

NeoPOS

Point of Sale and Retail Management System

Feel free to contact us: sales@neopos.com.au if you have any suggestions for improvements to the software or to report any bugs.

Your input is appreciated and will assist us to continue to develop this product.

You can print out this help file by navigating to and selecting the file c:\Program Files\NeoPOS\NeoPOS Help.htm (it opens in your default browser) and selecting File|Print.

NOTE: To search for an item or term press "Ctrl-F"

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Quick Start Guide / Setup

Note: Before you begin the setup process it is recommended that you setup and test your receipt printer and cash drawer as [described here](#).

Click on the "Utilities" button. Click on "Setup"

General

NeoPOS is designed to work with all versions of Windows (XP, Vista, 7, 8 and 10).

As there are a variety of operating systems and various security, permission and user configurations possible on target machines, there may be some issues when installing NeoPOS in regards to permissions and security level.

NeoPOS operates in standard screen resolutions including Standard and Widescreen Mode.

If the any displayed screen is too large or too small for your display then the screen size can be adjusted using the Screen Size Adjustment setting in the Setup|Display. For example if the screen is just a little too big then you may want to set this to 0.9 instead of the default.

NOTE: If you are unable to access the Setup button (for example the screen is too large) then you can open the Setup page by pressing "Y" on the keyboard.

Once you change any settings, exit and restart the program for them to take effect.

NeoPOS Mode - Select the Mode that you want the NeoPOS program to run in.

POS Terminal - NeoPOS runs as a standard Point of Sale terminal. This is for standalone terminals OR multiple terminals which are connected to a shared database on the Local Area Network.

Administrator - Allows all administrator functions such as Stock management, Reporting, Ordering etc.

Kitchen Screen - Terminal is used as a Kitchen Order display screen.

Server - Use this for Multiple Store configurations. Uses Virtual Database Replication (VDR) to maintain a synchronized master NeoPOS database which can be located on a cloud server or remote physical PC. Server runs independently of the clients and synchronizes any data added or edited on any client.

Client Terminal - Use this for Multiple Store configurations. Clients run on their own local databases (fast) independent of Internet connection. If the internet is down or slow, the performance of the client is unaffected. Clients displays status showing whether server is ONLINE (shows ping time) or OFFLINE (time it went OFFLINE). .If the

internet is down then the server synchronizes the data from the client(s) when the internet connection is re-established to the client

Terminal Number - This is the number assigned to this particular POS terminal. It is only used if you have multiple POS terminals connected to a single client/server database. In this case each terminal should have an individual Terminal No.

Store Number and Name - Select the Store Number and Name for this terminal. These can be edited and created in Setup|Stores. If you are only using only one store this should be set to 0 - Default.

LayBy Number - Shows the current layby no. This can be reset but should normally be left unchanged as it is an automatically generated number which advances each time a layby is created.

Backup / Restore Directory - Select the location where the backups are saved to when Automatic Backup is enabled. Recommend that this is set to a USB drive or Cloud storage location such as Dropbox or Google Drive.

Automatic Backup - When this is checked the program automatically backs up all data when NeoPOS is closed. We **Strongly Recommend** that this is always enabled.

Stocktake Data Directory - This is the location where the mobile scanner is set to synchronize its data to.

SQL Settings - This allows you to view or edit the settings for the SQL database server. These settings should normally NOT be changed, but for your reference the following settings are available.

Provider - Not used in the current version.

User Name - Set to 'postgres' unless you set it to something else during the PostgreSQL setup.

Password - Set to 'password' unless you set it to something else during the PostgreSQL setup.

Connection/Datasource - Normally set to 'localhost' If the database is located on a server, for example when you have multiple POS terminals running off a shared server, then it is set to the IP address of the server. If you are using the MSDASQL.1 ODBC provider then this is set to the ODBC connection name.

Port - Set to '5432' unless you set it to something else during the PostgreSQL setup.

Restore From Backup - Click this button to retrieve a table from a previous back up. This will overwrite all of the existing data in the selected table.

1. Select Directory - Select the Directory that the backups are in. This defaults to the Backup/Restore Directory you previously entered.
2. Select Table - Select the name of the table you want to restore.
3. Select Backup File - Select the specific backup file that you want taking note of the date and time. The Backups are displayed as TableName_yyyymmdd_hhmmss. The list is in order from newest to oldest with the newest one shown at the top.
4. Press OK.

Retrieve Settings - Click this retrieve all program settings (that is all the information in the Settings Section) from the settings that were saved in the most recent Backup. This is very useful if you have reinstalled the software or are installing the software on another terminal as it saves having to enter all of the settings manually.

NOTE: To use this, you must first use the "Restore" function.

Backup Directory

This sets the location of the automated backup files. It is recommended that you set this to a USB stick location.

If there is no setting in this box then the backup is saved to the NeoPOS program directory.

Backup procedure is done in 3 ways.

1. When NeoPOS is shut down/closed.
2. When the system time is 11:59. This is to do a backup in case you have not closed NeoPOS.
3. Pressing the "Backup" button. In this case you will be prompted to select the directory/location where you want the backup to be saved.

If you have an automated backup service running then you should include the NeoPOS directory and the Backup Directory in you schedule.

Business Operation - Select the Days, Opening and Closing Times and Shift times on which the business operates.

Enter the shift start and End times in HH:MM:SS format. If you do not use all 4 shifts then just leave the box blank..

.Warn On Low Stock Level - Check this if you want to display a warning message if the stock level of any item is below the set 'Minimum Stock' value at transaction finalization.

Allow Alpha-Numeric Barcodes - Check this if you want to use Alpha-Numeric Barcodes, that is barcodes with letters (A,B,C etc) in the barcode as well as standard "numeric only" barcodes.

Restrict item Quantity to 1 or Greater - Check this if you want to restrict use on the 'Quantity' key to accept only values of 1 or greater than 1 . This prevents the operator from entering 0 quantity or other unacceptable values.

Don't allow Quantity to be Multiplied - The normal behavior of the Quantity function is to multiply the existing quantity by the new quantity entered

e.g. -Register and Item, shows Quantity 1

- Enter 5 then press Quantity, then it shows 5 items.

- Enter 2 then press Quantity, then it shows 10 items

In other words the Quantity function allows progressive multiplication .

Check this box you want to prevent this feature (i.e. Each time you enter a Quantity it will set the new Quantity to this amount only.

Auto-Complete Account Names - Enables predictive text entry when selecting account names.

Refer to the documentation of your printer for the required code(s) . This webpage gives the required codes for a variety of printers <http://pages.prodigy.net/daleharris/popopen.htm>

Allow Linked Items - Allows you to use the linked items feature (in stock details screen). This is disabled by default.

Enable Messaging - Allows you to send and receive messages between terminals. This enables a timer which checks for messages every 10 seconds.

Only Search Products when Enter Key is Pressed - This stops the automatic search feature (each time a key is pressed) in the Stock Maintenance / Product Search screen. Instead the search will take place only when the "Enter" key or "Search" button is pressed.

Prompt to Delete Stock item when 0 Stock is Reached - Prompts the operator to Delete the Item when 0 stock is reached. Useful if you sell stock that is purchased once then is not sold again once it is sold out.

Print Receipt on Stock Movement - Print a receipt whenever Stock is Received or Dispatched from the "Stock Receiving Screen".

Deduct Layby Items from Stock Immediately - If this is checked then the item is deducted from stock immediately when the Layby is created. If it is unchecked then the item is not deducted from stock until the item is fully paid for and delivered.

Auto-Select item in Stock Maintenance - When searching for items in the Stock Maintenance the Item Details screen will be automatically shown if there is only 1 item that matches the search.

Reporting

Report Printing

Report Printer Name - Select the printer for printing of Reports from the drop down box.

Font Name - Select the font style / name for your printed reports.

Font Size - Enter the font size for your printed reports. If you are using the receipt printer for printing your reports (i.e. the selected receipt printer is the same as the selected report printer) then you may have to reduce the font size so that the report information fits properly on the receipt paper.

Left Offset - Enter the required left offset for printing reports . This is only required if the information is printing too far to the left on your reports. NOTE: This setting is in Pixels so you may have to enter a large number (say 500) here to see a significant left offset on the report.

Horizontal Scale - Adjust this value to space out or compress the printing on the page. This is useful if the numeric data is printed too far to the right hand side of the page. It is also used to compress the report when you are using the Receipt Printer to print your reports. This is only required if the information is printing too far to the left on your reports or receipt.

Subtract Returns from Item and Cat Totals - Check this to remove any returned items (and values) from the Item and Category sections in the report. For example if you sell 3 of a particular item, and have 1 returned then *with this checked* the item and category section will show 2 items, with the return section showing 1. *With this Unchecked* the item and category section will show 3 items, with the return section showing 1.

Print Direct To Printer - Prints Directly to the printer. This allows for very fast printing and should be used if the standard printing is unacceptably slow. (This mode always prints in standard Font Size and Style (cannot be changed)).

Daily Report End Time - Allows you to define the daily reporting period if it is different from the standard Midnight to

Midnight period. This setting affects both the sales reports and the reconciliations. The report screen will default the Start Date, Start Time, End Date and End time according to this setting. For example: if your business trades to 3 a.m. each day then you would set this to 03:00. In this case the report and reconciliation would always start at 3:00:01 each day and end at 3:00:00 (3 a.m.) on the following day. Note: This can only be set up to 11:55 (before midday on the following day)

Line Feeds at top of Account Report - This is the number of line feeds printed at the top of the Account Report. Useful if you are printing the account report on a sheet with a header on the top.

Report Captions - These are the captions displayed in the CASH RECONCILIATION section of the Sales Report. You can change these from their default values if required for easier recognition.

Please refer to [Printer Setup](#) for more details on setting up a report or receipt printer.

Automatic Transaction Export

This automatically creates a csv format export file of the NeoPOS daily transactions to a specified directory. This is used when you want to export the NeoPOS sales information to another application for further processing etc. When this is enabled the function checks every 5 minutes to see if the Transaction/Sales records, from the NeoPOS database, have been already exported (for the last 5 days). If the file for the particular day has **NOT** already been created then it creates a new file in the specified location in the format **yyyymmdd NeoPOS Transactions.csv**.

File path - Select or enter the location that you want the file to be created in.

Clear Transactions - Click this to clear all of the Transaction (Sales) data from the database. This would usually be used if you have been testing the software and want to clear the "test" transactions you have entered.

Receipt

Setting Up the Receipt Printer

Choose one of the 2 methods below. The simplest method is to install the specific, manufacturer supplied, driver (Option 1)

Unless you have already done so, go to Windows - Start Menu|Printers and Devices/Printers and Faxes and add an appropriate printer as your receipt printer. Once you have installed a receipt printer ensure that you can print a Test Page from the Properties page of the printer driver (in Start Menu|Devices and Printers page).

GENERAL NOTES - It is recommended that you set the following in Windows Printer Properties:

- In Printing Preferences and Advanced|Printing Defaults set the paper size to Receipt (if Available).
- Set Cont. Feed - No Break, No Cut and No Feed in relevant sections (Printing Preferences|Paper/Quality, Advanced|Printing Defaults, Options etc),
- Cut commands and paper feed can be set within the NeoPOS program itself in Setup|Receipt etc.
- If the printing is slow then try setting "Print Directly to the Printer" in Windows Printer|Properties|Advanced. Note: if you are using the \\ComputerName\PrinterName port to open the drawer you will have to select "VIA Printer" (in Setup|Receipt|Drawer and Cutter|Drawer Port)

For **Express setup** use Setup|Receipt|**Quick Setup** (button) and follow the instructions.

See below for further information (if needed).

Option 1. Install the printer with its own, specific, Manufacturer Supplied Driver (or search for one on the web)

For most printers (e.g. Ellix/Sam4s) you need to do nothing else as it will set the cutting etc automatically, through the Printer Driver. You may however have to set Setup>Receipt>Line Feeds at Bottom of Receipt to 2 or 3 for it feeds a small amount at the bottom.

OR

Option 2. Install a Generic/Text Only printer This is the default printer assigned by NeoPOS and will work with all printers.

This uses ESC/POS commands. This will maximize the speed of printing. If you use this function the program

prints directly to the printer which may disable some of the windows printer functions (e.g. Font Size or Font name). Also you should check "Print Direct To Printer" in Setup|Printers to maximize printing speed.

Once you have installed a Generic/Text Only printer then you **may** need to follow these steps:

1. Go to Start Menu|Printers and Faxes/Devices.
2. From the File Menu select "Server Properties"
3. Click on "Create New Form" check box then enter "Receipt" in the Form Name box.
4. In the "Form description (measurements)" section enter "8cm" (this is the width of the paper) in the Width Box and "4cm" in the Height Box.
5. Press then "Save Form" button at the top. Press "OK" to close this window.
6. Select the "Generic / Text Only" printer, Right-click and select "Properties" or "Printer Properties"
7. Under the "General" tab select the "Printing Preferences" button (at bottom).
8. Select the "Advanced" button (at the bottom). Select "Receipt" from the "Paper/Output - Paper Size" drop down box. Press OK.
9. Select "Paper/Quality" tab. Select "Cont.Feed - No Break" from the "Paper Source" drop down list Press OK then OK.
10. Select the "Advanced" tab then select the "Printing Defaults" button.
11. Select the "Advanced" button (at the bottom). Select "Receipt" from the "Paper/Output - Paper Size" drop down box. Press OK.
12. Select "Paper/Quality" tab. Select "Cont.Feed - No Break" from the "Paper Source" drop down list Press OK then OK.
13. Select the "Device Settings" tab.
14. Select "Cont Feed - No Break" from the "For to Tray Assignment" drop down box. Press OK.
13. Select the "Sharing" tab.
14. Click "Share This Printer" and note down the exact name of the printer. Press OK.

Drawer and Cutter

It is recommended that you first disable both the **Printer Driver Drawer Opening** and **Printer Driver Cutter commands** in the Windows Printer Driver for the specific printer you are using (see below) and allow NeoPOS to carry out these functions itself.

If, however, you are unable to open the drawer and/or activate the cutter ,after you have tried the Quick Setup procedure, then you may have to re-enable the functions in the Windows Printer Driver (see below) then run the Quick Setup procedure again.

Drawer and Cutter commands can be detected and set using the Quick Setup in Setup|Receipt|Quick Setup. Follow the instructions.

If the drawer open and cutter works during this procedure then you don't need to go any further.

Drawer Port -Sets the correct port for the cash drawer connection. Choose the option that best suits your requirements.

AUTO DRAWER - This method uses **Printer Driver Drawer Opening** and will always open the drawer whenever a transaction is completed, even if a receipt is NOT printed, or when 'NO SALE' is selected. It sends a short print job (with no text) to the receipt printer whenever a transaction is completed.

Printer Driver Drawer Opening - Many printer drivers have a method for opening the cash drawer automatically (independent of NeoPOS) whenever a receipt is printed.

1. Exit the NeoPOS program
2. Go to Start Menu|Printers and Faxes then right-click on the receipt printer name and select Properties.
3. Locate the tab called 'Additional Commands' or 'Drawer Control' or similar then locate the setting for 'Open Drawer 1' or 'End Print Job'.
4. Enable the setting and enter the specific ASCII Code Sequence for opening the drawer in the box if shown. An example sequence may be shown (just copy this).
5. Press OK to Save.

Note: See drawer open sequences below.

NO DRAWER - This means the NeoPOS makes no direct attempt to open the drawer. This may be used if there is no drawer connected or you intend to manually open the drawer.

NOTE: If **Printer Driver Drawer Opening** is used, the drawer will still be opened if a receipt is printed. It will NOT be opened if 'NO SALE' is selected OR if no receipt is printed.

VIA PRINTER - If you do NOT use **Printer Driver Drawer Opening** then this option opens the drawer by sending the entered ASCII Code Sequence (see below) through the Receipt Printer (no need to set a specific port as this is set by

the windows printer driver). Note: If your printer is connected to an LPT (parallel port) or Serial Port then you should select **LPT1** or **COM1-8** rather than VIA PRINTER. For **USB** printers see below.

\\ COMPUTER NAME \ PRINTER NAME

This is the preferred way to send the drawer open commands directly to **USB** printers.

Select the computer and printer share name from the drop down list or type the computer name and printer share name the box in the form "\\computername\printersharename".

Note: The printer must be shared for this to work and also the Printer should be set to "Spool Print Documents" in Advanced. The name of the Printer AND the shared name should be up to 8 digits long with no spaces e.g. Printer1. Also this will only work if you have an active network connection.

COM 1-8, LPT1 - Send the entered ASCII Code Sequence, via the selected port, to open the drawer (as in VIA PRINTER).

CR-4XX5-II - Opens Posiflex CR-4XX5-II USB Connected Cash Drawer. NOTE: This requires that the USBCR.DLL is in the NeoPOS Directory (contact NeoPOS to obtain a copy of this as it is not included in the standard NeoPOS installation).

Drawer Open ASCII Code Sequence - Select from the drop down list or enter the string of characters to open the drawer as required by the particular printer you are using.

The decimal control codes must be entered and separated by commas. Sequences enclosed by <> are hex representation and must be converted to decimal if used in NeoPOS.

Default: 27,112,0,25,255 or 27,112,1,25,255 or 27,112,48,25,255 or 27,112,49,25,255

Star : 7

Gprint: 16,20,1,D,T - D=Drawer No 0 or 1 T=Open/Close Time 1-8 (x100ms) or <1B>p0<19><FF> or

27,112,1,60,255 or 27,97,1,28,112,1,0,27,97,0,10,27,112,0

Sam4x ELIXIR 30: 27,112 or 27,112,48,64,255

Bixolon - 27,112,0,55,255

If these don't work then refer to the documentation of your printer for the required code(s) .

This webpage gives the required codes for a variety of printers <http://keyhut.com/popopen.htm>

NOTE: In the case where you want to use the cutter BUT not the drawer opening , then still select the appropriate drawer port (as above) BUT put a 0 in the Drawer Open ASCII Code Sequence.

Direct Connection - Check this option ONLY if the Cash Drawer is connected directly to the PC via a serial port. (not through the Receipt Printer) In this configuration the software asserts the DSR pin, on the 9D Serial connector to activate the drawer solenoid. To use this you will require a proprietary adapter supplied by NeoPOS.

Shared Drawer between Terminals - Check this box if you have 2 or more terminals connected to the same drawer. In this case you only enter and retrieve the total reconciliation for ALL Terminals.

Cutter ASCII Code Sequence - Enter the string of characters to activate the cutter (as required by the particular printer you are using). The decimal control codes must be entered and separated by commas.

For Generic/Text Only and ESC/POS the sequence is **27,105** or **27,109**

SETTING UP Posiflex PP8000 and Bixolon NETWORK PRINTERS

Printer DIP Switches Block 1 - Sw1-OFF Sw2-ON

1. Copy the Posiflex CD to Installation Directory on c: and call it PP8000 Install (or go to goodson.com.au, select SUPPORT. Next to "Posiflex" Click "Windows Drivers")
2. Run Index.htm from the root directory.
3. Select Peripheral Drivers and Utilities THEN PP Series - PP8000L Lan Mgr THEN PPLanMgr_WXP_v107 Directory
4. Run Setup
5. Navigate to C:\Program Files\Posiflex Inc\Posiflex LAN POS Printer Manager.
6. Copy MGR Icon to the desktop
7. The printer and its IP address should be located.
8. Select the Printer and Select "Change Settings" button.
9. Change the IP Address to suit your Network then Select "Save to Module" button.
10. Exit the Manager.
11. Go to Printers, Select Add Printer, Select "Local Printer" and UNCHECK Automatically search.
12. Click Next. Select "Create a new Port" and select "Standard TCP/IP Port". Next
13. Click Next. Enter the IP address that you previously entered for the printer. Next.
14. Shows "Device Type - Standard - Generic Network Card". Next. Finish.

15. Select "Have Disk" Navigate to Installation Software|PP8000 Install|PeriDrv|PP|PP8000_7000_6800|WinXP_Vista_Win7_v301
16. Select OK. Select Posiflex PP8000 Partial Cut. Press Next.
17. Give the Printer a Name. Next. Select Share or Do Not Share. Next.
18. Select "Print Test Page". Next. Finish. Continue.

PROBLEMS WITH RECEIPT OR REPORT PRINTING

Printing too compressed, squashed together or illegible on RECEIPTS or REPORTS.

- Go to Setup|Receipt|Horizontal Scale or Setup|Reporting|Horizontal Scale
- Increase this value to spread/space out the printing horizontally.
- Alternatively: Decrease the Font Size setting.
- Exit then Restart the program.

Unable to see prices on the RECEIPT (meaning the printing is too far spaced out)

- Go to Systems Setup|Receipt|Horizontal Scale or Setup|Reporting|Horizontal Scale
- Decrease this value to compress the printing horizontally. (For example change the value from 1 to 0.5)
- Exit then Restart the program.

Customer Name - The store name that will appear in large font on the top of the receipt.

Print TAX INVOICE on Receipt - Prints the words TAX INVOICE on the top of the receipt.

Print Barcode Number Under Items- Prints the barcode number for the item under the item descriptor.

Header Font Size - The size of the Header Lines which are printed on the top of the receipt.

Header Message - Enter up to 20 lines of text that will appear on the header of the receipt.

Footer Message - Enter up to 20 lines of text that will appear on the footer of the receipt. You can also enter spaces in these lines if you want to force the printer to feed out more lines when the receipt is produced.

Automatic Receipt Printing - Click this so a sales receipt will be automatically printed whenever the 'Total Amount Due' button is pressed.

Print A4 Invoice - Click this to print a standardized format A4 Invoice instead of the receipt style invoice.

Note: This assumes you are using standard resolution 600 DPI setting on your A4 printer.

The "To" box at the top of the invoice is filled with the Member/Client Name and Address (if selected)

The page header will show the Logo, Customer Name and any text details entered in the Receipt Header Lines box.

The details box at the bottom of the Invoice will show any text details entered in the Receipt Footer Lines box.

Prompt to Print A4 Invoice - Click this to show a prompt, each time you print a receipt, to allow you to select whether you want to print a standard receipt or a pro-forma A4 style invoice.

Print Direct to Printer - Prints Directly to the printer. This allows for very fast printing and should be used if the standard printing is unacceptably slow. (This mode always prints in standard Font Size and Style (cannot be changed)).

Don't Show Tax or Subtotal on Receipts - Only shows the Total line on receipts.

Don't Wordwrap Receipt Item Lines - Shows all item names as a single line on receipts (used if you are using wide receipt paper).

Don't Show Item Notation on Receipt - Stops printing of the item 'Notation' text on the receipt.

Print SKU - Prints the SKU number for the item (if there is one) on the receipt.

Print Barcode - Prints a Code 39 barcode, with the Receipt No, on Receipts and Invoices.

Receipt Printer Name - Select the installed receipt printer (as installed above) from the drop down list. If the printer you require is not in the list then you should exit NeoPOS and install a receipt printer as described below.

Font Size - Sets the default size for the text printed on the receipt. Normally set to 10.

Horizontal Scale -If required, adjust this value to change the horizontal locations of the text printed on the receipt. For example if the prices cannot be seen (meaning they are off the right of the receipt) then decrease this value (e.g.: to

0.5). Conversely if the printing on the receipt are in the center of the receipt or overlapping then increase the value (e.g. to 1.5).

