

Introduction



UniversalPOS

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Installation Guide & Technical Specifications



Recommended Hardware and Peripherals

This list is a guideline of hardware requirements only. We recommend you exceed these guidelines wherever possible. Computer hardware is very affordable today and purchasing quality hardware now can make you happier in the future.

Recommended Hardware and Software

- Microsoft Windows Server 2012 R2, Windows Server 2016, Windows 7 SP1, Windows 10 or Windows 11. All latest service packs, updates and hot fixes must be applied.
- TCP/IP network connectivity
- 4 Gig of Ram Memory or Greater
- 500 Gig Solid State Hard Drives on the Server, 100 Gigs on the Workstations
- Video supporting 32 Bit Color (minimum resolution of 1024x768)
- Gigabyte Network Adapter
- 450 Watt UPS (Uninterruptible Power Supply)
- Intel Dual Core I5 CPU on the Server, I3 CPU on Workstations
- Touch Screen Monitor
- Mouse

Peripherals

Receipt and 'Prep' Printers

You can use any brand of receipt printers. The POS supports Serial, Parallel, USB and Network (TCP/IP) printers. You can choose a Thermal or a Dot Matrix Printer. If you want a cash drawer connected to your computer, the printer should also have a Cash Drawer Port.

Cash Drawers

Cash drawers that connect through your receipt printer are preferred, but USB cash drawers are also supported.

Barcode Scanners

You can use any barcode scanner you want provided it uses a keyboard/wedge or USB Connection. Support is also offered for various Serial Scanners.

Portable Data Collectors

Weight Scales

The POS supports CAS, Kilotech and Datalogic Interface Scale.

Customer Pole Displays

The POS supports serial pole displays with an emulation of Epson or DSP800.

LCD Monitor Customer Display

Any LCD monitor can be used as a rear customer display.

Barcode Printers

The POS supports Eltron/Zebra and Cognitive Advantage printers.

Visit our web site at ***www.UniversalPointOfSale.com*** → ***Click POS News*** → ***Certified Devices*** to see a list of currently certified devices.

Windows 7, 8, 10 and 11

Installation & Configuration Tips

There are a few tips when installing the software on a Microsoft Windows 7 or greater.

- In the Windows Control Panel, turn Off User Access Control.
- In the Windows Control Panel, click System & Security → System → Advanced System Settings → Advanced Tab → Performance Settings → Adjust For Best Performance → Apply → OK.
- *Never* install the the POS server by left clicking the SystemSetup.exe icon. Instead, *Right Click* on SystemSetup.exe and *Left Click* on *Run As Administrator*.
- *Never* install the POS client by left clicking the StationSetup.exe icon. Instead, *Right Click* on StationSetup.exe and *Left Click* on *Run As Administrator*.
- If you are installing on more than one terminal, make sure sharing and security on the POSEGE root folder includes the user group *Everyone* with full read/write access.
- Always install a PDF reader on all computer terminals.

Getting Up and Running (Single Station)

Step 1 (Hardware Installation)

- ✓ Verify that all your hardware meets our minimum specifications.
- ✓ Install all computer hardware following the manufactures guidelines. This computer should be connected to a Battery Backup Uninterruptible Power Supply (UPS).

Step 2 (Windows Configuration)

- ✓ From Display Properties in the Windows Control Panel, set the screen resolution on each computer to 1024x768 High Color.
- ✓ Make the Full Computer Name for the main server computer **POSSERVER**.
- ✓ Name all other computers appropriately. For example, OFFICE, BAR, STOCKROOM, STATION2.
- ✓ Disable User Access Control in Windows on all computers.
- ✓ In the Windows Control Panel, adjust for Best Performance.

Step 3 (Installation)

- ✓ Download the latest POS installation from www.UniversalPointOfSale.com to the desktop of POSSERVER.
- ✓ Once downloaded, right click and left click *Run as Administrator*.
- ✓ When the installation is completed, restart the computer.

Step 4 (Setting Up Your System)

(Refer to the online documentation for details on each topic)

- 1) Double click the POS icon on your desktop
- 2) Once the system is loaded, click the screen and enter the default employee code (100) and click the Check Mark button
- 3) Click Managers Tasks and then POS Setup
- 4) Create Job Positions
- 5) Create Employees and assign them a Job Position
- 6) Create Suppliers
- 7) Create Sales Departments
- 8) Create Product Types and link them to your Sales Departments
- 9) Create Products and link them to your Suppliers and Product Types
- 10) Create Payment Methods

Getting Up and Running (Multiple Stations)

Step 1 (Hardware Installation)

- ✓ Verify that all your hardware meets our recommended specifications.
- ✓ Install all computers and hardware following the manufactures guidelines. Each computer should be connected to a Battery Backup Uninterruptible Power Supply (UPS).

Step 2 (Windows Configuration)

- ✓ From Display Properties in the Windows Control Panel, set the screen resolution on each computer to 1024x768 High Color.
- ✓ Make the Full Computer Name for the main server computer **POSSERVER**.
- ✓ Name all other computers appropriately. For example, OFFICE, BAR, STOCKROOM, STATION2.
- ✓ Create a folder **C:\POSEDGE** on **POSSERVER**.
- ✓ Share this folder giving it Full Read and Write Access for Everyone.
- ✓ Disable User Access Control in Windows on all computers.
- ✓ In the Windows Control Panel, adjust for Best Performance.

Step 3 (Server Installation)

- ✓ Download the latest POS installation from www.UniversalPointOfSale.com to the desktop of POSSERVER.
- ✓ Once downloaded, right click and left click *Run as Administrator*.
Note: It is important that you change Destination Folder during the installation from C:\POSEDGE to \\POSSERVER\POSEDGE
- ✓ When the installation is completed, restart the computer.

Note: The point of sale requires all Windows users to have Full Read/Write Access to the POSEDGE folder on the server as well as the C:\POSLOCAL folder on each client computer.

Step 4 (Client Installation)

- ✓ On all other computers that will access the point of sale or back office, click *Start* → *Run* and type **\\POSSERVER\POSEDGE\STATIONINSTALL**
- ✓ Right click on **STATIONSETUP.EXE** and left click Run as Administrator, click OK and follow the on-screen directions accepting the installation defaults.
- ✓ Create Shortcuts on your desktop for any applications you wish to run.

Step 5 (Setting Up Your System)

(Refer to the online documentation for details on each topic)

- 1) Double click the point of sale icon on your desktop
- 2) Once the system is loaded, click the screen and enter the default employee code (100) and click the Check Mark button
- 3) Click Managers Tasks and then POS Setup
- 4) Create Job Positions
- 5) Create Employees and assign them a Job Position
- 6) Create Suppliers
- 7) Create Sales Departments
- 8) Create Product Types and link them to your Sales Departments.
- 9) Create Products and link them to your Suppliers and Product Types
- 10) Create Payment Methods

Upgrading the POS

Step 1 (Server Upgrade)

- ✓ Close All POS Applications on All Stations. This includes the POS, Back Office, Reports, System Manager, Pay at the Table, Sales Exporter and On Line Order.
- ✓ Backup you existing POS root folder (eg c:\posedge) to another folder.
- ✓ Download the latest POS installation from www.UniversalPointOfSale.com to the desktop of POSSERVER.
- ✓ Once downloaded, right click and left click *Run as Administrator*.
- ✓ Read and Accept the License Agreement and Click Next.
- ✓ Uncheck all shortcut options and Click Next.
- ✓ Install the software update directly over the original installation. For example, if the original incitation is in c:\posedge\, then install the update to c:\posedge\.
- ✓ Once the installation is completed, the system may prompt for a database upgrade if one is required. If prompted for an upgrade, click Yes.
- ✓ When the upgrade is completed, your server upgrade is finished.

Step 2 (Client Upgrade)

- ✓ On all other computers that will access the point of sale or back office, click *Start* → *Run* and type `\\POSSERVER\POSEDGE\STATIONINSTALL`
- ✓ Right click on **STATIONSETUP.EXE** and left click Run as Administrator, click *OK* and follow the on-screen directions accepting the installation defaults.

Installing LCD Monitor for Customer Display

Each point of sale station can support a second monitor that can be used as a customer display.

- 1) Turn off and unplug all computer equipment.
- 2) Have a qualified technician install a dual port video card or USB to Video on the computer.
- 3) Connect your touch screen and customer display monitor.
- 4) Start your computer and Windows.
- 5) Under display properties, configure Windows so that your touch screen is your primary display (Screen 1) and the customer display monitor is your secondary display (Screen 2) and active. Also, make sure the screen positioning under display properties visually shows screen 1 is the left screen and Screen 2 is the right screen.
- 6) Set the screen size on the secondary display to 1024x768.
- 7) Check *Extend Your Windows Desktop* onto the 2nd display monitor.
- 8) In POS Setup, under Station Setup→ Devices, select 2nd Monitor Display.
- 9) Shut down Windows and restart the computer.

The customer display monitor is preconfigured in its layout.



Customer Display Image Advertising

The customer display can display random images for advertising purposes. Images are proportionately reduced down to fit in the image area. Images are never enlarged so it is a best practice to make the images larger than needed. The actual size of the image area can be determined by right clicking on the image area. The scrolling message will display the exact image area size. Right click on the image again to display your scrolling message.

To add images to your display,

1. Add the images files to the \posedge\data\advertise folder.
2. Run the application *LoadScreenSaverImages.exe* from the \posedge\data\advertise folder. This will populate the customerdisplayads.ini file.

or

edit the file \posedge\data\advertise\customerdisplayads.ini using notepad or any text editor. This file contains one line for each image to display using the following format

FILENAME,#

where FILENAME is the filename of the image and # is the number of seconds the image remains on the display.

Customer Display Scrolling Message

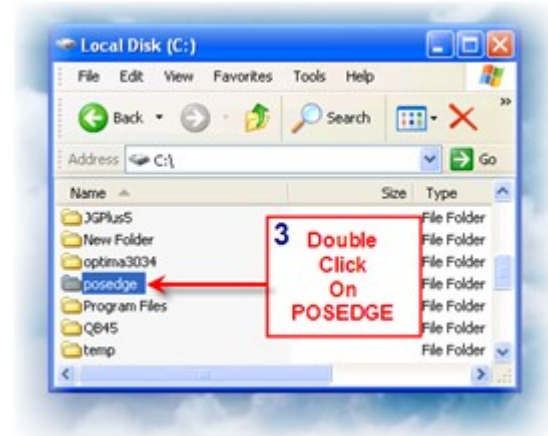
The customer screen can display a single line scrolling message for advertising.

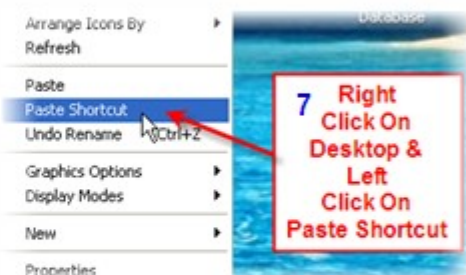
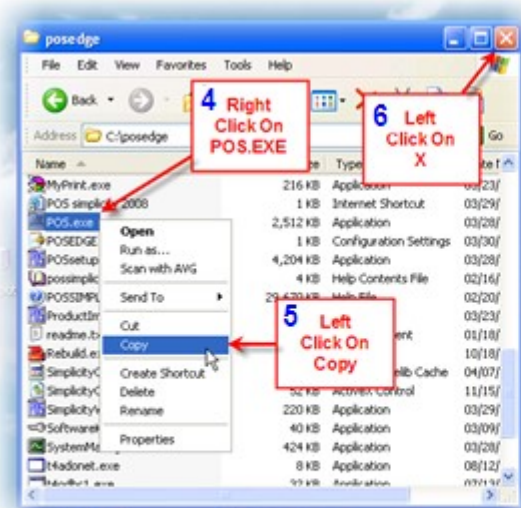
To add a scrolling message to your display, edit the file \posedge\data\advertise\customerdisplayscroll.ini using notepad or any text editor and enter the message information using the following format.

S,M,F,C where

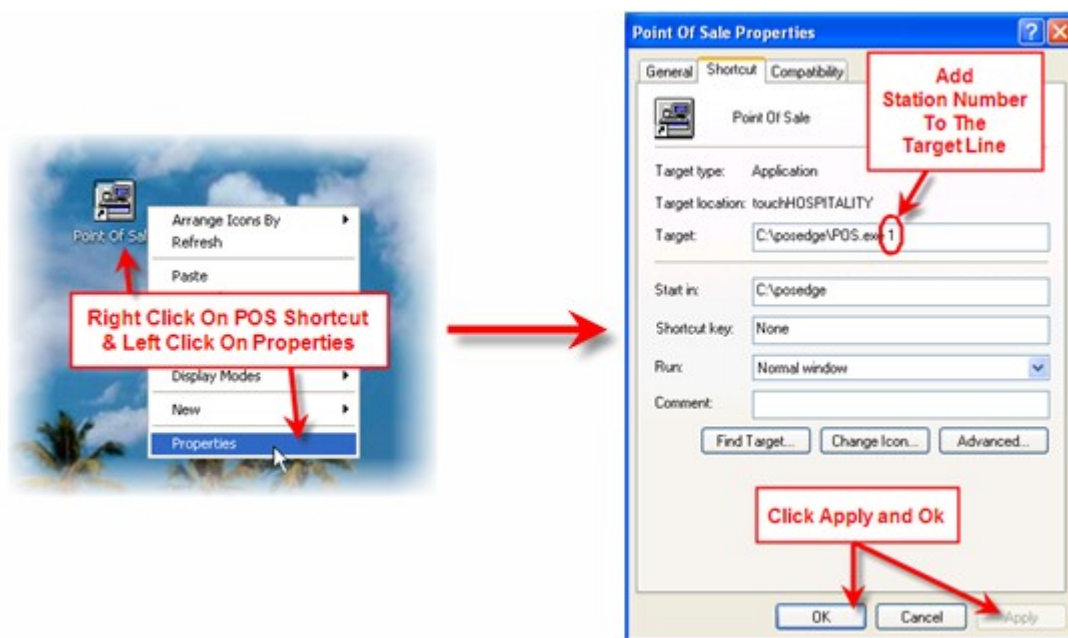
S	=	the scrolling delay speed of the message
M	=	the number of pixels to scroll after each delay
F	=	the size of the font
C	=	the message to display

Creating a Point of Sale Shortcut on Desktop





Specifying a Station Number



Database Tables

The Point of Sale uses a file structure called Codebase 6.5. This ODBC compliant database can be accessed directly from Microsoft Access or Excel or Similar products. The following is a list of all the system tables.

