Chocolate Bar', and 'Coffee Roast'. The main form shows the following details:

Chips		Sales Pricing	Bulk Pricing	Time Based Pricing
Short Name	Chips	Method *	Sale Price -	
SKU	451253000208	Price *		
Category	Groceries	Start Date	09/24/2020 00:00	
Avg Cost	\$0.0000	End Date	10/01/2020 23:59	
Price You Charge	\$3.00	01/01/20 00:00 - 12/31/20 00:00	30%off	+ (Add)
Mark up Price	\$3.12			- (Remove)
Cash Price	\$3.00			

**Add Product Quickly** is also available:



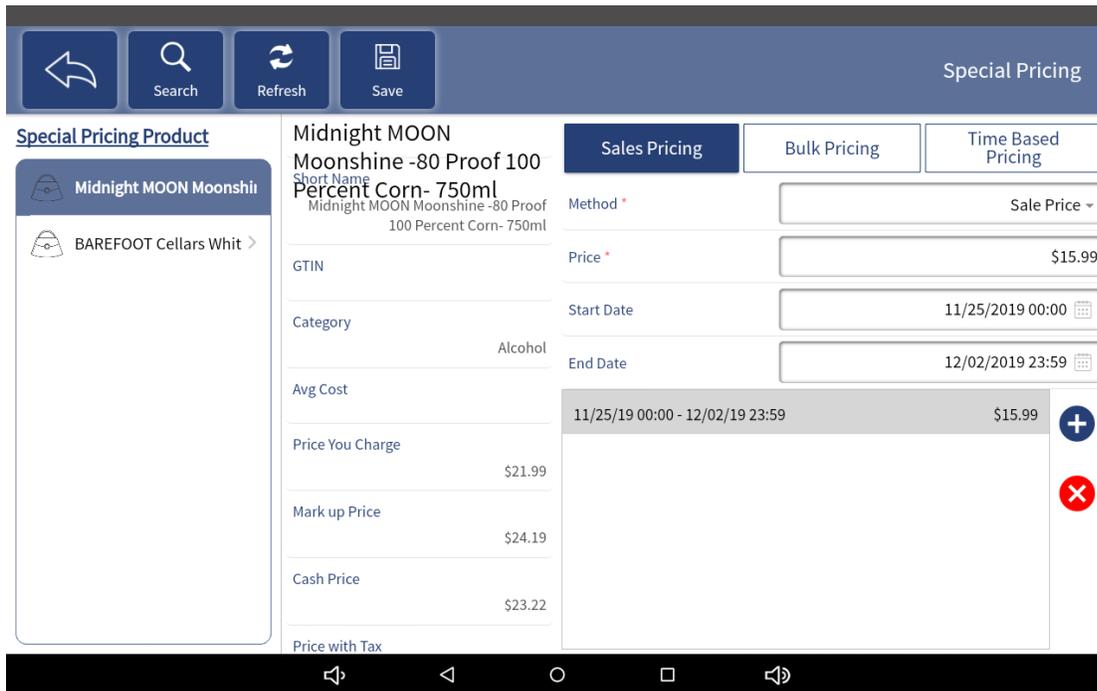
Please refer to **Appendix A** of this document for more about how Special Pricing interacts with other discounts.

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.

**Special Pricing Product**

Midnight MOON Moonsl >

BAREFOOT Cellars White ;

**BAREFOOT Cellars White ZINFANDEL**

Short Name  
BAREFOOT Cellars White ZINFANDEL

GTIN

Category  
White Wine

Avg Cost

Price You Charge  
\$7.99

Mark up Price  
\$8.79

Cash Price  
\$8.44

Price with Tax  
\$8.55

Sales Pricing | Bulk Pricing | **Time Based Pricing**

Mon ✓ | Tue ✓ | Wed ✓ | Thur

Fri | Sat | Sun

Start 00:00 Price \* \$7.99

End 23:59

MON,TUE,WED 00:00-23:59	\$7.99	+
-------------------------	--------	---

X

**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



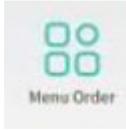
**End Time**- Select Time

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

Menu Order:

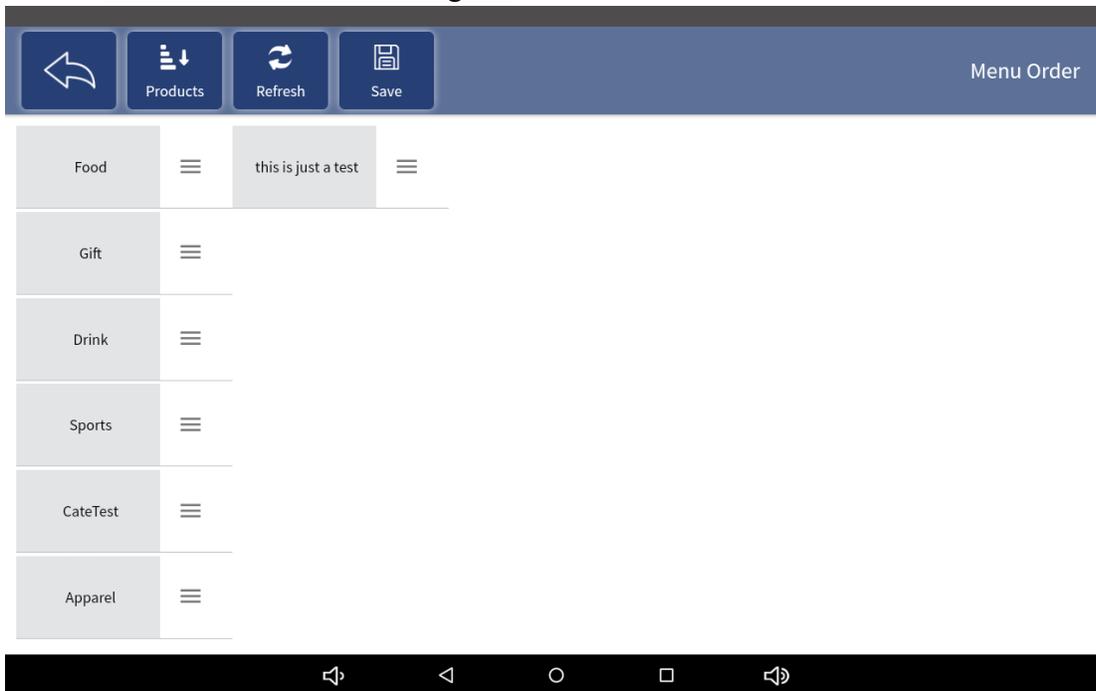


1. Select "Maintenance", from the Main Menu



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. Press the 3 stacked bars to grab.