Vertical Spacing -If required, adjust this value to change the vertical spacing of the text printed on the receipt. For example if the printed lines are too widely spaced then decrease this value (e.g.: to 0.5). Conversely if the text on the receipt is squashed together too closely together then increases the value (e.g. to 1.5).

Left Offset - Enter the required left offset for printing receipt . This is only required if the information is printing too far to the left on your receipt. NOTE: This setting is in Pixels so you may have to enter a large number (say 500) here to see a significant left offset on the receipt.

Font Name - Sets the font type for the text printed on the receipt. Normally set to 'Times New Roman'.

Current Receipt No - 10 digit number indication the starting number for your receipt serial numbers. This should be set when you start using the program.

Receipt No Font Size - Sets the size for the receipt No text. Normally set to 10.

Only Show Last n Digits - Truncates the printing of the Receipt No so that it shows only the last n digits. This can be useful in a food service application where you want to give the customer an easy to remember number.

Control Characters- Sends ASCII control characters to the printer when a receipt is printed (ESC/POS Mode). The control characters should be entered as decimal values separated by commas. See Food Service for more details.

Logo (bmp) -Click in this box and navigate to any bmp (bitmap) file that you wish to appear on the top of the receipt. This would usually be a company logo. Bitmap files can be created or edited in the standard Microsoft Paint program.

Logo Left Offset -Enter a numeric value in this box to position the logo across the top of the receipt. The larger the number the further to the right the logo will be printed. It may be used (for example) to center the logo on the printed receipt.

Monetary

Payment Type Captions - These are the captions for the payment types which are displayed shown when finalizing a transaction in the main transaction screen. CASH is fixed (cannot be changed). Enter the other payment types you accept (e.g.: CHEQUE, EFTPOS, AMEX, VISA, INTERNET etc)

NOTE: A special case is if you want to use Customer Reward Point to pay for an item. In this case you should enter "Points" as the payment type caption. When this is pressed, to finalize a transaction, and a customer has been selected, then if the customer has a sufficient no of reward points the sale will be completed and the relevant no of points will be deducted (redeemed) from the customers record.

NOTE: if you DELETE or MODIFY an existing payment type AND there are previous transactions which have used this payment type, then the payment type will be automatically added back into the payment types box. This ensures that historical sales reports will always reflect the actual payment types used.

Surcharge % or \$ - Enter the % /Percentage or \$ / Dollar surcharge for the particular payment type. When the transaction is finalized with this payment type, the surcharge will be calculated/added, displayed in the transaction grid, added to the total and printed on the receipt. To change from Surcharge in % terms to Surcharge in \$ Terms - click on the "%" or '\$' Caption.

Compulsory Tender - Check this if you require a tendered amount to be entered when the operator selects CASH payment type. If this is unchecked then the CASH payment type will finalize the transaction, regardless of whether a Tender Amount is entered.

Allow Credits on Accounts and Tables - Allows the customer to add credit amounts or over-payments to their table or account.

Only Allow Credits Accounts - All accounts must be in credit. The customer cannot buy anything on their account unless they already have paid credit into their account (i.e.No Debt accounts. This is useful if you have a scheme (or reward plan) where credit is awarded to a customers or member which can be later paid out in sales.

Currency Symbol - Select appropriate currency system for your country.

Note: \$AUD uses the Australian Denominations: 5c, 10c, 20c, 50c, \$1, \$2, \$5 \$10, \$20, \$50, \$100, \$200

\$US uses the USA Denominations: 1c, 5c, 10, 25c, \$1, \$2, \$5 \$10, \$50, \$100, \$200

Default GST Rate - This is the default amount of tax that will be added to items such as "Extra items" when they are selected from the transaction screen. The tax rate for normal stock items is set individually in the Stock Database grid.

Round to 5 Cents - Check this if you require "Nearest 5c" rounding (applicable in some locales). This is enabled by default. This will round off the 'Total' box when CASH is selected as a payment method.

No Rounding - Check this if you do not want any rounding to occur.

Show Discount as Separate Item - Check this to show all discounts as a separate item on the transaction screen and the customer receipt. Otherwise the discount is just subtracted from the individual item price.

Prevent Sales Below Cost Price - Does not allow sale of an item if the sale price is below the recorded cost price.

Compulsory Item Costing - All items must have a value in the Item Cost box. If there is no cost the system will error and not allow the operator to register the item.

Default Discount %- - Enter the default value for the %- key (discount) in percent. Any value typed into the numeric box (during a transaction) will override this default value. This presets the %- key (discount) key to the set value.

Default Premium %+ - Enter the default value for the %+ key (premium) in percent. Any value typed into the numeric box (during a transaction) will override this default value. This presets the %+ key (premium) key to the set value.

Tax Exempt for Transactions less than - Transaction totals and items will be tax exempt if the total of the transaction is less than the nominated value. Once the total of the transaction exceeds the value then the tax is added for all items.

Display Ex-Tax Prices - Check this to display the items in the main transaction grid and on the receipt without the tax component included (US style). In this case the Item price in the Stock Item Database should be entered without the tax component.

If you leave this unchecked the items displayed in the transaction grid and on the receipt will be displayed including the tax component. In this case the Item price in the Stock Item Database should be entered including the tax component.

Tax Descriptor - This is the description of the tax type printed on the customer receipt. For Australia it is GST (default) but you can put anything in this that is required by your country (e.g. TAX, VAT etc).

EFTPOS Terminal

Terminal Provider - Select the provider of your EFTPOS service and terminal(s).

EFT Confirmation Screen Display Time (ms) - Enter the amount of time that the EFT screen will remain visible in milliseconds (1 second = 1000 ms). Used if the EFTPOS screen disappears too quickly

Prompt for Customer Receipt - If you want the system to prompt for a Customer EFT Receipt (Yes or No).

Always Print Customer EFT Receipt - Always print Customer EFT Receipt.

Never Print Customer EFT Receipt - Never print Customer EFT Receipt.

Print Merchant Receipt - Uncheck this if you do not want to print the Merchant Receipt when an Eftpos transaction takes place.

Line Feeds at Bottom of Receipt - Amount of blank lines to feed at the bottom of the Merchant and Customer EFT Receipts.

Display

Widescreen Mode - For widescreen displays. Shows main POS in widescreen 1.33:1 Aspect Ratio.

Hide Descriptor 2 - Suppresses display of the second descriptor line in the Stock Database.

Hide Unused Account and Order Names - Check this if you want to stop displaying the Inactive/Unused names in the Order and Accounts screen. By default these are normally displayed on greyed out buttons so that you can select the Order or Account name without having to retype/re-enter the name.

Confirm Clear Transaction - If this is checked then a confirmation message will appear when the user presses the Clear button on the main transaction screen. Prevents the user from accidentally clearing the current transaction.

Confirm Program Exit - If this is checked then a confirmation message will appear when the user closes the program. Prevents the user from accidentally closing the program.

Clear Screen after Transaction - If this is checked then the transaction grid and details will be cleared when the transaction is finalized. Ensures that the operator always finishes off the transaction before starting another one.

Delay(s) - This is the time delay between when the transaction is finished and when the screen clears.

Hide Cost Column in Product Search Screen - Prevents Operators for seeing the Item Cost column on the Main Tab Search screen.

Show Caption Bar Icons - Check this to show the caption bar icons (Minimize, Maximize and Close) on the main screen.

Show Minimum Stock Information on Stock Receival - Prevents Operators from Viewing or Editing Stock Details when using the Stock Receival function. The operator can only see the Stock Description, Barcode, PLU, Image, Stock Level and use the Stock In/Out functions.

Hide Enter Key - Hides the Enter Key on the Numeric Keypad. Note: This key IS required if you want to manually enter and search for a PLU.

Screen Scale Adjustment - If the NeoPOS program window is larger than the available display area on you screen (i.e. Scroll bars appear or you cannot see all of the program elements) then you can reduce the size of the NeoPOS window by reducing this value (e.g .to 0.95) until the window fits. Also you can increase this size to increase the NeoPOS display window.

Transaction Grid Font Size - Enter the size of the font for the display in the main transaction grid.

Automatically Show Keyboard in Orders Screen - Always shows the onscreen keyboard whenever the orders screen is opened..

Stock Search Box Font Size - Enter the size of the font for the display in the Stock Maintenance or Search grid.

Layby Button Alt Name - You can enter another name for the Layby button if you require. This can be used when you want to use the Layby function for another purpose. An example of this would be for Quotations where you can register items and quote a customer for the items, but not sell them at that time. Using the Layby/Quote button you can record this transaction, including a customer name, then recall the quotation at a later time for payment and finalization.

Image File Location - Click on this box to select the location for stored product images and security camera images. It defaults to the install directory (usually c:\Program Files\NeoPOS). Your custom created product image files must be stored in this directory.

Ideally the created images should be a maximum of 300 pixels Height by 260 pixels Wide and in either bmp or jpg formats.

Language - Select the language you wish to use for NeoPOS. If your language is not listed then select "Custom".

Once you select a language you should restart NeoPOS. On restart you will be presented with the Translation dialog which records your selected translation for each English language element. In the beginning the program will display many of these screens (one for each translation required), so this can be quite a lengthy process. Note that this is a one-off process and once you have entered the translation you will not be asked again.

You have 4 possible selections in this screen:

OK - This is pressed if you know, and have entered the correct translation in the white entry box. Once you have pressed OK then this translation will be recorded permanently. You will not be asked to translate this word again.

Accept English - This is pressed if you are happy to accept (and clearly understand the English version) of the word or phrase. Once you have pressed OK then the English translation will be recorded permanently. You will not be asked to translate this word again.

Skip - This is pressed if you are unsure of the Translation you want to enter, or you don't understand the English word or phrase (possibly you want to look up the correct translation for this later). This defers entry of the particular element and you will be asked to translate this word again the next time that you start NeoPOS.

Ignore All - This is pressed if you want to disable translation entry for the current session of NeoPOS. The translation dialog will be shown again the next time you start NeoPOS.

Translation Table - Press this to access the Translation table where you can Edit or Correct the translations that you have previously entered.

Colors - Click on the relevant button to select the color of various screen elements.

Background Color - The color of main screen backgrounds.

Transaction Grid Color - The color of the transaction grid on the main screen.

Display Box Color - The color of all text entry boxes and onscreen entry grids.

Panel Color - The color of small screens and panel backgrounds.

Secondary Panel Color - The separate color for panels that are displayed on top of other panels.

Edit Box Color - The color of Text Entry, Drop-Down, Memo boxes etc.

Use Monochrome Theme - Check this to use a monochrome theme for the function buttons (old style) instead of the newer colored theme.

Open Drawer - Check this box if you want the drawer to open when the associated payment Type is selected.

Use EFT Terminal - Check this box if you have an integrated EFT terminal, connected to NeoPOS, to process the selected payment type (e.g. EFTPOS or CREDIT CARD)

Hotkeys

Hot Key Group Names & Key Configurations - Enter the Caption Names and the layouts for each of the 20 Hot Key screens and the layouts. The hotkey screens usually contains the Non-Barcoded items and are divided into 40 sets (screens). For example Drinks, Rides, Misc Items etc. If you leave the caption blank then the button will not be displayed on the hot key screen.

Note: These are different and independent from the Product Categories that are set in the Stock Item Details.

Set 1 and 2 - Displays the first 20 screens (1-20)

Set 3 and 4 - Displays the next 20 screens (21-40)

Set 1-4 Captions - Enter the display names for each of the 4 sets of hotkey screens (each with 10 selection screens). These names default to SET 1, SET 2, SET 3 and SET 4.

NOTE: If there is no (blank) caption for the Set Key then the key will not be displayed.

The following are the 4 different hotkey layouts for each of the 40 Hotkey screens.

9x3 - 27 Hotkeys per page which allows large text caption and a small image on the right hand side.

6x3 - 18 Hotkeys per page which allows large text caption and a small image on the right hand side.

5x5 - 25 Larger Hotkeys per page which allows small text caption and an image underneath the text caption.

4x4 - 16 Largest Hotkeys per page which allows small text caption and an image underneath the text caption.

Hotkeys Panel Utility Buttons - Here you can select any 8 utility buttons that you wish to appear on the "Sidebar" Hotkey selection screen. Normally you would select the 8 most commonly used functions.

Display Hotkeys on Separate page - This shows a full screen Hotkey screen on a separate page when the "Hotkey" button is pressed. This hotkey screen disappears and the program returns to the main screen after one of the hotkey items is selected. Usually this is the best option when a minority of items are non-barcoded.

Display Hotkeys in Side Bar - This shows a small version of the Hotkey screen on the Main Display screen when the "Hotkey" button is pressed. This hotkey screen remains on the main screen after one of the hotkey items is selected, allowing the operator to select multiple hotkey items without continually opening the Hotkey screen via the "Hotkey" utility button. This is particularly useful if you are selling mainly Non-barcoded items (e.g. Restaurant Meals, Drinks, Take Away Food etc.)

Display Hotkeys on Startup - If this is checked the hotkeys will be displayed automatically when the program starts.

Select Modifiers when Assigning HotKeys - If this is checked, the Modifier Lists (cooking time etc) will be displayed and can be selected / saved when the hotkeys are assigned (Hotkey Assignment). This saves having to setup the Modifiers for each item in the Stock Details screen.

Hotkeys Font Size - Enter the size of the font for the Hotkey text captions. This is useful if the Item names are very long or longer than can normally displayed on the hot keys.

Accessories

Scale Make / Model - Select the type make and Model of electronic scale you are using from the drop down list.

Scale Baud Rate - Select the baud rate (serial communication speed) of electronic scale you are using from the drop down list.

Scale Com Port - Select the Com port (serial port number) that the electronic scale output is plugged in to on the back of your PC.

Check Scale Stability - If you check this box, when a weighed item is selected, the program will wait for a stable weight to be displayed on the scale before continuing. (may cause a short delay processing the transaction) .NOTE: If you are using weighed items BUT the scale is not connected to the POS system then turn this option off.

Decimal Point Pos - Some scales do not output the decimal point as standard, in this case you can select the position that the decimal point will appear in the weight. This should match the position of the decimal point on the weight display.

Pole Display - Select the Com port (serial port number) that the pole/customer display is plugged in to on the back of your PC.

Pole Message - Enter the message you would like displayed on the top line (line 1) of the pole display. The second line of the display will show Item Details and Price as the items are scanned and display the Total Price when the transaction is completed.

Pole Emulation Mode - Select the type (emulation) of pole display you are using. This can usually be set on the pole display itself (refer to the documentation that came with the display)

Customer Display

This is used to enable and setup a secondary LCD display panel used as a customer display or advertising display.

To can use this feature if you require a secondary display panel (customer display) connected to your system. Preferably you need to have a video card with a DualView option, that is a secondary display that can be setup to display as a secondary monitor. (if you cannot see DualView option try installing the latest driver for your Video Graphics card)

Alternatively you can also use 'Extended Desktop' mode for the secondary monitor if DualView is not available. You may want to experiment with the various modes available.

Please refer to your Video Card settings or control panel to determine if a suitable mode is available.

Once you have the secondary monitor setup correctly proceed as follows.

Enabled - This enables the customer display and rolling advertisement mode.

Widescreen - Check this if the customer display screen is widescreen.

Use as Order Display - Check this if you want the secondary display to show Orders that have been prepared (and ready) and are waiting for the customer to collect. The customer can be asked this watch this screen for their order / receipt number to appear.

Restart the program and see if the display is operating correctly with the default settings.

If necessary change the following settings so that the image on the secondary screen displays correctly:

Left Position - This is normally set to a value just greater than the horizontal screen resolution of the main monitor you are using. For example if the resolution of the main monitor is 1024X768 then the value should be set to approx 1025. If the image is too far to the Left of the secondary display then increase this value, alternatively if the image is too far to the Right on the secondary display (i.e. there is a blank space on the left of the display) then decrease the value.

- This is normally set to 0 (top of the screen) but if the image is too high on the secondary display then increase this value to move the image down.,

Scale - This is to set the overall size of the image on the secondary display. If the image is too large (i.e. you cannot see all of the picture or image) then you can reduce this value (say to 0.8) until the screen image fits the display correctly. Conversely if the image is too small for the screen then increase the value.

Image File - Click in this box to select a single image that will appear beside the Customer Display transaction grid (which is displayed when a transaction is in progress). This image can be an advertising, promo or company logo image, the choice is up to you. You can create an image of any size for this (the selected image will be proportionally resized to fit the area available) but for the best quality results the size of the image should be approx 40% of the secondary display horizontal resolution and 90% of the secondary display vertical resolution. For example on a 800x600 screen it would be created as a 320 (pixels wide) X 540 (pixel high) image. Of course if you create an image with less height it will display correctly but it will not cover the whole vertical area available.

NOTE: If there is an associated image file for the registered / scanned stock item, this image will temporarily replace the image you have selected above. You need to restart the program for these settings to take effect.

Scanner / Card Reader Port

Select the Serial/Com Port number that the serial type scanner, card reader or auxiliary input device is connected to. (the baud rate is permanently set to 9600 Baud)

The Scanner can operate in 2 modes.

1. Standard Barcode scanning mode scans barcodes in keyboard emulation mode so that the scanner works as a standard scanner for registering items in transactions. In this case leave the 'Stocktake Mode' box UNCHECKED.

2. Stocktake mode allows you to use the serial barcode reader as a stocktake device, that is you can scan item barcode and the quantity that you have in stock and the stock database will be updated with the selected quantity entered. In this case CHECK the 'Stocktake Mode' box.

The data from the scanner must be received following form.

Note: MSD means most significant digit, LSD means least significant digit, Carriage Return is ASCII 13, Line Feed is ASCII 10

Barcode Number (can be any length) [Carriage Return+Line Feed]MSD Quantity[Carriage Return+Line Feed].....LSD
Quantity [Carriage Return+Line Feed]
OK [Carriage Return+Line Feed]

e.g.: 9301932212121CRLF000003CRLF000005CRLF000001CRLFOKCRLF

In this example the Item 9301932212121 will be updated to show 351 in stock.

Scanner Input Character Test - Use this to test what characters are coming out of the scanner when a barcode is scanned. Scan a barcode and see what characters are shown in the box. If it is set correctly the box should show the Barcode Number followed by a [13] (carriage return). e.g. 9310123456789[13]. If this is NOT the case you need to refer to the documentation on the scanner and set the scanner so that it gives the correct output. This is usually referred to as Suffix - Carriage Return or Character 13.

Enable Web Cam - Check this to enable a webcam (if connected). to be used for Security Camera photos. A preview can be seen in Security|Security Camera. If you want to use the webcam cam for Member Card photos instead, then you will need to check the option under 'Members'. If this is selected then the camera can not be used for Security Camera Snapshots.

Online Ordering

Zwift Integration - Allows the POS to integrate with Zwift online ordering system. Note: When you check this box a "Zwift" payment type will be added to the payment types shown on the main transaction screen.

Logging Interval (s) - Enter the amount of time, in seconds, that you want between each attempt (by NeoPOS) to read the online orders from the order server URL.

Order URL - Enter the web URL for receiving the Zwift orders.

Security

User Groups - Select the User Group name from the drop down list OR Type in a new User Group name. There is no restriction on the names you can use. Examples may be USER, MANAGER, NIGHT OPERATOR etc. If you have one particular operator that requires a separate set of permissions than all other operators, then you can set up a User Group name for that operator only.

Note: The DEFAULT user group is always available and it represents the permission settings that are enforced when the program is started up or before any operator has logged in. If you are the only user or all your users are trusted users then you only need to set this set of permissions. Of course if you have multiple users that you want to restrict permissions for, then you may want to disable all of the permissions under DEFAULT forcing the operator to log on before they can access any of the functions. This can also be achieved by Setting the 'Compulsory Operator' option.

Permissions - Once you have selected the User Group name above then you can check or uncheck the relevant boxes/buttons that you want the group to have permissions/access for. Press 'Save' when you are finished. Note: To delete a user permission group press "Delete".

Security Camera - Select the events when you want a Security Camera snapshot to be taken. If a valid webcam is installed and working the image can be seen in the Preview box.

Operator Can't Delete Account Items - Prevents the operator from taking items off any account once the items have been registered and added to an account.

Operators

Compulsory Operator - If you require a valid operator to be entered ()Log On) to activate the system. The system will always be inactive until a valid Operator ID is entered (at Log On)

Timeout - is the amount of time that the transaction screen stays enabled when there is no activity. Once the transaction screen is disabled the operator will be required to log in again.

Log Off after Each Transaction - Check this to make the system Log Off the current operator after each transaction. This means the operator must enter or scan their PIN before each transaction.

Operator must clear held transactions when logging off - Forces the operator to either Clear or Complete any "Held" transactions when they Log Off. NOTE: Do NOT check this if you intend to use the 'Floating Operator' function (where an operator can begin a transaction on one terminal, place the transaction on hold, and complete the transaction on another terminal.)

Use Business Closing Time when Clocking Off after Closing Time - If the operator clocks off AFTER the Business Closing Time (set in Setup>General) then the recorded clock off time will be the Business Closing Time.

Print Time Clock Receipt - Prints a short receipt with details when the operator Clocks On or Off.

1. Enter the Operator Code. The code can be a 1 to 10 digit number. This is both the PIN entered by the operator and barcode no used by the operator to log in. (in effect it is the operator password)
2. Enter an operator name (used for display purposes only).
3. Select the User Group from the "User Group" drop down box. The selected operator will only have permission to use the keys/buttons selected in the "Security" section under that group name.
4. Select the Type, required if the operator is Delivery, from the "Type" drop down box.
5. Enter the Hourly Wage Rate for the Operator in the "Hourly Wage Rate 1" column. This is used in the Screen to calculate Wages Due in the Employee Hours Report.

Delete - Deletes the selected operator.

Barcode Printing - This prints barcodes for the selected item on either the standard computer printer or the dedicated label printer.

To print a range of barcodes (for more than 1 operator) select the check boxes in the list OR press Select All.

If *Standard A4 Printer* is selected then a full A4 sheet of adhesive labels will be printed.

Check the "Print Price" check box to print the price details on the label .

Creating or Editing a Layout - See [Here](#).

Members

Member Tracking - Check this if you want to use member or client tracking, including rewards points and discounts.

Member Code Data Length is the length of the barcode number on the member's cards. Minimum of 4 numeric characters.

Note: If the Member Code Data Length is the same length as any of the Stock barcodes then the system will search for the Member Code first, and if it is not found then it will search for the barcode number in the Stock Database. If you issue a new card to a member you must create a member in the Members screen using the member code.

Member Discount % - This is the % global discount that will be applied to all sales to members.

Default Redeem Points - The default no of redeem points that is displayed in the Member|Reward Points screen.

Value Per Point - The value of each reward point in currency (e.g. 1.50 = \$1.50 per point) . This is used when redeeming a members reward points for credit.

Member Groups - Enter a list of member groups and an associated discount % that applies to each group. Typically this would be a customer loyalty program where a member may have Gold, Silver or Bronze etc status, with an associated discount. When a member is created in the Member Entry screen you can then assign the member to one of the member groups from the "Member Group" drop-down box.