User Files

• ADJREASONS	Stock Adjustment Reasons
• CATEGORY	Menu Page Buttons
• CHECKFILE	Positive Check Files
• CITY	City Names
• CONTACTS	Customer and Supplier Contacts Table
• CONTUSER1	User Fields for Contacts
• CONTUSER2	User Fields for Contacts
• COUNTDWN	Current Countdowns
• COUNTS	Current Counts
• CPOS	Menu Page Button Screen Positions
• CUSTOMER	Customer Information
• CUSTTYPE	Customer Types
• CUSTUSER1	User Fields for Customers
• CUSTUSER2	User Fields for Customers
• DRIVGUID	Drivers and Guides for Deliveries and Sales Trackers
• DUTIES	Employee Duties Descriptor File
• EMPDEPT	Employee Departments
• EMPLOYEE	Employee Information
• EMPTYPE	Employee Types
• IDHDR	ID Prompt Headers
• IDDTL	ID Prompt Details
• IGROUP	Image Group Files
• IPOS	Item Button Screen Position
• JOBS	Job Positions
• LABELS	Product Label Designs
• MATRIX	Matrix Files
• MEALPLANS	Meal Plan Information
• MODIFIER	Product Modifiers
• NEGCHECKFILES	Negative Check Files
• POREASON	Paid In/Out Reasons
• PRICESCH	Price Schedules
• PRICETBL	Price Tables
• PRINTDEF	Printer Control Definitions
• PRINTERS	System Printers
• PRODTYPE	Product Types

• PRODUCTS	Product Information
• PSLEVELS	Price Levels
• QUANTITY	Current Quantity On Hand Levels
• RECIPEHDR	Recipe Header Information
• RECIPEDTL	Recipe Detail Information
• REFUND	Refund / Void Reasons
• REVENUECENTER	Revenue Center Information
• RGROUP	Product Report Groups
• SALEDEPT	Product Sales Departments
• SALEREP	Sales Representative File
• SALETYPE	Sales Type Information
• SCREEN	POS Screen Names
• SECTION	Floor Plan Section Names
• SECURITY	Security Levels
• SHIPTO	Customer Ship To Information
• SSETUP	System Setup Information
• SSETUP1	System Setup Information
• STATION	Station Setup Information
• STORE	Store Information
• SUPERBTN	Super Button Setup Information
• SUPPLIER	Supplier Information
• SUPPUSER1	User Fields for Suppliers
• SUPPUSER2	User Fields for Suppliers
• TABLES	Floor Plan Table Information
• TARE	Scale Tare Information
• TAXES	System Taxes
• TOUROPER	Tour Operators
• WAREHOUSE	Warehouse Information
• WEATHER	Weather Conditions
• WINECLUB	Wine Club Information

Sales and Transaction Files

• ADMISSIONS	Details for the Admission Tracker
• ARJOURNAL	Customer Accounts Transactions
• CCARD	Credit and Debit Card Sale Details
• CURDAY	Daily Sales Totals
• DUTIESLOG	Log of Completed Duties
• FLOAT	Float Entry Details
• FUTURE	Details for Future Transactions
• GDETAILS	Gift Certificate and Meal Plan Detail Information

• GIFTCERT	Gift Certificate and Meal Plan Header Information
• LIQCTRL	Sales Details for Liquor Control Tracking
• MAIL	Staff Mail Files
• PCOUNTS	Counts Transaction Details
• PT	Frequent Buyer Details
• RESHDR	Reservation Header File
• RESDTL	Reservation Detail File
• SALESHDR	Sales Header File
• SALESDDL	Sales Detail File
• SALESPAY	Sales Payments File
• SALESRFD	Sales Refund File
• SALESMGR	Sales Stock File
• STHIST	Sales Tracker Details
• STRACKER	Sales Tracker Header
• STOCKHDR	Purchase Order Header
• STOCKDDL	Purchase Order Details
• TIMECARD	Employee Time & Attendance File
• WCH	Wine Club Header File
• WCD	Wine Club Detail File
•	

System Files

• CONS	Prep Printer Consolidation
• CONTROL	POS Station Operations
• COUNTERS	Next Record Numbers
• INVOICEHDR#	Temp System File
• INVOICDDL#	Temp System File
• INVOICEPAY#	Temp System File
• LANG	Language File
• PHYSICAL	Temp System File for Physical Inventory Process
• REPORTS	System Report Controller
• SCRIPTS	System Scripts File
• SHELFEXPT	Temp System File
• TAGEXPT	Temp System File
• TBLLOCKS	System Table Lock Control
• TODAY	Current Business Date
• VERSION	Current Database Version

ODBC Configuration

Open Database Connectivity (ODBC) is a widely accepted method of sharing data between applications. Using the ODBC driver included with the POS, you can access our database using any ODBC compliant application such as Crystal Reports or Microsoft Access.

The ODBC driver is automatically installed during our server and station installs.

To manually install the ODBC Settings, add the following to the Windows Registry.

THESE SETTINGS SHOULD ONLY BE PERFORMED BY A QUALIFIED TECHNICIAN.

```
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Collating Sequence" "Machine"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Description" "CodeBaseODBCStand"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "DBQ" "c:\temp"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Driver" "$SYSDIR\CB65ODBC.DLL"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Expose RecNo" "Yes"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Locking Attempts" "-1"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Transactions" "Disabled"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "Trim Blanks" "Yes"
WriteRegStr HKLM "Software\odbc\odbc.ini\postemp" "MaxColSupport" "368"
WriteRegStr HKLM "Software\odbc\odbc.ini\ODBC Data Sources" "postemp" "CodeBaseODBCStand"
```

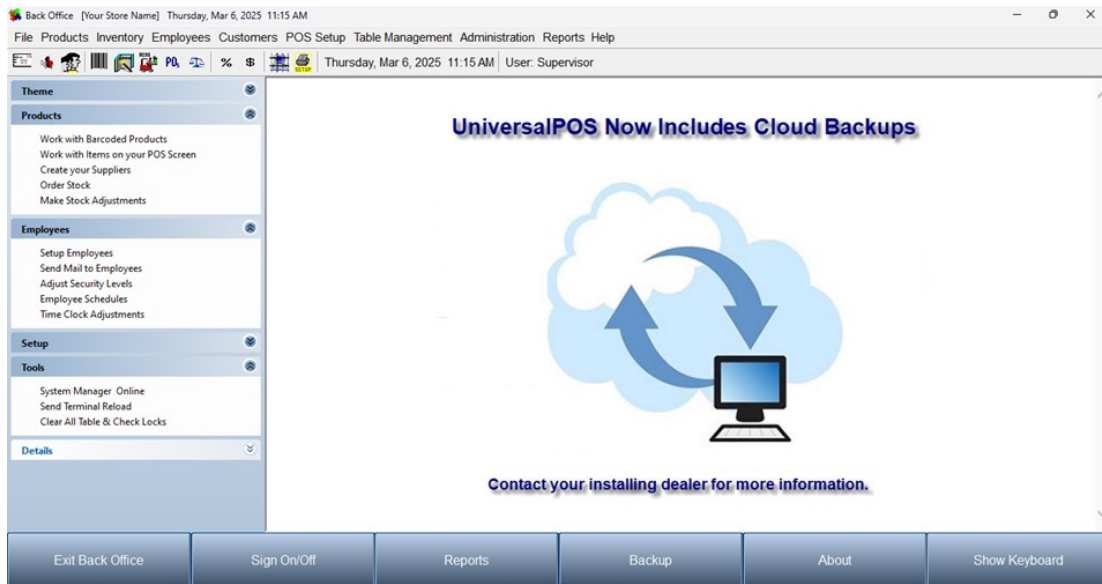
postemp *is the name you want to use for your data source.*
c:\temp *is the location of the data*

Setup Guide



Back Office Concepts

The Back Office is where all programming of your point of sale system takes place. Setting up your products, employees, security, customer, all takes place in POS Setup.

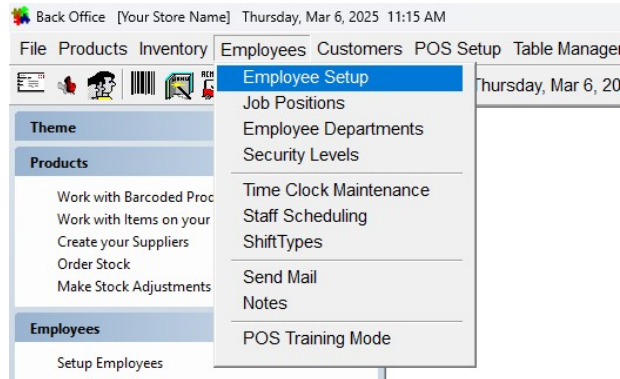


The Back Office can be accessed three different ways.

- Directly from Windows by clicking **Start → Programs → POS → Back Office Setup**
- From the point of sale by clicking **Manager Tasks → Back Office**
- Create a shortcut on your desktop to **\\POSSERVER\POSEDGE\BACKOFFICE.EXE**

To use the Back Office, you will need to *Sign On* to the system by clicking the **Sign On/Off Button** at the bottom of the POS Setup screen and entering your employee code. The default code after installation is 100.

Access the various functions by clicking the appropriate heading on the menu bar and selecting the function you want to access. For example, to access Employee Setup, click **Employees → Employee Setup**

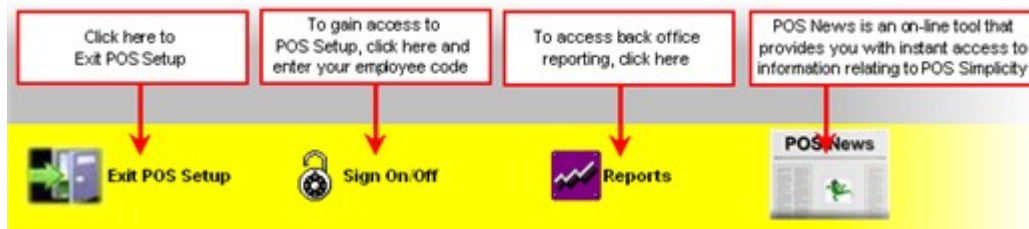


Changes made to the system in the Back Office may not be visible immediately in the point of sale. The point of sale stores virtually all information in its memory. Changes made in POS Setup must be reloaded into memory at the point of sale. This can be achieved by restarting the point of sale on each computer or by returning each computer to the main Login Screen. The Login Screen is always looking for any changes made in the Back Office. If any are found, the point of sale automatically reloads the information.

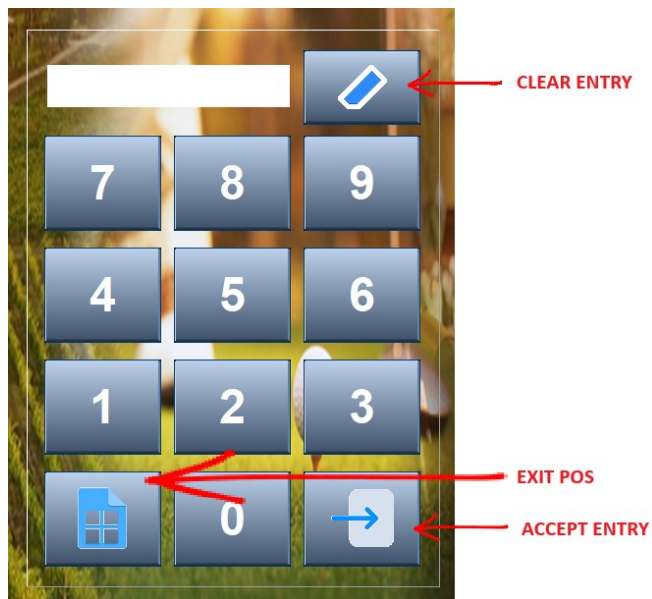
Because the system is a multi-user system, you only have to make changes in the Back Office on one computer and all computers will see the change.

Sign On/Off

Click the *Sign On/Off Button* on the POS Setup toolbar to bring up the Login Screen. This will sign off the current user and allow you to sign on.



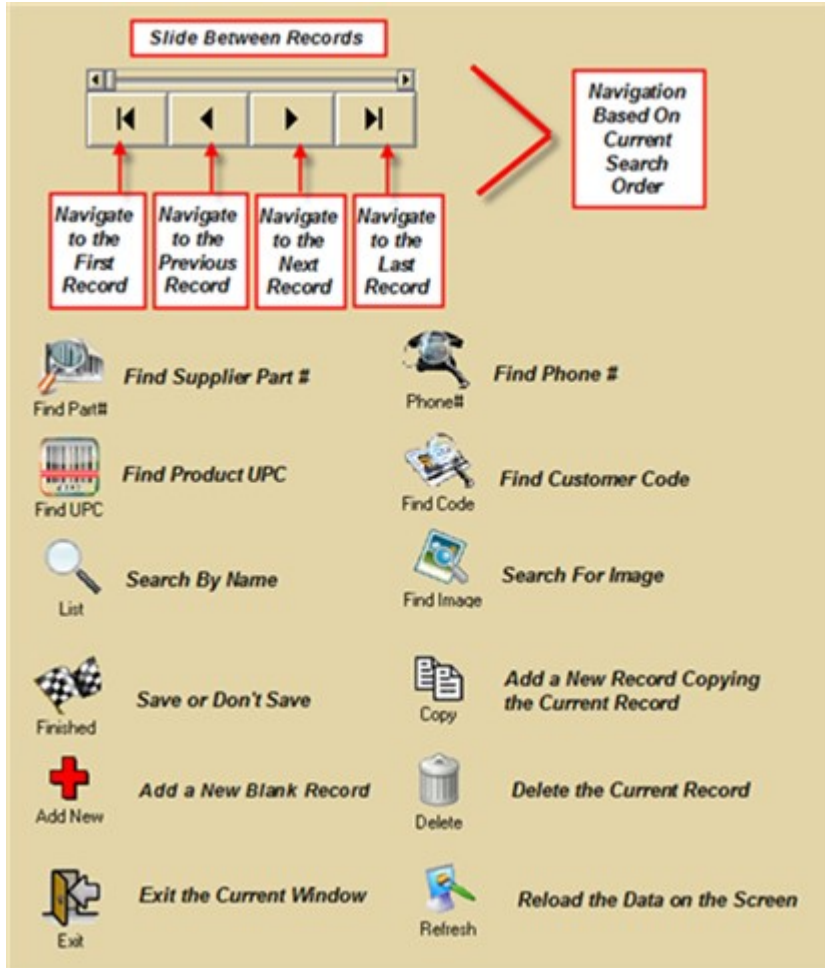
Enter your employee code, (default code is 100), and click the *Accept Button* to sign yourself on to the system.



For Additional Information see Employee Setup & Job Positions

Navigating and Editing Records

A *Navigational and Editing Toolbar* sits at the bottom of all data entry windows. Whether you are entering product, suppliers, customers or employees, the functionality of the toolbar remains basically the same.



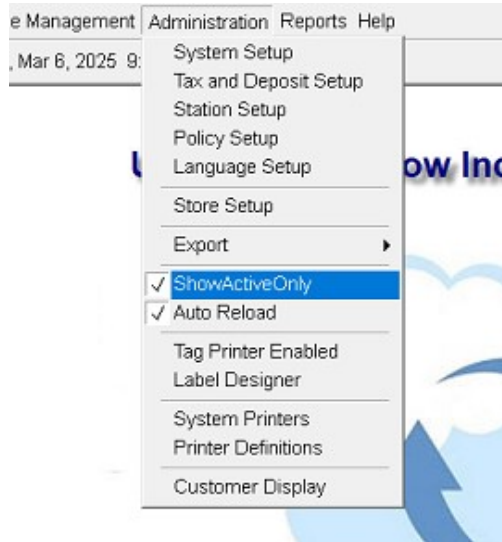
The **Copy Current Record** is useful to add many new records where most of the information you are adding is the same as the previous record.

Deleting Records



Use the *Delete Icon* on the *Navigational Toolbar* to delete records from the system. We call it deleting records, but in reality, no records are actually ever deleted. They are simply hidden from view.

Under Administration in *System Setup*, there is a feature called *Show Active Only*. When this feature is disabled, all deleted or hidden record can be viewed and you can actually undelete records if you wish.