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



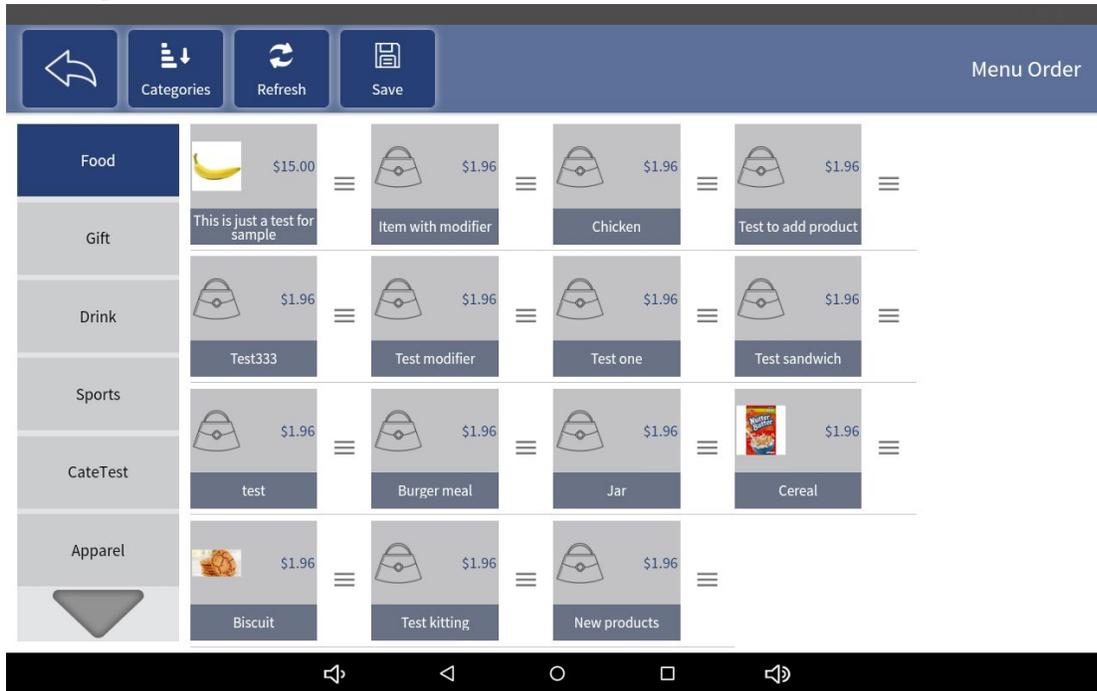
Refresh: Select "Refresh", to refresh the current Menu Oder.



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

A screenshot of the software interface for editing a Price Level. At the top is a dark blue ribbon with five buttons: a back arrow, a circular refresh icon, a plus sign for 'Add', a trash can for 'Delete', and a floppy disk for 'Save'. The text 'Price Level' is on the right side of the ribbon. Below the ribbon is a form with a 'Member' dropdown menu on the left. The form fields are: 'Name \*' with a dropdown menu showing 'Member'; 'Percent \*' with a dropdown menu showing '10% off'; and 'Automatically Set' with a right-pointing chevron.

**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.



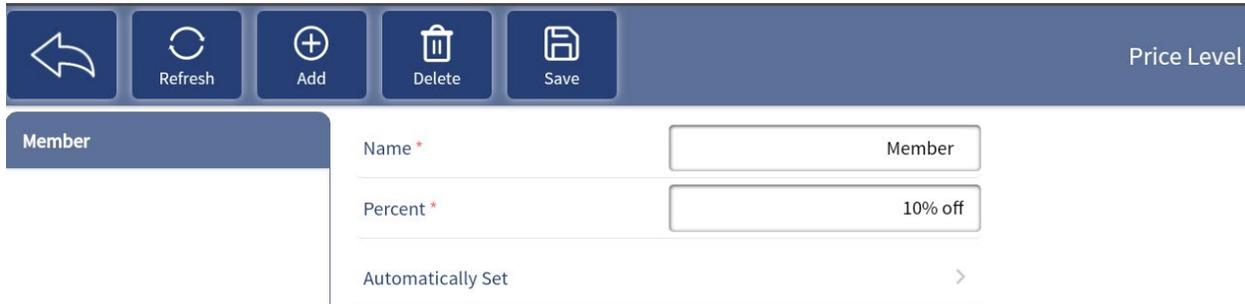
**Save:** Select "Save", from the ribbon to save changes after modifying Price Level.

### Add a "Price Level":



1. Select "Maintenance Menu", from the ribbon

2. Select  “Add”, from the ribbon



The screenshot shows a software interface with a dark blue ribbon at the top containing icons for Back, Refresh, Add, Delete, and Save. The text "Price Level" is visible on the right side of the ribbon. Below the ribbon is a form with a "Member" tab selected. The form contains three input fields: "Name \*" with the value "Member", "Percent \*" with the value "10% off", and "Automatically Set" with a dropdown arrow.

**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.

A screenshot of a mobile application screen titled "Verify Identity". At the top, it shows "USER ID : 0001". Below that is a text input field labeled "Enter Passcode" with a clear button (X) on the right. Underneath the input field is a numeric keypad with buttons for digits 1-9, 0, a "Cancel" button, and an "Enter" button.