Linked Price Shift - If you click in the "Linked Price Shift" column you can select a Price Shift Name for the selected Member Group (assuming you have set one or more up in Pricing) . In this case, when you select the member at the start of a transaction, the Linked Price Shift will be enabled and the item price(s) will be discounted according to the price shift. In fact this is the same as the operator manually selecting a Price Shift button. Note that then any other discount, including the Member Group discount, will NOT be applied. Once the transaction is completed then the price shift will be disabled, as if the operator had hit the Price Shift Cancel button.

NOTE: If a member is assigned to a member group then the associated discount will override the global "Member Discount %" (see above)

Display Member Details when Card is Scanned - Check if you want to display the details of the member when the member card is scanned from the transaction screen.

Assign Members to Account Names means that when the accounts screen the member Surname/Business Name (from the members database) will appear on the account buttons (whether the account is active or not) . In this case ONLY member account names will appear on the account buttons. If this is enabled then you can view or edit the Member details, after an account has been selected, by clicking on the Account Name box (member surname) displayed at the bottom of the main transaction screen.

Auto-Complete Member Code - Auto completes the member code when entered in the member screen.

Use Web Cam for Member Card Photos - Check this to use the webcam (if connected). for taking member card photos. A preview can be seen in Members|ID Card. If you want to use the webcam cam for Security photos instead, then you will need to uncheck this option and check the "Enable Webcam" in the Accessories setup section.

Show Membership Expiry - Displays the Membership status for members in the main screen member display box (turns red if the Membership has expired)

Only Allocate Points to Members with Email - Don't add or allocate Reward Points to Members who don't have an email address.

Always Print Receipt for Member Purchases - Whenever a sale is made to a Member a receipt will always be printed, regardless whether "Automatic Receipt Printing" is On or Off.

Member Card Printer is the name of the printer that is used to print the member cards (usually a card printer)

Layby Footer - Add Text to be printed on the bottom of the Layby Receipt Printing to allow you to enter terms and conditions for Laybys.

Member History Export

Allows you to configure the format of the data that is exported when you use the File (Export) function in Members|Database / Reports.

This box displays all of the fields in both the Reward Points (customer purchases) and Customer databases.

Select (check) each field that you require to be included in the export file.

Change the order of the fields by selecting the field and using the Up and Down buttons respectively.

Member Accounts

Shows a list of members with running (or finalized) accounts.

This allows you to completely delete selected accounts if required. This may be because the account is faulty, errant or no longer required.

Select the account(s) you want to delete by checking the box, next to the name, then pressing the "Delete Selected Accounts" button.

NOTE: This will delete ALL account information associated with the customer so it should be used with care.

Purchasing

Current Order No - This is then next Order Number that will be issued when an order is created.

Invoice Address - The invoicing address details which are printed on the top of the Order.

Compulsory Supplier for Stock Receival - Check this box is you require that a Supplier Name is always selected when you receive stock.

Delivery Address - The delivery address details which are printed on the top of the Order.

Notes - Up to 3 lines of text which are printed on the order. This could be banking details or any special instructions that you need the supplier to be aware of. These can also be changed or edited when the order is issued.

Advertising

This area allows you to setup up to 200 'rolling' advertising / promo images and messages that will be displayed, in sequence, as a full screen on the secondary customer display.

To Add an Image to the list click "Add Image" button then navigate to and select each the previously created image(s) that you require.

To Delete an image from the list, mark the image in the list and press 'Delete Image'.

Cycle Period - This is the amount of time (in seconds) that you require each image to be displayed, before it moves on to the next image.

Delay Before Display - This is the amount of time that the customer display grid remains on the screen, after the transaction is finalized, before the full screen images begin to display again. This is useful to allow the customer some to review their recently completed transaction.

Creating the Advertising Image Files - You can create images of any size for this (the selected image will be proportionally resized to fit the area available) but for the best quality results the size of the image should be approx the size of the secondary display horizontal and vertical resolutions. For example on a 800x600 resolution screen it would be created as a 800 (pixels wide) X 600 (pixel high) image.

Food Service

KITCHEN ORDER PRINTERS AND SCREENS

For each kitchen printer or screen:

No 1 - 4 - Select the name of the kitchen printer or the kitchen screen you are using from the drop down list.

Printer Name - Enter a descriptive name for the selected kitchen printer (e.g. Fryer, Salad Bar, Grill etc)

1. If an item is to be prepared in the kitchen or other area when ordered and registered on the POS terminal then select Printer/Screen 1,2,3 or 4 in the stock item details.

2A. If the transaction is finalized normally: Any item in the transaction which is a 'Kitchen Printer / Screen Item' will be sent to the selected Kitchen Printer/Screen along with Time, Date and Receipt No. This allows the kitchen staff to prepare the item(s) and deliver the completed item(s) to the appropriate customer using this identification number.

2B. If the transaction is allocated to an order: When the order is selected any item in the transaction which is a 'Kitchen Printer/Screen Item' will be printed to the selected Kitchen Printer/Screen along with Time, Date and Order No. This allows the kitchen staff to prepare the item(s) and deliver the completed item(s) to the appropriate order (or Table) using this identification number.

NOTE: If an item is added to an existing active order then only that item (not the whole order) will be sent to the Kitchen Printer/Screen.

Printer Control

The following settings work when using a standard windows printer driver:

Font Size - Sets the font size for the text on the Kitchen docket.

Font Name - Sets the font name for the text on the Kitchen docket.

Order No Font Size- Sets the font size for the Order No text on the Kitchen docket.

Bottom Line Feed - Sets the number of blank lines printer after the text on the Kitchen docket.

Control Characters - Enter the various control characters for each element on the Kitchen Docket.

Add Blank Line Between Items - Adds a blank line between each item on the Kitchen Dockets. (makes them easier to read)

Print Direct to Printers - Prints Directly to the printer. This allows for very fast printing and should be used if the standard printing is unacceptably slow. (This mode always prints in standard Font Size and Style (cannot be changed)).

Printer Control

Enter the control commands for each of the Kitchen Printers. (Print Direct to Printers must be enabled for these command to be effective)

NOTE: Control characters should be entered as decimal values separated by commas.

Printer Name - Control characters for the Printer Name element.

Date And Time - Control characters for the Date and Time element.

Items - Control characters for the printed items. (this is overridden if there are Control Characters set in the specific Item Details)

Receipt/Order No- Control characters for the Receipt/Order No/Table No element.

UNPAID- Control characters for the "UNPAID" text printed on the Kitchen Printers.

Clear Commands -The commands to clear the text attributes after each line is printed. This should always be entered.

Cutter -The commands to cut the docket after it is printed.

Examples of ESC/POS (Epson) sequences. (please refer to the relevant ESC/POS manual for more information)

Turn Red Printing On - **27,114,49**
 Underline - **27,45,49**
 Emphasized Printing - **27,33,8**
 Double Height Printing - **27,33,16**
 Double Width Printing - **27,33,33** Clear Commands - **27,64**
 Cutter - **27,105**

Note: They be combined by adding to together the last 3 digits.

For example to print Double Width and Double Height the command would be **27,33,49 (33+16)**

Example:

Printer Name - 27,114,49 - Turns Red On - The Printer Name appears in red.

Date And Time - 27,33,24 - Turns Emphasized and Double Height Printing On - Date and Time Prints Dark Black and Double Height

Items - 27,33,8 - Turns Emphasized Printing On - Items print in Dark Black and Normal Size.

Receipt/Order No- 27,33,16,27,45,49 -Turns Double Height Printing AND Underline On - Receipt No prints in Double Size Black Underlined..

UNPAID - 27,114,49 - Turns Red On - The UNPAID text prints in Red.

Clear Commands - 27,64 - Clears the text attributes after each line is printed.

Cutter -27,105 - Cuts the Docket after it is printed.

Examples of Citizen / Javelin sequences. (please refer to the relevant manual for more information)

Red - **19**

Enlarged Characters -**14**

Normal Characters - **15**

Inverse Print -**18**

Underline - **27,45,1**

Clear Command - **24**

Full Cut - **27,80,0**

Partial Cut - **27,80,1**

Purge Orders and Tables - This removes all items from the Table / Order database where they are marked as "Paid" (i.e. completed).

Purge Kitchen Orders - This removes all pending or completed Kitchen Orders.

Table Layout - Allows you to design the graphical layout of you tables for easy table selection, as follows. (recommended to use a mouse for accurate positioning in this design mode)

- To **Add** a new table press the "Add Table" button.

- To **Move** a table, click in the upper-left corner of the table, hold down the mouse and drag the table to the required position.

- To **Resize** a table, click on the black "Grip" box at the bottom right corner of the table, hold down the mouse and rezsized the table.

- To **Change the Shape** of the table to "Round", right click on the upper-left corner of the table and select "Round Shape"

- To **Assign a Table Number** to the table, right click on the upper-left corner of the table and select "Assign Table No" then enter the Table Number in the box.

- To **Copy an Existing** table (make a clone of it), right click on the upper-left corner of the table and select "Copy Table". This is used if you have already made a table of the correct size and you want to make an exact copy.

- To **Delete** a Table, right click on the upper-left corner of the table and select "Delete Table".

Note: You can also create other objects such as seats, walls, dividers, doors, benches, kitchen/service areas etc by adding a new table and re-sizing it but not Assigning a Table No to it.

You can also enter some text as the Table Number (as a description such as "Service Area" or "Kitchen" etc). If text is used instead of a Table Number then this object will not be treated as a table.

Order Button Name - You can change the name of the "Order" button (on Misc panel) to something else if required. This would be useful if you are using the Order function for Table service (for example) This operates in an identical way to Orders (i.e. you can assign a transaction to an Table ID, which can be recorded, added to and finalised at a later time).

Show Table Layout Instead of Buttons - Check this to display a graphical layout of Tables when a Table order is entered or selected.

Print Long Receipt for Orders - Always prints a standard (long) when Orders are used (overrides short receipt option)

Use Order Name instead of Receipt No - Prints the name of the Order instead of the Receipt No on the customer receipt.

Print Receipt / Order No Only - Prints a receipt only with Store Name, Logo and Receipt / Order No.

Show Kitchen Printer List on Docket - Shows a list of all active Kitchen Printers at the bottom of each docket.

Prompt for Order, Table, Pickup or Delivery - Prompts the operator to select the type of order when the order button is selected.

Order: This is used for customers who come to the establishment, place an order and wait for the order.

Table: This is used for customers who come to the establishment, place an order and wait at a specific table to be served the order.

Pickup: This is used for customers who order by phone (or other means), and come to the establishment to pickup the order.

Delivery: This is used for customers who order by phone (or other means), and the order is then delivered to them.

Prompt for Order No - Prompts the operator to enter a Number (maybe a Table or Order Number) to be printed on the kitchen dockets. This is useful when you assign number to the customer when he places and pays for the order in one step. It eliminates the need to assign an Order or Table No using the "Order" button.

Auto-Complete Order Name - Auto complete/suggests the order name from the first letters typed in.

Prompt for Partial Payments for Tables and Orders - Displays a prompt when partial payments are made on Tables and Orders.

Prompt for Delivery Docket on Order Recall - Displays a prompt for printing of a Delivery Docket when a Order is recalled. Used in conjunction with the option described above.

Show Kitchen Printers for Extra Items - Displays buttons for each Kitchen Printer ,or All Printers, in the "Extra Item" screen. This allow you to print any extra item text to the selected or all kitchen printer(s). This is usually where you want to add a comment or instruction to a kitchen order.

Use Member Details on Order Buttons - If a member no is entered or selected, and the sale is assigned to an Order then the selected Member Code and Surname are automatically displayed in the Order ID box in the Order screen. This saves the operator from having to retype the Member Name or Number when it is assigned to an Order. This is typically used where phone orders are taken, assigned to an order then later selected for delivery.

A typical scenario would be as follows:

1. Customer rings with phone order.
2. Operator enters Customer No on main screen and presses enter. The Customer No is usually the 10 digit phone number of the customer (set the Member Code Data Length to 10 in Setup|Members) or a Customer Name.
 - If the customer is already on file the Customer details are displayed with Code (phone number), Name and Delivery address.
 - If the customer is NOT on file, a new Customer detail screen is displayed. The operator enters the Name or Phone and Delivery address in the appropriate fields.
3. Operator presses 'Select' and the Customer detail is displayed on the main transaction screen.
4. Operator selects and registers the items ordered.
5. Operator selects Order button. The Customer Code and Surname is displayed in the ID box. Operator selects OK.

When the order is ready to be delivered.

1. Operator selects Order button then selects the Order from the displayed buttons.
2. Operator is prompted to print a Delivery Docket. If selected, a delivery docket is printed with the Order Details and Delivery Address.

When the Driver / Deliverer returns from Delivery.

1. Operator selects Order button then selects the Delivert Order from the displayed buttons.
2. Operator is prompted to print a Delivery Docket and Selects 'No'.
3. Operator finalizes the transaction with payment etc.

Prompt for Receipt on all Orders - Displays a prompt for printing of a Receipt when a Order is created.

Prompt to Delay Kitchen Order - Prompts the operator whether they want to delay printing of the Kitchen Order (docket). This is useful if the kitchen facilities are unavailable to process the whole order immediately and require the whole order to be printed to the kitchen only when the facilities are ready. The order is then stored and recalled using the "Kitchen Orders" button in the Misc screen.

Delay (Sec) - This is the amount of time that elapses before a prompt appears asking the operator if they want to print the delayed orders (this ensures that the operator does not forget that there are pending, delayed kitchen orders).

Prompt to Pay for Order/Table Immediately - Shows a prompt allowing the operator to immediately finalize and pay for an Order or Table when the Order or Table is selected.

Notify when Screen Order is prepared - Pop up a message when the kitchen screen order is marked as complete.

Use Phone Number as Identifier for Delivery Orders - Use the customer's phone number to identify delivery orders.

Modifier Lists

Allows you to setup various "Modifier Lists" or "Condiment Chains" which can be linked to any stock item and printed to the Kitchen Printer(s). The lists and items under each list are then chosen by the operator when the item is selected.

In Setup|Modifier Lists

1. Either Type a NEW List Name (e.g. Cooking Time) into the Modifier List Name box OR select an EXISTING List Name from the drop down list.
2. Type in the Options for the List in the lower grid (e.g. Rare, Med-Rare, Medium, Well Done etc.). If there a price or charge for the extra item enter it in the "Price Column"
3. Press "Save" to save the List Name .

To Link Modifier list(s) for a selected Stock Item

1. Select the Stock Item from Stock Database.
2. Select the "Modifier List" button.
3. Place a check mark next to the Modifier List(s) you want to use on the Stock Item.

An Example:

You have a Menu (Stock Item) called "Steak" with possible sauces - Mushroom, Garlic, Pepper AND possible side dishes of Salad, Vegetables or Chips.

1. Create stock items, with a price if required, for each of these: Mushroom Sauce, Garlic Sauce, Pepper Sauce, Side Salad, Side Vegetables and Side Chips.
2. In the modifier lists you would create a list called "Cooking Time", with the (typed in) options Rare, Med-Rare, Medium, Well Done.
3. In the modifier lists you would create another list called "Sauce" then add each of these: Mushroom Sauce, Garlic Sauce, Pepper Sauce to the list.
4. In the modifier lists you would create another list called "Side Dish" then add each of these: Side Salad, Side Vegetables and Side Chips to the list.
5. In the Stock Database, select the "Steak" item then in Modifier section, check each of the above list names. (Cooking Time, Sauce and Side Dish).

Thus when the operator selects the "Steak" item he will be presented with Cooking Time, Sauce and Side Dish to select from.

Select Single Modifier from each Page - This means that you can only select one modifier from each page of modifiers that are linked to the item. This saves keystrokes as the operator does not have to press the Next key to select the following page (if there are any more pages)

Staff Commissions

Allows you to issue your staff with sales commissions with percentages based on on individual (or All) categories and discounts (if any) granted by the sales person.

Enable Commissions - Enables the commission feature.

Staff Commissions Panel

The first column allows you to select the individual categories that you want to set specific commissions for. This is

when you want different commission rates for specific categories.

If you just have one commission rate for all of your products then do not select any categories in the list, just use the first row (ALL).

The second column 'Maximum Discount 1' allows you to enter the Maximum Discount % that is allowed for the staff to receive the Commission % entered in the 'Commission % 1' column.

If you DO NOT allow discounts then just put 0 in the 'Maximum Discount 1' column and the commission % in the 'Commission % 1' column .

If you DO allow discounts then you can set the maximum discount allowed in the 'Maximum Discount 1' column and the commission received in the 'Commission % 1' column.

You can also (optionally) enter other maximum discounts allowed, and the corresponding commission % received in the 'Maximum Discount 2', 'Commission % 2' , 'Maximum Discount 3' and 'Commission % 3' columns.

For Example:

Issue a commission of 10% on any sale that the staff member makes where there is no discount applied.

Issue a commission of 7.5% on any sale that the staff member makes where there is a discount applied of up to 10%

Issue a commission of 5% on any sale that the staff member makes where there is a discount applied of up to 20%.

No commission issued for any sale where there is more than 20% discount.

The table will look like this:

<u>CATEGORY</u>	<u>Maximum Discount 1</u>	<u>Commission % 1</u>	<u>Maximum Discount 2</u>	<u>Commission % 2</u>	<u>Maximum Discount 3</u>	<u>Commission % 3</u>
ALL	0	10	10	7.5	20	5

Also you can select any category where you want to apply specific commission(s) to.

For Example:

Issue a commission of 12.5% on the sale of any item in the "Hardware" category, that the staff member makes where there is no discount applied.

Issue a commission of 9% on the sale of any item in the "Hardware" category, that the staff member makes where there is a discount applied of up to 8%

Issue a commission of 6% on the sale of any item in the "Hardware" category, that the staff member makes where there is a discount applied of up to 15%.

No commission issued on the sale of any item in the "Hardware" category, where there is more than 15% discount.

The table will look like this:

<u>CATEGORY</u>	<u>Maximum Discount 1</u>	<u>Commission % 1</u>	<u>Maximum Discount 2</u>	<u>Commission % 2</u>	<u>Maximum Discount 3</u>	<u>Commission % 3</u>
ALL	0	10	10	7.5	20	5
Hardware	0	12.5	8	9	15	6

When an item is sold the commissions table is checked. If the item fits into one of the specific categories then that Discount/Commission rate is used.

If the item is NOT in one of the specific categories then the ALL (default) Discount/Commission rate is used.

Pricing

Disable MID - Disables the MID price (Multiple Item Discount) feature.

Disable Special Prices - Disables the Special Price feature.

Price Shift Names % + or - - These are the descriptive names and percentage discounts or premiums for the global price shifts.

For example you may have:

"Happy Hour" when you charge 10% less for all (or specific items). In this case you would put "Happy Hour" in the left box and "-10" in the second box. OR "Late Hours" when you charge 20% more for all (or specific items). In this case you would put "Late Hours" in the left box and "20" in the second box.

In either case when you select the price shift using the "Price Shift" key on main screen, the prices for all Stock Items which have "Enable Price Shifting" checked in the Stock Detail|Pricing section for the item, will be increased or decreased by the given percentage.

Enable Promotional Discounts -This allows you to issue numbers or barcodes to your customers as a special discount promotion. When the barcode is scanned or a number entered at the end of a customer transaction, then the transaction is automatically discounted by the percentage amount that you have entered in Default Discount Percentage
(Setup|General|Monetary)

Price Shift Overrides Multiple Item Discount (MID) - Overrides item Multiple Item Discount price whenever a Price Shift is selected.

Start Time and End Time

This enables the Time Based price shift feature.

Enter the Start Time for the time shift (in the format hh:mm:ss) for the time, every day, when you want the Price Shift to activate.

Enter the End Time for the time shift (in the format hh:mm:ss) for the time, every day, when you want the Price Shift to deactivate.

Note: This means that you do not need to manually activate the 'Price Shift' key from the main screen. In other words the Price Shift will be automatically activated at the selected time.

If you use the 'Price Shift' key from the main screen then the Time Based price shift feature will be deactivated / overridden with the manually selected Price Shift.

If you want to set the Price Shift details to all items in a specific category then select the Category from the category drop down list and press "Apply to Selected Category".

This will set the Price Shift for each item to 'Enabled' and additionally, if the Default radio button is pressed, set the Price Shift name (for Time based Price Shift) to the corresponding Price Shift name.

For details on this see "[Pricing](#)." in the stock database section.

Scan Retail Variable Weight Items (Prefix 02, 21, 28 and 29) - Check selected items this to enable scanning of retail Variable Weight item barcodes. These are usually "in-house" printed barcodes or from weigh-label machines applied to weigh and price labelled items.

These barcodes are 12 or 13 digits long, start with either 02, 21, 28 or 29 and have the price embedded in them.

The item is identified by digits 3 to 6 in the barcode (4 digits). To identify the product, first create a stock item (description etc) with 4 digits only (digits 2 to 6) entered into the barcode field in the stock item details. In these cases the price field of the item is irrelevant as the actual price is embedded in the barcode and is extracted when the barcode is scanned.

4 Code, 5 Price Mode - Select this when the barcode is encoded with 4 digits for the product code (digits 3 to 6) and 5 digits for the price (digits 8 to 12).

5 Code, 4 Price Mode - Select this when the barcode is encoded with 5 digits for the product code (digits 3 to 7) and 4 digits for the price (digits 9 to 12).

Stores and Connections

Allows you to enter the details of, and details required for accessing multiple Stores or Sites.

Usually there are two ways this would be used.(press Down Arrow to create a new entry in the grid)

All stores are connected to a single database server

In this case you need to enter a Store Number and Store Name in the grid.

Each store has a separate (local) database

To add a database server connection for another store or site the postgres server must be configured to allow incoming connections on the specified port, through the router, at the remote site. See the PostgreSQL Help file for more information on setting this up.

In this case you need to enter a Store Number and Store Name, Connection (the static IP address of the remote database), Password and Port (usually 5432) in the grid. These connections can also be seen and created in "[Connection Manager](#)".

Use Total Stock for All Stores - Check this option to display total stock levels on all stores (doesn't maintain individual stock levels for each store)

Produce XML Transaction File - Produces an XML file for each transaction.

XML Transaction File Location - Select the directory location where you want the XML output file to be written.

CSV Stock Dump every xx Minutes - Produces a CSV File (every xx Min) in the selected File Location including SKU, ID and Stock fields.

CSV File Location - Select the directory location where you want the CSV stock file to be written.

XML Order File Poll every xx Minutes - Polls the location for a new XML Order File (every xx Min) . If a new file is found the order is processed.

XML Order File File Location - Select the directory location where the XML order file will be written.

Bookings and Hiring

Minimum Booking Time - This is the minimum length of time, in minutes, that you reserve for a booking. The booking grid dates will be divided up into blocks by this time period.

Advance Bookings (Days) - The amount of days in advance that you will accept bookings for.

Maximum Simultaneous Bookings - This is the amount of bookings you can accept at the one time. For example a hairdresser working on his own can only take 1 booking at a particular time whereas a restaurant may have 20 tables thus be able to take 20 reservations at the same time.

Minimum Hire Period - This is the minimum length of time, Days and Hours that your hire items are hired out for. When you select a Hire Item the item can be hired for any amount of time based on this minimum period.