To undelete a record

- 1) Go to POSsetup
- 2) Click Administration → Remove the check mark from *Show Active Only*
- 3) Go to the module where you want to undelete the record
For example, to undelete an employee, go to employee setup
- 4) Locate the record you want to undelete
- 5) Remove the check mark beside the Deleted field
- 6) Save the record
- 7) Place the check mark back in *Show Active Only*

Setting Up Your Employees and Security

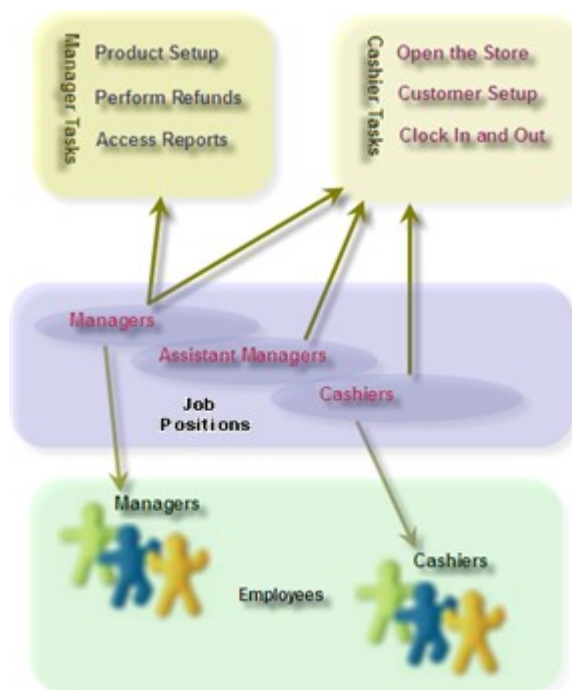
Security is a very important issue in any computer system. Over time, your POS system accumulates a lot of valuable information. Making sure only authorized individuals view this information is a simple process.

There are three main components when setting up the security system.

- 1) Job Position Setup
- 2) Security Level Setup
- 3) Employee Setup

Job Positions are a means of grouping Employees into various groups, such as Administrators, Managers and Cashiers. Each Job Position is assigned a numerical Security Level from 0 to 99 where 0 would be the lowest level and 99 would be the highest level.

Each Employee in your establishment must be assigned to at least one Job Position. Each function within the system is also assigned to a Job Position. This relationship determines what functions employees have access to.



Employees can only access functions that have a *Job Position Security Level* equal to or less than theirs. For example, if you create an employee and assign them a Job Position of Cashier and then specify that Voids require a Job Position of Managers, then that employee could not perform voids.

The basic steps to setting up your security system are,

- 1) Create the Job Positions or use the system defaults
- 2) Assign the appropriate Job Positions to the various system functions under Security Levels or use the system defaults
- 3) Create your Employees and assign the Job Positions to each employee

Security Basics

- ✓ Make sure employees Log Out when they leave the system unattended or when they are finished using the system.
- ✓ Make sure employees change their Employee Access Code often. In a touch screen environment, it is difficult to keep codes secret so changing codes often is a good security practice.
- ✓ Never tell anyone your Employee Access Code.
- ✓ When possible, use the keyboard to enter your Employee Access Code or use Employee Access Cards and a magnetic card reader.

Job Position Setup

Job Positions group employees together for security and reporting purposes. Groups such as Supervisors, Managers, Cashiers and Clock In/Out Only provide the means in which we determine who can or cannot access the various functions the system offers. Job Positions are assigned to each system function and each employee.

The screenshot shows a software window titled "Job Position Setup". On the left is a list box containing "Cashier", "Manager", and "Owner/Administrator", with "Cashier" selected. The main area is the "General" tab, which contains the following fields: "Job Position" (text box with "Cashier"), "Security Level" (text box with "25" and a note "0 for lowest to 99 for highest"), "Department" (dropdown menu), "Tip Pooling % Division" (text box with "0"), and "Schedule Back Color" (a red button labeled "Sample Text"). Below these is a "General Duties" label and a large empty text area. At the bottom are navigation buttons (back, forward, etc.) and action buttons "Delete", "Add New", and "Exit".

For example,
The system function Void has been assigned the Job Position of Manager (Security Level 75). You as an employee have been assigned the Job Position Cashier (Security Level 25). You will not be able to use the Void Function because your security level of 25 is less than the required security level of 75.

By default, the system has three Job Positions

- Cashiers (Security Level 25)
- Managers (Security Level 75)
- Owners/Administrators (Security Level 99)

Job Position Fields

Job Position Name

Enter the job position name for this employee type. Example, Manager, Cashier

Security Level

Enter the security level this Job Position carries. Security levels are from 0 to 99 where 99 is the highest level.

Department

Select from the dropdown list, the appropriate department for the Job Position. This is strictly used as a reporting tool to group job positions.

For Additional Information see Employee Setup & Employee Department Setup

Employee Setup

Use Employee Setup to maintain records for all employees who work at your establishment. The employee module determines who can access the system and is utilized by the time and attendance features. (* Indicates required field)

The screenshot shows the 'Employee Maintenance' window with the 'General' tab selected. On the left is a list of employees: Brown Jack, Camden Lisa, Henry Susan, Smith Ken, and Supervisor. The main area contains the following fields and controls:

- Last Name:** Brown
- First Name:** Jack
- POS Name:** Jack
- POS Access Number:** 4521
- Alternate POS Access Number:** 4522
- Pinpad Access Number:** 123
- Job Position:** A table with two columns: 'Job Position' and 'Pay Rate'. It contains one row with 'Manager' and '20.00'. To the right of the table are '+' and '-' buttons.
- Employee Reference Number:** (Empty field)
- Pager Number Required:** ☐ (Empty field)
- Is Delivery Driver:** ☐
- Cash Out Required:** ☒

At the bottom, there is a 'Modify Current Record' button and a 'Finished' button.

Employee Fields

* Last Name and First Name

Enter the employee's name.

* POS Name

Enter the name to appear on reports and on the customer's receipt.

*** Card Number**

Enter the employee's access card number. This is the number the employee enters to gain access to the system. This code must be unique for each employee.

*** Job Position and Pay Rate**

Add the job position for the employee. The job position gives the employee their security level and their pay rate. Employees can have multiple job positions. For example, a person maybe a bartender one day, and a floor manager the next day. Their security level and pay rate would fluctuate between shifts. Enter the hourly rate this employee receives. If the employee is on salary, calculate an hourly rate. This information is used to calculate labor costs in reporting and for payroll.

Is Floor Manager

Is Floor Manager allows an employee to act on behalf of another employee. For example, in a restaurant, a Floor Manager would be allowed to access all other employee's checks, modify or close those checks and all changes would appear as if they were performed by the owner of the check. This functionality allows the floor manager the ability to assist servers in their duties.

Address, City, Phone Numbers

Enter the employee's address and telephone numbers.

Email Address

Enter the employee's email address.

Social Insurance Number

Enter the SIN or Social Security Number for the employee.

Pager Number Required

Pagers are utilized in a hospitality environment to notify servers when their food is ready for pickup. If checked, the employee will be prompted for their pager number when they clock in at the start of their shift. Staff can change their current pager number during their shift in the point of sale under Staff Tasks. The pager number will appear on the kitchen and bar chits.

Accessible Functions

This list shows all the functions the employee can access based upon their Job Position. This is displayed for informational purposes only and can only be modified by changing the employee's Job Position or by modifying Security Levels.

Birthday

Enter the employee's birthday.

Employee Since

This is the date the employee's record was created.

Notes

Enter any information you wish here.

Password Expires

Check this to force the employee to change their card number every 5 days. This forces a higher level of security because passwords don't become common knowledge throughout your company. This is primarily useful for companies where passwords are manually entered through the touch screen or the computer keyboard. Companies that utilize Employee Access Cards don't require this feature because in this instance, passwords are never manually entered and therefore cannot ever be overseen by any employee.

Photo

Employees Picture.

Gender

Select male or female for the employee. This is used to display specific gender icons within the system and also when providing gender in questions such as his or her and he or she.

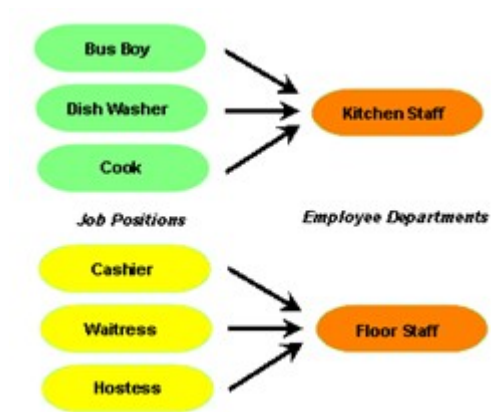
Hide In POS

This will prevent the employee from showing up on schedules and various other systems. This would be useful if the employee were a computer technician and didn't actually work in the establishment.

For Additional Information see Job Position Setup

Employee Department Setup

Employee Departments are a method of grouping Job Positions for reporting purposes.



Employee Department Fields

Department Name

Enter the name for the department.

For Additional Information see Job Position Setup

Security Level Setup

The point of sale accumulates a lot of valuable information. It is important to set up the security system so it cannot be accessed or modified by just anyone. The Security Levels section is one area in which you can determine who has access to some functionality the system offers.

By default, the installer assigns

- Cashiers to very basic tasks.
- Managers to most tasks but limited reporting and setup specifics.
- Owner/Administrators to all tasks.

Security Level Setup

Access Back Office

Access Invoicing
Access Point Of Sale
Apps - Cuboh Setup
Apps - On Line Order Setup
Apps - Optimum Controls Setup
Apps - Poll Setup
Apps - Shopify Setup
Apps - Woo Commerce Setup
Backup Data
Berg - Access Bar Orders
Berg - Void After Dispensing
Cash Declaration
Cash Drawer - Assignment
Cash Drawer - Change Assignment
Cash Drawer - Manual Open
Cash Drawer - Open With Zero Dollar Sale
Change Current Cashier
Change Employee Code
Change Sales Type in Point Of Sale
Clock In
Clock Out
Close Credit Card Batch
Close Current Shift
Close Store
Count Down Maintenance
Count Setup
Currency Override Rates
Customer - Add Credit On Account
Customer - Lock Override
Customer - Payment On Account
Customer Setup
Customer Type Setup
Customers - View Last 5 Purchases

General

Description 142
Access Back Office

Minimum Job Position Required
Owner/Administrator

Staff with an Job Position in the highlighted section can access
Access Back Office

Current Job Positions	Security Level
Cashier	25
Manager	75
Owner/Administrator	99

Click the following for more Security Settings

Payment Methods
Discounts
Refunds/Void Reasons

Exit

Note Security Levels can also be assigned under Discount Setup, Payment Method Setup, Refund Reason Setup and Product Setup.

Initially, it is recommended to use the system with the default security settings. Make adjustments as they become necessary. If you determine that staff are accessing functions they should not or are unable to access functions they require, then make the adjustment.

You cannot add or delete records from the Security Levels module. You can only modify the information.

The screenshot shows the 'Security Level Setup' window with the 'General' tab selected. The 'Description' field is set to 'Open Store'. The 'Minimum Job Position Required' dropdown is set to 'Manager', indicated by a red arrow. A text box states: 'Staff with an Job Position in the highlighted section can access Open Store'. Below this is a table of 'Current Job Positions' and their 'Security Level'.

Current Job Positions	Security Level
Cashier	25
Manager	75
Owner/Administrator	99

Annotations on the screenshot:

- A red arrow points to the 'Manager' dropdown.
- A red text box on the right says: 'By adjusting the minimum job position, you can control who can access this function'.
- A red text box at the bottom left says: 'In this example, cashiers cannot open the store'.

At the bottom, there are buttons for 'Payment Methods', 'Discounts', and 'Refunds/Void Reasons', and a 'Finished' button.

Security Level Fields

Description

The description indicates what feature you are assigning a security level to. Although you can modify this description, do not change the meaning of the description to something else.

Job Position Required

Select from the dropdown list the minimum Job Position required to access the feature.

Note: The Current Job Positions list shows the jobs positions that your system uses and the security level assigned to that job position.

Security Levels can also be assigned under Product Setup, Discount Setup, Payment Method Setup and Refund Reason Setup.

Current Back Office functions that can have a security level

Customer Setup	Employee Setup
Supplier Setup	Customer Type Setup
Job Position Setup	System Setup
Station Setup	Security Level Setup
POS Screen Design Setup	Menu Names Setup
Product Setup	Sales Department Setup
Product Type Setup	Modifier Setup
Menu Page Setup	Menu Design Setup
Payment Method Setup	Discount Setup
Refund Setup	Price Tables
Sales Types	Tour Operator Setup
Sales Tracker Setup	Define Printers
System Printer Setup	Driver Setup
Receive Stock	Image Group Setup
Inventory Adjustments	Label Design
Prompts Setup	Product Group Setup
Currency Override Rate	Currency Setup
Manually Adjust Statistics	Return Processing
Floor Plan Designer	Table Setup
Sections Setup	POS News
Staff Scheduling	View/Change Passwords
Booking Setup	Paid Out Reason Setup
Backup Data	Marketing

Current Point of Sale functions that can have a security level

Exit POS to Windows	All Transaction Viewer
Your Transaction Viewer	Flag Transaction Voided
Reopen A Transaction	POS Reports
Time Clock	Time Clock Adjustments
Printer Manager	Float In
Float Out	Cash Declaration
Paid Out	Open the Store
Close the Store	Reprint A Receipt
Start New Shift	Send POS Mail
Exceed Delivery Maximum	Print Employee Cash Out Summary
Change Employee Code	Close Current Shift
Override Credit Limit	Access Smart Scan System
Access Point Of Sale System	Transfer All Checks
My POS Reports	Access All Tables
Edit Payments At POS	Move/Change Table #
Direct Voids	Open Cash Drawer
Close Credit Card Batch	POS Stock Adjustments
Edit Daily Notes	Assign To Cash Drawer
Access Any Table	Change Tender Method
Frequent Buyer Adjustments	Open Cash Drawer With No Sale
Access Invoicing	

Current Report functions that can have a security level

Access Report Viewer	Employee Reports
A/P Reports	Customer Reports
A/R Reports	Enterprise Reports
Multi Store Reports	Schedule Reporting
Misc. Reports	Listings
Product Reports	Winery Reports
Load Reports Function	Prompt Reports

For Additional Information see Job Position Setup & Employee Setup

Training Mode

The point of sale has a full training mode. Under training mode, you can open and close the store, and make sales and voids, without affecting sales.

Under training mode

- Prices of products sold will always be random
- The cash drawer will never open
- Kitchen and Bar chits will not print
- You cannot access POSsetup in training mode
- Sales receipts will print with a training mode message, which can be set up under System Setup → Receipt Messages

All POS functions can be used under training mode, including

- Sales
- Table Management
- Voids and Refunds
- Clocking In and Out

Training mode will not start if the point of sale is currently running on the station.

To access training mode,

1. Exit the Point Of Sale on the terminal back to Windows.
2. Enter POSsetup and click Employees → Training Mode.
3. Click the *Check Mark* to begin training mode.
4. Select the station number to use for the training mode. This should be the terminal number of the station you are using.

Be patient. Before training mode begins, the system creates a copy of your database in its current state. Once created, the point of sale will open and you are in training mode. You will be reminded you are in training mode when each employee clocks in and on the completion of each sales transaction. Virtually all functions can be used in training mode.

5. To exit training mode, Log In and click Manager → Exit POS

Time Clock Maintenance

Time clock maintenance provides a convenient method to make adjustments to the punch clock.