**Selections:**

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



Clean Transaction

Reset Ticket Number

Clean Log

Reset all data

**Clean Transaction:**



Clean Transaction

Start Date 10/04/2019

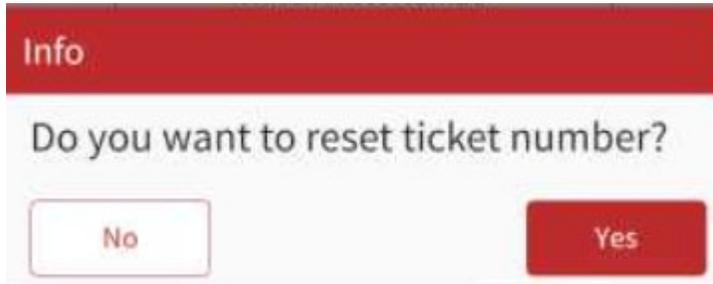
End Date 04/01/2020

Cancel Clean

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

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

**Clean Log:**

Allows permissioned user to clean logs going back

Clean Log

A week ago

A month ago

days ago

1. A Week
2. A month
3. XDays 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

**Add Email to Email List** ×

You need to add an email address before you send email reports

Name

Email Address \*

Cancel

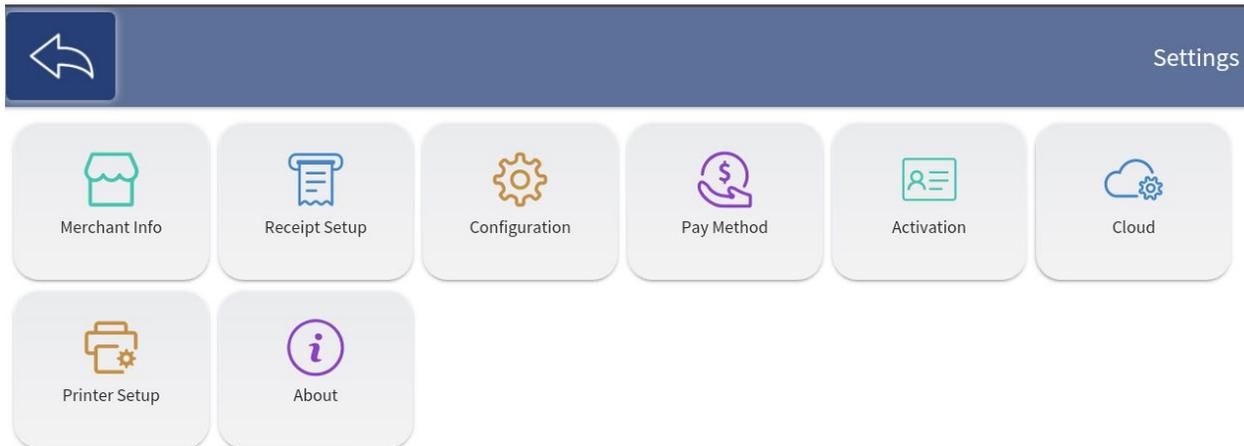
Submit

submit

## Settings



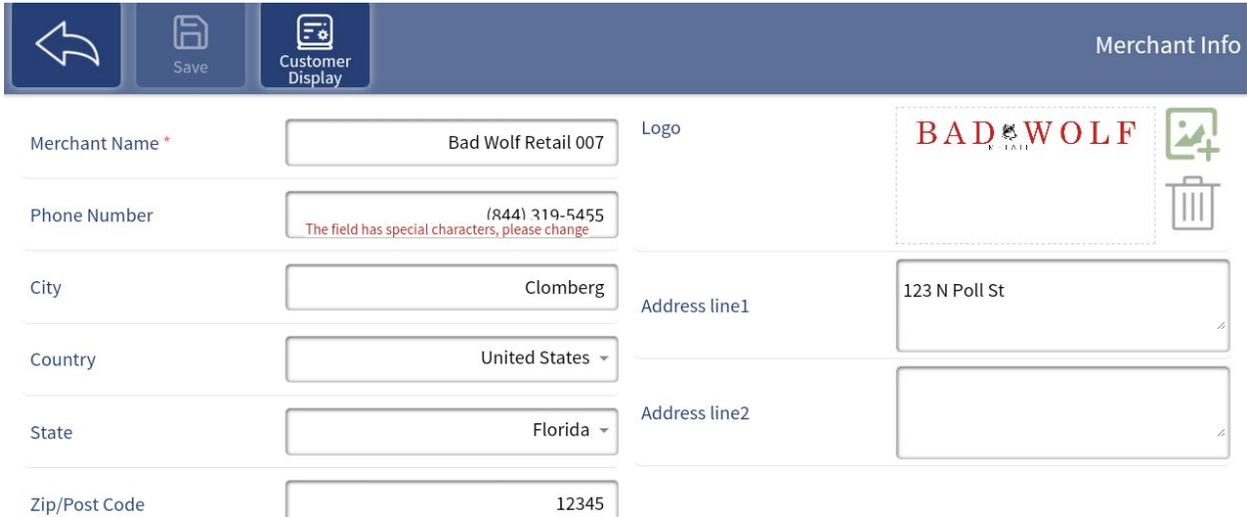
1. *Select* **“Settings”** From the Main Menu
  - **Merchant Info** - This page displays information about the store, such as Merchant Name, Phone Number, Logo, and Address. Please refer to provisioning user roles and permissions within Back Office User Guide (See page 25, Add a new POS Role) for additional 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.



Merchant Info	
Merchant Name *	Bad Wolf Retail 007
Phone Number	(844) 319-5455 <small>The field has special characters, please change</small>
City	Clomberg
Country	United States
State	Florida
Zip/Post Code	12345
Address line1	123 N Poll St
Address line2	
Logo	BAD WOLF RETAIL

**Note:** Fields marked with “\*” are required

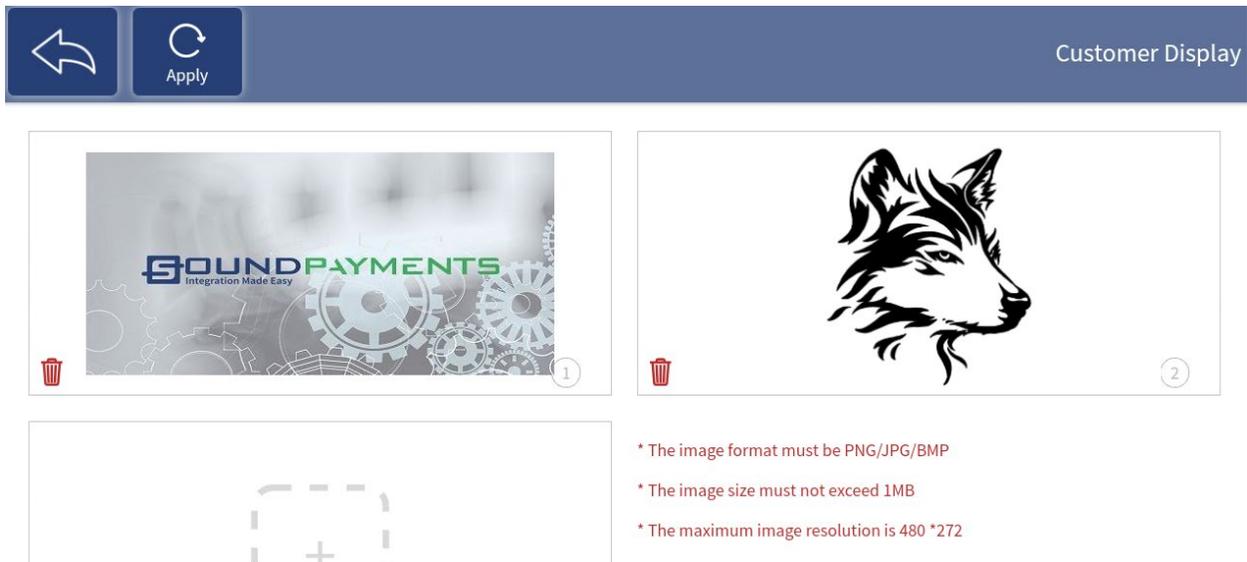
**Save:** Save changes after editing Merchant Info. Select 

- 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*



Choose an action



Camera



Documents

**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:

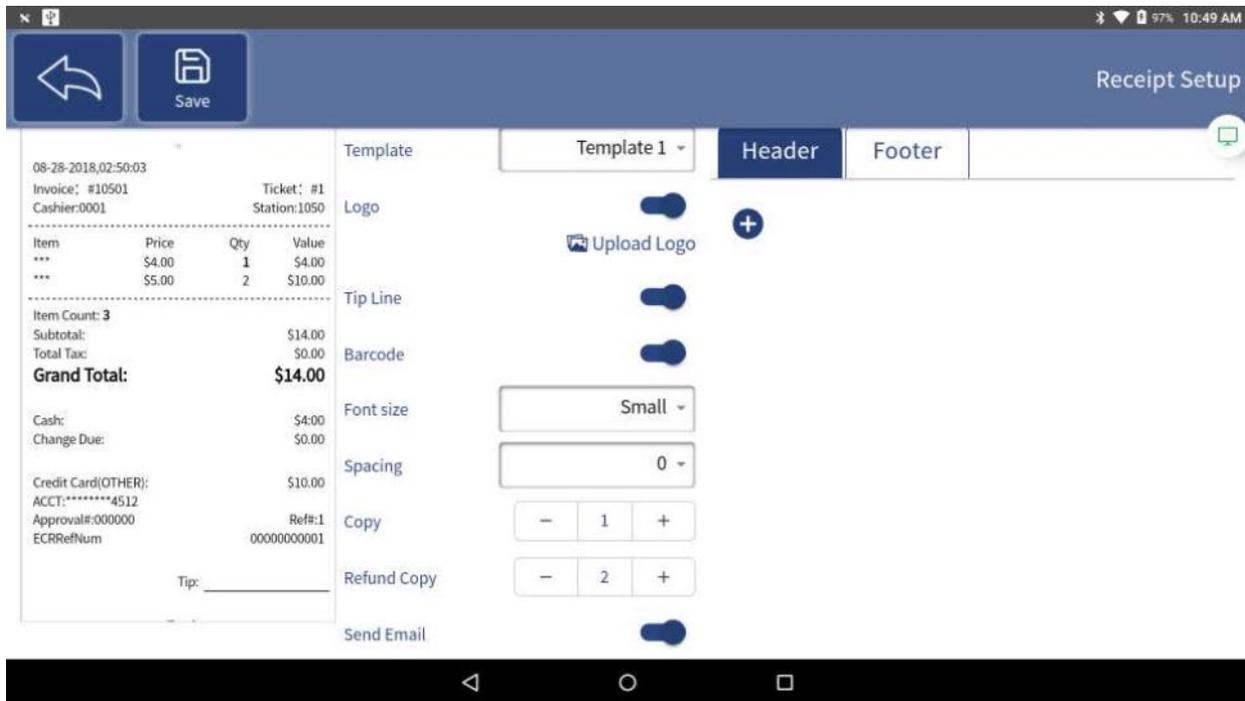


1) Select **“Settings”** From Main Menu



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
-  , 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