Stock Database

Press the 'Utility' tab then click on the 'Stock database' button on the main screen to access the Stock Database which allows you to view all of your stock / sales items

Use the Mouse and/or Up/Down, Home/End, PgUp, PgDn keys to navigate within this grid.

NOTE: The currently selected item is highlighted with a blue line.

You can customize the display of the columns in the grid by clicking on the column title(s) and dragging to the position that you require. If you do this then the grid will show the first 20 columns in future.

View and Edit

You can edit the item detail directly in the grid by clicking on the cell and entering the information

OR (for full details)

View and Edit the Stock details by double clicking on the displayed stock item line or by searching, highlighting then pressing the 'Select' button..

New

To create a new item entry press the 'New Item' key and enter the new information as required.

Select

After an item has been located press the 'Select' button to select it or display the details.

Find

1. Select search by Name, Barcode, PLU or SKU in the 'Search Type' box.

2. Type in (or select on the onscreen keyboard) part of an item Name, Barcode or PLU (one all of the Unique Serial No). All matches, to the entered string, will be displayed and highlighted in the grid.

The list will be displayed in the order selected in the 'Search Type' box.

Click in the 'Find' box to clear the current search and start a new one.

Delete

Press the 'Delete Item' button to delete the currently selected item.

To delete an item using the keyboard highlight the stock item line, or multiple lines (Ctrl-Click) press the Ctrl-Delete keys together and press Yes button when the 'Delete Record' box appears.

Category - Select a category from the drop down list to display only the items in that category

Auxiliary Category - Select the Auxiliary category from the drop down list to display only the items in that auxiliary category .

NOTE: Double-Click in either the Category or Auxiliary Category box to clear it.

Connection Manager - Allows you to connect to other Stores where you can adjust and edit stock accordingly.

Price Adjustment - Allows you to bulk adjust the prices of all items or items in a selected category by a set %, \$ amount of based on the cost price of an item.

1. Select the Category to adjust or leave it at ALL for all categories (i.e. All Items)
2. Enter the amount you want to change the prices by, either % (percentage) or \$ (dollar amount) in the "Adjustment Amount" box
OR Enter the amount you want to set the prices to, based on the Cost price in the "Set Price from Cost - % Markup" box.
3. Press % Increase, % Decrease, \$ Increase, \$ Decrease or "Set Price From Cost" button.

View Stock Database as Grid - Displays the whole stock database in grid format where you can edit the various fields directly on one screen.

Stock Item Details Screen

PRODUCT - 40 characters following information: product description. 2 Lines are available here if required.
IMPORTANT: This should be a unique name for each product (i.e. No 2 products should have the same name)

ID - This is the, non-editable, 32 Digit Unique ID no that is assigned to the item when it is first created.

Category- The predefined category to which the product is assigned. Either select from the drop down list OR Type a new category name in the box.
Total sales of each individual category will be displayed in the Reports section.

Auxiliary Category - An optional secondary category that that items can also assigned to. Either select from the drop down list OR Type a new category name in the box.

Note: If both categories then items can be searched (in the Stock Maintenance screen) using either Category, Auxiliary Category or a combination of both.

Example: Assign Milk to a Category "Dairy" and an Auxiliary Category "Pura" (manufacturer) or maybe an item could be assigned to a Category "Grocery" and an Auxiliary (sub) Category "Dairy".

Notation - Use this box to enter up to 5 lines of free text, related to the specific item, that you want printed on the receipt. This may be some general descriptive text, warranty information or other legal requirement that applies to the item.

Location - Record the physical location of the item in the store. You can use any scheme that you like (for example A2-B1-L4 Aisle 1, Bay 2, Level 4)

Store Number / Name - Allows you to select which Store Number to record the information to (Stock Level, Item Location etc)

Price - The unit selling price for the product including tax (if required)

GST - The Tax payable on this item (GST, Sales Tax, VAT etc) in % (percentage terms)

Total Stock - The current stock level of the item This is automatically updated as transactions are carried out or when Stock Entry is used. If either the 'Stock In' or 'Stock Out' button is not visible (disabled in the Permissions List) then this field is not directly editable although the stock can still be modified via the "Stock Movement" function.

Store Stock - The current stock level of the item, for this particular store. This is automatically updated as transactions are carried out or when Stock Entry is used. If either the 'Stock In' or 'Stock Out' button is not visible (disabled in the Permissions List) then this field is not directly editable although the stock can still be modified via the "Stock Movement" function.

NOTE: This is only visible or usable when you are using multiple stores connected to a shared database AND you have set "Store" number (in Settings|General) to a value other than 0.

Min Stock- The minimum stock level required for the item. You can set this value to a level which is convenient for re-ordering purposes (see Re-Order Reports)

Max Stock - The maximum stock level required for the item.

Cost - Your buy price for the item. (for your reference only)

Reward Points - The amount of reward points you issue to the customer for your reward points scheme. If you enter a % sign in this box (e.g. 10%) then the amount of reward points awarded, will be calculated as a percentage of the Item Price.

Points Cost - The amount of reward points the customer needs to have accumulated to purchase this item (this is used when you have a "Points" key in your Payment Types)

Expiry Date - Select an Expiry Date for the product (if required). If this is not used it defaults to 01/01/3000 (in other words the product never expires).

To set the date click in the Date box, the date will revert to today's date, then click on the drop-down arrow and select the Expiry Date from the calendar.

To reset the Expiry Date to 01/01/3000 (not used) click on the "Clear Date" button.

SKU - This is a system database generated, read only, serial number which can be used as a unique number to identify each product in the Stock database.

Item Barcode - The barcode number for the item. This can be scanned in by selecting the box and scanning the item with your barcode scanner. The barcode box is cleared when you click in it.

NOTE: If you manually enter the barcode via the Onscreen keyboard or from a computer keyboard press 'Find' to search for the barcode.

If the length of the product barcode is 13 this will be printed as an EAN-13 type barcode. If the length of the product barcode is 8 this will be printed as an EAN-8 type barcode. If the length of the product barcode is not 13 and not 8 then the barcode will be printed as a Code 3 of 9 type barcode.

A message appears to notify you if any change has been made to the barcode. You can also validate the barcode by clicking on the "Validate Barcode" button in the Stock Details screen.

If you are creating your own custom barcode (i.e. Not scanning it from a product) then you should enter 7 or 12 digits and either Validate the barcode in the Stock Details screen, or Print the barcode out. The software will automatically add the 8th or 13th Check-digit.

PLU - Put a PLU number (1 to 999999) for the item this box. This item can then be recalled from the main transaction screen by entering it via the numeric keypad and pressing the Enter Key.

Generate PLU - Press this button to automatically generate a unique, 6 digit PLU for this product. It will be one higher than the last PLU found in the stock file. NOTE: If you are using Member Codes then the lengths of the codes should NOT be set to 6 digits long as they could conflict with a PLU look-up. In other words set Member Codes to 1-5 or 7-8 digits long.

Weighed Item - Check this box if the item is to be weighed (requires electronic scale connection) or is sold as a measured quantity. The price of the item will then be calculated by multiplying the PRICE by the weight on the scale or the entered measured quantity.

NOTE: If there is no connection between the scale and the computer, when the item is selected or scanned, a message prompt appears in the main entry box ("ENTER QUANTITY:....."), prompting the operator to enter the item quantity (or weight) via the keyboard or on-screen keypad. In this case you must turn OFF the 'Check Scale Stability' option in Setup|Accessories|Scale.

Units of Measure - Enter the units of measure used for Weighed or Measured Items (for example Litre for Petrol or Kg for a weighed item). Whatever is entered will appear on the screen and on the receipt for this item.

Tare - The tare or deduction weight that is subtracted from the gross weight when the item is weighed. This would normally be the weight of a container or packaging associated with the item.

Open Price Item - Check this box if the item price is variable. In this case a price entry box will appear when the item is selected.

NOTE: There is a special case when both **WEIGHED ITEM AND OPEN PRICE ITEM** is selected. In this case the operator enters the Open Price for the weighed/measured item. The **Quantity** for the item is automatically calculated from the Price entered and the Price (per unit) of the item. This is useful if the operator knows the amount, in dollars, of an item purchased but doesn't know the actual amount in units of the item. (for example a customer purchases \$20 of petrol but he (or the cashier) doesn't know the actual amount of litres purchased when the customer presents at the point of sale)

Sell Item Online - Check this box if you want to display the item on your Web Store or Web Page.

Sell Item Locally - Check this box if you intend to sell the item in your local store (defaults to true).

Item Unavailable - Check this box if the Item is not currently available , that is it is temporarily Out of Stock or for some other reason you want to prevent registration or selection of the item. If the item is selected (Scanned or selected from a Hotkey) by the operator, a message appears "Item Unavailable" and the item cannot be registered or sold.

Bulk Product - Check this box if the item is a bulk item that will be dispensed and sold in smaller quantities and you require the quantities sold to be deducted from this "Bulk Item" stock quantity. See the [Example](#) below.

Credit Item - Check this box if the Item is to be a Credit Item or Paid Out item. In this case the item shows a -ve price when it is registered This is useful for items such as Winning Lotto Tickets etc where the operator gives the customer money from the till.

Serial Number - Check this box if you want to record a Serial Number whenever this item is purchased. If this is checked, when the item is scanned or selected, a serial number entry screen will appear in which you can enter or select the serial number associated with the item. This can be either manually entered, scanned from a barcode or selected from the drop down list (if the item has a list of serial numbers as entered in the Stock Details screen). The serial number is then recorded and printed on the receipt.
The serial number can also be later looked up using the Serial Number Look-up function (in the Utility panel).

Hire Item - Check this box to mark the item as a Hire or Rental Item. When this item is selected, in a transaction, a prompt appears allowing the operator to select the Hire Time from a drop down box. This item is then marked as a Hired item and the deposit is registered and charged.

NOTE: In this case the PRICE box is the price for hiring the item for the Minimum Hire Period (as set in Setup|Hiring) For example: The price entered for the item is \$100 and the Minimum Hire Period (in Setup|Hiring) is 1 day. When the operator selects the item for hire and selects 2 Days then the price would be calculated as 2 Days (hire periods) x the Price of the Item = \$200.

Hire Deposit -Enter the deposit that is charged when the item is hired and refunded when the item is returned.

AcctReq -Check this box if an account is to be associated with this item whenever it is sold.

Ticket - Check this box if you wish to issue a ticket (as well as a receipt) whenever this item is sold. This is useful when are selling rides or admittances.

Stock Movement - If you want to add or remove a quantity of stock items enter the no of units received in the "Units" box and "Record Incoming or Outgoing Stock".

Note: If you are taking stock out (Outgoing) then put a -ve sign in the Units box.

Also if you just press the "Save" button any Incoming or Outgoing Stock will be recorded.

If you are using more than one store, you can select the "Store Number / Name" for the stock using the drop-down list. (leave this at 0 if you only have 1 store)

Cost Averaging - If the inwards stock has a different cost price than the existing stock you can enter a new cost in the "New Cost" box.

The new (average) cost of the item is calculated as follows: $(\text{Existing Stock Count} * \text{Existing Stock Cost}) + (\text{New Stock Added} * \text{New Stock Cost}) / (\text{Existing Stock Count} + \text{New Stock Added})$

IMAGE - Con the image display box to display the image selection screen. Select the appropriate image, for the selected product, from the list of files displayed in the box. This is the image that will be displayed on the main transaction screen when the product is scanned or selected.

Note: Images should be created in either bmp or jpg format and should be approx. 200 pixels High by 200 pixels Wide. Typically a good size image would be 10-20 KB. Smaller size is OK (but the quality will be less) and larger images may take a longer time to display/load. The created images must be stored in the [Image File Location](#) directory defined in Setup.

Dimensions - These settings are used for logistics purposes.

Weight - The Weight of the item (in Units of Measure).

Length - The Length of the item.

Height - The Height of the item.

Width - The Width of the item.

Use Sub Groups - Check this box if you wish to use the Sub Group Price Matrix for pricing this item. This allows you to setup a 2 dimensional grid for the item consisting of a Color-Description and available Sizes for the item. It is useful when you have items that all have the same, identical, barcode number but are available in different Colors-Descriptions and Sizes. It allows you to assign a different price and stock level for each individual item. This would usually be used for a clothing, shoe shop or similar.

Once the 'Use Sub Groups' box is checked then the "Sub Groups" button appears. Press this to show the Sub Group matrix screen.

The **Sub Group Setup Screen** is used as follows:

1. The 'Characteristics' buttons are divided into COLORS and DESCRIPTION. Any colors or descriptions that you have already entered for this item and category will be displayed.

- To enter a Color for an item, double-click on a gray (unused) button in the COLORS column then select the closest matching color from the displayed color pallet and press OK.
- If the item has a Style, Pattern or other Text Description (e.g. Tartan, Stripes. Checked) then double-click on a blank button in the DESCRIPTION column. The button will be highlighted white. Enter the description via the onscreen or standard keyboard.

2. Click on one of the 'COLOR' buttons OR one of the 'DESCRIPTION' buttons to show the available sizes for this Color-Description, in the 'Sizes' grid on the RHS of the form. Enter or edit the available sizes, prices, stock levels and minimum stock levels, for this specific Color-Description, in the appropriate entry boxes. To add stock of an existing item, enter the quantity of new stock in the 'Add' column. Press 'Save' to save the details and add the quantity to stock.

3. Repeat Steps 1 to 4 until you have entered all Colors and Sizes available for the particular item then press 'Close' to return to the "Stock Details Screen".

Copy - Press this button to copy the Sizes, Prices and Min entries from the displayed boxes.

Paste - Paste the previously copied Sizes, Prices and Min into the displayed boxes.

Copy Price- Press this button to copy the Prices in the top row of the size matrix to all other sizes below.

Copy Stock- Press this button to copy the Stock and Min in the top row of the size matrix to all other sizes below.

Delete Color - Press this button to delete the current Color-Description for the item.

In the Transaction screen - When an item that has 'Use Sub Groups' option enabled is either scanned or selected from a hotkey then a screen appears, similar to the sub group setup screen above, which displays all available combinations and allows the operator to choose a color-description and size for the item.

PRICING

Discount - Don't Allow Discount on this Item - Check this item to prevent the Member Discount from being applied to this item.

Multiple Item Discount (MID)

This feature allows you to assign a special discount price to a stock item.

The discount price will be applied either if there is another item in the current transaction which is also assigned to the same Multi Item Discount Group OR if multiples of a particular item are purchased.

The feature works as paired items.

For Example if you purchase 3 items then 2 will be discounted and the 3rd charged at normal price, or, if you purchase 6 items (or any even number) then the discount applies to all of the items.

This can be used as an 'Up sell' to encourage customer purchases of 2 items at a discount instead of 1 at full price.

Group- Enter or select a group name. Any other items with this same group name will be discounted if 2 or more are purchased. For example you might have a discount on chocolate bars say, Mars Bar, Snickers, Kit Kat. You would enter. say. Chocolate Bar, as the group name for each item, then when 2 (or multiple of 2) of any of these items is purchased, then the discount price will be applied to both.

Price - The discount price.

Start Date - Select the required starting date for the mid price.

End Date - Select the required end date for the mid price.

Special Pricing - Enter the Special Price for the item. This price will be applied only between the selected Start Date and End Date range as selected below.

Start End - Select the required starting date for the special price.

- Select the required ending date for the special price.

Start Time - Select the required starting time for the special price.

End Time - Select the required ending time for the special price.

Note: When Start Time and End Time are set then the special price will apply only between the selected time ranges AND on each of the days selected in the Start an End Date. This is useful for "Happy Hours" etc when there are special prices for particular times of the day.

Price Shifts - This allows you to use and enable the "Price Shift" function for this item. Check the "Enable Price Shifts" box to allow the item to be affected by the price shift function. NOTE: If you do NOT check this box then the price of the item will always be the same as the price in the Details section and will not be changed regardless what Price Shift you select on the main screen.

1. If you leave the boxes blank then the discount or premium price charged for the item will be controlled by the Percentage + or - that you have entered in the Setup|Captions|Price Shift Names section.

2. If you put a specific price in any of the boxes then the price charged for the item (and that shift name) will be this price and it will OVERRIDE the Percentage + or - that you have entered in the Setup|Captions section.

Time Based - This enables the Time Based Price Shift feature for the Stock Item. This means that the selected Price Shift will be activated automatically according to the Start and End Times entered in the Setup|Pricing section. t

Price Breaks - This allows you to set discounted prices (breaks) for items when they are purchased in multiple quantities.

For example you may sell an item for \$1.00 if only one is purchased, but \$0.95 if 5 to 10 are purchased and \$0.85 if 11 or more are purchased.

In this case you would put the \$1.00 price in the "Price" box in the Details screen. This would be the default price for quantities less than 5.

In the 'Pricing' section, in the 'Price Breaks' panel you would put '5' in the 'Min Qty' Box, '10' in the 'Max Qty' Box and 0.95 in the 'Price/Unit' box. Therefore If the Quantity purchased is between 5 and 10 then price charged will be 0.95.

In next line down in the 'Price Breaks' panel you would put '11' in the Min Qty Box, '1000' in the Max Qty Box and 0.85 in the Price/Unit box. Therefore If the Quantity purchased is between 11 and 1000 the price charged will be 0.85.

NOTE: The last entry in the 'Max Qty' Box should be set to a value larger than any possible purchase quantity expected.

Price Break Group Name - This means any stock items with the same Price Break Group Name will be discounted according to the price breaks on the individual item (Mix and Match).

For Example:

- You have 1L Coke Bottle priced at \$2.00 per bottle. This item also has a Price Break of \$1.80 for 10 bottles or more.

- You have 1L Sprite Bottle priced at \$2.00 per bottle. This item also has a Price Break of \$1.80 for 10 bottles or more. If you set the "Price Break Group Name" to the same on both items (for example: DRINK) then if you purchase 5 Coke and 5 Sprite then they will all be discounted to \$1.80.

GROUP - Either select the Multi Item Discount Group from the drop down list or type a new name in the box.

PRICE - Enter the Multi Item discount price for the item. This price will be applied only during the selected Start Date and End Date range as selected below.

START DATE - Select the required starting date for the Multi Item Discount.

END DATE - Select the required ending date for the Multi Item Discount.

Note: When the Start Date OR End Date are changed then the new date range will apply to ALL other stock items in the selected Multi Item Discount Group.

Barcode Printing - This prints barcodes for the selected item on either an A4 printer or dedicated label printer.

When the screen initially it shows only the Selected item. To select all items press the "Show All" button OR Select a Category.

NOTE: If the length of the product barcode is 13 this will be printed as an EAN-13 type barcode. If the length of the product barcode is 8 this will be printed as an EAN-8 type barcode. If the length of the product barcode is not 13 and not 8 then the barcode will be printed as a Code 3 of 9 type barcode.

Operator and Member barcodes are printed as Code 3 of 9 symbology.

NOTE: If you are using a roll label printer you may have to set the page height equal to the label height, in the print dialog "Page Height" properties (when the print dialog displays)

Select the category from the drop down list to show items for the selected category only.

If **Standard A4 Printer** is selected then a full A4 sheet of adhesive labels will be printed.

1. Select one or more items in the Checklist on the left. The item from Stock Details screen is automatically selected but you can select other items to print barcodes here as well.

2. Press "Print Labels".

3. For each Item selected a dialog box appears asking you to enter the number of labels you want to print. Note: The quantity that is recorded in the item stock, is automatically displayed which is useful when you receive new stock items and want to print the exact number of barcodes for those items when they are received.

If **Print Price** is checked then the item price will be printed on the label (in place of the second product descriptor line)

Default No of Labels - If you put a number in here this will be the quantity of labels printed for each selected item. If this is left blank then it will prompt for how many labels to print for each individual item.

Creating or Editing a Layout .

NOTE: NeoPOS automatically creates a Label Layout called DEFAULT which should be sufficient for most purposes. If you want to edit this layout or create a new layout entirely then proceed as follows:

Click on the **Edit Layouts** button to display the Label Layout editing screen.

In the **Layout Name** box either select the Layout Name you want to edit OR type in a new name (this will create a new layout name)

In the **Rows** box enter the number of rows of labels (vertical count) that are on the A4 label sheet .

In the **Columns** box enter the number of columns of labels (horizontal count) that are on the A4 label sheet.

In the **Label Horizontal Spacing** box enter the horizontal distance, in MM, between the left edge of one label and the left edge of the next one across.

In the **Label Vertical Spacing** box enter the vertical distance, in MM, between the top edge of one label and the top edge of the next one down.

In the **Left Margin** box enter the distance in MM from the left edge of the A4 sheet to the left edge of the first column of labels.

In the **Top Margin** box enter the vertical distance, in MM, between the top edge of the A4 sheet to the top edge of the first row of labels

Rotate Label - Select this to rotate the whole printed label 90 degrees anti-clockwise.

You can now add the various elements to the label as required by clicking on one of the 4 buttons: Name, Barcode, Price and Text. (if they are not already visible on the label Layout design screen)

NOTE: The labels should all be designed and placed in the Top-Right corner of the Label Design area. (see the DEFAULT layout for an example)

Name - This is the element that will display the Product Name (for Product Item labels) OR Operator Name (for Operator barcode labels) OR Member Name and Code (for Member barcode labels)

To change the position, font size or rotation of the name element:

Position - Position the mouse over the element then Double-Click on the element and hold down the left mouse button. A small cross appears which allows you to drag the element (with the mouse) to any position on the screen. When you have the element in the correct position release the left mouse button.

Size - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Size then select the new size for the element.

Rotation - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Rotation then select the new rotation/orientation for the element.

Delete - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Delete to remove the element.

Price - This is the element that will display the Product price. This is for Product Item labels only.

To change the position, font size or rotation of the price element:

Position - Position the mouse over the element then Double-Click on the element and hold down the left mouse button. A small cross appears which allows you to drag the element (with the mouse) to any position on the screen. When you have the element in the correct position release the left mouse button.

Size - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Size then select the new size for the element.

Rotation - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Rotation then select the new rotation/orientation for the element.

Delete - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Delete to remove the element.

Text - This is the element that allows you to add a single line of free text on the label (if required).

To change the position, font size or rotation of the text element:

Position - Position the mouse over the element then Double-Click on the element and hold down the left mouse button. A small cross appears which allows you to drag the element (with the mouse) to any position on the screen. When you have the element in the correct position release the left mouse button.

Size - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Size then select the new size for the element.

Rotation - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Rotation then select the new rotation/orientation for the element.

Delete - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Delete to remove the element.

Barcode - This is the element that allows you to add a barcode the label. EAN 8 or 13 for Product Barcode (for Product Item labels) OR Code 3of 9 for Operator Code OR Member Code barcode

To change the position, size or rotation of the barcode element:

Position - Position the mouse over the element then Double-Click on the element and hold down the left mouse button. A small cross appears which allows you to drag the element (with the mouse) to any position on the screen. When you have the element in the correct position release the left mouse button.

Symbology - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Symbology. This allows you to select the type (symbology) of the barcode for Stock Item barcodes (Note: Member and Operator barcodes are always printed as Code 3 of 9 type). This is used when you require a different type barcode than the default EAN13 or EAN8 types.