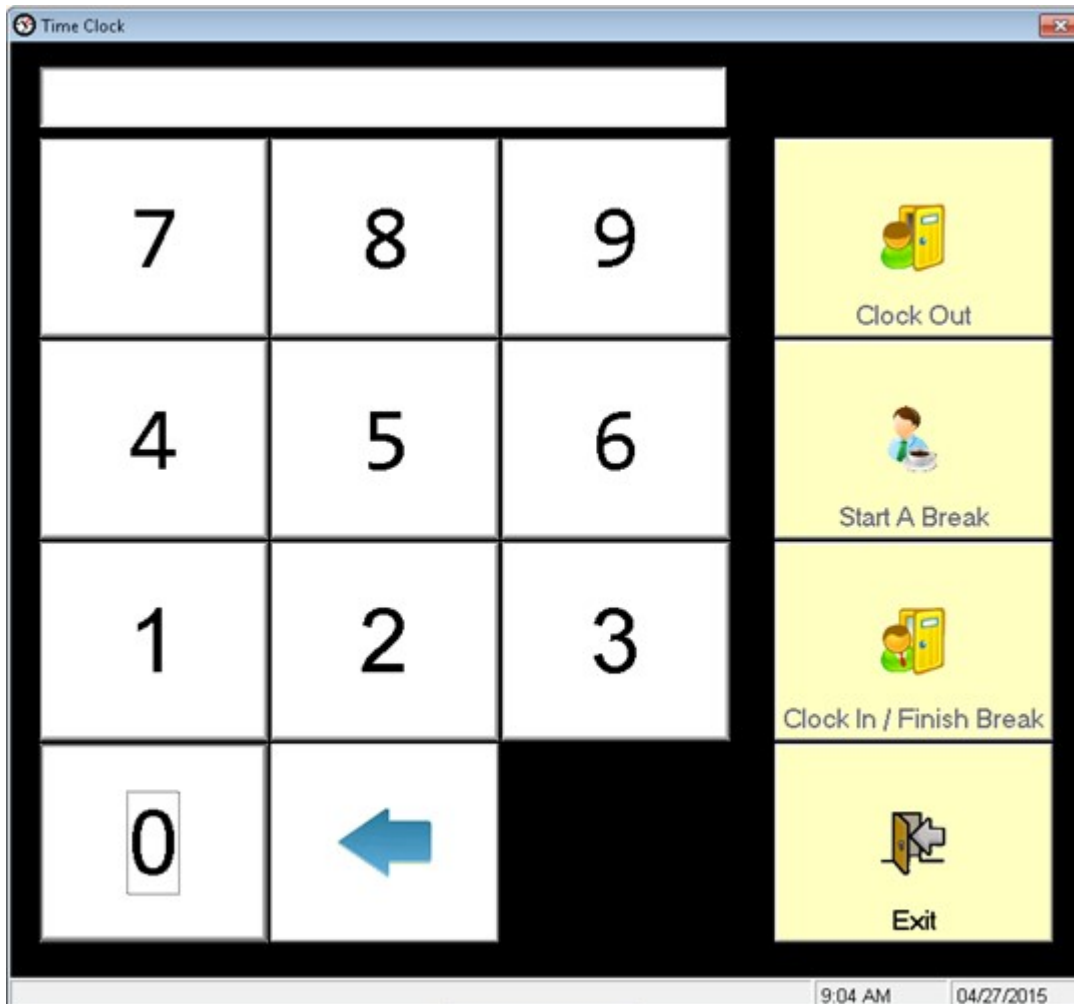
Employee	Shift Type	Date Start	Date End	Shift #	Business Date	Wage	Job Position	
Carl	Shift	12/06/2024 07:15:00 PM	12:00:00 AM	10	Oct 06, 2022	0.00	Owner/Administrator	12/06
Donald	Shift	03/06/2025 01:00:00 PM	03/06/2025 06:00:00 PM	11	Oct 06, 2022	20.00	Manager	03/06
Joe	Shift	03/06/2025 10:00:00 AM	03/06/2025 03:00:00 PM	13	Oct 06, 2022	20.00	Server	03/06
Lisa	Shift	03/06/2025 01:00:00 PM	03/06/2025 05:00:00 PM	12	Oct 06, 2022	17.00	Server	03/06

The following adjustments can be made through time clock maintenance.

- The business date the shift is assigned to
- The shifts start date and time
- The shifts end date and time
- The pay rate for the shift
- The job position assigned to the shift
- New shifts and breaks can be created
- Existing shifts can be deleted

Stand-alone Time Clock

The stand-alone time clock allows you to have a terminal that does not require a POS license to operate. You can have the time clock running on a back-office computer allowing staff to clock in and out without needing to use a POS terminal. TimeClock.exe is located in the root POS folder on the server. Place a shortcut to the application on any desktop to have a time clock on that computer.



Staff Scheduling

Under Construction.

Setting Up Your Products

Before you start creating the products you sell, there are several steps that should be completed first. The following is a general guideline on how you should set up the system.

- 1) Find as much paperwork as you can that contains supplier information, product descriptions, costs etc.
- 2) Create the Suppliers you purchase your products from. Enter all relevant information such as phone numbers and credit limits.
- 3) Determine on paper the breakdown of your Sales Departments and Product Types. See example below. Each Product you sell will increment a Product Type category. Each Product Type category will increment a Sales Department. The main reason for this breakdown is to group your products for reporting purposes, so a little extra thought and effort at this early stage in the setup process can reward you with valuable reporting statistics in the long run.
- 4) Create the Sales Departments you determined in step 3.
- 5) Create the Product Types you determined in step 3.
- 6) Create the Products your establishment will sell.

For Additional Information see

Modifier Setup

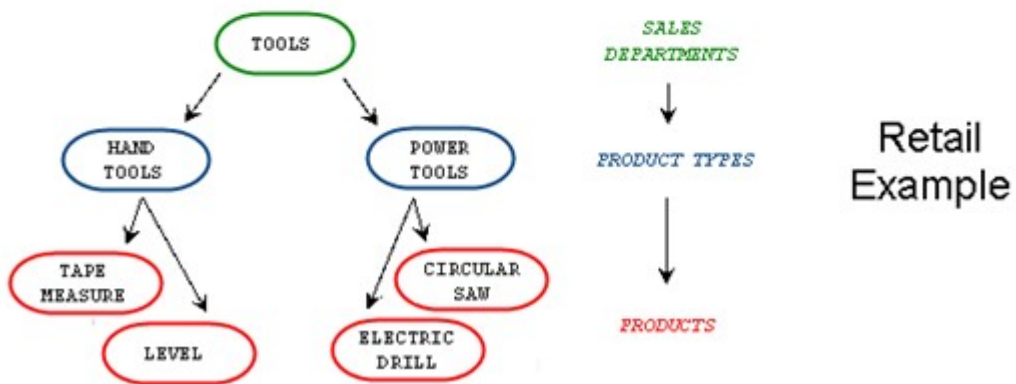
Report Group Setup

Price Table Setup

Prompt Setup



The relationship between Products, Product Types and Sales Departments



Supplier Setup

Enter your supplier information here. This information will be used when ordering products. Supplier Setup can be found under the Inventory Menu in POS setup.

Supplier Setup is also tightly integrated with Product Setup and Purchase Orders.

- Create and modify purchase orders
- Delete and Undelete products associated with the supplier
- Modify the cost and retail price of products associated with the supplier

Supplier Setup

General | Purchase Order | Products

ABC Company
My Software Company
POSSimplicity Corporation
Universal POS

Name POSSimplicity Corporation 3

Address 1 600 Ontario Street

Address 2 PO Box 28065

City St. Catharines **Province** Ontario

Postal Code L2N7P8 **Country** Canada

Phone (905) 329-9283 () -

Fax () -

User Field 1 **User Field 2**

Email info@possimplicity.com

Web Address www.possimplicity.com

Our Customer Code

Contact Craig

Terms Net 30 Days **Discount Rate** 0.0

Credit Limit \$1000.00 **Account Balance** \$0.00

Approx. Order Interval In Weeks 4

Notes Buy POSSimplicity Today!

List **Delete** **Add New** **Exit**

Supplier Fields

Company Name

Enter the name of the supplier.

Address, City....Country

Enter the mailing information for the supplier.

Phone and Fax Numbers

Enter the supplier's telephone numbers.

Email Address

Enter the email address for the supplier.

Web Address

Enter the address to the supplier's web site

Our Customer Code

Enter the code the supplier has assigned to your company.

Contact

Enter the name of the person whom you normally talk to at the company.

Terms

Enter the payment terms the supplier has assigned to your company. For example, Net 30 Days.

Credit Limit

Enter the credit limit you have with the supplier.

Account Balance

This is the amount of money you currently owe the supplier. You cannot enter anything in this field. It is calculated by the system.

Notes

Enter any additional information regarding the supplier here.

Purchase Orders Tab

Create, View and Edit Open & Closed Purchase orders for the supplier.
See Purchase Orders for additional information.

Products Tab

View and edit products that are ordered from the selected supplier.
Click the Product Tab→Load Products to list the products purchased from the supplier.
See Product Setup for additional information.

Sales Department Setup

Sales Departments are used to group your sales into categories for reporting purposes. Sales Departments are your top level of reporting. Each Sales Department is incremented by a Product Type. Product Types are in turn incremented by Products. The Sales Department Setup can be found under the Products Menu in POS Setup.

Sales Department Setup

General

2

Department Name: Food

Hash Department: ☐

Accounting Code Sales:

Accounting Code COGS:

Tip Pool % Rate: 15

Accounting Code Inventory:

Group:

- ☒ Other
- ☐ Merchandise
- ☐ Food
- ☐ Beverages
- ☐ Liquor

Navigation: [Previous] [Next] [Delete] [Add New] [Exit]

Sales Department Fields

Department Name

Enter the name of the sales department. For example, Food, Modifiers, Merchandise

Accounting Code

Enter the GL Account Number that this sales department applies to in an optional accounting package. *See Accounting Integration for additional information.*

Hash Department

A hash department is a department that should be excluded from your sales. For example, you sell raffle tickets for a charity; you are taking the money in but giving it away; it is not your sale. Check this if this department is a hash department.

Tip Pooling % Rate

Enter the % rate to hold back from this department for gratuity distribution to other job positions.

For Additional Information see Product Type Setup & Setting Up Your Products

Product Type Setup

Product Types are used to group your sales into categories for reporting purposes. Product Types are your second level of reporting. Each product you create must be assigned to a Product Type. The Product Type provides the product with its tax status, and also links the product to any remote printers that should be printed to when the product is sold. Product Type Setup can be found under the Products Menu in POS setup.

The screenshot shows the 'Product Type Setup' window with the 'General' tab selected. The left sidebar lists various product categories, with 'Entrees' highlighted. The main area contains the following fields and options:

- Name:** Entrees
- Sales Department:** Food
- Loyalty Applies:** ☐
- Is Drink:** ☐
- Use Age Verification 1:** ☐
- Use Age Verification 2:** ☐
- Food Stamps Allowed:** ☐
- Comission Rate:** 0.
- Link To:** (empty field)
- 3rd Party Loyalty ID:** (empty field)
- Deposit:** 0.00
- Other Fee 1:** 0.00
- Other Fee 2:** 0.00
- Combo Tag:** (empty dropdown)
- Prep Printers:**
 - ☐ Local Receipt
 - ☒ Kitchen
 - ☐ Bar
 - ☐ Ticket Printer
- Taxes:**
 - ☒ H.S.T.
 - ☐
 - ☐
 - ☐
 - ☐

At the bottom of the window, there are navigation buttons: 'Delete', 'Add New', and 'Exit'.

For Additional Information see Sales Departments & Products

Product Type General Tab

Product Type Name

Enter the name for the product type. For example, Appetizers, Entrees, Merchandise, Hats

Sales Department

Select from the dropdown list the sales department that this product type will increment when sales are made.

Rate

The rate field has various uses depending on how your system has been configured in system setup.

- Under normal circumstances, this field would be the commission rate a sales rep. would receive if a product were sold under this category. *See Sales Representative for additional information.*
- If the *Use Frequent Buyer Program* has been enabled, this field contains the number of units that a customer must purchase to be entitled to a free one.
- If the *Use Sales Tracker* feature has been enabled, this field contains the commission rate to be paid to Drivers and Tour Operators when products are purchased under this category.

Link to UPC

The UPC code specified under Link to UPC will be sold automatically whenever this product type is used. You can also set the Link to UPC at the product level under Product Setup.

Use Age Verification 1 & 2

The age verification feature allows an onscreen prompt to cashiers and servers when selling products to customers that must meet a minimum age requirement. This prompt will let the cashier know what the birth date should be for a customer purchasing the product. Enable this feature if this product type relates to any products that require age verification. *The Age Verification feature is configured under System Setup.*

Food Stamps

Check this box if items associated with this product type are food stamp allowed.

3rd Party Loyalty ID

Enter the 3rd Party Common field for online ordering.

Taxes

Select the taxes that products in this product type category should charge.

Deposits

Enter the value of any deposit to collect, such as a bottle deposit that should be applied to items that use this product type.

Other Fees

Enter any other fees that should be applied when a product is sold that is associated with this product type.

Printers

Select any remote printers that products in this product type category should print to when sold. Generally, this feature is used by restaurants to send *how to make* information to the kitchen and bar printers. You do not have to select any printers for normal receipt printing. Receipt printing is automatic and has nothing to do with printer selection here.

Note: If you do not use optional printers, you can hide it under System Setup, Show Optional Printers

Price Schedule

Price Schedules allow product pricing to fluctuate automatically. For example, you could have special pricing on draft beer every Friday between 5 pm and 8 pm. You can create a price schedule for an entire product type or for individual products. If the Price Schedule button is flashing, then a price table is in effect on the selected product type. *See Price Schedule for additional information.*

Invoice Module Gets Taxes from Wine Pricer

This line will only appear if your POS system is configured as an Ontario Winery. See Wineries for additional information.

Product Type Advanced Tab

Receipt Text

Enter any special text that you want to appear on the sales receipt when a product associated with this product type is sold. *See Format Receipt Text for additional information.*

Spec. Sheet

The Spec. Sheet is used in conjunction with our Auto Sale Email feature. Select the document (normally a PDF document) which markets this product type. *See Marketing Tools for additional information.*

POS Button Appearance

The POS Button is what appears on the screen for the cashier or server. If you want to change the buttons text, click on the button and use the backspace keys to remove text and then type the new text.

- Change the color of the buttons text and background.
- The button can contain text, a graphic image or both.

Product Type Auto Coupon Tab

Auto Coupons allow the system to print coupons on the local receipt printer if a product is sold that is assigned to the associated product type. The coupon issued will be uniquely numbered and will be tracked. This will force that each coupon issued can only be redeemed once. The coupon redemption can be any discount you create.

Note: The discount must have Check File Enabled on the Advanced Tab in Discount Setup.

The screenshot shows the 'Product Type Setup' window with the 'Auto Coupon' tab selected. On the left, a list of product types is shown, with 'Pizza' highlighted. The main area contains an 'Auto Coupon' dropdown menu showing 'Auto Coupon'. Below it is a 'Coupon Text' text area containing the following text:

```
Coupon Issued /DATESTAMP/  
Issued On transaction # /TRANSNO/  
*****  
^Enter Your Text Here  
^CFor Example  
^CGet 10% Off  
^CYour Next Purchase  
^CCoupon Expires Dec 31, 2021  
^CCoupon Code /AUTOCOUPON/  
^C^A/AUTOCOUPON/^  
*****
```

At the bottom right of the text area are two buttons: 'Load Default' and 'SHOW CODES'. At the bottom of the window are navigation buttons: 'Delete', 'Add New', and 'Exit'.