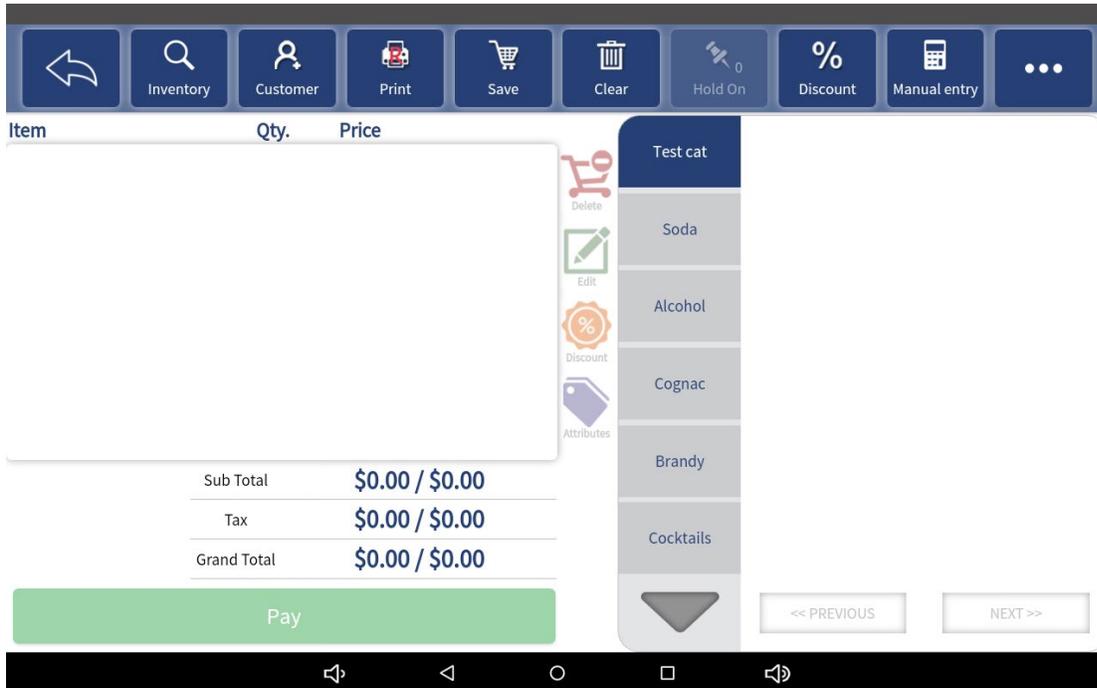


2. Select *“Configuration”*; to set Single line item Operation, Enable Exit System When Idle, Set Screensaver timeout, Enable Camera Scanner, Set The default Right Side, Set Transaction Operations, and App Settings.

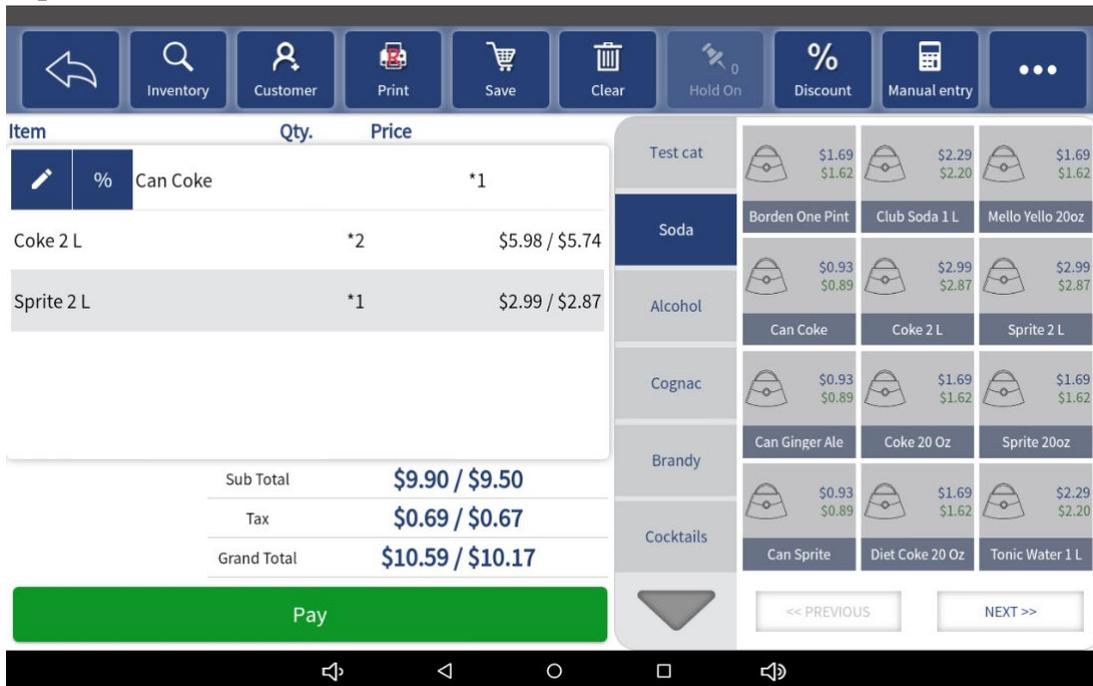
Sale Screen Mode		Exit System When Idle	
Item Operation		Enable	<input type="checkbox"/>
Traditional	<input checked="" type="radio"/>	15 Minutes	<input checked="" type="radio"/>
Popular	<input type="radio"/>	30 Minutes	<input type="radio"/>
Right Side		60 Minutes	<input type="radio"/>
Manual Entry	<input type="radio"/>	<b>Screensaver</b>	
Menu	<input checked="" type="radio"/>	Enable	<input checked="" type="checkbox"/>
Others		15 Minutes	<input checked="" type="radio"/>
Camera Scanner	<input checked="" type="checkbox"/>	30 Minutes	<input type="radio"/>
Transaction Options		60 Minutes	<input type="radio"/>
Use Customer Display	<input checked="" type="checkbox"/>	Passcode	<input type="checkbox"/>

- **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 users 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:



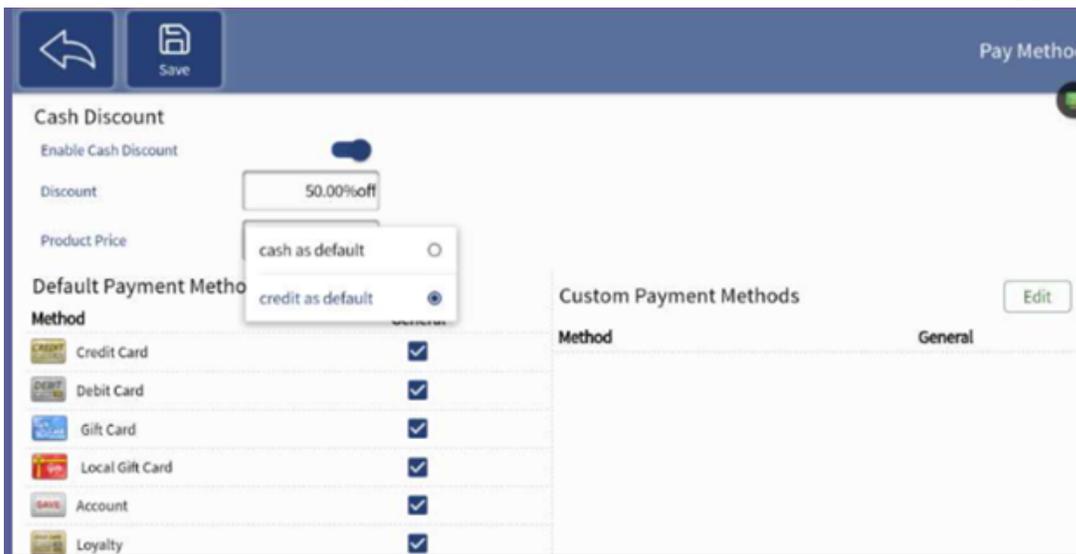
1. Select “Settings” From Main Menu



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.