NOTE: If you select either EAN13 or EAN8 then the appropriate barcode (EAN13 or EAN8) will be printed according to the length of the item barcode entered (7 or 8 = EAN8, 12 or 13 = EAN13)
Height - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Height, then enter the Height for the barcode (in MM) and press OK.

Wide Bar Size - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Wide Bar Size, then enter the size for the bars in the barcode (usually in the range 2-20). This will increase the horizontal width, and increase the readability, of the barcode then press OK.

Rotation - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Rotation then select the new rotation/orientation for the element.

Delete - Position the mouse over the element then press the Right Mouse Button. When the menu appears select Delete to remove the element.

Save - Saves the current layout.

New - Creates a new layout.

Delete - Deletes the current layout.

Once you have completed creating your layout(s) close the Layout Screen, Select the required layout name in the Barcode printing screen and do a test print as required. If the layout is not exactly in the position, sizes etc that you are satisfied with, then go back to the Layout screen and adjust the layout accordingly.

Linked Items

This feature allows you to add "Linked items" to any other stock item. When you then select the stock item, any linked item(s) will also be registered as well as the original/master item. This can be useful where you want to separate items (for reporting etc) that are always sold along with a master item. For example when bottle of drink is sold that has a "Container Refund" surcharge then you may set up a Container Refund surcharge stock item (with a price) then link this item to the bottled drink item so that every time the bottle of drink is registered, a separate item Container Refund will also be recorded and displayed in the transaction box.

1. Setup any linked Items that you require as separate Stock items. (you may want to set these up in a specific category)
2. Select the main stock item in the Stock Database screen and select the "Linked Items" button.
3. Click on the "Add" button and select the linked item from the Stock Database screen displayed.

Auxillary Barcodes

Enter up to 16 Auxillary / Alternative barcodes for the specific stock item.
This is used where identical stock items are supplied with more than one barcode number.

Kitchen

Kitchen Order Issue - Select one of the 4 kitchen printers (defaults to None) to print to, if the item is to be prepared in the kitchen or other area when ordered. In this case the item will print to the selected Kitchen Printer when the transaction is finalized OR allocated to an Order.

Control Characters - You can enter control characters for printing this item on the Kitchen Printer Docket. This may be to change the color, size etc for this item only. This is only used when you select "Print Direct To Printers" in Setup|Food Service. See Setup|Food Service for more details.

Kitchen Order Notes - Enter up to 20 lines of "Free" text that you want to be printed on the Kitchen Docket. This may be a recipe or other instructions relevant to the particular item.

Order Receival

When you receive orders which were previously issued using the Purchasing function.

1. Select the received Order No from the "Outstanding Orders" box. It shows all of the orders that have been Created

AND Issued.

2. Press IN to receive the items into stock. This will update the Stock for the items, Add to the Stock Movement table and mark the Order as received.

Modifiers

Select the modifier list(s) that you require to be linked for the item, from the displayed list names. (check the box to select the list(s)). See the the Modifier Lists section in Setup for more information.

This allows the operator to select the options when the item is selected for sale. The options are then printed on the kitchen printer (as an instruction to the cook or food preparer).

For example for a "Steak" item you may want the operator to select a list "Cooking Time" with options Rare, Med-Rare, Medium, Well Done etc.

NOTE: In the Modifier Selection screen, click on buttons to select (the caption turns red). If an incorrect selection is made then click on the button again to de-select..

Packs and Bulk Products

Pack Barcode / Pack Quantity

This is used when the item is sold/stocked as a single item (e.g. Bottle) AND as a pack (e.g. Six Pack) AND (optionally) a higher level container (e.g. Carton) Firstly you create separate items in stock database for Bottle, Six Pack and Carton (each with their own barcode).

In the "Pack Barcode" field of the individual item (Bottle) enter the barcode from the next package level up (Six Pack).

Also enter the quantity of the pack in the "Pack Quantity" field (in this case 6, Bottles per Six Pack)

In the "Pack Barcode" field of the next level item (Six Pack) enter the barcode from the next package level up (Carton).

Also enter the quantity of the pack in the "Pack Quantity" field (in this case 4, 4 Six Packs per Carton)

It operates as follows:

Note: In this example we use an item that comes as Bottle , Six Pack of Items, and Carton of Cartons. (3 levels)

1. If the quantity of Bottles sold is less than the Stock Level of the Bottle , then the Stock Level of the Bottle is reduced by the amount sold (as normal, no other action necessary)

2. If the quantity of Bottles sold is more than the Stock Level of Bottle , then it assumes that a Six Pack of the item is broken into/opened with some items sold as individual Bottles . The Stock Level of the Six Pack is automatically reduced by 1 and any remaining individual items from the opened Six Pack are added to the the Stock Level of the Bottles .

3. If the quantity of the Six Pack sold is more than the Stock Level of the Six Pack , and there is a higher level Carton then it assumes that a Carton of the Six Pack is broken into/opened. The Stock Level of the Carton is automatically reduced by 1 and any remaining Six Pack Carton are added to the the stock level of the Six Pack Item.

Bulk Products

Bulk Product - Check this box if the stock items is a "Bulk Product". That is it is a product that will be dispensed in smaller quantities at point of sale.

Outer Pack Descriptor - This is the descriptor for the pack that a bulk product is received in. For example "Keg" if the product (beer) is received in Kegs. It is merely a text prompt to remind the user how the Stocktake or Stock Reveal units will be calculated.

Inner Pack Units - This is the descriptor for the measurement of quantity that you will use for a bulk product is received in. For example a Keg may be measured in Litres so you would put "Litres" in this box. It is merely a text prompt to remind the user how the Stocktake or Stock Reveal units will be measured.

Units per Outer Pack - This is the quantity of Inner Pack Units that are contained in each Outer (bulk pack). For example a Keg could contain 49.50 in Litres, so you would put 49.50 in this box. It is used to convert Outer Units (say Kegs) to Inner Units (say Litres) which are stored in the Stock level for the item.

Linked Bulk Product Names

This is used to select bulk products that are linked to and used when the stock item is sold. That is where the Stock Item is composed of, or dispensed from larger bulk item(s) and you want to deduct an amount from the bulk item stock whenever this item is sold. Only items that have been marked "Bulk Item" (checkbox) are shown in the drop-down lists.

1. Select the Bulk Item from the drop-down box.

2. Deduction Quantity - Enter the quantity of the bulk item that will be deducted from the bulk item stock level (quantity) when this item is sold.

For example:

For the Bulk Item:

1. Create a stock item called "Keg of Beer" and check the "Bulk Item" check box.
2. Enter the total quantity of "Keg of Beer", that you have in stock, in the "Stock" box, for example 200 (Litres)
3. Enter the "Outer Pack Descriptor". In this case "Keg"
4. Enter the "Inner Pack Units". In this case "Litres"
5. Enter the "Units Per Outer Pack". In this case 50 (Litres per Keg).

For the Dispensed Item:

1. Select the "Packs and Bulk Products" tab and select "Keg of Beer" from the drop-down box in the "Linked Bulk Product Names" panel.
2. In the adjacent "Deduction Quantity" box enter the quantity of the bulk product that is used for each sale of the item, in this case say 0.375 (375ml) for a glass of beer. This is the quantity that will be deducted from the bulk item (Keg of Beer) each time a glass of beer is sold.
3. You can then then create other Stock Items such as Pot of Beer, Pint of Beer etc.

Stock Receival / StockTake

Use this function to update or adjust stock when doing a stocktake or when receiving bulk items.

1. Units - - Put the amount of Stock received in this box (in either bulk pack or units).
2. Select either Outer Units (Kegs) or Inner Units (Litres) button.
If you select "Outer Unit" then the number entered/received will be multiplied by the Units per Outer Pack (e.g. 5.5 Kegs X 50 Liters/Keg = 275 Liters added to stock.
If you select "Inner Unit" then the number entered/received will be directly added to stock.
3. Click "Reset Stock" to reset the stock to the new value you have entered (usually use during stocktake)
OR Click "Add to Stock" to add the amount to teh existing the stock level (usually use during stock receival)

Serial Nos

This displays a list of item serial numbers for the selected stock item (up to 100).

To enter a new serial number select a blank line in the grid and enter or scan the serial number.

When an item is registered, and "Serial Number" is checked in the "General" section, the Serial Number can be entered or selected from the drop-down list displayed.

This serial number will then be deleted from the list.

Laybys - Shows a list of active (unpaid) laybys for this stock item. Includes Date, Quantity, Price and Customer Details.

History - Shows the sales and layby history and counts of the selected stock item, with selectable Date Range including Date of Sale, Quantity, Price, Receipt No and Operator.

Web - Contains information that can be displayed on a web page or web store.

HTML Description - Enter HTML code that is to be displayed on the web page. This could be, for example, a detailed , formatted, description of the product.

8 Images - Select up to 8 images of the product that may be displayed on the web page. Click on the image box to select an image or press 'Clear' to clear the existing image.

Data Fields

The following is the data and field definitions for the Stock Database.

PRODUCT	character varying(55)
PRICE	character varying(6)
STOCK	character varying(8)
MIN	character varying(8)
MAX	character varying(8)
CATEGORY	character varying(20)
BARCODE	character varying(20)
COST	character varying(6)
GST	character varying(6)
TICKET	character varying(1)
POINTS	character varying(3)

DESCRIPT2	character varying(50)
WEIGHED	character varying(1)
IMAGE	character varying(254)
SPPRICE	character varying(10)
SPSTARTDA	character varying(10)
SPENDDA	character varying(10)
MIDGROUP	character varying(25)
MIDPRICE	character varying(6)
MIDSTDATE	character varying(10)
MIDENDDATE	character varying(10)
KITCHPRINT	character varying(1)
PLU	character varying(6)
USESUBGRP	character varying(1)
KITCH2	character varying(1)
serial	integer (read only)
Printer Control Character	character varying(3)
Credit Item	character varying(1)
Item Unavailable	character varying(1)
Measured Units	character varying(8)
On Order	character varying(8)
KITCH3	character varying(1)
KITCH4	character varying(1)
Auxillary Barcodes	character varying(130)
PRICEBREAKMAX1	character varying(8)
PRICEBREAKMAX2	character varying(8)
PRICEBREAKMAX3	character varying(8)
PRICEBREAKMAX4	character varying(8)
PRICEBREAKMAX5	character varying(8)
PRICEBREAKMAX6	character varying(8)
PRICEBREAKMAX7	character varying(8)
PRICEBREAKMAX8	character varying(8)
PRICEBREAKMAX9	character varying(8)
PRICEBREAKMAX10	character varying(8)
PRICEBREAKMAX11	character varying(8)
PRICEBREAKMAX12	character varying(8)
PRICEBREAKMAX13	character varying(8)
PRICEBREAKMAX14	character varying(8)
PRICEBREAKMAX15	character varying(8)
PRICEBREAKMAX16	character varying(8)
PRICEBREAKMAX17	character varying(8)
PRICEBREAKMAX18	character varying(8)
PRICEBREAKMAX19	character varying(8)
PRICEBREAKMAX20	character varying(8)
PRICEBREAKMIN1	character varying(8)
PRICEBREAKMIN2	character varying(8)
PRICEBREAKMIN3	character varying(8)
PRICEBREAKMIN4	character varying(8)
PRICEBREAKMIN5	character varying(8)
PRICEBREAKMIN6	character varying(8)
PRICEBREAKMIN7	character varying(8)
PRICEBREAKMIN8	character varying(8)
PRICEBREAKMIN9	character varying(8)

PRICEBREAKMIN10	character varying(8)
PRICEBREAKMIN11	character varying(8)
PRICEBREAKMIN12	character varying(8)
PRICEBREAKMIN13	character varying(8)
PRICEBREAKMIN14	character varying(8)
PRICEBREAKMIN15	character varying(8)
PRICEBREAKMIN16	character varying(8)
PRICEBREAKMIN17	character varying(8)
PRICEBREAKMIN18	character varying(8)
PRICEBREAKMIN19	character varying(8)
PRICEBREAKMIN20	character varying(8)
PRICEBREAK1	character varying(8)
PRICEBREAK2	character varying(8)
PRICEBREAK3	character varying(8)
PRICEBREAK4	character varying(8)
PRICEBREAK5	character varying(8)
PRICEBREAK6	character varying(8)
PRICEBREAK7	character varying(8)
PRICEBREAK8	character varying(8)
PRICEBREAK9	character varying(8)
PRICEBREAK10	character varying(8)
PRICEBREAK11	character varying(8)
PRICEBREAK12	character varying(8)
PRICEBREAK13	character varying(8)
PRICEBREAK14	character varying(8)
PRICEBREAK15	character varying(8)
PRICEBREAK16	character varying(8)
PRICEBREAK17	character varying(8)
PRICEBREAK18	character varying(8)
PRICEBREAK19	character varying(8)
PRICEBREAK20	character varying(8)
ENABLEPRICESHIFTS	character varying(1)
SHIFTPRICE1	character varying(8)
SHIFTPRICE2	character varying(8)
SHIFTPRICE3	character varying(8)
SHIFTPRICE4	character varying(8)
SHIFTPRICE5	character varying(8)
SPSTARTTIME	character varying(10)
SERIALNO	character varying(1)
PACKBARCODE	character varying(20)
PACKQUANTITY	character varying(5)
SPENDTIME	character varying(10)
OPENPRICE	character varying(1)

STOCK RECEIVAL

Press the 'Utility' tab then click the 'Stock Receival' button on the main screen to access Stock Receival which add or remove stock for selected individual items.

NOTE: This screen is also displayed when an item scanned from the main transaction screen is NOT found in the Stock Database.

This is used when you receive items on an item-by-item basis. In this case you need to select each item separately and update the stock levels.

There are three ways to search for an item::

Barcode - When the form is first opened the 'Barcode' entry box is highlighted green. In this case the database will be searched by whatever is typed or scanned into the barcode box.

Product Search - If you want to search by Product Descriptor then Click on this box . In this case the database will be searched by whatever is typed into the box and all entries that match the entered text will be listed in a list box.

PLU - If you want to search by PLU then Double-Click on the PLU box (so it is highlighted green). In this case the database will be searched by whatever is typed into the PLU box.

1. Scan or manually enter the barcode (press Enter), the product descriptor or the PLU for the item.
2. If the item is found then the item details are displayed. If the item is NOT found in the Stock Database then you can enter the details as described in the Stock Database section above.
3. Enter no of units in the "Units" box. Press the "Record Incoming or Outgoing Stock" button. The new stock level is automatically recorded. Note: If you want to take stock OFF (remove stock) then put a "-" sign before the quantity in the Units" box.
5. The stock for the item will be Updated and the Barcode box will be selected again.
6. To select another item, repeat the process from Step 1.

Note: In Stock Receival Mode the "Total Stock" box is disabled and the only way to add stock is by using the "Record Incoming or Outgoing Stock" button. Also whenever stock is added or subtracted the information is recorded in the "Stock Movement" table.

Minimum Information Mode

This is used when you want to hide most item information from the operator but still want them to be able to receive stock. It also allows you to receive multiple items (one after the other) with a minimum of operator input. To use this mode you need to check "Show Minimum Information in Stock Receival" in Setup|Display.

1. Open Stock Receival.
2. Scan the item barcode - The item description is displayed if the item is found. Note: If the item is not found the you will need to use Stock Database and enter the item details.
3. Enter the Quantity Received or Dispatched in the Units box.
4. Press Stock In or Stock Out button - The details are displayed in the stock receival grid. Note: You can clear all of the items in the stock receival grid by pressing the 'Clear' button.
5. Proceed to Step 2 for the next item received.
6. Once all of the items received are recorded then press the 'Submit' button to verify and record the items.

Order Receival Mode

ORDER BASED STOCK RECEIVAL

This is used when you receive items on an order basis. This means you have previously created and issued stock orders, from suppliers, in the Purchasing and Ordering sections. In this case the system will automatically update stock levels for ALL of the items on the received order (you do not have to select the individual stock items).

Select "Purchasing".

All Outstanding (issued but un-received) orders are displayed in the "Order No" drop down box.

Select the order no and press 'Order Receival' button.

Stock levels for the ordered items will be adjusted accordingly.

STOCK REPORT

Press the 'Utility' tab then click the 'Stock List Report'.

To View Stock Reports

Select the Category OR Auxilliary Category from the drop-down list(s)

Show Only Items with Stock-On-Hand - Check this to produce a report of items with some stock on hand (greater than zero).

- Un-Check this to produce a report of all items.

Show Only Items below Minimum Level - Check this to produce a report of items where the stock level is below the minimum stock level.

- Un-Check this to produce a report of all items.

Show Barcodes - Show the item barcodes on the report.

Show Minimum Stock - Show the minimum stock levels on the report.

Show Cost Value - Show the stock cost value on the report.

Show Sale Value - Show the stock sales (price) value on the report.

If the Value column shows 0.00 it means either you have none (or -ve amount) in stock OR the 'Cost' field in the Stock Details for the item is blank or zero.

The stock value can be useful in producing financial reports where you want to know the total value of your stock.

You can select to print this Report to File (CSV Comma Separated), Printer or Screen (View).

Print Check List - Prints a list of stock in a line separated list, showing product names and current stock, for manual stock take purposes.

Stock Take

Select the Category from the drop-down list (if you want to work with category by category)

The stocktake can be done in several ways.

Barcode Scanning

1. Click in the "Quantity" box and enter the No of units, of a particular item, you have in stock.
2. Press Enter (this will move the cursor into the "Barcode" box).
3. Scan the item barcode. This will then automatically search the stock database and fill the "Adjusted Stock" field with the quantity you have entered.

Manual Entry by Barcode No

1. Click in the "Quantity" box and enter the No of units, of a particular item, you have in stock.
2. Press Enter (this will move the cursor into the "Barcode" box).
3. Type in the item barcode then press Enter (or press the Record key). This will then automatically scan the stock database and fill the "Adjusted Stock" field with the quantity you have entered

Search by - Allows you to find specific items by Name, Barcode or PLU

1. Select search by Name, Barcode or PLU.
2. Type in part of an item Name, Barcode or PLU All matches, to the entered string, will be displayed and highlighted in the grid.

The list will be displayed in the order selected in the 'Search Type' box.

Click in the search box to clear the current search and start a new one.

Grid Entry

1. Select /navigate to the item in the grid. If necessary select the "Category" from the category drop down box.
2. Enter the stock quantity into the "Adjusted Stock" column.

Variance Report

Once you have completed the stocktake you can print a Variance report showing which items are in Deficit or Surplus. This is the difference between the Adjusted Stock, the actual stock level of the item, and the reported Stock level according to the database.

The report shows the Item / Product Name, Barcode, Stock (calculated), Adjusted Stock (actual) and Deficit (--)
surplus (+). Deficit may indicate theft (for example) whereas surplus may indicate incorrect stocking procedures (for example failure to register incoming stock)

Note: Only stock items where a "Stock Variance" figure has been recorded or entered will be shown in the report.

Show Only Items with Variance - means that the report will only show items where there is a difference between "Stock" and "Adjusted Stock". (i.e. if "Stock" and "Adjusted Stock" are the same value, then there is no need to report on that item)

Only Show Barcode and Variance - means that the report will only show the Barcode and Variance totals on the report. This is normally used when you want to print on a receipt printer.

Zero Stock Levels - Sets the stock level for ALL items to 0 (zero).

Show Adjust Stock - Displays Stock Items where there is a value in the 'Adjust Stock'. These are the items that you intend to change the stock levels.

NOTE: Both of the following clears out the "Adjusted Stock" field on all items (so you can no longer do a variance report). You should do a Variance report, if you require one, first.

Reset Stock Levels - Stocktake - This is Stocktake mode. When you press this button it RESETS the item stock level to the new value in the 'Adjusted Stock' column.

Adjust Stock Levels - Stock Receival - This is Stock Receival mode. When you press this button it ADDS the value in the 'Adjusted Stock' column to the existing stock level.

PURCHASING

Click 'Purchasing' under the Utility Section or under Stock menu item (admin mode)

This is the section where you can schedule, create, edit, issue, review and receive purchase orders.

To Create an Order

Select the Supplier from the Supplier drop down list.

Press "Show All Items" - To display ALL items linked to the particular Supplier regardless whether the Stock Level is below the Minimum Stock level recorded.

Press "Show Items Below Minimum" -To display ONLY items linked to the particular Supplier where the current stock level for the item is less than the set minimum stock level.

The **In Stock** , **Min** , **Max** and **On Order** columns show the relevant values for these fields from the Stock Item database. These columns can be edited (for example if you want to correct the no of items in stock etc).

Press "**Save Stock Changes**" button to save them to the Stock Item database.

You can also add or edit the "Product Code" column as required. (press "**Save Stock Changes**" button)

The **Buy** column is a suggestion of the amount of items you need to purchase. If there is NO Maximum value set then this column will show the amount of items to order to bring the stock level up to the Minimum value. If there IS a Maximum value set then this column will show the amount of items to order to bring the stock level up to the Maximum value. This column can be edited as required.

Once you have entered an amount in the "Buy" column, for each item you want to order, press "Save Order". This creates an interim "Draft" order for the selected supplier.

You can come back to this order , at any time, and add to it or modify it by selecting the Supplier Name from the drop-down box.

Note: When you select the supplier and there is NOT a "Draft" order in the system for the supplier THEN you will see the "Show All Items" and "Show Items Below Minimum" buttons will show, allowing you to create a new Order for the supplier.

HOWEVER if there IS a "Draft" order in the system for the supplier THEN you will NOT see the "Show All Items" and "Show Items Below Minimum" buttons, and instead you will see the details of the "Draft" order for the selected supplier.

Issue Orders

This allows you to review and issue (print) the "Draft" orders.

Once you are satisfied with the order press 'Issue Order'.

This displays the Order in the format it will be printed.

At this point you can review the order and if it is NOT correct press "Close" to return to the Purchasing screen so you can modify the order as necessary.

If the order IS correct then press the "Issue Order" button to produce the Order (either printed or PDF format).

At this point the order is marked as "Issued" (not a Draft Order). Also the quantity that you have purchased for each item is recorded as "On Order" which will be displayed in the Purchasing screen when you select the item for further ordering.

Recall Order - Allows you to view previous orders that have already been issued. Enter the Order Number in the "Order No" box and press this button.

Order Receival - In the Purchasing screen , select the Order No (that has presumably arrived) from the "Order No" drop-down box. Click "Order Receival" to record the stock as arrived, and add the appropriate quantities to the stock levels for the various items.

SUPPLIERS

Press the 'Utility' tab then click 'Suppliers'.

This is the section where you can create and edit your suppliers list and link the stock items to particular suppliers.

You can sort the Supplier List by Code or Name by pressing the button at the bottom of the supplier list.

To Create a New Supplier

1. Sort the Supplier List by Code (press Order By Code button)
2. Move to the bottom of the suppliers list (Ctrl-End) and Arrow down to create a new line.
3. Move to the left of the grid and enter the next Supplier Code (in the same format as shown)
4. Arrow Down or Up (move off the new record) to save.