Auto Coupon

Select from the dropdown, the discount associated with this auto coupon.

Coupon Text

Design the coupon that will print. The following format codes can be used.

- /AUTOCOUPON/ will display the unique coupon code as text.
- ^A/AUTOCOUPON/^ will display the unique coupon code as a barcode.
- /DATESTAMP/ will display the date and time the coupon was issued.
- /TRANSNO/ will display the transaction number.
- ^C will center the text on the line.
- ^B will bold the text on the line.
- ^D will double size the text on the line.
- ^R will print the text red on the line.

Product Setup

Product setup is where you create the various items and products that you sell in your business. If you want the items to appear on your point of sale screen, then the items should be created using the POS Menu Designer. The Menu Designer will create the product and then allow you to place it directly on your point of sale screen.

Product Setup can be accessed from many different places.

- From POS Setup, click Products → Product Setup
- From Suppliers Setup on the Products Tab
- From Menu Design by clicking Product Setup
- From Stock Adjustment Utilities by clicking Product Setup
- From the point of sale, click Manager Tasks → Products → Product Setup

Products can include

- The items you sell; Hammers, Post Cards, New York Steak Dinner
- Modifiers for restaurants such as Rare, Medium and Well for a steak which direct kitchen staff on how to prepare the Steak Dinner

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions | Sync Names Now

Description:

Product Type:

Classification:

Report Group:

User Field:

UPC Code:

Alternate UPC 1: 1

Alternate UPC 2: 1

Price Table:

Sync Prices

Cost/Qty	\$10.00	1
Retail 1	\$14.00	40.0%
Retail 2	\$0.00	
Retail 3	\$0.00	
Retail 4	\$0.00	
Retail 5	\$0.00	
Retail 6	\$0.00	
Modifier Price	\$0.00	

POS Button

 Text Color New Capture

Jack Color Delete

Top Line Text

Text Middle

User Field 1

User Field 2

Supplier Part Number

Sample Supplier

Quantity On Hand ☒ Track Stock

Minimum Stock Levels

Re-Order Quantity

Label Type

Package Size

Print Shelf Tag Print Product Tag Quick Stock

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

Product Screen In Retail Mode

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions | **Sync Names Now**

45

Description: New York Striploin

Prep Printer Text: New York Striploin ☐ Print In Red

Product Type: Entrees

Classification: Product

Report Group:

User Field:

Price Table:

Sync Prices

Cost/Qty	\$0.00	1
Retail 1	\$15.95	
Retail 2	\$0.00	
Retail 3	\$0.00	
Retail 4	\$0.00	
Retail 5	\$0.00	
Retail 6	\$0.00	
Modifier Price	\$0.00	

↓

POS Button



Text Color:  New:  Capture: 

Back Color:  Delete: 

Text Bottom:

Top Line Text:

Modifier Table Ask All At Once ☐

How Cook Meat ?

Potato Choice

Salad Choice ?

Course Sorting

☐ Appetizer

☒ Entree

☐ Dessert

☐ 4th Course

☐ No Course

Navigation:    

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

Product Screen In Hospitality Mode

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions | Sync Names Now

Description: Cabernet Merlot 2010

Product Type: Red Wine 750

Classification: Wine / Beer / Cider Sales By Bottle

Report Group: VQA

User Field:

UPC Code: 7334199820001

Alternate UPC 1: 0

Alternate UPC 2: 0

POS Button

Cabernet Merlot 2010

Text Color: New Capture

Text Middle: Top Line Text

Bottle Size (millilitres): 750

Basic Selling Price: 24.95

Supplier: Part Number

Quantity On Hand: 1084 ☐ Track Stock

Minimum Stock Levels: 0

Re-Order Quantity: 0

Label Type: No Label

Package Size:

Print Shelf Tag Print Product Tag Quick Stock

Wine Beer Cider Price

Sync Prices

Cost/Qty		
Retail 1	\$24.95	72.4%
Retail 2	\$22.46	55.2%
Retail 3	\$14.70	1.6%
Retail 4	\$13.82	-4.5%
Retail 5	\$14.70	1.6%
Retail 6	\$0.00	
Modifier Price	\$0.00	

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

Product Screen In Winery Mode

Product Fields

Description

Enter the description of the product. This description appears on the customer's sales receipt as well as all reports. You can enter up to 50 characters for the description. Due to constraints on receipt printers, only the first 25 characters print on the sales receipt. Analysis reports will display the complete description. The description is also a key search field so make it meaningful.

Kitchen Print

Enter the description of the product that will print on the remote printers that are selected under product type setup. Typically, this feature is used in a hospitality environment to instruct the kitchen staff on what product to prepare. This description should be shorter than the product description because it prints double size and will be truncated on the remote printer. It is recommended to keep the kitchen print to a maximum of 15 characters. If the products classification is *Manually Entered Comment*, the kitchen print text will appear on the line following the manually entered comment.

Product Type

Select from the dropdown list the product type that applies to this product.

Matrix

The Matrix feature would be primarily used in a retail environment. You can set up size or color matrixes for products such as clothing and shoes. Select the applicable matrix for the product. See *Matrix Setup* for additional information.



The screenshot shows a portion of a software interface for product setup. It includes a 'Supplier' label above a text input field. Below this are two more input fields, each with a dropdown arrow on its right side. A red-bordered callout box with the text 'Click Here To View Quantity On Hand For A Matrix Item' has a red arrow pointing to a magnifying glass icon next to the 'Matrix' dropdown menu. The 'Matrix' dropdown currently shows 'What Size'. Below these fields is a 'Quantity On Hand' label followed by a text input containing '7.' and a checked checkbox labeled 'Track Stock'.

Note: The Matrix feature is optional and must be activated under System Setup.

Classification

Select from the dropdown list the classification that describes this product.

- **Product**
For example, NY Strip Steak, Hammer, Lamp
- **Modifier (Print Follows Product Type)**
For example, Rare, Medium, Well Done
- **Modifier (Print Follows Item)**
For example, Rare, Medium, Well Done
- **Price/Weight Embedded In Barcode**
Select if this item has the products price or the products weight embedded in the barcode. Commonly, these are products that have a barcode assigned by a weight scale such as in a deli counter. See *Weighted Product Format under System Setup*.
- **Manually Comment (Print Follows Product Type)**
The system will bring up an on-screen keyboard when the product is sold at the point of sale. The printer path for prep printers will follow the associated product type.
- **Manually Comment (Print Follows Item)**
The system will bring up an on-screen keyboard when the product is sold at the point of sale. The printer path for prep printers will follow the previous item.
- **Non-POS Item**
Non-POS Items are products that you may stock but are used internally for your business. For example, cleaning supplies.
- **Winery Sales By Bottle**
Sales of wine by the bottle sold by Retail Wine Outlets. If this is selected, the Wine Pricer will be available to price your wine for the various retail channels. See *Wine Pricer for additional information*.
- **Other Sales**
Product placed under this category will print other documents that are programmed under the Documents in System Setup.
- **Product – Multi Price Level**
The system will prompt you for the price level when the item is purchased. For example, create an item called strawberries with price levels by pint, quart, flat.
- **Weighted Product By Weight**
The system will prompt you for the products weight when you sell the item.
- **Price By UPC and Alternate**
UPC sells for retail 1, Alternate UPC1 sells for retail 2 and Alternate UPC2 sells for retail 3.
- **Survey**
.....
- **Combo**
.....

- **Serialized Product**
Select if this item needs to track a serial number when sold.
- **Gas**
Select if this item is tracking fuel sold. On the Advanced Tab, check *Open Price* or *Ask For Weight*.
- **Modifier Call**
Select if this item only calls a modifier table. This item will not print on the receipt or prep printers and pricing is ignored.
- **Modifier Call-Heading Prints**
Select if this item only calls a modifier table. This item will not print on the receipt or prep printers and pricing is ignored.
- **Super Button**
This product will sell a Super Button. See *Super Button* for additional information. If Super Button is selected, you will be required to select the Super Button the product applies to from the dropdown menu.



The screenshot shows a form with three fields: 'Product Type' set to 'Entrees', 'Classification' set to 'Super Button', and 'Report Group' set to 'Select Your Super Button'. A red box highlights the 'Report Group' field, and a red arrow points to the 'Sample Super Butte' dropdown menu next to it.

- **Wine Club**
This product will sell a Wine Club See *Wine Club* for additional information. If Wine Club is selected, you will need to select the Wine Club the product applies to from the dropdown menu.



The screenshot shows a form with three fields: 'Product Type' set to 'Entrees', 'Classification' set to 'Wine Club', and 'Report Group' set to 'Select Your Wine Club'. A red box highlights the 'Report Group' field, and a red arrow points to the 'Sample Wine Club' dropdown menu next to it.

- **Rated/Hourly**
This product allows you to sell products where the value of the item is based on how long the customer uses or has the product. When creating this product, set the retail price as the price per hour. When you sell this item, a timer starts. When you stop the timer, the retail value for the item is calculated based on the difference between the time started and the time finished. You need to add the Stop All Timers button to the POS screen.

UPC Code

Enter the UPC for the product. If you have a barcode scanner attached to your system then you should set this field for any product you intend to scan. Scanning the barcode with your barcode scanner can also complete this field. The system automatically generates a 6 digit numeric UPC code for you with a sequence starting from 200000 and increasing by one for each records added. You can modify the starting sequence by as follows.

1. Run the program DBeditor.exe located in the POSEDGE folder.
2. Enter the password. Authorized resellers have this password.
3. Locate and select the Counters table from the dropdown and click GO.
4. Change NextUPC to the required starting sequence eg 400000,
5. Click the Blank Field immediately below the number you just entered.
6. Close the DBeditor,

Note: For Head Office Systems, the default numbering sequence starts 20000000.

Alternate Product Code and Quantity

You can have up to two secondary product codes for each product. Each alternate code can also have an optional quantity associated with it.

For example, there is a UPC code on every can of pop. Pop normally comes in a case of 24. Each case would also have a barcode. The barcode on the can would be different from the barcode on the case

- 1) Set UPC code to the barcode on the can.
- 2) Set the Alternate Code to the barcode on the case and set the alternate quantity to 24.

When you scan the can, 1 unit will be deducted from stock. When you scan the case, 24 units will be deducted from stock.

User Field 1 and 2

These fields are included in the system as a means of sorting the inventory in a way that we did not think of. For example, if you are a bookstore, you might want to use User Field 1 as Authors Name, to allow you to quickly search for books by a particular author.

Report Group

Select from the dropdown list the report group that applies to this product.

Price Table

Select from the dropdown list any price table that applies to this product. A price table is a convenient way of pricing a group of items that all charge the same retail price. A good example of this is bottled domestic beer. Since most beer cost and sell for the same price, you could set up a price table for beer and assign this table to each beer product you create. This way if the price of beer changes, you only need to update the change in the price table instead of in each different beer product you created. *See Price Table Setup for additional information.*

Retail 1 each

Enter the regular retail price for this product.

Retail 2 through 15

Enter the retail price for the appropriate price level.

Modifier Price

Enter the price to sell this item for if it is being sold as a modifier. For example, if this product was Ginger Ale, you might also use this Ginger Ale product as a modifier for a drink Rye and Ginger. Your Retail Price 1 might be \$1.50 but your modifier price would be \$0.00 because you don't charge for the soda that comes with a mixed drink.

Cost/Qty

Enter the cost for the product. You can specify the cost as a price per unit or you can specify the case price. For example, if the product is cans of pop, you could say you pay \$0.20 for 1 or \$4.80 for 24 because pop normally comes in a case of 24. Either method is acceptable.

Note: If you specify the Qty value as anything other than 1 (one), then when you receive product into stock, the system will assume that you are receiving by the case and will multiply the amount of stock you are receiving by Qty value.

Using our above example with the pop, if you are receiving 2 cases or 48 cans of pop into stock,

If we enter the cost as \$0.20 for 1 then we would receive 48 cans into stock

If we enter the cost as \$4.80 for 24 then we would receive 2 cases into stock

Both methods would give us a total of 48 cans in stock.

POS Button Appearance

The POS Button is what appears on the screen for the cashier or server. If you want to change the buttons text, click on the button and use the backspace keys to remove text and then type the new text.

- Change the color of the buttons text and background.
- The button can contain text, a graphic image or both.
- Enter specific text to appear on the top left of the button.
- Modify the Position of the Button Text

Supplier

Select from the dropdown list the supplier that you purchase this product from. There are dropdown lists for 3 different suppliers for each product. The first dropdown list box is the supplier that the purchase order system will utilize when generating orders. The remaining list boxes are for reference only of other suppliers that can supply the product

Supplier Part Number

Enter for each supplier, their part number for the product for ordering purposes.

Track Stock

Enable or disable track stocking for this product. There are sometimes products that you don't receive into stock such as 'labor'. By disabling stock tracking, you won't end up with a large negative 'Quantity On Hand' figure for this product.

Minimum Stock Levels

Enter the minimum quantity of product you want to have in stock for this product at any given time. The system will generate stock order reports based on this figure. You can manually enter this figure or the system can auto-generate it based on the last 1 to 52 months of sales history. *See System Setup for additional information.*

Re-Order Quantity

This figure determines how many units the system will say to order if your minimum stock level has been reached. The re-order quantity figure is how many units the system will say to order if you're current quantity on hand is the Minimum Stock Level.

Minimum Stock Level 20 units

Re-Order Quantity 30 units

Current Quantity On Hand 10 units

The system will assume that you want to get your stock level to 50 units (20 units + 30 units). Since you only have 10 units in stock the order report will suggest you purchase 40 units (50 units - 10 units).

Label Type

Select from the dropdown list any label that you want to print when you receive the product into stock. You can use our preset label types or create your own label designs. *See Label Designer for additional information.*

Package Size

Enter how this product is packaged from the supplier. For example, 150-gram bag or 2 lb. box. This is a descriptive field and is only used for reporting purposes.

Modifier Table

Select from the dropdown list, any modifiers or forced questions that apply to the product. *See Modifier Setup for additional information.*

Course Sorting

Course Sorting allows product to appear in a particular order when printed on remote printers such as kitchen printer. Servers can modify this sort order when the order is entered but setting the basic order here will make the servers job easier. For example, you don't want the cherry cheesecake to appear on the kitchen chit before the steak dinner. Select the primary sort order when items are sent to remote printers such as bars and kitchen printers. *See System Printers for additional information.*

POS Keyboard Shortcut

You can create a shortcut to a particular product. This allows for quick access to the product by pressing a key on the keyboard.

Shortcuts can be applied to the following keys:

- F1 ~ F12
- Alt F1 ~ Alt F12
- Ctrl F1 ~ Ctrl F12
- Shift F1 ~ Shift F12

Notes

Enter any additional information relating to the product for reference purposes.

Prompt

Select from the dropdown list any prompt you want to appear when you sell the product. See *Prompt Setup for additional information*.

Security Level Required

Select from the dropdown list the minimum Job Position that is required to sell this product.