Non-Cash Adjustment      Cash Back

Name      Non-Cash Adjustment      Enable Cash Back

Percentage      3.99%      Max Amount      \$200.00

Default Payment Methods      Custom Payment Methods      Edit

Method	General	Non-Cash Adjustment
CREDIT Credit Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEBIT Debit Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gift Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Local Gift Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Loyalty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EBT	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Method	General	Non-Cash Adjustment

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

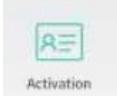
**Pay Method:**

- **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:

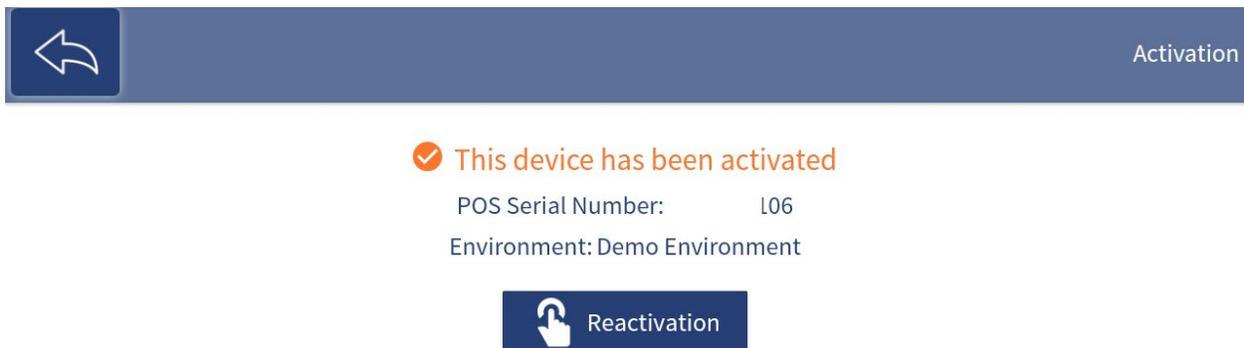
1) Select  “Settings” From Main Menu

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 not 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

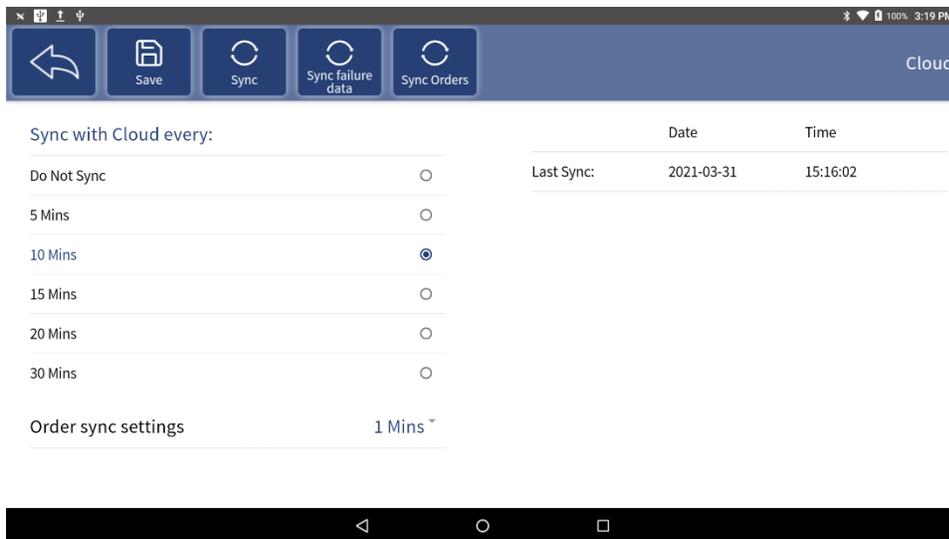
2. Select  “Cloud”, and Set Sync with Cloud Every: 5/ 10/ 15/ 20 minutes or “Do not Sync”

**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.

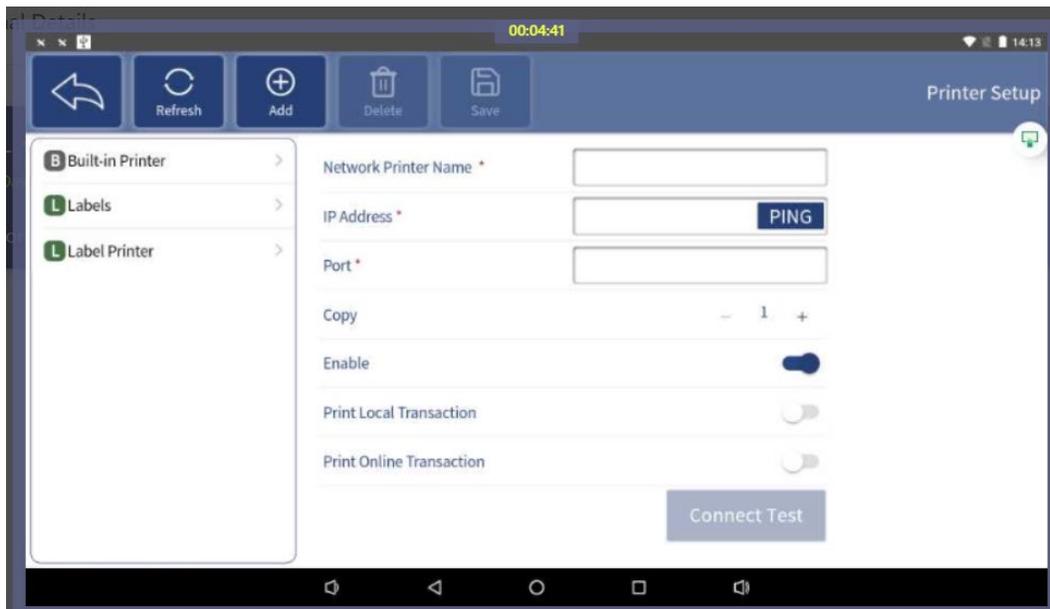


1. To Add a printer, select
2. Select type of printer to add:

## 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](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.

The screenshot displays the 'Printer Setup' interface. On the left, a list of printers is shown, with 'Built-in Printer' selected. The main configuration area includes the following fields and controls:

- Label Printer Name \***: Text input field.
- Port \***: Dropdown menu set to 'NET'.
- IP Address \***: Text input field with a 'PING' button.
- Printer Model \***: Dropdown menu set to 'QL\_810W'.
- Paper Size \***: Dropdown menu set to 'W62'.
- Printing Orientation \***: Dropdown menu set to 'Portrait'.
- Copy**: Control with a minus sign, the number '1', and a plus sign.
- Enable**: Toggle switch, currently turned on.
- Print Local Transaction**: Toggle switch, currently turned off.