To Delete a Supplier

1. Select the supplier in the list.
2. Press the "Delete" button.

To Select a Supplier and Show or Edit Linked Items

1. Select a category from the "Category" drop down list. This displays a list of ALL stock items, for the category, in the All Items list.
2. Click on a Supplier Name in the supplier grid. This shows which of the items in the category are linked to the supplier, in the Supplier Items list.
Note - If there is a specific Supplier Product Code (i.e. A Code that the particular supplier uses to identify the product) associated with the product, then is it shown before the Product Name followed by a ':'. For Example SAL0001 : Salada Biscuits 325g.
3. To add / link an item to the selected supplier, highlight the item(s) (Select All/None, Ctrl-Click, Shift-Click, or drag the mouse to select multiple items) in the "All Items" list and click the '<<' button.
4. To remove a linked supplier, highlight the item(s) (Select All/None, Ctrl-Click, Shift-Click, or Drag the mouse to select multiple items) from the "Supplier Items" list and click the '>>' button.

To Edit or Add Supplier Product Codes

1. Click on the "Edit Product Codes" button.
2. Enter the Supplier Product Codes in the left-hand column for each product.
3. Press "Save and Close"

STOCK TRANSFER

Press the 'Utility' tab then click 'Stock Transfer'.

This is the section where you can transfer stock from one store to another store.

1. Select the "Origin" of the stock (where the stock is coming from) from the drop-down list. (this list contains the connections/stores that you have setup under [Connection Manager](#))
2. Select the "Destination" of the stock (where the stock is going to) from the drop-down list. (this list contains the connections/stores that you have setup under [Connection Manager](#))

NOTE: You can narrow down the stock items displayed by selecting the category drop-down list.

Download Scanner - Click this to download the transfer items from the scanner

OR **Manually Enter** the quantity of the item(s) that you want to transfer in the "Transfer Qty" column (in the top grid)

NOTE: You can do a "Reverse Transfer" (that is from Destination back to Origin) by putting a -ve value in the "Transfer Qty" column.

4. Press the "**Transfer**" button to transfer the item(s).

NOTE: If the selected item is not found in the Destination Stock database then you will be prompted to create a new item in the destination database (if required)

Once the transfer is complete then the grids (Origin and Destination) will be updated to reflect the new stock levels.

"Clear Transfer Qtys" - Clears all all previously entered quantities in the Transfer Qty column.

Also the details of each transfer are recorded in the "Stock Transfers" database.

REPORTS

To print or view reports press the 'Utility' tab then click on the Reports button.

The Start Date and End Date entry boxes automatically default to today's date for the report .If you require a report for another date or date range then use the Start Date and End Date drop down calendar to select the required report dates.

If you select "View" option, the screen report can be closed by double-clicking the report (as with all onscreen reports)

OPTIONS

Sales - Produces a standard sales report, with the selected options.

Transaction - Produces a report showing the details of each transaction done.

Employee Hours - Produces a report showing the details of hours worked for the selected employee according recorded by the [Timeclock](#) function. If the Employee/Operator has failed to Clock Out after Clocking In a warning message will appear.

Employee Hours Log - Shows the Hours grid where you can edit the operator hours worked. The direction column shows **I** for the date/time that the operator logged on and **O** for the date/time that the operator logged off. You can then edit or correct the Start Time (I) or End Time (O), in the time column (24 hour format).

Hourly - Show Hourly or Half Hourly sales breakdown Totals and Transaction Count for any selected Date Range.

Stock Movement - Produces a report showing the details of Stock Received or Sent for a selected Date period.

Reward Points - Produces a report showing historical Reward Points Awarded, Redeemed and Available for all members.

Show Transactions - Report includes transaction details, reward points awarded and reward points redeemed in the selected date range.

Note: The reward points redeemed shows the reward points redeemed based on the current "Reward Points Cost" of the item. If the "Reward Points Cost" of the item has changed since the transaction was made, then the value may not reflect the actual reward points redeemed at the time.

Accounts - Produces a report showing a summary of categories and items sold on account and a detailed breakdown showing items sold, payments made and amount in credit or owing for each individual active account. You can select an individual account to report on from the drop down box. If you leave this box blank the report will show items and payments for all accounts.

Laybys - Produces a report showing a summary of ALL outstanding Laybys including details and total outstanding amount.

Daily Takings - Produces a report showing the daily takings for each day in the selected date range.

Commissions - Produces a report showing commissions that have been issued to staff members.

All - Shows a list of all commissions paid to all staff for the selected Date period. If you select a single operator drop down list then this report shows all commissions paid to the selected operator only.

Unpaid- Shows a list of all commissions which have NOT yet been paid out, to all staff and for any date (the selected Date period has no effect). If you select a single operator drop down list then this report shows all commissions which have NOT yet been to the selected operator only.

Print Payment Voucher - This prints out a Payment Voucher, showing the outstanding commissions due, for a specific operator. This voucher is then be issued to the operator for payment.

When the voucher is issued a prompt appears asking "Mark These Commissions as Paid?". Answering Yes to this prompt marks all of the outstanding commissions for the operator as Paid (i.e. they will not appear in the unpaid commissions any longer)

Redeeming a Payment Voucher - The operator presents the Payment Voucher, at the main transaction screen, enters the amount via the numeric pad, and selects "Paid Out". The detail can be entered in the Paid Out prompt box (e.g. COMMISSION Tom Smith). The daily report will then show these payments under 'Paid Out' with the specific details (if entered)

OPTIONS

Item Details - Applies to Sales Report Only. Shows a summary of all individual items sold showing item description, total no of sales and total sales amount for that item .

Paid Out Details - Applies to Sales Report Only. Shows the details of each "Paid Out" transaction.

Category Details Only - Applies to Sales Report Only. Show a summary of total sales value for each category.

Profit / Loss Report - Applies to Sales Report Only. Shows profit and loss for each individual item and profit/loss total for all items. Includes item description, total no of sales, total sales amount, total cost (your buying cost) and profit or loss amount for each item.

Export - Applies to Sales Report Only. Check this box to produce both Category and Item Profit and Loss export file.

To produce Excel type charts proceed as follows:

1. Click on the 'Profit Loss Report' and 'Export'
2. Press "View' or 'Print' .
3. The save file dialog appears. Press 'Open' to save the automatically named file to a known location.
4. Exit out of NeoPOS and locate the saved file. Open the file with MS-Excel (usually double click it)
5. Select and highlight the displayed data (3 columns and all the rows).
6. Select "Insert|Chart" and select the desired type of chart. The default chart in the upper Left Hand Side is recommended or for a 3D type chart select the "Custom Types" tab and select "Columns with Depth".
7. Click 'Finish' to display the chart. You can adjust various aspects of the chart by right clicking on the various elements of the chart and selecting one of the options. For example if you right click on the descriptors along the bottom (X) axis of the chart you can change the font size etc.

Chart - Check this box to produce a Category Profit and Loss chart showing total sales for each category compared to total item cost.

This instantly produces a chart, similar to an excel chart, without the need to export the file (as described above)

Reconciliation Required - Requires that reconciliation figures be entered (see below) before a report is produced.

Operator - Select a specific operator from the drop-down list OR leave it at ALL to report for all operators together.

Terminal No - Select a specific terminal no from the drop-down list OR leave it at ALL to report for all terminals together.

Shift - Select the Shift No you want to report for.

Archive File Name - Create report from a previously created Transaction Log Archive . These archives are usually created, using SQLAccess program, if the Transaction file becomes very large and the PC performance is poor which may result in increased time when creating reports.

Show No Sales Details - Click this to show details of "No Sales" including Date and Time for each No Sale.

Show Return Details - Click this to show details of Returned Items including Quantity, Name and Cost.

Show Error Details - Click this to show items that have been Errored by the operator (security reasons)

Detailed Account Report - Account report shows Date, Time, Invoice No and item details for each individual transaction.

Show Stock Levels - Shows quantity sold AND remaining stock for the item in the form: Quantity Sold/Quantity Remaining in Stock.

Show No Sales Details - Click this to show details of "No Sales" including Date and Time for each No Sale.
Transaction Database - Click this to view or edit the complete transaction database sorted in date-time order. Use the Mouse or Up/Down/Left/Right/Home/End and Page Up/Page Down keys to navigate through the grid. Click in a cell to edit it or select a whole line and press Ctrl-Delete to delete a whole line.

Connection Manager - Use this to select and report on other connected stores.

Transaction Log - Shows the transaction details for the selected Date/Time period.

RECONCILIATION

CASH IN DRAWER

Enter the totals for the amount of cash in the drawer at the END of the shift, day etc, for each monetary denomination (i.e. for 3x \$100 dollar notes put 300 in the \$100 box).

Also enter the totals for each of the non-cash payments as shown.

The total is automatically calculated and displayed.

DRAWER FLOAT

Enter the totals for the amount of cash that was in the the drawer at the START of the shift, day etc, for each monetary denomination (i.e. for 3x \$100 dollar notes put 300 in the \$100 box).

The total is automatically calculated and displayed. You can enter a figure directly into the "Total" box and it will override the figures in the individual denomination boxes

OTHER PAYMENT TYPES

Enter the totals for the amount of non-cash transactions in the appropriate boxes. (e.g. The batch total from your

EFTPOS terminal, Cheques or Credit Cards etc)
The total is automatically calculated and displayed.

NOTES

Enter a descriptive, unlimited size, note to allow you to record any information about the reconciliation / report (For example the reason for a discrepancy between the reported sales and the actual reconciliation)

Press "**Save**" to save these reconciliation totals.

Press "**Retrieve**" to retrieve the reconciliation for the selected date. NOTE: The Reconciliation figures are automatically retrieved when View or Print Report is selected.

NOTE: If you have selected a particular operator (from the Operators drop-down list) then the reconciliation will be saved against that operator only.

Press " " to view the reconciliation data for the selected date.

Press "**Match Reconciliation**" to ensure that the reconciliation figures exactly match the recorded takings for the selected date. This is usually used if you have incorrectly entered or failed to enter reconciliation figures for a particular date.

Press "**Save Default Float**" to make the current figures in the float column the defaults which will automatically appear if there is no float recorded for the selected date (each new day for example) This means that you do not have to fill in the float figures each day.

Press "**Transfer CID to Float**" which transfers all of the cash currently in the drawer (CID) into the float column. This is usually used in conjunction with the "**Save Default Float**" function so that the cash currently in the drawer can be used as the float for the following days trading.

"**Safe Drop**" - Allows you to record safe drops of cash etc. Enter the amount in the box under the key and press "Safe Drop". This will be shown in reports.

REPORT DETAILS

Click on the Print of View. The report includes the following information:

DATE : The date for the report.

OPERATOR - The operator who the report is for.

TRANSACTION COUNT: Total amount of transactions.

CASH RECONCILIATION

Takings - Total cash takings reported from the transaction log (expected cash amount in drawer).

Counted - Actual cash in the drawer that was counted (taken from the reconciliation panel)

Float - The float that was in the drawer at the start of the shift/day.

CA Out - Any Cash Out amounts. These will be shown in the other payment types totals. This amount is of course subtracted from the Nett amount in the drawer.

PA Out - Any Paid Out amounts. These will NOT be shown in the other payment types totals. This amount is of course subtracted from the Nett amount in the drawer.

Nett - The counted amount in the drawer MINUS the Float (actual cash takings which should correspond the the "Takings" amount)

OVER/UNDER - Shows whether the drawer cash balances with the expected cash amount.

OTHER PAYMENT TYPES (EFT, CHEQUE etc)

Takings - Actual takings for the each payment type reported from the transaction log.

Counted - The counted total for the each payment type (taken from the reconciliation panel) (e.g. The batch total from the EFTPOS terminal or counted cheque total)

TOTAL TAKINGS - Total of all amounts received reported from the transaction log.

TOTAL COUNTED - Total of all (actual) amounts counted (taken from the reconciliation panel)

PAID OUT DETAILS - Shows details of Paid Out descriptions if the check box is checked.

CATEGORY TOTALS - Summary of total sales value for each category.

ITEM DETAILS - Summary of all individual items sold showing item description and total no of sales for that item.

RETURNS - Summary of all returned items showing description and total values.

ASSIGN HOT KEYS

This section allow you to assign sales items to the hot key screens. These are usually set for the non-barcoded items but any item can be assigned to a hotkey.

NOTE: To setup the configuration for the hotkeys see "Hotkey Configuration" in Setup|Display

1. Select the screen (20 available) by clicking on the appropriate key on the bottom of the screen. (The captions for these keys are set in Setup|Captions and roughly correspond to the category that the items are set to in Stock Database)
Note: Press "SET 2' to display the second set of 270 Hotkeys (set selection keys 11 to 20) giving 540 Hotkeys in total. The captions for the set selection keys are entered in the Setup Section.
2. Click on the selected key. NOTE: If you click on a key that has already been assigned then the key will be re-assigned to the new item.
3. Mark and Select the category to display a list of items in the category.(or press Skip to skip the step)
4. Mark and Select the item from the displayed list (use PAGE UP and PAGE DOWN buttons if the list is longer than 1 screen).
5. Select a color for the key. Press OK. .(or press Cancel to skip the step)
6. Select an image for the key, if required, from the list. Press 'Use Image' or 'No Image'. The location for all images is set in Setup|General|Image File Location.

You can create the images for the hotkeys using the Window Paint (or similar) program and saving as a BMP or JPG format

OR aquire the image from a camera

OR search the internet (Google Images is a good source)

NOTES:

1. The image can be of any size as it will be resized automatically to fit the available area.
2. If you create or aquire images with "Transparent" background, the image will appear with the selected Hotkey color as a background.
You can also create or aquire images with a **white** background then set the Hotkey color to **white** to achieve a similar effect.
3. Image size is a compromise. If the image file is TOO SMALL then the resulting image may be of poor (pixelated) quality when shown in a larger format, such as on the transaction screen image display ALTERNATIVELY if the image file is TOO LARGE then the hotkey screens or image display may exhibit a delay while it loads. Generally sizes of 10-50KB should display in good quality without affecting program performance.

Blank Key - Press 'Blank Key' button then the required key to remove an item from a hotkey.

The Hot Keys screens (as setup here) are then accessed from the main transaction screen.

MEMBERS / CLIENTS

Use this to enter and edit the list of members / clients and their corresponding details.

The information displayed on this page can be customised in the 'Members' section of the Setting section.

LOOKING UP AN EXISTING MEMBER

There are several ways to find the entry for an existing member:

1. Enter or Scan the Member Code (located on the member card) into the "Code" box and press 'Search' or Enter.
2. In the Surname or Business box, Double Click (to clear the box) then enter the Member's surname or Business (or part of the name) and press 'Search' or Enter.
OR In the Member No box, Double Click (to clear the box) then enter the Member No and press 'Search' or Enter.
OR In the Company box, Double Click (to clear the box) then enter the Company and press 'Search' or Enter.
3. Press the "Up" or "Down" keys to scroll through list of members by Surname or by Code.
4. Scan the member card from the main transaction screen (if this option is set in Setup)
5. Click on the Member Name box (Bottom RHS) on the main transaction screen.

Press the "Print Barcode" to print a scannable barcode for the selected member.

ENTERING A NEW MEMBER

1. Press the 'New' Button to automatically create a new record with the next available Code OR Enter or Scan the Member Code (located on the member card) into the "Code" box.
2. Enter the details as necessary into the boxes.
3. Press Save.

DELETING A MEMBER

1. Locate the member.
2. Select File|Delete (from menu).

Email - Click this button to send a direct email, via your default email application, to the selected email address.

MEMBERSHIP EXPIRY

Select the Membership expiry date by using the drop down calendar.

To Cancel a Membership press the "Cancel" button. This sets the Membership Expiry date to "01/01/00" which is the default value for a cancelled IMembership.

To Renew a Membership press the "Renew " button. This sets the Membership Expiry date to 1 year forward from the existing date. If another expiry date is required select it using the drop down calendar.

MEMBER GROUPS

Used in 2 ways:

1. Assign the member to one of the predefined member groups (setup) from the "Member Group" dropdown box.

Typically this would be a customer loyalty program where a member may have Gold, Silver or Bronze etc status, with an associated discount.

2. Enter a % amount in this box (instead of selecting the member group) to discount the particular member by this percentage.

NOTE: If a member is assigned to a member group then the associated discount will override the global "Member Discount %"

PRINT FORM

Press this button to print a customer detail entry form with GIVEN NAME, SURNAME, STREET, CITY/SUBURB, POSTCODE, PHONE, DATE OF BIRTH and SEX.

The customer can then be asked to fill out the form with their details, at their leisure, and returned.

A customer record can be created and the customer details can then be entered into the membership database at a time that suit you.

ID CARD

This allows you to Create and Print Membership cards.

Front Side of Card

Displayed in the top-left showing the relevant details (Member No, Name, Type, Issue Date, Expiry Date and Barcode). Each of the elements can be moved to any required position by Double Clicking and dragging them.

You can show or hide the various elements by selecting the elements in the panel below the ID card area.

Select either Portrait or Landscape mode according to the orientation of your card printer.

Background Logo

Click on the background to select a logo/image file to be printed on every card. This would usually be a company logo or suitable artwork.

The logo must be previously saved as .bmp or .jpg in the NeoPOS directory or the Image File directory selected in setup. To ensure that the logo fills the entire area the logo ideally should be approx. 370 pixels wide x 235 pixels high. Larger or smaller is also OK but the logo should be in these proportions 1.55 Wide to 1 High.

Once the image is shown in the background you can move the elements around so that they are displayed in a clear area. If necessary you can edit your background image (in MS-Paint) and create a whitespace/clear area where you can place the texts and barcode.

Photo

Click on the photo panel and select a previously saved photo file (jpg or bmp).

To ensure that the photo prints clearly and maintains it's aspect ratio it ideally should be in approximately these (portrait) proportions: 1 Wide to 1.22 High.

OR Using Webcam

1. Take the photo with the webcam software.

2. Save it into the c:\Program Files\Neopos directory (or the Image File Location) with the relevant name

3. When you create the member details just click on the photo box and you can able to select it from the list (as described above).

Back Side of Card (for double side card printers)

Enter the text to be printed on the back of the card. At the end of the written text, place a single * character on a separate line. (this indicates the end of the text block).

Set the Font Name, Size or Style using the boxes at the bottom.

Font Name - The name of the font type that you want the back of card text printed in.

Font Size - The size of the font that you want the back of card text printed in.

Font Style - The style of the font type that you want the back of card text printed in.

Image Load Time (s) - The amount of time delay to allow the bottom of card image to load to the card printer. If this value is too small the image may not appear or load correctly.

Photo Load Time (s) - The amount of time delay to allow the photo image to load to the card printer. If this value is too small the photo image may not appear or load correctly.

Photo Load Time (s) - The amount of time delay to allow the photo image to load to the card printer. If this value is too

small the photo image may not appear or load correctly.

Save Card Settings - Press this to save the Current Logo, Element positions and printed (back side) text so that they automatically appear and will be printed on all cards.

Print Card - Prints the card on the selected card printer. Once the card is printed you are given the option of deleting the photo file. This can be used to ensure that you keep the quantity of images stored in the image directory to a minimum.

Print Barcode Only - This prints barcodes for the selected member on either the standard computer printer or the dedicated label printer.

To print a range of barcodes, for more than 1 member, select the check boxes in the list OR press Select All.

Take Photo - Takes a photo from an attached Webcam and loads it into the Photo box on the front side of the card. A preview of the webcam image is shown to the right of the button.

DATABASE / REPORTS

Click this button to display the complete members database in grid form.

Use the Mouse and/or Up/Down, Home/End, PgUp, PgDn keys to navigate within this grid to modify or view the fields.

To create a new item entry press the 'Insert' key and enter the new member as required.

To delete an item press the CTRL-Delete keys together and press Yes button when the 'Delete Record' box appears.

Print Report - Use this option to Print, View or (Export to) File a list of members including Name, Address and Phone Numbers, selected by code range.

Check "Show Purchases" to show all purchases by the Member including any reward points awarded.

NOTE: When "Export" is selected then the output format of the information is determined by the fields and field order selected in Setup|Members||Member History Export.

PURCHASES / POINTS

This displays all purchases made including the details of reward point items, date awarded and accumulated reward points for the selected member.

Note: This grid show the purchases by the selected member (whether the item has associated reward points or not) so it is useful for reviewing the purchase pattern for the customer.

You can remove incorrect entries from this grid by selecting the appropriate line then pressing Ctrl-Del or change the amount of points recorded for a sale by changing the value in the Points column.

Accumulated Points from Purchases - This is the total amount of points that have accumulated from purchases of items.

Accumulated Added Points - This is the total amount of points that have accumulated from added bonus points.

Redeem Points - You can redeem reward/loyalty points by entering the number of points to redeem in the entry box and pressing 'Redeem Points' button.

Add Points - You can add extra 'Bonus' points by entering the number of bonus points in the entry box and pressing 'Add Points' button.

Redeem Points as Credit - You can redeem all of the accumulated points as a credit in the current transaction as follows:

1. Select the Member (scan member card or enter the member no).
2. Register the items in a normal transaction.
3. Select the member details by clicking on the Member name at the bottom of the transaction grid.
4. Click on the "Purchases/Points" button.
5. Click on the "Redeem Points as Credit" button.

The screen will then return to the main transaction screen with a new item "REWARD POINTS REDEEM" in the transaction with the value shown as a credit in the transaction.

Clear Purchase History and Points - Clears the entire purchase history and rewards points for the selected member..

Report

Allows you to produce a report of member purchases, sorted into Category and Items with Total Items and Total Value. Select the date range and press "Print" or "View" to produce the report.

Laybys - This displays the details of any current (unpaid) laybys for the selected customer.

ENTER DESIGN MODE

The member entry/editing screen is fully user configurable. You can add or delete different entry boxes and position the boxes anywhere on the screen as follows:

1. Click on the "Enter Design Mode" button in the "Screen Layout and Design Panel" at the bottom RHS of the screen. DESIGN MODE is displayed in the screen caption.
2. To *Delete* fields that you do not require select the "Remove Element" drop down and then scroll down and select the field.
3. To *Add* other fields that you do require select the "Add Element" drop down and then scroll down and select the field. Note: Adding a field may cover an existing fields so you may need to reposition the newly added field.
4. To *Move* an existing field *Click and Hold down the Mouse Button* then drag the field to the new position.
5. Click on the "Exit Design Mode" button to return to normal mode.

IMPORT EXPORT

This allows you to import or export stock, transaction or member/customer information to or from the NeoPOS databases, via CSV (comma separated value) files. This format file can then be imported into third party applications such as MS-Excel etc.

IMPORTING INFORMATION

1. Open the original file in Excel (or other third party software) so that you can see the information displayed in columns and rows.
2. Take note of which information is in each column and if necessary record.
3. Save the spreadsheet as a "CSV - Comma Separated" type file, with any name, to a convenient location on your hard disk. This is a simple text file with the fields separated by commas.
4. Open NeoPOS|Utility|Import/Export. Click on the Stock, Transaction or Member button.
5. Click on the "Import Filename" box and then navigate and select the CSV file you previously saved (step 3)
6. Setup the fields in the list box so they correspond and are in the same order as the information recorded in step 2..
 - A. Check the required boxes (put a tick in them) if they has a corresponding field in the CSV file.
 - B. Select Move the fields up and down, so that they appear in the same order as in the CSV file, by clicking the up and down arrows.
 - C. Add blank fields, using the "Insert Blank" button, where either there is no corresponding field in the NeoPOS Stock database or you do not require the field imported from the original CSV file.