Image Group

Select from the dropdown list the appropriate Image Group to assign to this product. Image groups allow you to search for a product by its picture. For example, in a grocery store you might have an Image Group called Lettuce. You could program in pictures of all the different types of lettuce you sell and search for the particular type of lettuce a customer brings to the checkout by its picture. See *Image Group Setup for additional information*.

Product Image

Use the Get Button to locate the picture of this product.

Special From, Special To, Price

Select the date the product will go on special, the date the special ends, and the price the product will be on special. The computer will automatically start and end the special.

Link To UPC

The UPC code specified under Link To UPC will be sold automatically whenever this product is sold. Link To UPC can also be specified under Product Type Setup. The Link To UPC under Product Type Setup always overrides the Link To UPC specified in Product Setup

Points

Enter the amount of additional reward points that a customer will receive if they purchase this product. See *Reward Systems for more information*.

Open Priced

With this feature enabled, the system will prompt for a price when you sell the product.

Is Negative

With this feature enabled, the system will force the *Open Priced* item to be a negative price.

Use Scale

Enabling this will cause the retail price of an item to be multiplied by the weight on the terminals weight scale.

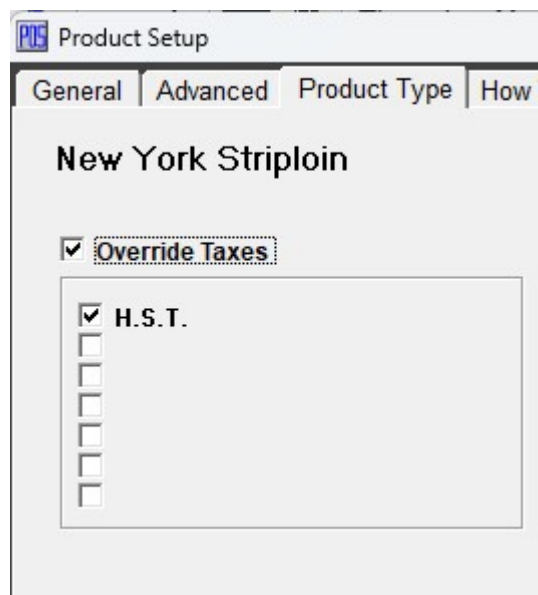
Spec. Sheet

The Spec. Sheet is used in conjunction with our Auto Sale Email feature. Select the document, (normally a PDF document) which markets this item. *See Marketing Tools for additional information.*

Product Type Tab

Normally products inherit their taxes and price schedules from their assigned product type. Sometimes it may be necessary to override these defaults. Under the Product Type tab, you can override the defaults and set the taxes and price schedules at the product level.

If Override Product Type Defaults is not checked, the page will be grayed out and will indicate the values assigned by the associated product type.



The screenshot shows a software window titled "Product Setup" with a tabbed interface. The "Product Type" tab is selected. The product name "New York Striploin" is displayed. Below the name, there is a checkbox labeled "Override Taxes" which is checked. Underneath this checkbox is a list of tax options, each with a checkbox. The first option, "H.S.T.", is checked. There are five other unchecked options listed below it.

Taxes

Select the taxes this product needs to charge

Price Schedule

Price Schedules allow product pricing to fluctuate automatically. For example, you could have special pricing on chicken wings every Tuesday between 5 pm and close. You can create a price schedule for an entire product type or for individual products. If the Price Schedule button is flashing, then a price table is in effect on the selected product. See *Price Schedule* for additional information.

How to Make

How to Make allows you to track stock on a multitude of products when one item is sold. This process can be useful in hospitality and retail environments. Example of each are:

- A restaurant could create a recipe for a Caesar Cocktail. When you sell the cocktail, the system would deduct from inventory, 1.5 oz Vodka, 4 oz Clamato Juice and 1 Cocktail Garnish.
- A retail store could create a recipe for a gift basket. When you sell the basket, the system would deduct from inventory, 1 Basket and a variety of other products that are in the basket.

Note: If using the recipe feature, the Price Table feature is disabled

The screenshot shows the 'Product Setup' window for a product named 'Ceasar'. The 'Recipe' section contains a table with ingredients and their costs.

Description	Quantity	Units	Cost	Extended Cost
Vodka	1.5	oz	1.5000	2.2500
Clamato Juice	4	oz	0.1500	0.6000
Cocktail Garnish	1	Unit	0.5000	0.5000

Below the table, there are checkboxes for 'Deplete Stock On Inventory Receive' and 'Set Cost From Recipe', both of which are unchecked. To the right of the table are buttons for 'Remove Item', 'Add Ingredient', 'Add Batch Recipe', and 'Add Product'. The 'How To Make' section contains a text area with instructions: 'In shaker, pour 1.5oz of vodka. Add 4oz of clamato and shake. Pour into glass and add cocktail garnish.' and a 'Time To Make (seconds)' field with the value '30'. At the bottom of the window is a toolbar with buttons: 'List', 'Find UPC', 'Find Part#', 'Find Image', 'Delete', 'Copy', 'Add New', 'Refresh', and 'Exit'.

See Ingredients Setup and Recipe Setup for additional information.

Deplete Stock on Inventory Receive

This determines when ingredient stock is deducted.

- If a product depletes on receive, the ingredient stock is deducted from inventory when you receive the Bottle of Wine into stock. For example, if we quick receive 10 bottles of wine, the system would deduct from stock, 10 bottles, 10 labels, 10 corks and 7.5 units of red wine juice. *Typically, if a product is pre-packaged, each ingredient item should have Track Stock checked.*
- If a product is not depleted on receive, the ingredient stock is deducted each time you sell the Bottle of Wine. *Typically, if a product is not pre-packaged, each ingredient item should have Track Stock unchecked.*

How to Make Notepad

The how to make notepad allows you to free hand enter specific details as to how this product is prepared or manufactured. This area can also be printed on product labels.

Web/Online Tab

Enter specific information to appear on your web store.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions

10 Chicken Wings

Web Name: 10 Chicken Wings

Description: 10 of the worlds BEST chicken wings!

Price: \$7.50

Modifier Table

How Cook Wings

On Shopify / WooCommerce: ☒

Inventory ID: 1234

Cloud Menu: All Day Menu

Picture

clr
get
cap

Quick Set

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

Web Name

Enter the name of the product to display on the ordering platform.

Description

Enter a full description of the product for the ordering platform.

Price

Enter the retail price for the ordering platform.

Modifier Table

Select and modifiers that are required for the product.

See On Line Ordering for Additional Information.

Counts Setup

Counts provide a simple method of tracking how many specific units of an item or group of items are sold.

For example,

We could track how many chicken wings are sold. You 12 pack of wings would have a count of 12, your 24 pack of wings would have a count of 24. If we sold one pack of each, our count of wings would be 36.

Or

We could track draft beer. Your pitcher could have a count of 60oz; your small glass could have a count of 10oz. Sell one of each; our draft count would be 70. This value could be compared against your draft meter.

You can also assign multiple counts to items. A pizza wing combo could count 12 Wings and one pizza box.

Count Setup

General

Bottled Beer
Draft Beer
Pizza Box
Wings

Name: Draft Beer

Is Resettable: ☒

Apply Counts Globally Delete Add New Exit

1. Enable Counts under Administration → Policy Setup → System → UseCounts.
2. Create descriptive name for the counts under Products → Counts
3. Check if the count value is resettable to zero at any point during the day or leave unchecked if the counts run by day and reset automatically at the end of the day.
4. Assign the applicable count by clicking Apply Counts Globally or by assigning the count to the applicable product under Product Setup → Images & Notes tab.

The screenshot shows the 'Product Setup' window for '20 Chicken Wings'. The 'Images & Notes' tab is selected. On the left, there is an 'Image Group' dropdown and a 'Picture' section with buttons for 'Delete Image', 'New Image', and 'Capture'. On the right, there is an 'Email Spec. Sheet (in data\documents folder)' field. A red box highlights a table with two columns: 'Count' and 'Qty'. The 'Count' column has a value of 'Wings' and the 'Qty' column has a value of '20'. To the right of the table are '+' and '-' buttons.

Count	Qty
Wings	20

Current count values can be seen in the POS under Manager > Products > Count Tab

General	Additional Information	Adjust Stock	Counts															
 Reset Count <table border="1"><thead><tr><th>Name</th><th>Quantity</th><th>Last Reset</th></tr></thead><tbody><tr><td>Bottled Beer</td><td>36</td><td>12/29/2022</td></tr><tr><td>Draft Beer</td><td>0</td><td>12/30/2022</td></tr><tr><td>Pizza Box</td><td>0</td><td></td></tr><tr><td>Wings</td><td>1</td><td></td></tr></tbody></table>				Name	Quantity	Last Reset	Bottled Beer	36	12/29/2022	Draft Beer	0	12/30/2022	Pizza Box	0		Wings	1	
Name	Quantity	Last Reset																
Bottled Beer	36	12/29/2022																
Draft Beer	0	12/30/2022																
Pizza Box	0																	
Wings	1																	

Products

Count values can also appear on Day End POS Reports. Enable this option in the Back Office by clicking Administration > System Setup > Reports Tab.

Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

any Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup |
Receipt Messages | Screen Saver | SMS | Winery/Brewery |

Employee Cash Out Reports

Cash In Drawer Report ☐

Department Summary ☐

Product Type Summary ☐

Product Sold Summary ☐

Report With Departments ☒

Full Report With Product ☐

Full Report With Products ☐

Refund/Void Details ☐

Copies

Show Customer Stats On Day End ☐

Include Open Transactions In Daily ☐

Hide Sales Rep Summary On Reports ☐

Hide Sales Types On Reports ☒

VAT Tax Removed From Items ☐

Report Direct Voids ☐

Show Counts On Day End ☒

Show Tips On Shift Reports ☒

Show Cash Due Less Tips ☒

Cashier Summary On Reports

UniversalPOS

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Ingredient Setup

Ingredients allow you to track inventory for items that are used in the creation of other products. Ingredients are assigned to products under the How to Make tab in Product Setup and also in Recipe Setup.

For example, a restaurant would probably sell a Caesar Cocktail. A typical Caesar would consist of Vodka, Clamato Juice and a Garnish. Ingredients allow us to track the inventory for these items when the Caesar is sold.

The screenshot shows the 'Ingredient' setup window. On the left is a list of ingredients: Baileys, Cheese Slice, Chicken Wings, Clamato Juice, Cocktail Garnish, Olives, Pepsi, Rum, and Vodka. 'Vodka' is selected. The main area is titled 'Information' and contains the following fields:

- Description: Vodka
- Product Type: Liquor
- Report Group: (empty)
- Ingredient Unit: oz
- Container Unit: Bottle
- Shipping Package: Case
- oz/Bottle: 40
- Bottle/Case: 6
- Cost per Case: 245.00
- Cost per oz: 1.0208
- Supplier: Liquor Store
- Supplier Item Number: V0012
- Min. Stock Level: 0 Bottle
- Reorder Quantity: 0 Bottle
- PLU#: (empty)

There are also buttons for 'Stock Adjust by oz', 'Stock Adjust by Bottle', 'Stats', and 'History'. At the bottom are navigation buttons: 'List', 'Find Part#', 'Delete', 'Copy', 'Add New', 'Refresh', and 'Exit'.

Ingredient Setup Fields

Description

Enter the name for the ingredient.

Product Type

Select the product type for reporting purposes.

Report Group

Select the report group for reporting purposes.

Ingredient Unit

Ingredient Units are applied to recipes and products. When an item is ordered, the ingredient unit is depleted. A typical ingredient unit could be,

- for Eggs, the unit would be egg
- for Bread, the unit would be slice
- and in our example, the typical unit for liquid (vodka) would be oz

When entering the unit, make sure it represents a unit measurement that can be applied to all recipes and products.

Container Unit

A container is how the Ingredient Units are packaged. For example, the container for eggs would be a Carton, the container for slice of bread would be Loaf, and the container for - oz would be Bottle.

Shipping Package

Enter how many Container Units are in the package when you buy the item. Typically, Box, Case, Flat, Pallet. The Shipping Package can be the same as the container unit if needed.

Units/Container

These descriptors are carried across. Enter how many units you can yield out of the container. In our example above, we get 40 oz of Vodka in a bottle. If this were eggs, we would typically get 12 eggs per carton.

Containers/Package

These descriptors are carried across. Enter how many containers are in each shipping package. In our example, we get 6 bottles of vodka per case.

Cost Per Shipping Package

Enter the price you pay for the Shipping Package. The system will calculate the Ingredient Unit Cost.

Supplier

Select from the dropdown list the supplier that you purchase this product from. There are dropdown lists for 3 different suppliers for each product. The first dropdown list box is the supplier that the purchase order system will utilize when generating orders. The remaining list boxes are for reference only of other suppliers that can supply the product.

Supplier Part Number

Enter for each supplier, their part number for the product for ordering purposes.

Batch Recipe Setup

Batch Recipes allow you to put several ingredients together into a common group for ease of maintenance and data entry. Batch Recipes are assigned to products under the How to Make tab in Product Setup.

Here are a few examples of recipes.

- Homemade Hamburger Patties would consist of several ingredients; Ground Beef, Eggs, Bread Crumbs, Ketchup and Worcestershire Sauce.
- A garnish for our Caesar Cocktail consists of Celery, a Dill Pickle Wedge, 2 Gherkins, 1 Radish and 1 Wooden Cocktail Stick.

The screenshot shows the 'Batch Recipe Setup' window. On the left, a list of recipes includes 'Blue Cheese Dressing', 'Cocktail Garnish' (which is selected and highlighted in blue), and 'Hamburger Patty'. The main area is titled 'Information' and shows the 'Name' field set to 'Cocktail Garnish'. Below this is a table with the following data:

Ingredient	Quantity	Units	Cost	Extended Cost
1 - Olives	3	Piece	0.12	0.3600
1 - Wooden Bar Stick	1	Stick	0.04	0.0400
1 - Celery	1	Piece	0.33	0.3333

Below the table are two buttons: a '+' button and a '-' button. To the right of these buttons, the total 'Cost' is displayed as '0.7333'. At the bottom of the window, there are navigation buttons: 'Delete', 'Add New', and 'Exit'.

Price Schedules

Price Schedules allow product pricing to fluctuate automatically. For example, you could have special pricing on chicken wings every Tuesday between 5 pm and close or draft beer could be on special for a happy hour daily between 4 pm and 7 pm. Price schedules can be created at the product type level where the table will affect all the associated products or they can be created for individual products. Price schedules can be programmed to 30-minute intervals.

To enable Price Schedules,

1. Enable under Administration → Policy Setup → System → PriceSchedules.
2. Under Station Setup → Set Price Structure to Customer & Schedule Pricing for each applicable station.