### 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.

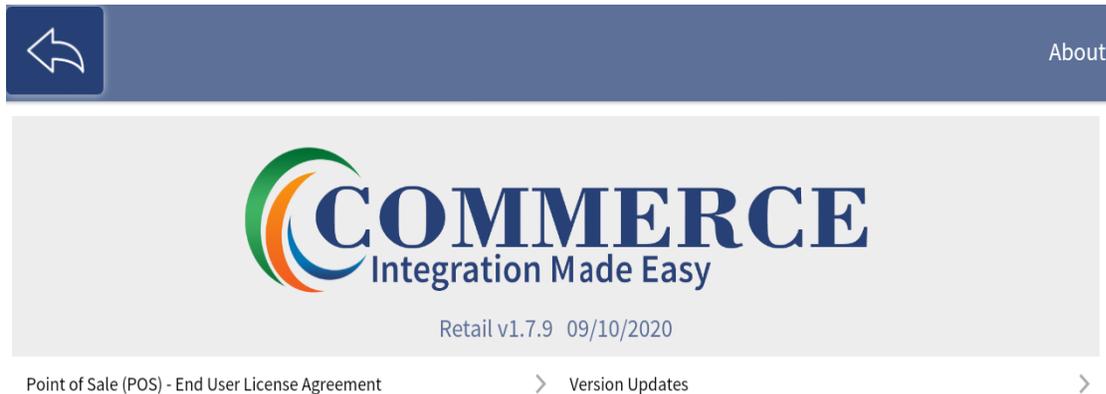
## About



1. *Select* “Settings” *From Main Menu*



2. *Select* “About”, will display Information on Version and Information on Select Version Updates, to view patch notes.

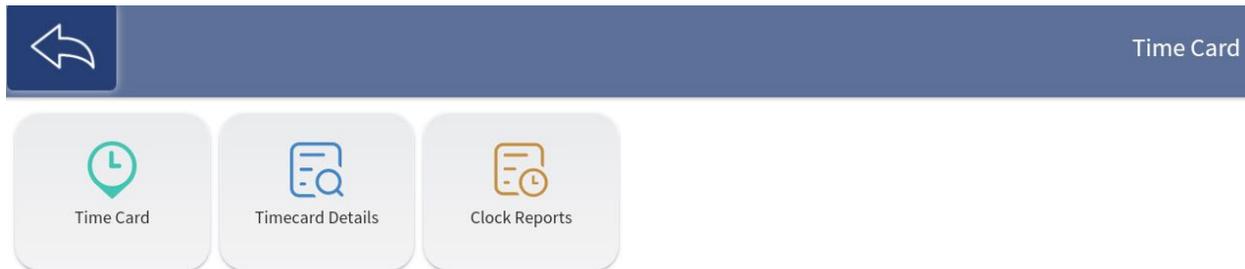


## Timecard:



Select **Time Card** “Time Card” from Main Menu

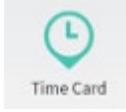
- Timecard: to Clock In, Clock Out, go on Break
- Timecard Detail: Permissioned users can view information on Employees and perform timeclock management
- Clock Reports: Permissioned users can view reports on employees and get printouts of Timeclock



## 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

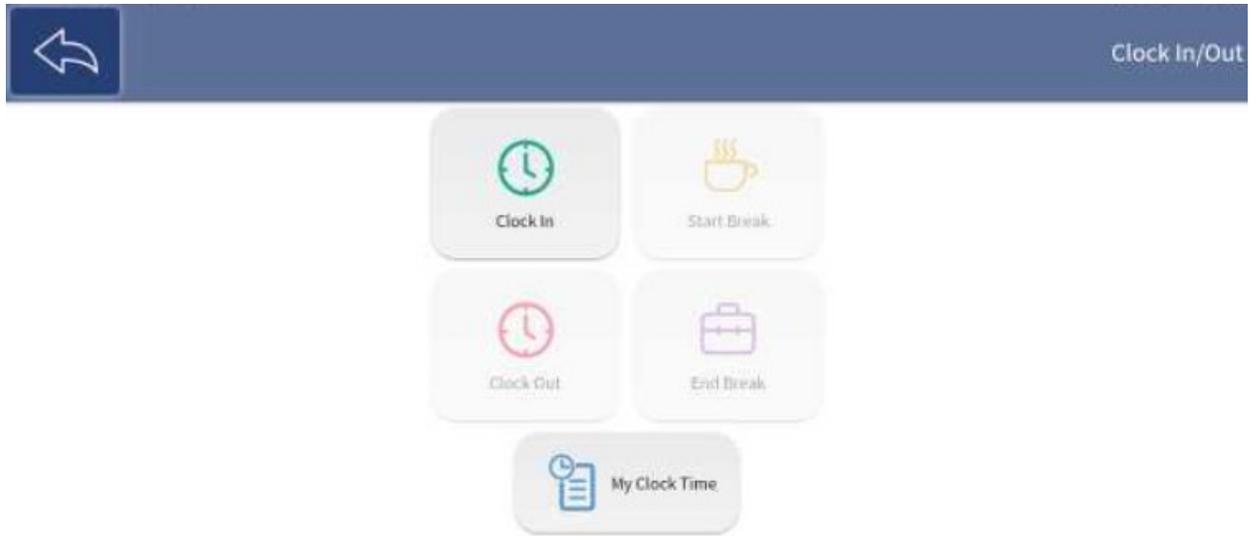
Before the user punches the card, they need to log in to confirm their identity.

Enter User ID:

A screenshot of a mobile application screen titled "Clock In/Out". Below the title is a "USER ID" label and a text input field. Below the input field is a numeric keypad with buttons for digits 1-9, 0, "Cancel", and "Enter". There is also a small "x" icon in a box to the right of the input field.

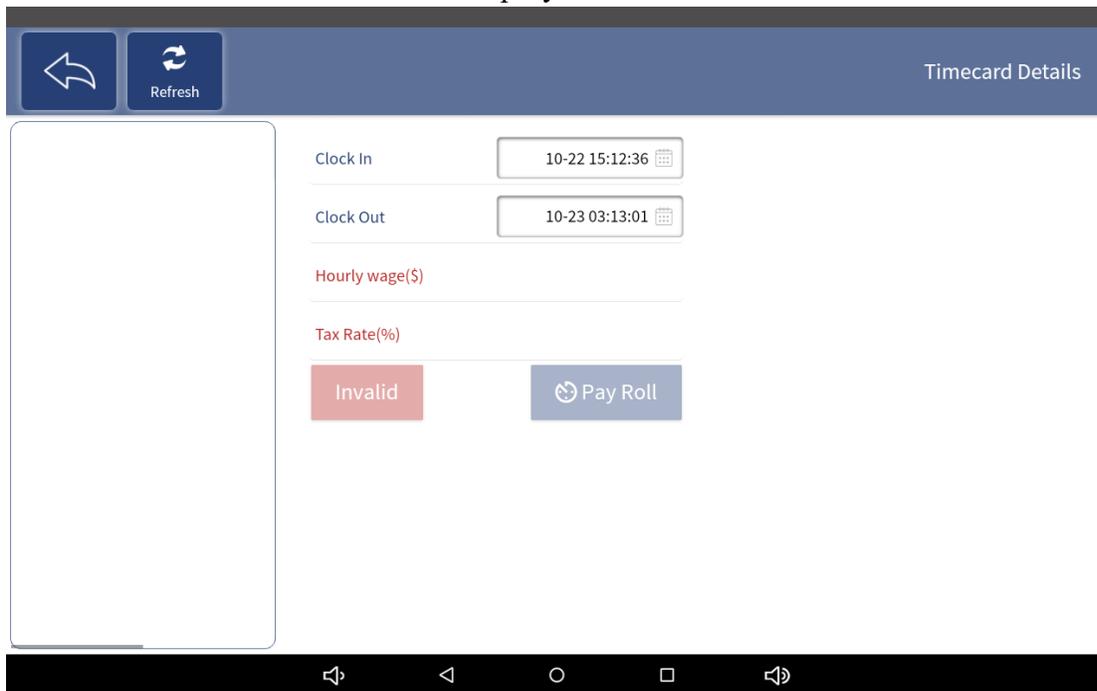
**Clock In:** Record the time that employee started working.