Note: If you have a Supplier Name in the import file (and you add it to the field list) then the import will automatically add the Supplier Name and link the items imported to that supplier name. It must have a Supplier Product code which must be put in the SKU field (put this in the correct position in the field list)

Here is an example:

PRODUCT corresponds to the first field in the CSV file "Coca Cola" - The Product Name/Description
 BLANK corresponds to the second field in the CSV file "," (a blank field)
 BLANK corresponds to the third field in the CSV file "," (a blank field)
 GST corresponds to the fourth field in the CSV file "10" - The Tax Rate
 STOCK corresponds to the fifth field in the CSV file "2" - The no of items currently in stock.
 BLANK corresponds to the sixth field in the CSV file "," (a blank field)
 BLANK corresponds to the seventh field in the CSV file "," (a blank field)
 CATEGORY corresponds to the eighth field in the CSV file "Drinks" - The assigned category for the stock item.
 BARCODE corresponds to the ninth field in the CSV file "9781400060146" - The barcode for the stock item.
 PRICE corresponds to the tenth field in the CSV file "2.45" - The price (including tax) for the stock item.

8. Click in the "Import File Name" box and navigate to the location of the CSV file you exported.
9. Click on the "Import" Button.

OPTIONS

Overwrite Existing Database - Clears the existing Stock Database and replaces it with the new items for the import file.

Add New Items and Adjust Stock Levels for Existing Items - For each item in the import file, it searches the stock database for the name/barcode of the product.
 If it finds the product name/barcode then it edits the existing record, adding the stock level the import file to the existing stock levels.
 If it doesn't find the product name then it adds it to the database.

Don' Adjust Stock Levels or Prices for Existing Items - For each item in the import file, it searches the stock database for the name/barcode of the product.

If it finds the product name/barcode then it edits the existing record but does not change the Stock Level, Price or Cost for the item.

If it doesn't find the product name then it adds it to the database.

Export Grand Total then Items - The file will show all of the transaction totals followed by the individual item transactions.

Add Default GST to All Items - If you want to automatically add the default GST rate to each item in the stock database check this.

Add GST to Item Price - If the item prices, in the import stock file, do not include Tax/GST then you should check this box so that the price stored in the NeoPOS stock database includes tax.

Create XML Stock File - Creates an XML stock file with the fields: ID, Product Name, SKU and Stock on Hand.

Comma Delimited - If you are importing or exporting Comma Delimited Files (CSV)

TAB Delimited - If you are importing or exporting TAB Delimited Files.

VTAB Delimited - If you are importing or exporting Vertical TAB Delimited Files.

Notes: After this procedure check the stock database to see that all the information is in the correct columns. If you have made a mistake simply repeat the above procedure.

Select All - Selects all of the items in the list (except for "BLANK")

UnSelect All - Un-Selects all of the items in the list

MYOB MODE - Click this button if you are importing a standard MYOB stock file. This sets the options to TAB delimited and configures the field list to match the MYOB format.

EXPORTING INFORMATION

1. Click on the 'Transaction File', 'Members File' or 'Stock File' button.
2. Select fields you want to export, (put a tick in them). Move the fields up and down, so that they appear in the order you require. Adding a BLANK puts an empty field (, ,) record in the output CSV file.
3. Click the 'Export' button select the output folder, select or enter a name for the file then press OK to save the CSV export file.

SERIAL NO LOOKUP

This allows you to lookup the serial number of any item sold.

1. Enter or scan the serial number into the "Serial Number" box.
2. Press "Lookup". If the Serial Number is found then the relevant details are displayed.
3. Press "Print" to print a copy of the details.

POS OPERATION AND MAIN TRANSACTION SCREEN

OPERATOR LOG ON or LOG OFF

Press the 'Log On' or 'Log Off' button.

If Log Off is selected AND Compulsory Operator is enabled then the Log On screen is displayed.

If Log On is selected the Log On screen is displayed.

Scan the Operator Card (barcode) OR Enter the Numeric Code and press 'Log On'.

Note: The current operator is automatically logged off a new operator logs on OR if the "Autotomatically Log off after each transaction" option is selected OR if the "Till Timeout" function activates.

On successful logon the Operator Name is displayed in the Operator Status box (bottom LHS of main screen)

TIMECLOCK

The timeclock function allows each employee (registered in the Operators table) to record their own starting (Clock On) and ending times (Clock Off) during their working day.

NOTE: If the employee fails to "Clock Off" at the end of the shift then the hours report will default to 5PM (17:00) as the

employee finish time.

Alternatively the employee "hours worked" can be entered directly.

This allows you to produce an "Hours Worked" report for each employee for calculation of payroll etc.

To CLOCK ON of CLOCK OFF.

1. Select the 'Timeclock' button.
2. Scan Operator/Employee Card (barcode) OR Enter Numeric Code
3. Press the "Clock In" or 'Clock out' button.

To Record EMPLOYEE HOURS Directly

1. Select the 'Timeclock' button.
2. Scan Operator/Employee Card (barcode) OR Enter Numeric Code.
3. Select the date from the date box.
4. Click in the "Hours" box and enter the hours worked, for the selected date.
5. Press "Hours Worked".

REGISTERING SALES ITEMS

Method 1

Scan the barcoded item.

If the item is found in the Stock Database it is displayed in the transaction grid.

If the item barcode is NOT FOUND in the Stock Database then the [Stock Receiving](#) (Stock Details) screen is displayed.

At this point the operator must enter the details for the new item as described in .

When save is pressed the item will be added to the Stock Database. (press cancel if you decide NOT to add the new stock item)

Method 2

Press the "Hotkey" button.

Select one of the 10 Hotkey category buttons at the bottom of the screen.

Note: Press "SET 2" to display the second set of Hotkeys (set selection keys 11 to 20) giving 540 Hotkeys in total.

Select the item.

Method 3 - Select "Search" button on the main tab screen. select the category (if necessary) then type in the first part of the item name and select the item when it found.

As each item is displayed in the transaction grid the total for the transaction, including Tax payable, is displayed in the boxes below the transaction grid.

PRODUCT IMAGES - If a product image has been registered in the Stock Database then the image will be displayed in the bottom Right Hand corner of the main transaction screen, in place of the numeric keypad. Click on the image to redisplay the numeric keypad if required.

FINALISING THE TRANSACTION

1. If the sale is to be paid by CASH then enter the tendered cash using either of 2 methods:

A: Enter the amount using the Tender Keys to the left of the Total Boxes (for example if the customer pays for a \$35 sale with 2 x \$20 dollar notes then press the \$20 key twice). Note: Clicking into the "Tender" box clears any previous entry in the box.

OR

B. Enter the amount via keyboard numeric keys then either press the 'D' key OR click in the "Tendered" box.
Note: Pressing the 'D' key when there is no numeric amount in the transaction box clears the "Tendered" box.

2. Press the appropriate payment type key (CASH, CHEQUE, EFTPOS etc)

SPLIT TENDERS

1. Enter the first part of the tendered amount in the in the "Tendered" box (this must be less than the amount in the total box).
2. Press the payment type button for the first part of the tender.

3. The "Split Tender" box will appear. Select the payment type button for the second part of the tender OR enter the amount tendered (for cash tenders) via the numeric keypad.

QUANTITY

To register multiple items of a particular item.

1. Scan a single item so that it appears in the transaction list box or select (click on and highlight) the item in the transaction grid.
2. Enter the No Of Items into the transaction entry box (above the numeric keypad) via the numeric keypad.
3. Press the 'Quantity' button
4. The displayed product will be updated to show the number of items in the item count column on the left and the total price in the price column on the right.

PAID OUT

To register paid out items.

1. Enter the Paid Out quantity into the transaction entry box via the numeric keypad with no decimal point (i.e.1000 = \$10.00)
2. Press the 'Paid Out' button.
3. Either select the description for the drop-down box (shows previous entries) or enter a description for the Paid Out via the on-screen keyboard.
NOTE: If nothing is entered in the box the the description defaults to "PAID OUT".
4. Select "Inc Tax" if you want to include the calculated tax amount (according to Default Tax Rate) in the Paid Out report. Select "Ex Tax" if you want to include NO tax in the Paid Out report.
5. The transaction will show PAID OUT or the description entered and the negative amount shown in the price column.
6. Press the appropriate payment type key (CASH, CHEQUE, EFTPOS etc)
7. The Cash Drawer opens and the Receipt is printed (if "Automatic Receipt Printing" is enabled in Setup). If "Automatic Receipt Printing" is not enabled then a receipt can be issued by pressing the "Receipt" key on the main screen.

EXTRA ITEM

To register an extra item, charge or item not included in the Stock Database.

1. Enter the Extra item value amount into the transaction entry box via the numeric keypad with no decimal point (i.e.1000 = \$10.00). This can also be a negative value for entering discount.
2. Press the 'Extra Item' button
3. Either select the description for the drop-down box (shows previous entries) or enter a description for the Extra Item via the on-screen keyboard.
NOTE: If nothing is entered in the box the the description defaults to "EXTRA ITEM".
4. Select whether the item Includes Tax (Inc Tax) or is Exempt form Tax (Ex Tax).
5. The transaction will show EXTRA ITEM or the entered description and the amount in the price column. The tax charged for Extra Items is calculated from the Default GST Rate (see Setup)
NOTE: This can also be used to send a free-form message to the Kitchen Printer(s) by selecting the "Extra" button, Selecting or Entering the message ad pressing the required printer (or all printers)

DISCOUNT

1. Enter the Discount amount into the transaction entry box via the numeric keypad, with a - sign preceding the amount and with no decimal point (i.e. -1000 = \$10.00 discount)
2. Press the 'Extra Item' button
3. The transaction will show EXTRA ITEM and the -ve discount amount in the price column. The tax charged for Extra Items is calculated from the Default GST Rate (see Setup)

ERROR

Note: To remove to an individual item, highlight the item in the transaction grid by clicking on it.

If an incorrect item has been registered during a transaction entered then press the 'ERROR' button to remove the item from transaction grid. If an individual item is highlighted then this item will be removed otherwise the last item in the grid will be removed.

RECEIPT

Prints a sales receipt immediately after a transaction has been completed. This is usually used if Automatic Receipt Printing has been turned off and the customer requests a receipt.

If you are WITHIN a transaction this will print a receipt showing just the items in the Transaction Grid and Totals. This is usually used to present the customer with a preliminary bill, that he can inspect, before he pays and finalizes the transaction.

REPRINT

Allows you to reprint a receipt. Enter a previous Receipt No in the box to reprint it.

Select "Normal Sales" for normal transactions (this is the default value when it opens)
OR Select "Account Sales" for Account transactions.

OR (if you don't know the Receipt No)

1. Select the date range for the transaction, from the Start Date and End Date drop down calendars.
2. Press 'Show Transactions' to display all of the transactions within the selected range (autoamtically scrolls to last/most recent transaction).
3. Use the scroll bars (or keyboard keys) to navigate up and down the grid until you find the required transaction.
4. Click on the grid to select the transaction Receipt No.
5. Press the OK button to reprint the selected Receipt No (and close the window).

CLEAR

To Restart a transaction after a transaction has been started press the "Clear" button. This removes ALL items from the transaction grid and effectively starts the transaction again.

VOID

To void a transaction then press the "Void" key. This defaults to the most recent transaction (receipt no)
To erase a previous transaction, eithe backspace and enter the receipt no via the keypad then press 'OK' OR select the date of the transaction then select the receipt in the grid.

NO SALE

Press the "No Sale" button to open the drawer without completing a transaction. This is recorded however in the transaction log file.

%- (Discount Percentage)

Applies the Default Discount Percentage to the whole transaction.
If you want to apply the discount only to 1 item, then highlight the item in the transaction grid then press the %- key.
The Default Discount % is set in Setup|Monetary.

Otherwise if you to use a discount other than the Default Discount %:

1. Enter the Discount Percentage in the transaction entry box via the numeric keypad.
2. Press the '%-' button.
3. The selected item (if one is highlighted) or all items transaction grid will be reduced in cost by the entered percentage .

%+ (Premium Percentage)

Applies the Default Premium Percentage to the whole transaction.
If you want to apply the premium only to 1 item, then highlight the item in the transaction grid then press the %+ key.
The Default Premium% can be set in Setup|Monetary section.

Otherwise if you to use a Premium other than the Default Premium %:

1. Enter the Premium Percentage in the transaction entry box via the numeric keypad.
2. Press the '%+' button.
3. The selected item (if one is highlighted) or all items transaction grid (no. individual item is selected) will be increased in cost by the entered percentage .

\$ - (Dollar Discount)

1. Enter the Discount amount into the transaction entry box via the numeric keypad with no decimal point (i.e. 1000 = \$10.00 discount)
2. Press the '\$ -' button
3. The transaction will show DISCOUNT and the -ve discount amount in the price column. The tax charged for the item is calculated from the Default GST Rate (see Setup)

REFUND

1. Enter the Refund amount into the transaction entry box via the numeric keypad with no decimal point (i.e.1000 = \$10.00)
2. Press the 'Refund' button.
3. If required enter a description for the paid Out item via the on-screen key board..
4. The transaction will show REFUND or the entered description and the negative amount shown in the price column.
5. Press the appropriate payment type key (CASH, CHEQUE, EFTPOS etc)
6. The Cash Drawer opens and the Receipt is printed (if "Automatic Receipt Printing" is enabled in Setup). If "Automatic Receipt Printing" is not enabled then a receipt can be issued by pressing the "Receipt" key on the main screen.

CASH OUT

1. Enter the Cash Out amount into the transaction entry box via the numeric keypad with no decimal point (i.e.1000 = \$10.00)
2. Press the 'CASH OUT' button.
3. The transaction will show CASH OUT with the amount shown in the price column.
5. Press the appropriate payment type key (usually EFTPOS or CREDIT in this case) Setup). If "Automatic Receipt Printing" is not enabled then a receipt can be issued by pressing the "Receipt" key on the main screen.

Kitchen Orders

1. Displays a list of any "Delayed" kitchen orders. Select the Order(s) by highlighting them the press "Print" to send them to the kitchen printer(s) or "Remove" to remove them from the list (so they will never be printed). Press 'Clear Selections' to unselect all items.
2. Displays a list of all orders that have been prepared but are still waiting for the customer to collect. This is the same as the list of orders displayed on the secondary (customer screen) when it is used in Order Display mode. Once the order has been collected the Operator should select the item here and press "Mark Item Collected" to clear it from the list and from the customer order display screen.

HOLD and FLOATING OPERATOR

Allows you to place a transaction on "Hold" so that it can be recalled and finalised later OR recalled at another terminal, where the operator wants to finalise a transaction on a different terminal than the one where the transaction was started. (floating operator)

To place a transaction on hold click the "Hold" button and select one of the Hold buttons. This can only be done if there is a transaction in progress.

To recall a held transaction click the "Hold" button and select the Hold button corresponding to the previously held transaction (it only shows the buttons where there is a transaction on hold) . This can only be done if there is NO current transaction in progress.

ALTERNATIVELY: If you are logged in as an operator and you have placed a transaction on "Hold", when you login to another terminal with your Operator No, the held transaction will automatically appear without the need for you to recall the transaction via the "Hold" button.

PRICE SHIFT

This allows you to select 1 of 5 different price shifts which will change the prices of the items according to the details entered in the Setup|Captions|Price Shift Names section. See "[Price Shift Names](#)." Refer to "[Price Shifts](#)" in the Stock Database to enable, disable or override this feature for individual stock items. Simply select the Price Shift name from the displayed buttons. If you do not require any price shift then press "Cancel" and all the prices will return to the standard item price. The Price Shift Name will be displayed on the top of the main form (if it is active)

HIRE

The Hiring/Rental functions operate as follows.

Hiring The Item

1. The Item to be hired must be marked a "Hire Item" in Stock Item Details.
2. When the operator selects the item a dialog box appears allowing the operator to select the Hire Period from a drop down list. (The minimum hire period is defined in Setup|Hiring). The Deposit required is also displayed. Note: If the item is already On Hire then a prompt appears to alert the operator (he can go no further). Also if the item is selected from a Hotkey screen then the label "ON HIRE" appears on any item hotkeys where the item is already on

- hire.
- Operator finalises the transaction and a receipt is issued showing the cost of hire, deposit paid and the date the hire is due back.

Returning The Hired Item

There are 3 ways of returning a hired item.

- Select the item from a Hotkey screen, Scan the item or Select the item from the Product Search screen.**
- Enter the Receipt No from the Hire Receipt and press the "Hire" button (on the misc panel)**

In both of these cases a prompt appears for the operator to confirm the item being returned. The operator then finalises the transaction and issues the deposit refund.

- Press the "Hire" key to display a list the currently hired items**

In this case the operator can locate then click on the returned item and select "Yes" when prompt appears for the operator to confirm the item being returned.

The operator then finalises the transaction and issues the deposit refund.

Viewing Currently Hired Items

Press the "Hire" key to display a list of currently hired items.

The list shows the Item Name, Date of Hire and Due (return) Date.

If the hired item is overdue for return then the item is highlighted in yellow which allow the operator to see at a glance which items need further action.

SEARCH

Allows you to directly search the stock database and register an item.

- Select Search Type - Name , Barcode or PLU (defaults to Name)
- Type in all or part of the item name, barcode or PLU via the onscreen (or standard) keyboard.
- Double-Click the item to select and register it.

RETURNS

Allows you to register a returned item, refund the customer and add the item back into stock.

- Scan or select the returned item.
- Press the 'Return' button. The item price and quantity will become negative value.
- Finalise the transaction as normal (do not enter a tendered amount).

OVERRIDE

Allows you to override or change the price for a previously registered item.

- Select the item in the transaction grid (so that it is highlighted blue)
- Enter the new price into the transaction entry box via the numeric keypad with no decimal point (i.e. 1000 = \$10.00)
- Press the 'OVERRIDE' button.

NOTE: If you are overriding an item where you have a quantity of more than 1, the Override price should be entered as the price for a single item.

BACKUP

Click this button to back up all of your data and settings . Backups are stored as BAK, Tab separated value, files.

You will be prompted to select the directory/location where you want the backup to be saved.

Backup procedure is done in 3 ways.

- When NeoPOS is shut down/closed.
- When the system time is 11:59. This is to do a backup in case you have not closed NeoPOS.
- Pressing the "Backup" button.

If you have an automated backup service running then you should include the NeoPOS directory and the Backup Directory in your schedule.

NOTE: If you are using Windows 7 or Vista you may need to create or allow access to the folder you intend to use for backups (the default setup in these operating systems sets "Read Only" access to the standard folders on your hard drive)

COST

Pressing this button reduces all of the registered items to the Cost price of the item (if you have recorded a Cost price). This is usually used when you have Staff or Management discount allowing them to buy items at Cost price.

MESSAGE

Allows you to send a message to another terminal (which is also running NeoPOS) on the network OR to one or more Kitchen Printers .

1. Select the Terminal(s) and/or the Kitchen Printer(s) checkboxes that you want to send the message to. (press Select All to select all Kitchen Printers).
2. Enter the Message in the "Enter Message" box.
3. Press Send.

If you receive a message from another terminal this message screen will appear, where you can enter your reply and press Send (the "sending terminal" checkbox will automatically be selected)

BOOKINGS

Displays a grid where you can View, Record and Edit Bookings, Reservations and Appointments etc.

The grid is divided/configured in Setup|Bookings.

Dates are shown in the left hand column and extend from today's date until the maximum amount of days (into the future) that you accept bookings for.

Time periods are displayed along the top in the first row and displayed in blocks as configured in Setup|Bookings.

Note: To navigate around the grid you can use the Side and Bottom Scroll bars OR the Mouse Wheel OR the Left,Right.Up.Down PgUp, PgDn, Home and End keys.

1. To mark a cell/time block (i.e. set a booking) then click in the cell once - the cell will turn blue.
To unmark the cell/block (i.e. remove the booking) then click in the cell once - the cell will turn white and delete any text / identifier.
2. To enter an identifier (usually the client name) , click in the cell then type in text as required either from the onscreen keyboard or a standard keyboard.

Press the "Save" button when finished to save the changes and exit the screen

EXIT - Closes the Program

PLU

PLU's in the range 1 to 99999 can be used to lookup items. The PLU should be entered in the "PLU" box in the stock details screen.

To lookup or recall a PLU item enter the PLU number via the onscreen keypad and press the "Enter" key.

LAYBYS

The layby function allows you to assign a transaction to a Layby Number or name or any entity where items will be tendered or supplied but totaled together and paid for later.

The current Layby is displayed in the Layby Status box in the middle bottom of the main screen.

CREATING A LAYBY

1. Register the transaction items as normal so they appear in the transaction grid.
2. Press the "Layby" button. The Layby screen is displayed.
3. A new Layby No is displayed in the Layby No box on the top of the screen.
Once a new Layby No is used, in future it will be displayed on one of the Layby No Hotkeys and in the drop down list.
5. Press the OK button. The Member / Customer Selection screen is displayed.
6. Either Enter New Customer details
OR Type part or all of the customer surname in the 'Surname' box then click the 'Find' button to find matching entry(s)
OR Type part or all of the customer code in the 'Code' box then click the 'Find' button then scroll through and locate the existing entry(s)
7. Press 'Select' to select the customer (if it is a new customer it will automatically saved) .
8. A Layby Docket is printed to the Receipt Printer.
9. The program will now return to the main screen.

ADD NOTATION TO A CURRENT LAYBY

You can add any amount of notation to an active layby.

1. Select the Layby button and Hold down the button. The notation screen will appear.
2. Enter or add or text to the layby notation shown in the box.
3. When finished touch and hold (or click and hold the mouse) in the notation box. It will disappear.

VIEWING or FINALISING EXISTING LAYBY

1. Click on the 'LayBy' button OR select from the Drop Down list at the top (shows Laybys in Surname order).
2. Existing Layby's Nos and associated Customer Names are displayed in blue text on the Layby Hotkeys and in the drop down list (shows Laybys in Surname order).
3. Select the LayBy from the displayed LayBy Hotkeys or from the drop down list.
4. The items for this Layby are displayed in the transaction grid with the amount outstanding.
5. To Finalise the Layby enter the **outstanding amount in the 'Tendered' box and press the finalisation key.**

MAKING A PAYMENT ON A LAYBY

1. Click on the 'LayBy' button.
2. Existing Laybys and associated Customer Names are displayed in blue text on the Layby Hotkeys and in the drop down list.
3. Select the LayBy from the displayed LayBy Hotkeys or from the drop down list.
4. The items for this Layby are displayed in the transaction grid with the amount outstanding.
5. Enter the payment amount in the in the 'Tendered' box and press the finalisation key.

NOTE: If the amount tendered is equal to the outstanding (OWING) amount then the layby will be finalised.