The screenshot displays the 'Price Schedule' configuration window. On the left, a list of product categories is shown: Appetizers, Bar Modifi, Beer, Beverages, Cocktails, Desserts, Draft, Entrees, Food Modifi, Liquor, Merchandi, Pizza, Salads, Toppings, and Wine. Next to this list are 15 retail price levels, each with a color swatch: Retail 1 (red), Retail 2 (yellow), Retail 3 (dark red), Retail 4 (light grey), Retail 5 (dark grey), Retail 6 (light grey), Retail 7 (green), Retail 8 (blue), Retail 9 (cyan), Retail 10 (dark green), Retail 11 (magenta), Retail 12 (light green), Retail 13 (pink), Retail 14 (blue), Retail 15 (orange), and Not Available (olive). A small inset window shows a preview of the schedule for a specific product, with a red box indicating 'Start 9am End 11am'. The main grid shows the schedule for each day of the week (SUN, MON, TUES, WED, THURS, FRI, SAT) and time intervals (12 AM, 12:30 AM, 1 AM, 1:30 AM, 2 AM, 2:30 AM, 3 AM, 3:30 AM, 4 AM, 4:30 AM, 5 AM, 5:30 AM, 6 AM, 6:30 AM, 7 AM, 7:30 AM, 8 AM, 8:30 AM, 9 AM, 9:30 AM, 10 AM, 10:30 AM, 11 AM, 11:30 AM, 12 PM, 12:30 PM, 1 PM, 1:30 PM, 2 PM, 2:30 PM, 3 PM, 3:30 PM, 4 PM, 4:30 PM, 5 PM, 5:30 PM, 6 PM, 6:30 PM, 7 PM, 7:30 PM, 8 PM, 8:30 PM, 9 PM, 9:30 PM, 10 PM, 10:30 PM, 11 PM, 11:30 PM). The grid is currently empty, with only the 'Not Available' (olive) color visible in the top row. On the right side of the window are buttons for 'Delete', 'Cancel', and 'Save'.

The above example shows a price table at the product type level. All appetizers would charge retail price 1 during the red periods, retail price 9 during the blue periods and would be unavailable during the gold periods.

If the price schedule is created from the Product Type Setup screen, the schedule will apply to all products associated with the product type. If the price schedule is created from the product setup screen, the price schedule will apply to that product only.

If the Price Schedule button is flashing, then a price table is in effect on the selected product or product type.

To use the schedule grid,

1. Using your mouse, highlight the time period you want to set
2. Click the price level to charge during that period
3. Click Save when you are finished.

Click Delete to remove a price schedule.

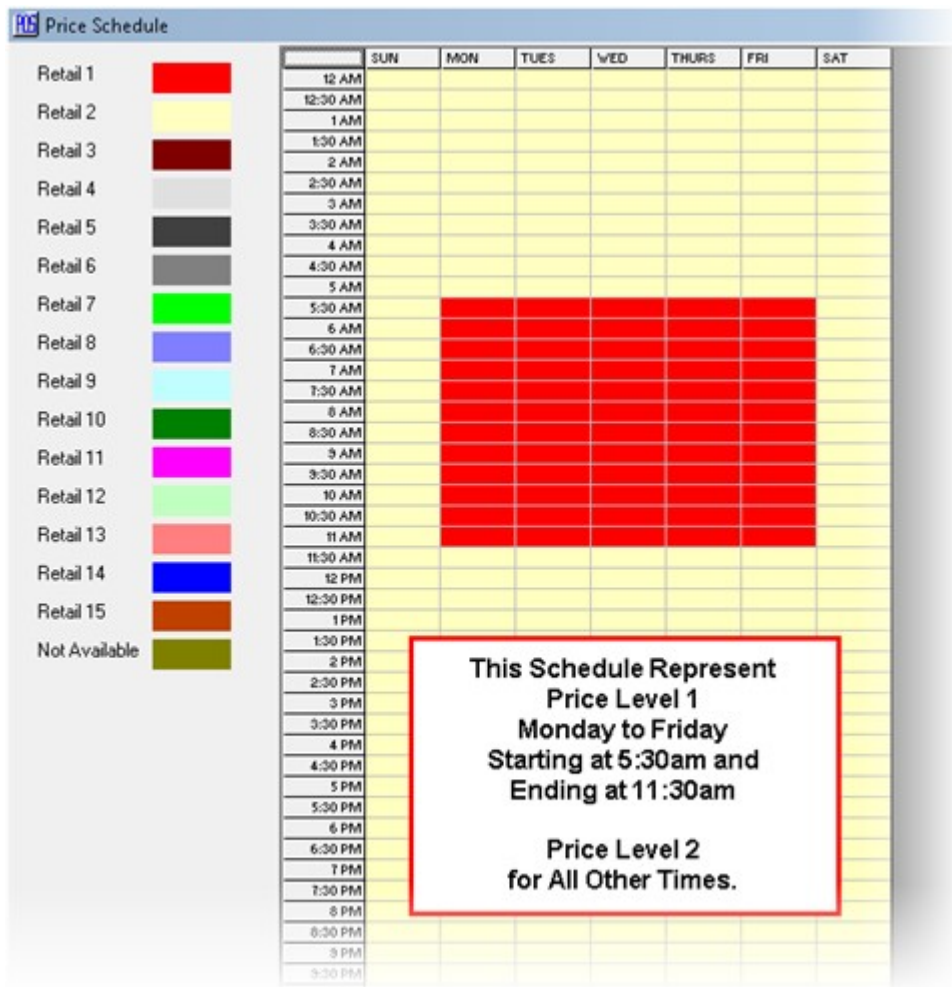


Image Group Setup

Image groups are used to enable quick searches of products by their picture. You can create various groups. For example, a grocery store may create groups for Lettuce and for Mushrooms. Once all the various lettuce and mushroom products have been programmed into the system with their picture, you can bring up visual lists to locate the particular item by its picture.



Once you have created the Image Groups, you assign them to the appropriate products in Product Setup. *See Product Setup for additional information.*

The Image Search List can be implemented by pressing the Image Search button on the Product Setup toolbar or by pressing the Image Search button from the Product Inquiry Screen in the Point Of Sale.

Report Group Setup

Report Groups are used to group your products into categories for reporting purposes. Each product can be optionally assigned to a Report Group.

Report Group Fields

Report Group Name

Enter the name for the report group. For example, Appetizers, Entrees, Merchandise, Hats

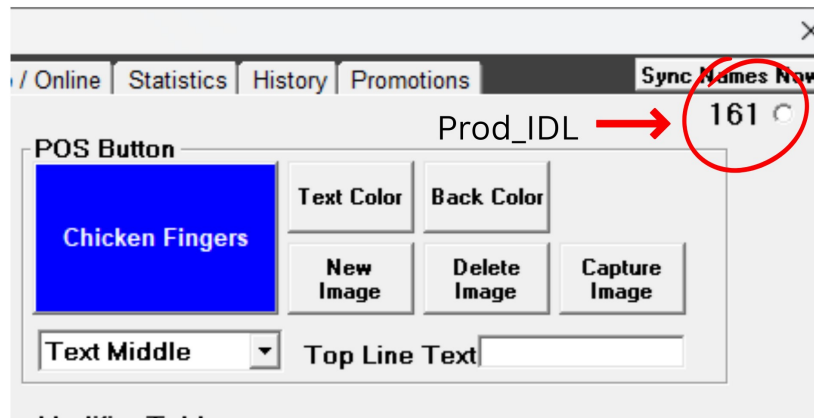
For Additional Information see Product Setup.

Setting a Product to use with 'Open Carton'

The basic concept behind the *Open Carton* feature is to transfer inventory from one product to another. For example, you might sell cans of pop by the case and also by the can and you will need to maintain inventory of cases and cans. Each time you open a case to create can inventory you would use the Open Carton button.

To setup a product to use with this feature,

1. Create a product called Can of Pop.
2. Set all other product fields as needed.
3. Make a note of the Prod_IDL number located in the top right of the product screen after the product is saved.



4. Create a product called Case of Pop
5. Set all other product fields as needed.
6. Set UserField1 for the product as the noted Prod_IDL for the Can of Pop.
7. Set UserField2 for the product as the quantity of stock to receive when Open Carton is used. For example, a case of pop would have a quantity of 24.

To use the Open Carton feature,

1. Click Open Carton.
2. Scan the barcode on the Case of Pop.
3. The inventory on the case of pop is decreased by one and the can inventory is increased by 24.

Setting up Products for Consignment

The POS has the ability to report for Consignment Sales and it's really a matter of setup and reporting.

1. Create a Supplier for the consignor as the individual who is putting the products into your store for consignment sales.
2. Create the products that are being placed on consignment in your store. Assign these products to the appropriate supplier as created in step 1. The cost price for the product is the value the consignor wishes to receive when the items are sold.
3. At the end of each month or whatever period you want, run the Detailed Sales by Supplier report. The report will show the sales for each supplier for that period. The cost value represents the value you need to pay the consignor for their merchandise sold. The retail represents what you received.

Matrix Setup

The Matrix feature is primarily used in the retail industry. Create a color or size matrix for products such as clothing and shoes.

The screenshot shows the 'Matrix Setup' window. On the left, there is a sidebar with two tabs: 'What Show Size' and 'What Size'. The 'What Size' tab is selected. The main area is titled 'Matrix Setup' and contains a 'Name' field with the text 'What Size'. Below this, there are two columns of input fields, numbered 1 through 40. The first column contains the following text: 1 SMALL, 2 MEDIUM, 3 LARGE, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20. The second column contains the following text: 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40. At the bottom of the window, there is a yellow bar with four buttons: 'Copy', 'Add New', 'Delete', and 'Exit'.

Note: The Matrix feature is optional and must be activated under System Setup.

For example, you sell a T-Shirt in 3 different sizes. You have two options on how to set up this product.

Option #1: Create 3 different products for the T-Shirt,

- T-Shirt Small
- T-Shirt Medium
- T-Shirt Large

Option #2: Create a Matrix called What Size and assign it the following values

- Small
- Medium
- Large

Create a product called T-Shirt and assign the matrix What Size to it.
When you sell the T-Shirt, it will ask you for the particular size.

Matrix Fields

Matrix Name

Enter a descriptive name for the Matrix. For example, What Shirt Size

1 to 40

Enter up to 40 descriptive names for the Matrix. For, example, Small, Medium, Large

For Additional Information see Product Setup.

Price Maintenance

Price Maintenance allows a simple method to modify product pricing on a group level.

- Changes can be a fixed price or a percentage increase or decrease.
- Percentage price changes can automatically round based on several criteria.
- Changes can be immediate or take place automatically on a future date.

Any changes that are required to take place on a future date will be displayed whenever the appropriate product type is recalled under Price Maintenance. Future price changes are controlled by the System Manager so it MUST be operating for the changes to take place.

Price Maintenance -

Home Settings

Product Type

Beer

% Rounding

No Rounding

Select All

De-Select All

Cancel All Current and Future Changes

Exit

Save

Description	Tag	Change When	Retail 1	New Retail 1	Retail 2
Corona		Change On Save	4.50		0.00
Coors Light		Change On Save	4.00	6.00	0.00
Budweiser		Change On Save	4.00	5.00	0.00
Bud Light		Change On Save	4.00		0.00
Carlsberg		Change On Save	4.00		0.00
Sol		Change On Save	4.50	5.00	0.00
Becks		Change On Save	4.00		0.00
Bohemian		Change On Save	4.50		0.00
Brahma		Change On Save	4.50		0.00
Bud Lime		Change On Save	4.00	3.00	0.00
Newcastle Brown Ale		Change On Save	4.50		0.00
Canadian 67		Change On Save	4.00		0.00
Labatts 50		Change On Save	4.00	4.50	0.00
Poddingtons Pub Ale		Change On Save	4.00		0.00
Dos Equies		Change On Save	4.50		0.00
Fosters		Change On Save	4.50	5.00	0.00
Grolsch		Change On Save	4.50		0.00
Guinness		Change On Save	4.50		0.00
Heineken		Change On Save	4.50	5.50	0.00
Labatts Blue		Change On Save	4.00		0.00
Miller Lite		Change On Save	4.00		0.00

Back Office [Your Store Name] Thursday, Mar 6, 2025 1:04 PM

File Products Inventory Employees Customers POS Setup Table Management Administration Reports Help

Thursday, Mar 6, 2025 2:13 PM

User: Joe

Theme

Products

Employees

Setup

Tools

Details

Work with Barcoded Product

Work with Items on your PO

Create your Suppliers

Order Stock

Make Stock Adjustments

Setup Employees

Send Mail to Employees

Adjust Security Levels

Employee Schedules

Time Clock Adjustments

System Manager Offline

Send Terminal Reload

Clear All Table & Check Lock

Price Maintenance -

Home Settings

Product Type

Beer

% Rounding

No Rounding

Select All

De-Select All

Cancel All Current and Future Changes

Exit

Save

Description	Tag	Change When	Retail 1	New Retail 1	Retail 2
Corona		Change On Save	4.50		0.00
Coors Light		Change On Save	4.00	6.00	0.00
Budweiser		Change On Save	4.00	5.00	0.00
Bud Light		Change On Save	4.00		0.00
Carlsberg		Change On Save	4.00		0.00
Sol		Change On Save	4.50	5.00	0.00
Becks		Change On Save	4.00		0.00
Bohemian		Change On Save	4.50		0.00
Brahma		Change On Save	4.50		0.00
Bud Lime		Change On Save	4.00	3.00	0.00
Newcastle Brown Ale		Change On Save	4.50		0.00
Canadian 67		Change On Save	4.00		0.00
Labatts 50		Change On Save	4.00	4.50	0.00
Poddingtons Pub Ale		Change On Save	4.00		0.00
Dos Equies		Change On Save	4.50		0.00
Fosters	*	Change On Save	4.50	5.50	0.00
Grolsch	*	Change On Save	4.50	5.50	0.00
Guinness	*	Change On Save	4.50	5.50	0.00
Heineken	*	Change On Save	4.50	5.50	0.00
Labatts Blue		Change On Save	4.00		0.00
Miller Lite		Change On Save	4.00		0.00

Exit Back Office

Sign On/Off

Reports

Backup

About

Show Keyboard

2:13 PM

03/06/2025

ENG US

2:13 PM

03/06/2025

1. Select the product type and rounding method from the appropriate dropdown list. Rounding methods only apply to percentage price modifications.
2. Optionally tag multiple items to apply changes to several items at the same time. Click the TAG column for the appropriate row to apply the tag.

newcastle brown ale		Change On Save	4.50	
Canadian 67		Change On Save	4.00	
Labatts 50		Change On Save	4.00	4.50
Poddingtons Pub Ale		Change On Save	4.00	
>> Dos Equies	*	Change On Save	4.50	
Fosters	*	Change On Save	4.50	5.50
Grolsch	*	Change On Save	4.50	5.50
Guinness	*	Change On Save	4.50	5.50
Heineken	*	Change On Save	4.50	5.50
Labatts Blue		Change On Save	4.00	
Miller Lite		Change On Save	4.00	

3. Click the new price column and enter the fixed new price or right click on the column and select the price adjustment method. (Fixed, % Increase, % Decrease, \$ Increase, \$ Decrease)

		Change On Save	4.50		0.00
		Change On Save	4.00		0.00
		Change On Save	4.00	4.50	0.00
		Change On Save	4.00		0.00
	*	Change On Save	4.50		
	*	Change On Save	4.50	5	
	*	Change On Save	4.50	5	
	*	Change On Save	4.50	5	
	*	Change On Save	4.50	5	
		Change On Save	4.00		
		Change On Save	4.00		0.00

Fixed Price
% Increase
% Decrease
\$ Increase
\$ Decrease

2:13 PM 03/06/2025

- Optionally right click on the Change When column to select when the price change should take effect.

		Change On Save	4.00	
		Change On Save	4.00	4.50
		Change On Save	4.00	
*	Ch			
*	Ch	Change On Save		5.50
*	Ch	Change Date		5.50
*		Change On Save	4.50	5.50
*		Change On Save	4.50	5.50
		Change On Save	4.00	

- Make all the modifications that are required and then click Save.

Price Table Setup

Price tables have two possible uses.