- **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.

**Break List** [X]

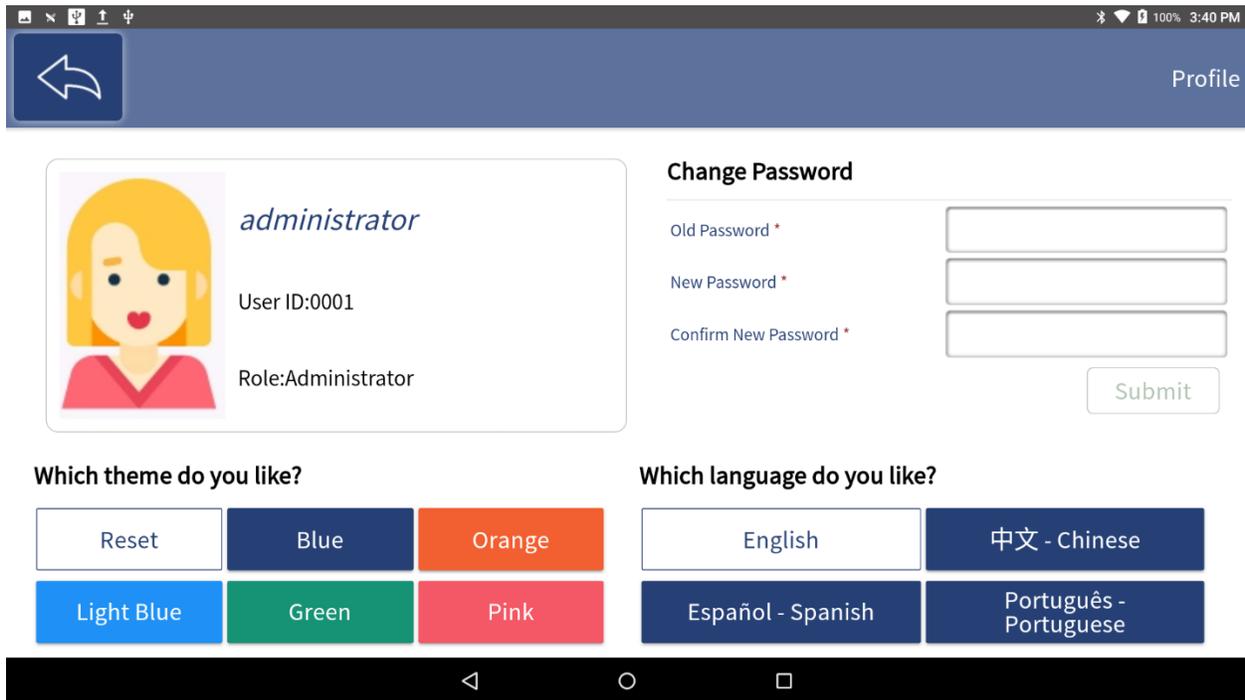
Start Break 1: 10/17/2018, 1:54:07 AM      End Break1: 10/17/2018, 1:54:10 AM

[X] Cancel

. JGAD:



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

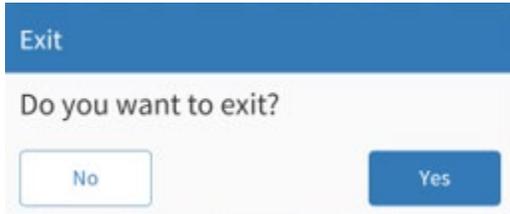
- Input Old Password
- Set New Password
- Confirm New Password

### Select a theme

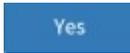
## Log Out



1. Select **“Log Out”** From Main Menu



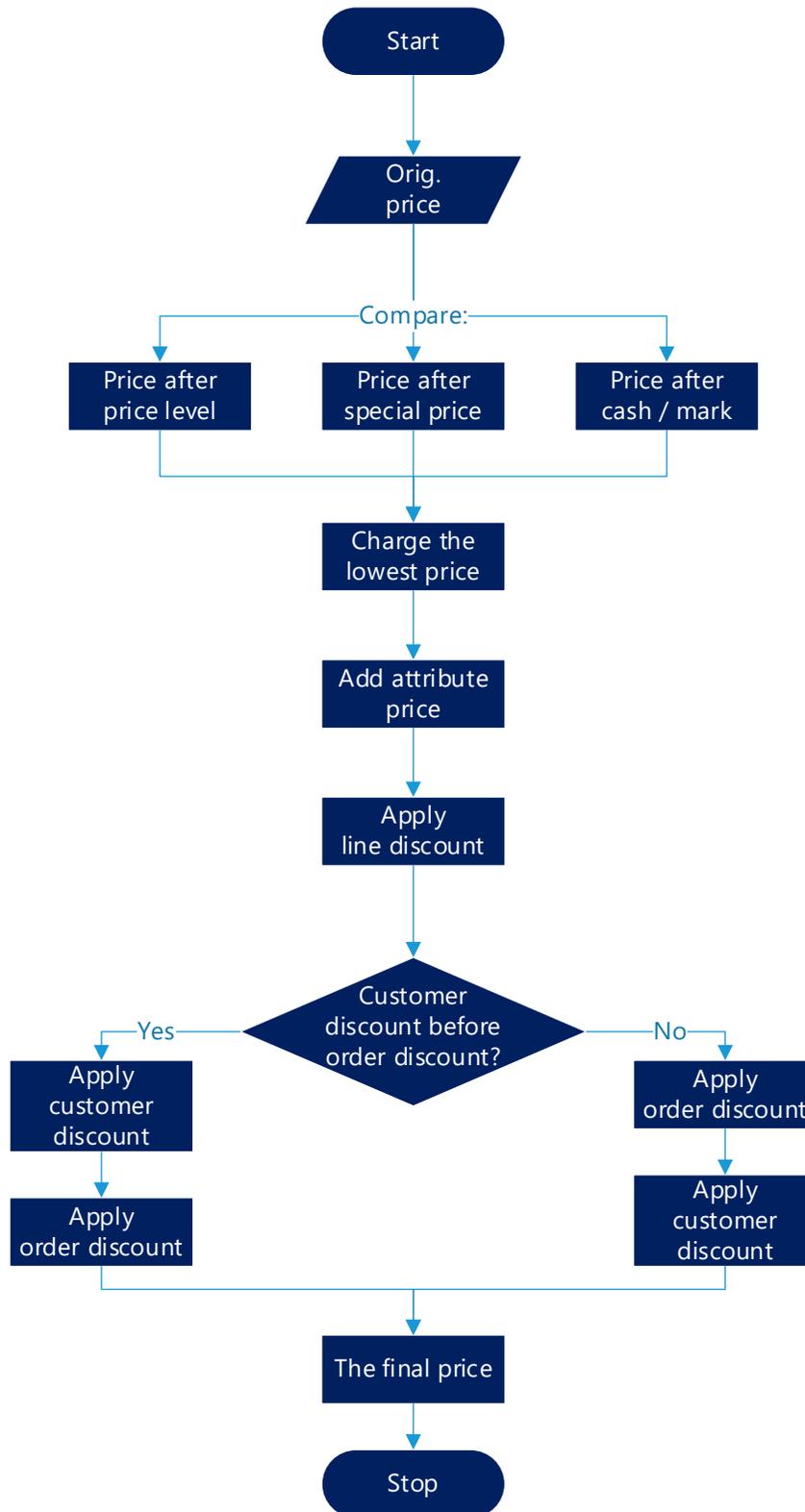
A Reminder will prompt **“Do you want to exit?”**

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.