DELIVERY

Typical steps for processing a Delivery Order

1. Register Items.
2. Select "Order/Table button" and Select "Delivery" as the order type.
3. Enter or Select the Delivery Name or Phone Number in the top box, or press the OK button to select a member directly from the member database.
4. Press OK. If the name / phone number already exists then the address is automatically recorded otherwise you have to enter the address in the members screen (then press Close).
5. When you are ready to deliver select "Delivery" button. It shows waiting / outstanding deliveries.
6. Select Driver Name, highlight the Delivery Items that the driver is taking. Press "Accept Items and Print Delivery Schedule"
7. System will print a delivery list for the driver.
8. When the driver returns press "Show Orders in Transit" and it displays the items.
9. Select the items that the particular driver delivered. and press "Mark Items As Delivered"
10. If you want to pay the driver then select the driver name and Date and press "Print Delivery Summary"

Shows the delivery screen and options.

Driver Name - Select the driver name for allocation to or reporting. This is filled in automatically if the driver has logged on as an operator.

Show Orders Waiting for Delivery - Displays all orders that have been processed as Delivery Orders but have not yet been allocated to a driver.

- To accept items for delivery, the driver clicks on each of the delivery items he wants to take on his next delivery run (or press "Select All")

- Press **Accept Items and Print Delivery Schedule** - To print a report showing all of the delivery details for the driver's delivery run. This also marks the orders as In-transit.

Show Orders In Transit - Displays all orders that have been accepted for delivery (by a driver) but have not yet been paid for (when the driver returns) .

Mark Items as Undelivered - In case and item was accepted by the driver, but unable to be delivered, you can mark the item and press this key. The item will then reappear in Show Orders Waiting for Delivery.

Print Delivery Summary - Prints a summary of all deliveries made on a selected date. It shows the Order nos and Amounts collected as well as the Delivery charge total. NOTE: For the delivery charge total to show you must create a stock item, and hot key, with the word 'Delivery' contained in it, and add it to each delivery order.

ORDERS / TABLES

The Order function allows you to assign a transaction to an Order (or a Table etc) or any entity where items will be tendered or supplied but totalled together and paid for later.

The current Order is displayed in the Order Status box in the middle bottom of the main screen.

NOTE: You can change the name of the "Order" button (on Misc panel) to something else if required. This would be useful if you are using the "Order" function as a "Table" allocation function which operates in an identical way to Orders as described below (i.e. you can assign a transaction to a Table ID, or an Order No ,say a phone order, which can be recorded, help and finalised at a later time).

ASSIGNING A TRANSACTION TO AN ORDER

1. Register the transaction items as normal so they appear in the transaction grid.
2. Press the "Orders" button.
3. The order selection screen is displayed.

If the Order is already active (i.e. it has items already assigned to it) it will be displayed as a caption in blue text on the Order Hotkeys or ,if you are Using Table Layout, the table layout screen will be displayed.

In this case just click the hotkey, or the table in the layout, and the item(s) will be added to the selected Order or Table . The system will then return to the main transaction screen.

If the Order is not active it can be selected by one of 3 methods.

If you are using Table Layout then just press on the grey (unused) table.

NOTE: Press the 'Keyboard' button to Hide or Display the On-Screen Keyboard.

1. Select it from one of the Order Hotkeys with black text.
2. Type the Order name or number via the onscreen keyboard. The closest match to the typed entry will automatically appear in the Order ID box.
3. Use the arrow key to drop down the Order ID box and Scroll and Select the name from the list.

Note: The Order caption can be a person's name, identifier number or simply a order number.

Once a new Order No is used, in future, it will be displayed on one of the Order No Hotkeys and in the drop down list.

EDITING, VIEWING OR ADDING TO AN ORDER

1. Press the 'Orders' button.
2. Select the Order from the displayed Order Hotkeys OR the yellow (active) table from the table layout screen
3. The accumulated transactions for this Order are displayed in the transaction grid
4. When the extra items have been added or edited press the "Save Order" button.

FINALISING AN ORDER

1. Press the 'Order' button.
2. Select the Order from the displayed Order Hotkeys OR the yellow (active) table from the table layout screen.
3. The accumulated transactions for this Order are displayed in the transaction grid
4. Finalise the transaction as normal.

DELETE AN ORDER

1. Press the 'Order' button.
2. Press the 'Delete' button.
3. Select the Order from the displayed Order Hotkeys OR the yellow (active) table from the table layout screen.
4. Press 'Yes' to delete the selected order.

MOVING or MERGING AN ORDER / TABLE

Used when a customer moves from one table to another.

1. Press the 'Move / Merge' button.
2. Enter the "From" Table name (the one that the customer is currently seated at).
3. Enter the "To" Table name (the one that the customer is moving to).
4. Press 'Move' to move the table. NOTE: If the "To" Table is currently being used then the option to "Merge" the tables is shown.

ACCOUNTS

The Account function allows you to assign a transaction to an Account or any entity where items will be tendered or supplied but paid for later.

The current Account is displayed in the Status box in the middle bottom of the main screen.

ASSIGNING A TRANSACTION TO AN ACCOUNT

1. Register the transaction items as normal so they appear in the transaction grid.
2. Press the "Accounts" button.
3. The Accounts selection screen is displayed.

If the Account is already active (i.e. it has items already assigned to it) it will be displayed as a caption in blue text on the Account Hotkeys.

In this case just click the hotkey and the item(s) will be added to the selected Account. The system will then return to the main transaction screen.

If the Account is not active it can be selected by one of 3 methods.

NOTE: Press the 'Keyboard' button to Hide or Display the On-Screen Keyboard.

1. Select it from one of the Account Hotkeys with black text.
2. Type the Account name or number via the onscreen keyboard. The closest match to the typed entry will automatically appear in the Account Name box.
3. Use the arrow key to drop down the Account Name box and Scroll and Select the name from the list.

Note: The Account caption can be a person's name, identifier number or simply an Account number.

Once a new Account is used, in future, it will be displayed on one of the Account Hotkeys and in the drop down list.

EDITING, VIEWING OR ADDING TO AN ACCOUNT

1. Press the 'Accounts' button.
2. Select the Account from the displayed Account Hotkeys.
3. The accumulated transactions, including Payments, for this Account are displayed in the transaction grid
4. When the extra items have been added or edited press the "Save Acct" button.

PRINTING A PERIODICAL ACCOUNT

You can print or view an account statement for any selected date period (be it weekly, monthly etc) and print the account items for presentation to your account customer.

1. Press the 'Account' button.
2. Press the 'Account Report' button.
3. Select the Account from the displayed Account Hotkeys.
3. Select the period for the account by selecting either or both the Start Date and End Date calendar selection boxes.
4. Select 'Paid and Unpaid Items' (all transactions), "Paid Items' (only paid for items) or 'Unpaid Items' (outstanding unpaid items).

NOTE: To print the account statement in standard A4 invoice format check the "Print A4 Invoice format" box. This box will be automatically checked if you have selected A4 Invoice in Setup|Receipt.

5. Press "View or Print".

MAKING A PAYMENT ON AN ACCOUNT

1. Press the 'Account' button.
2. Existing Accounts are displayed in blue text on the Account Hotkeys and in the drop down list.
3. Select the Account from the displayed Account Hotkeys or from the drop down list.
4. The items for this Account are displayed in the transaction grid with the amount outstanding.
5. Enter the payment amount paid in the in the 'Tendered' box and press the finalisation key

NOTE: If the amount tendered is equal to the outstanding (OWING) amount then the Account will be finalised.

FINALISING AN ACCOUNT

1. Press the 'Account' button.
2. If required, select the period for the account by dropping down the Start Date and End Date calendar selection boxes. (both must be selected)
3. Select the Account from the displayed Account Hotkeys.
4. The accumulated transactions for this Account are displayed in the transaction grid
5. Finalise the transaction as normal.

CONNECTION MANAGER

This allows you to connect NeoPOS to other stores or databases for reporting, stock maintenance or stock transfer.

To select the connection click on the connection you require from the connections displayed (it's color will change to red when selected)

To Add or Edit a connection

1. Click on "Connection Manager"
2. In **Store Name** enter a name for the store or connection (this can be anything that you like)
3. In **Connection** enter a the connection IP address, that is the external IP address Usually a static IP) at the store location. Note: This is set to 'localhost' for your local/current NeoPOS connection.
4. In **Port** enter the port number for the conenction (usually 5432)
5. In **Password** enter the password for the conenction (usually [P@ssw0rd](#))

To Delete a connection

1. Click on "Delete"
2. Click on the Connection you want to delete.
3. Press Yes to delete the selected connection or No to return to normal selection mode.

KEYBOARD OPERATION

The following keys are used to operate the main transaction screen of the software.

- A - Accounts
- B - Kitchen Orders
- C - Clear
- D - Tender
- E - Error
- F - Refund
- G - Log Off
- H - Hotkeys
- I - Import Export
- J - Dollar Discount
- K - Stock Receival
- L - Layby
- M - Members
- N - No Sale
- O - Orders
- P - Paid Out
- Q - Quantity
- R - Receipt
- S - Cash Out
- T - Time Clock
- U - Return
- V - Void
- W - Price Shift
- X - Extra Item
- Y - System Setup
- Z - Report
- = - Percent +
- - Percent -

NOTE: The software is compatible with all programmable keyboards. Refer to the documentation of the Keyboard to program the keyboard keys to your requirements.

TRANSACTIONS

1. Scan the item(s) OR Select from the HotKey screen (Press H) OR press the preprogrammed key on the programmable keyboard.
2. Enter the tendered amount via the numeric keys (the amount appears in the box on the screen) Note: Do not enter a decimal point, 2000 represents \$20.00)
3. Press one of the Finalisation Keys (the F Keys on the top of your keyboard) as follows:

The F12 - CASH key is fixed and cannot be changed.

The function of the other F Keys are setup by the user in Setup|Captions|Payment Type Captions (e.g. EFTPOS, CHEQUE, CREDIT etc)

Troubleshooting and Additional Information

DATE FORMAT IS NOT CORRECT (e.g. shows mm/dd/yyyy instead of dd/mm/yy)

Check the short date format in Control Panel|Regional Settings|Customise|Date|Short Date Format.

If it is dd/mm/yy then do the following (there is a known bug in windows that requires you to do this)

1. Select **any other** Language/Region and Click "Apply"
2. Select the **correct** Language/Region and Click "Apply"
3. Check that the Short Date Format is correct (dd/mm/yy). Change it to dd/mm/yy if necessary.
4. Click "OK".

ERROR MESSAGES

ERROR ACCESSING THE POSTGRESQL DATABASE - Refer to the Postgres Help.html file (in c:\Program Files\Neopos or on the Desktop).

OR

Step 1

When this is displayed press the OK button to display the PostgreSQL settings screen.

Provider - **NOT USED (any value)**

Database Name - Should show **NeoPOS**

User Name - Should show **postgres**

Password - Should show either **password** (installed before April 2010) or **P@ssw0rd** (it is a **zero** not an **O**)

Connection/Data Source - either **localhost** OR the **IP address** of the server / master terminal machine (e.g. 192.168.0.2) See following:

IMPORTANT NOTE: Check the properties of the NeoPOS Icon on the desktop (right-click Properties). In the Target box you will see .../NeoPOS.exe.

If there is an entry "IP10.0.0.1" after the NeoPOS.exe then this IP address will OVERRIDE the one in the PostgreSQL settings screen.

In this case either delete the whole "IP10.1.1.1" from the target box OR change the IP address so that it is correct.

If this is a terminal connected to a server

1. Go to the server (the machine where the master database is stored)
2. Select Start Menu | Run, Type **cmd** in the box and press OK.
3. In the black (DOS) screen type **ipconfig** then enter.
4. Take note of the entry This is the value that should be put in the Connection/Data Source box (on the terminal) as described above.

Port - **5432** (this is the default value although it can be changed in the PGAdmin program)

Try changing the password to either of the 2 alternatives, Save then try to restart NeoPOS.

Step 2

Try accessing the database using the PGAdmin program.

Go to: Start Menu | Programs/All Programs | PostgreSQL 8.3 | pgAdmin III

In the left Hand Panel you should see:

Postgres Database Server 8.3 or 9,2 (where you only have 1 terminal OR the terminal is the master)

AND/OR the **IP address** of the server / master terminal machine (e.g. Server 192.168.0.2:5432)

In either case try double-clicking on the entry to open the database (if it prompts for a password enter one of the alternatives shown above)

If the message "**Server Doesn't Listen**" then either the password, port, IP address or other setting is incorrect OR the postgres database is corrupt.

You can access and change the various settings for the server by right clicking on the Server Name (in the left hand panel) and selecting properties. You can then try the various combinations of password, port, IP etc

If you are able to access the database then a list will appear under the Server Name - showing Databases, Tablespace, Group Rules, Login Roles. This indicates that the connection is working. Take note of the password, IP address (or localhost), port etc from the properties of the connection then go to Step 1 and enter the values for these settings in the PostgreSQL settings screen.

If the message "**Server Doesn't Listen**" continues to appear, then proceed to step 3.

Step 3

Reinstall the PostgreSQL Database- Refer to PostgreSQL Help.html file

SETTING UP POLE DISPLAY

1. Set Pole display to one of the following emulation modes: Epson, Noritake or Aedex (ADM). This is often done using switches (refer to the Pole Display manual). In any case you must determine which emulation mode the pole display is configured to. If it is not one of the 3 supported types then contact NeoPOS and we may be able include the emulation mode in the software.
2. Connect power to the pole display and check for indication that it is powered up.
3. Connect the Pole Display to a spare RS232 Serial COM port on you PC.
4. In System Settings|Accessories|Pole Display select the correct COM (RS232 Serial) port.
5. In System Settings|Accessories|Pole Display select the correct emulation mode. This should correspond to the selected emulation mode set in Step 1.
6. Exit then restart the NeoPOS program.
7. Still in trouble? Repeat the above from Step 1. Try the different emulation modes and different com ports especially if you are unsure of the com port no.

MOVING NeoPOS TO ANOTHER PC

1. Install the NeoPOS Setup.exe on the NEW PC.
2. On the existing installation use System Settings|Backup to create a copy of your original data to your networked hard disk or removable media.
3. Open the new NeoPOS application, use the System Settings|Restore and import the data that was saved in step 2.
4. You will need to enter all of the settings from the old Systems Setting section to the Systems Settings on the new NeoPOS.
5. You will need to send the Serial Number to NeoPOS to obtain a new Registration Key.

TESTING SERIAL OUTPUT FROM SCALE

Download the Dataview from the Downloads link at www.neopos.com.au
This allows you to see the data coming out of the indicator.

The output of the scale indicator must be set to continuous.

1. Set the program to Parity=None, Data Bits=8, Stop Bits=One
2. Select the Com port you have the scale indicator connected to.
3. Check the "Show Non-Printable Characters"
4. Click "Connect port".

If you don't see anything in the output box at all then:

1. You are not connected to the correct serial port OR
2. The cable is not wired correctly OR
3. The Scale Indicator is not sending anything out (transmitting). It must be set to continuous or streaming output.

If you see characters appearing but they are rubbish (i.e. You cannot see the weight in the strings) then:

1. Click "Disconnect Port". Click "Clear Screen"
2. Click on each of the Baud rates (in turn) and click "Connect Port"
3. Alternatively try combinations of Baud Rate, Data Bits, Stop Bits and Parity until you can see the weight in the string.

Once you can see the correct weight somewhere in the string then:

1. Click on "Save to File", save the file and email the file it to us OR just highlight, copy and email us part of the data from the box.
2. Record the selected Com Port and Baud Rate.
3. Open the weighing application, got to settings, put in the recorded Com Port and Baud Rate (and of course Scale Make and Model), close then restart the application and test if it works.

DOWNLOADING and REGISTERING NeoPOS

1. Go to www.neopos.com.au
2. Download and install the demonstration version.
3. If you have purchased the software send the Serial Number (displayed at program startup) to

sales@neopos.com.au.

4. We will email you back with your Registration Key.
5. Enter the Registration key in the Registration box and you will have your fully registered version of NeoPOS

TO RECOVER ARCHIVED INFORMATION

1. Download "[Latest Version of BEC's DBAccess Database Utility](#)" and then run the program DBAccess.
2. Click "File|Open" and navigate to the NeoPOS Installation directory (usually in c:\Program Files\bec\NeoPOS)
3. Find, select and open "TransactionLog.dbf".
4. Select Utilities|Merge Databases.
5. Navigate to and select the archive file that you want to recover (TransactionLog_archive?????.dbf).
This will add the records from the archive file back into you main TransactionLog.dbf transaction file.

TO UNINSTALL AND REINSTALL NEOPOS

1. If possible, do a backup from within the NeoPOS program using Setup|General|Backup and select a known location on your hard disk.
2. Copy the existing NeoPOS directory (usually c:\Program File\BEC Systems\NeoPOS or c:\Program Files\NeoPOS) to another location on your hard disk.
3. Go to Start Menu|Control Panel|Add Remove Programs and remove NeoPOS..
4. Go to Control Panel|Add Remove Programs and remove any NeoPOS programs (NeoPOS, Bowerbird etc) that you have previously installed.
5. In Control Panel|Add Remove Programs, select PostgreSQL and Click "Remove". Close Control Panel.
6. From Start menu select Run and type in "Regedit" then press OK.
7. Move to the top of the Left Panel and highlight "My Computer"
8. Go to Edit|Find and type in "NeoPOS", uncheck "Values" and "Data" Check box, Check the "Keys" box and Click "Find Next"
9. When it finds NeoPOS (folder) in the Left Pane Right-Click on it and Delete it.
10. Close the Regedit program.
11. Run the NeoPOS Setup.exe.
12. Run NeoPOS. This will reconstruct new, empty database tables.
13. The Help file instructs you on how to recover the old backup data into the new version.

TO RECOVER DEFAULT OPERATOR STATUS

1. From Start menu select Run and type in "Regedit" then press OK.
2. Move to the top of the Left Panel and highlight "My Computer"
3. Go to Edit|Find and type in "CompulsoryOperator" and Click "Find Next"
4. When it finds this in the Right Pane Right-Click on it and Delete it.
5. Close the Regedit program and restart Neopos. It should now start with the DEFAULT operator (all options enabled).

TO RECOVER CSV DATA INTO SQL DATABASE

This procedure requires BEC's DBAccess program.
Download "[Latest Version of BEC's DBAccess Database Utility](#)".

1. Run the DBAccess Program.
2. Go to "SQL Profiles"
Select or Enter the following in the boxes:
Provider PGNP.1
Database Name NeoPOS
User Name postgres
Password password
Connection/Data localhost
Port 5432
3. Press one the Keys on the Left Hand Side. Press 'Save Profile"
4. Go to 'SQL Utilities' and select 'Retrieve from CSV file' and select one of the .CSV files that you have saved or we have sent you.
5. Press OK.
6. Repeat Steps 4 & 5 for each of the CSV files you want to retrieve,
7. You should be able to see your Data by selecting File|Open SQL Database and selecting a table.
8. Close DBAccess and restart NeoPOS and you could see your recovered data.

REPAIRING CORRUPT SQL TABLES

1. Start the PGadimn Program. (Programs Menu|PostgreSQL 8.3|PGAdmin III)
2. Select PostgreSQL Database Server 8.3 (Double Click)
3. Find/ Expand Databases and select the relevant database (e.g. NeoPOS)

4. Expand NeoPOS\Schemas\public\Tables.
5. Select the relevant table you are having problems with (e.g. TransactionLog)
6. Right-Click on the Table and select Maintenance.
7. Select 'VACUUM' and 'FULL' under Vacuum options.
8. Click 'OK' then click 'Done';
9. Close the PGAdminIII program.

SETTING UP SQLACCESS FOR SQL TABLES

This procedure requires BEC's SQLAccess program.

Download "[Latest Version of BEC's SQLAccess Database Utility](#)".

1. Open SQLAccess.
2. Select "SQL Profiles". Click on one of the buttons on the Left Hand Side.
3. Select / Enter the following in the boxes.
 Provider: PGNP.1
 Database Name: NeoPOS
 User Name: postgres
 Password: P@ssw0rd (or password for older versions)
 Connection/Data Source: localhost
 Port: 5432
4. Enter a name (your choice) for the Database you are connecting to, then press 'Save Profile' button.

You can now access any of the Database Tables.

1. Select File>Select SQL Database then select NeoPOS.
2. Select the table with File|Open SQL Table and select from the list.

Navigate using the Up/Down/Left/Right Arrows, Pg Up, Pg Down, Home and End keys.
 Ctrl-Page Down takes you to the bottom of the table (to view the latest/newest entries)
 Also look at other options under the File and Option menus.

SETTING UP REMOTE ACCESS

If you still have problems, to ensure we can assist you in an efficient and timely manner you can enable us to remotely connect.

TeamViewer

1. Go to <http://www.teamviewer.com> , Click on 'Start Full Version' button
2. When 'TeamViewerQS.exe' file save appears select "Run" or when the file has finished downloading, double-click it and select 'Run'.
3. If "Open File - Security Warning" dialog appears click "Run".
4. When "Teamviewer 6 Setup" windows appears Click Run then Next. Click on "I accept the Terms of the Licence Agreement" box then Click "Next"
5. When the program start select the "Remote Control" tab at the top.
6. **Leave this window open** and send the "Your ID" and "Password" that appear to sales@neopos.com.au.

Windows Remote Assistance

1. Go to Start Menu|Settings|Control Panel|System|Remote.
2. Click 'Allow Remote Assistance invitations to be sent from this computer' box. Click OK then close Control Panel.
3. Go to Start Menu|Help and Support Center. Under 'Ask for Assistance' click [Invite a friend to connect to your computer with Remote Assistance](#) .
4. Click [Invite someone to help you](#) , Click [Save invitation as a file \(Advanced\)](#) . (at bottom of screen).
5. Type your name in the 'Enter Your Name' box. Click Continue.
6. Enter a password in both boxes. Click 'Save Invitation', select a location to save the file and press Save.
7. Open you email client, send an email to sales@neopos.com.au , attach the file that you just saved and put the password in the text of the email.
8. We will respond and attempt to log in to your PC when we get the email.

LogMeIn

1. Go to <http://www.logmein.com> , Click 'Get Started' . Under **Personal Remote Access** select 'LogMeIn Free - Free Trial'
2. Enter your email and a password etc. (record this for later) then click 'Create Account'.
3. Select 'Add Computer' on Right Hand Side then click on 'Download Now' when the next screen appears. Allow the File to download.
4. When download has finished start the installation file 'LogMeIn.msi' (wherever it was downloaded to) or open it.
5. Follow the prompts to install the LogMeIn software. Enter and record the 'Computer Access Code'.

6. Email sales@neopos.com.au with the email address, password and Computer Access Code that you entered above.

JoinMe

1. Go to <http://www.joinme.com> , Click on "Share" (orange arrow)
2. Download and Run the program.
3. When the "JoinMe" toolbar appears at the top of your browser email the number that appears in the box to sales@neopos.com.au
4. Wait for us to connect or contact you and enable "Allow Remote Sharing" when it appears.

Alternatively you can setup either Windows Remote Desktop or PCAnywhere or VNC.

This is a technical procedure, if you are an inexperienced user we suggest that you get an experienced user or your IT specialist to set this up for you.

These require 2 steps:

1. Port forwarding your ADSL Router/Modem for the required service to the client PC (Windows Remote Desktop or PCAnywhere or VNC) See. <http://portforward.com/>
2. Installing or Enabling Windows Remote Desktop or PCAnywhere or VNC on the client PC.