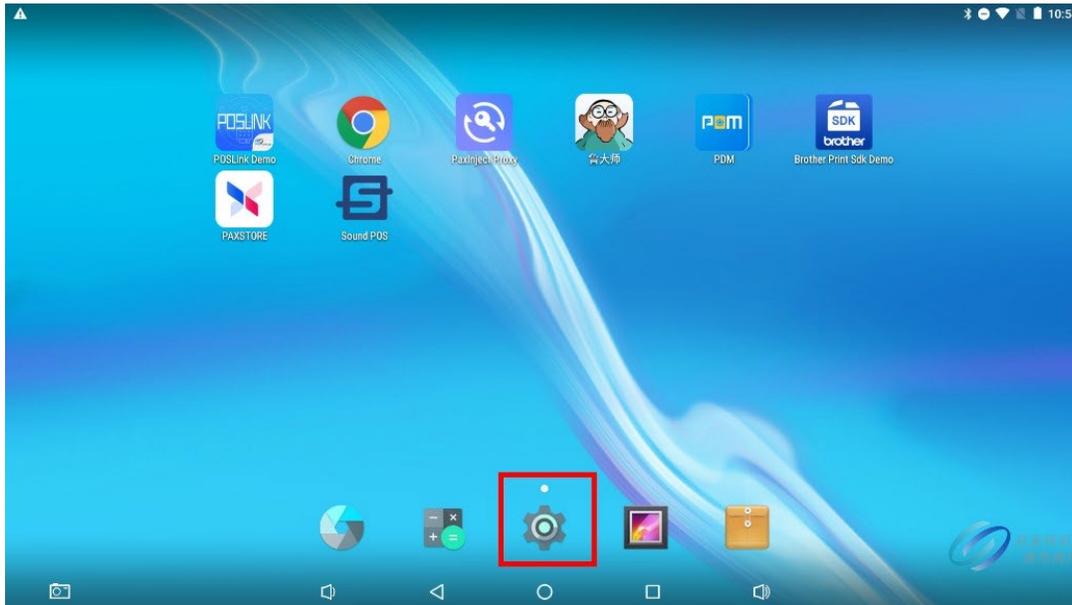
Appendix A – Pricing



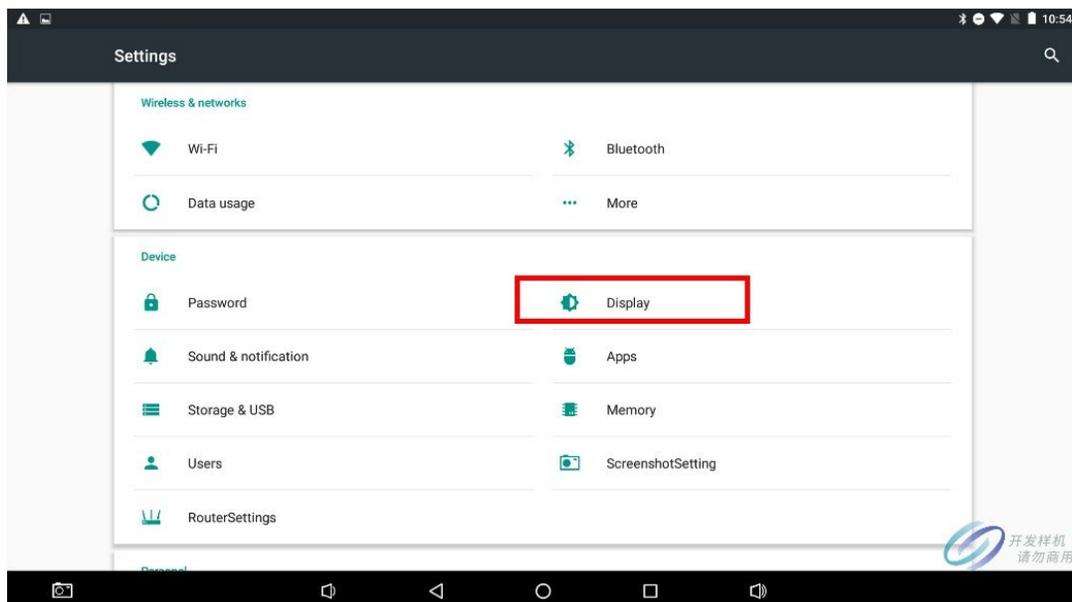
## Appendix B – E800 Secondary Screen

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

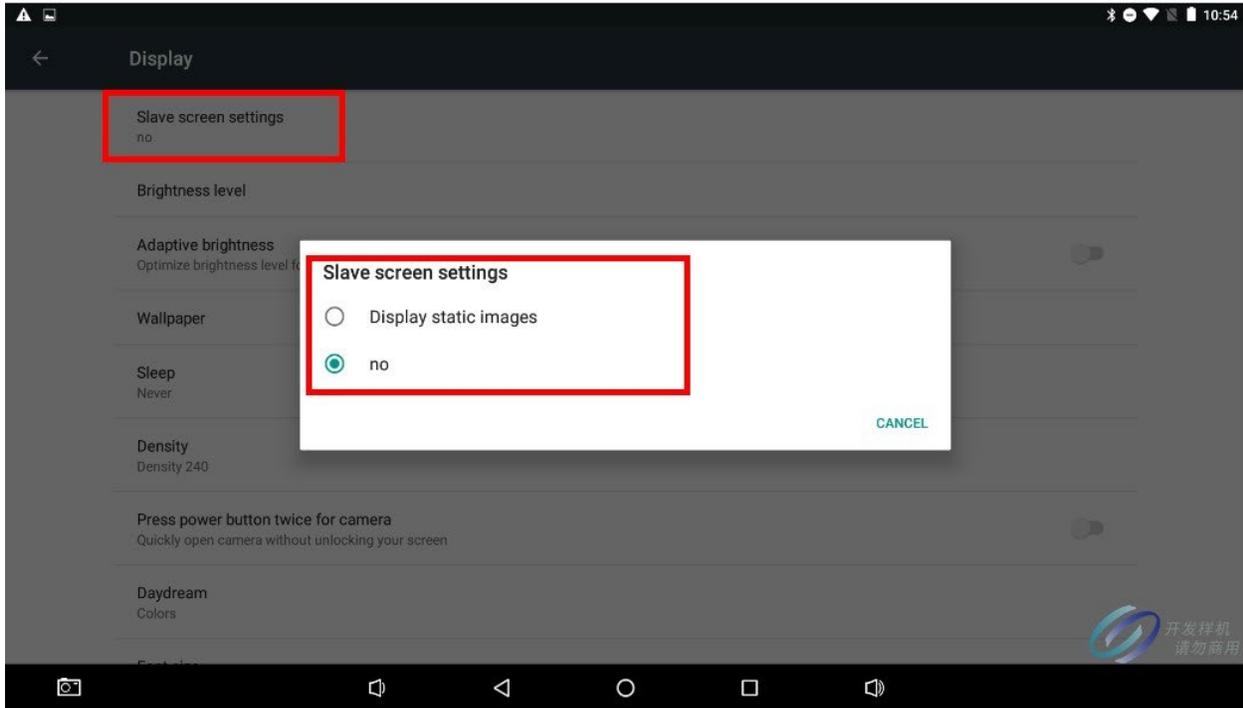
1. Enter it the Android Settings on the E800



2. Select Display



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



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