- Mix n Match Pricing
- Group Pricing

Mix n Match Pricing

A convenience store would typically use *Mix n Match* pricing for several of their products. Chocolate bars are a good example.

- Purchase any one chocolate bar for \$0.85
- Purchase any two chocolate bars for \$1.25

The screenshot shows the 'Price Table Setup' window with the 'Products' tab selected. The product 'Chocolate Bar' is chosen from the left-hand list. The 'Description' field contains 'Chocolate Bar'. The pricing table is configured as follows:

Retail	Price	Qty	Discount
Retail 1	\$1.00	1	150.0%
Retail 2	\$1.50	2	87.5%
Retail 3	\$0.00	0	
Retail 4	\$0.00	0	
Retail 5	\$0.00	0	
Retail 6	\$0.00	0	
Modifier Price	\$0.00		

Additional settings include:

- Must Purchase Quantities To Get Discount:** ☒
- Is Mix N Match:** ☒
- Exclude Cost:** ☐ **Cost/Qty:** \$20.00 / 50
- Exclude Specials:** ☐ **Date From:** // **Date To:** // **Special Price:** \$0.00

A red text box on the right side of the window reads: **MIX AND MATCH EXAMPLE**

At the bottom of the window are navigation buttons: List, Delete, Add New, and Exit.

Group Pricing

Group pricing is a convenient way of grouping similar priced objects together. For example, in a restaurant, you could create a price table for domestic beer and assign all of the domestic beers you sell to the price table. When the price of domestic beer changes, you only need to adjust the price table as opposed to adjusting the price in every beer record.

The screenshot shows the 'Price Table Setup' window with the 'Products' tab selected. The 'Description' field is set to 'Domestic Beers'. The 'Retail' prices are configured as follows:

Retail	Price
Retail 1	\$4.24
Retail 2	\$0.00
Retail 3	\$0.00
Retail 4	\$0.00
Retail 5	\$0.00
Retail 6	\$0.00
Modifier Price	\$0.00

The 'Is Mix N Match' checkbox is unchecked. The 'Exclude Cost' checkbox is checked, and the 'Cost/Qty' is set to \$0.00. The 'Exclude Specials' checkbox is unchecked. The 'Date From' and 'Date To' fields are empty, and the 'Special Price' is set to \$0.00. A red text box on the right says 'GROUP PRICING EXAMPLE'. The bottom of the window has navigation buttons: 'List', 'Delete', 'Add New', and 'Exit'.

Price Table Fields

Description

Enter a name to describe the price table such as Bottled Beer or Chocolate Bars.

Is Mix N Match

If the price table is a Mix N Match table, check this box.

Must Purchase Quantities To Get Discount

This field only applies to Mix n Match. If checked, the customer must always meet the quantity criteria to get the discount. In the chocolate bar example above, chocolate bars must be purchased in groups of two to get the applicable discount. If unchecked, once two chocolate bars are purchased, all additional chocolate bars are discounted.

Price A/Qty

Enter the standard retail price for the product. Always enter 1 for the quantity for Price A.

Price B/Qty to Price F/Qty and Modifier Price

For Mix n Match pricing, enter the discounted price and the quantity that must be purchased to receive that price.

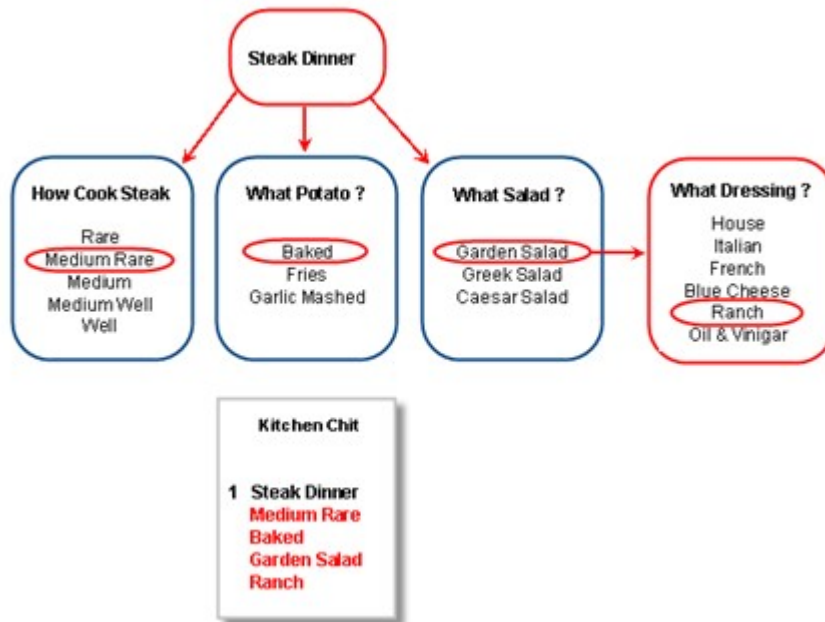
Cost Price/Qty, Special From, Special To, Special Price

For added convenience, these fields can optionally be included or excluded from the price table.

See Product Setup for a detailed description of these fields.

Modifier Setup

Modifiers are used mainly in the hospitality industry. They are a series of questions and answers that help cooks and bartenders prepare your food and drink orders. For example, if you order a Steak Dinner, an appropriate question would be 'How Cook Steak?' and the answers would be *Rare, Medium Rare, Medium, Medium Well or Well*. Once you have created your modifiers, you can assign them to the appropriate products. In product Setup, you can assign up to 75 modifiers to each product. Each answer within a modifier table is in itself a product, so each answer can also have up to 7 modifiers. In our example below, the steak dinner has 3 modifiers, *How Cook Steak, What Potato and What Salad*. The *Garden Salad* answer in the *What Salad* question also has a modifier, *What Dressing*.



Modifier Fields

Table Name

Enter the name for the modifier table such as '*How Cook Steak?*'.

Minimum Choices

Enter the minimum number of choices that the server can select from the list. For a question such as '*How Cook Steak?*', the minimum number of choices would be one. You must select one cooking method otherwise the chef could not prepare the steak.

Maximum Choices

Enter the maximum number of choices that the server can select from the list. For a question such as '*How Cook Steak?*', the maximum number of choices would be one. The steak can only be prepared one way. If the question was '*What Burger Toppings?*' then the maximum choices would be higher, *Lettuce, Tomatoes, Relish, Onions, Ketchup*.

Allow How Many Splits

Splits allow you to order one product and have it prepared more than one way. An order of chicken wings could be ½ Honey Garlic and ½ Hot, or a pizza may have olives on just one side. The number of splits determines how the item can be divided.

- 2 Splits allow for halves
- 3 Splits allow for thirds
- 4 Splits allow for quarters
- etc.

Auto Accept Selection

Auto Accept is useful if the Minimum Choices and the Maximum Choices are equal. When the maximum number of choices is reached, the modifier window automatically closes. If Auto Accept is disabled, you must touch the *Ok* box to close the modifier window.

Roll Up Price

Roll Up Price will force the price on any modifiers to be added to the master item.

Auto Sell

Auto sell allows for the modifier choices to be sold automatically without the server touching any buttons. The Minimum and Maximum Choices determine how many items are automatically sold. For example,

- If Min. & Max. Choices are one, the first item in the selection list is sold
- If Min. & Max. Choices are two, the first two items in the selection list are sold.
- etc

A useful example would be to add a line divider between items for clarity.

For example, we have a product 12 Slice Pizza and 20 Wings.

The screenshot shows the 'Product Setup' window for '8 Slice Pizza and 20 Wings'. The 'Description' field contains '8 Slice Pizza and 20 Wings'. The 'Prep Printer Text' field contains '8 Slice Pizza and 20'. The 'Product Type' is set to 'Pizza'. The 'Classification' is set to 'Product'. The 'Report Group' is empty. The 'User Field' is empty. The 'Price Table' is set to 'Sync Price Levels'. The 'Cost/Qty' table shows a cost of \$0.00 for 1 unit. The 'Retail 1' price is \$25.00. The 'Retail 2' price is \$0.00. The 'POS Button' is a blue button with the text '8 Slice Pizza and 20 Wings'. The 'Modifier Table' is empty.

Cost/Qty	
\$0.00	1
Retail 1	\$25.00
Retail 2	\$0.00

Selling this item with Pepperoni, Onions and Medium Wings would produce a kitchen chit similar to the following.

The screenshot shows a kitchen chit for '8 Slice Pizza 20 Wings'. The chit lists the items: '8 Slice Pizza 20 Wings', 'Pepperoni', 'Onions', and 'Medium'.

Kitchen Chit
8 Slice Pizza 20 Wings
Pepperoni
Onions
Medium

If we create an additional modifier called Line Space similar to the following,

The screenshot shows the 'Advanced' tab of a software interface. The 'Table Name' is 'Line Space'. The 'Minimum Choices' is 1, and the 'Maximum Choices' is 1. The 'Auto Accept Selection' checkbox is checked. The 'Allow How Many Splits' is 0. The 'Number Free Choices' is 0. The 'Max. Price For Free Choice' is \$0.00. The 'Price Level' is set to 'Modifier'. The 'Font Size' is 8. The 'Product List' on the right includes items like 'Jack Daniels BBQ Sauce', 'Medium', 'Medium Rare', 'Medium Well', 'Mild', and 'Mushrooms'. The 'Selection' area on the left has an 'Add Item' button and a 'Remove Item' button.

and added this modifier to our product

The screenshot shows the 'Modifier Table' with the 'Ask All At Once' checkbox checked. The table lists the following modifiers: 'What Medium Pizza Topping?', 'Line Space', 'How Cook: Wings', and three empty rows.

Our Kitchen Chit would now resemble the following adding additional clarity to the chit, without the server having to press any additional buttons.

The screenshot shows the 'Kitchen Chit' with the following text: '8 SlicePizza 20 Wings', 'Pepperoni', 'Onions', '-----', and 'Medium'.

Constant Color

Constant color allows you to specify the default color scheme for the modifier screen, overriding the individual items colors set for each item in product setup.

Show Price on Button

This will display on each button any price associated with the item. A price of zero will not be displayed.

Splits Charge Full Price

If this modifier allows for splits, do you want those splits to charge full price or a fractional price? For example, a pizza can be sold as pepperoni on the whole pizza and one half anchovies. If anchovies were not a free option, should it charge full price or half price?

Font Size

Specify the font size for the button text on the modifier.

Number Free Choices

Generally, modifiers are free, but there are times when there is a charge. This choice allows you to specify how many choices are free. For example, you sell a Medium Pizza with 3 Toppings for \$10.99. All toppings sell for 50 cents. Our question *'What Pizza Toppings?'* would allow for 3 free choices. That would mean the first 3 toppings selected would all be priced at zero, but any additional toppings would charge their retail price of 50 cents.

Maximum Price for Free Choice

The maximum price for a free choice puts a dollar value limit on what can be selected as free. For example, if the maximum price was fifty cents, and they purchased a topping such as double cheese, which costs a dollar, then it would count as two items.

Price Level

Select the product price level that applies to this modifier table.



Moves the item selected in the Product List to the Selection List.



Removes the selected item from the Selection List.



Product Setup is opened so you can create a new modifier. Once saved, it is added to the selection list.



Creates a copy of the selected item, prompts for a new name, and then adds the new modifier to the selection list.



Product Setup is opened so a modifier can be edited. Changes to descriptions will not be visibly seen in the selection list until the modifier table is saved.

Assigning Modifiers to Products

Once you have created your modifiers, you must assign them to the appropriate products in Product Setup.

ASSIGN UP TO 7 MODIFIERS TO EACH PRODUCT

Product Setup

General | Advanced | **Product Type** | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions | Sync Names Now

Description: New York Striploin

Prep Printer Text: New York Striploin ☐ Print In Red

Product Type: Entrees

Classification: Product

Report Group:

User Field:

POS Button

Text Color New Capture

Jack Color Delete

Top Line Text

Text Bottom

Modifier Table

Ask All At Once ☐

How Cook Meat ?

Potato Choice

Salad Choice ?

Course Sorting

☐ Appetizer

☒ Entree

☐ Dessert

☐ 4th Course

☐ No Course

Price Table

Sync Prices

Cost/Qty	\$0.00	1
Retail 1	\$15.95	
Retail 2	\$0.00	
Retail 3	\$0.00	
Medium Pizza Topping	\$0.00	
Retail 5	\$0.00	
Retail 6	\$0.00	
Modifier Price	\$0.00	

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

When you sell the item at the point of sale, the modifier selection screen will appear.

1	8 Slice Pizza	\$9.75
Whole		
1.	* Pepperoni	
1.	* Onions	\$2.00
Left Side		
.5	* Hot Peppers	\$1.00
Right Side		
.5	* Green Olives	\$1.00
\$13.75		

\$2.00 * Pepperoni	\$2.00 * Sausage	\$2.00 * Ham	\$2.00 * Bacon	Split Void
\$2.00 * Black Olives	\$2.00 * Green Olives	\$2.00 * Green Peppers	\$2.00 * Green Onions	
\$2.00 * Hot Peppers	\$2.00 * Onions	\$2.00 * Pineapple	\$2.00 * Roasted Red Peppers	
\$2.00 * Mushrooms	\$6.00 * Double Cheese			

Choose 1 Free Minimum 0 Maximum 99	8 Slice Pizza -> What Medium Pizza Topping ?
--	--

Modifier Screen with Split Option

1 New York Striploir \$15.95 1. * Medium Rare 1. * Baked 1. * House Salad	<table border="1"> <tr> <td>* 1000 Island</td> <td>* House</td> </tr> <tr> <td>* Ranch</td> <td>* Blue Cheese</td> </tr> <tr> <td>* French</td> <td>* Balsamic</td> </tr> </table>	* 1000 Island	* House	* Ranch	* Blue Cheese	* French	* Balsamic	Void  
* 1000 Island	* House							
* Ranch	* Blue Cheese							
* French	* Balsamic							
\$15.95	New York Striploin -> What Dessing ?							

Minimum 1
Maximum 1

Modifier Screen

Combo Setup

A typical scenario to describe a combo is a hamburger meal. The hamburger meal automatically sells the Hamburger, Fries and Drink for a discounted price. There are many other uses for combos such as gift baskets or packages. The POS also offers advanced combo recognition.

To create a very basic Combo,

1. Create your products as normal. In our example below, we have created our Universal Burger, Medium Drink and Medium Fries and assigned the appropriate retail price to each of these items.
2. From the Back Office, click Products → Combos → Combos and create a new combo. Give it a name and assign your items created in step 1 to the combo and save it.

Combo Setup

Sample Combo

Universal Burger Combo

Combo Name: Universal Burger Combo

Product For Auto Combo Recognition

Price Level for Combo Upcharges

BASIC COMBO

3 Selections

Cheese Burger
Medium Fries
Medium Drink

Add Item
Remove Item
Add New Modifier
Copy and Create New
Edit Product

Product List

Filter

Kitchen Command
Labatts 50
Labatts Blue
Lasagna
Lemon
LG Pepsi
Lime
Long Island Ice Tea
Manhattan
Margarita
MD Pepsi
Medium Drink
Medium Fries
Miller Genuine Draft
Miller Lite

Delete Copy Add New Exit

3. From the Menu Designer, create a new item as normal with the appropriate price. Set the classification to Combo and assign the Combo created in step 2.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels

Description: Universal Burger Combo

Prep Printer Text: Universal Burger Com ☐ Print In Red

Product Type: Entrees

Classification: Combo Universal Burger Combo

Report Group:

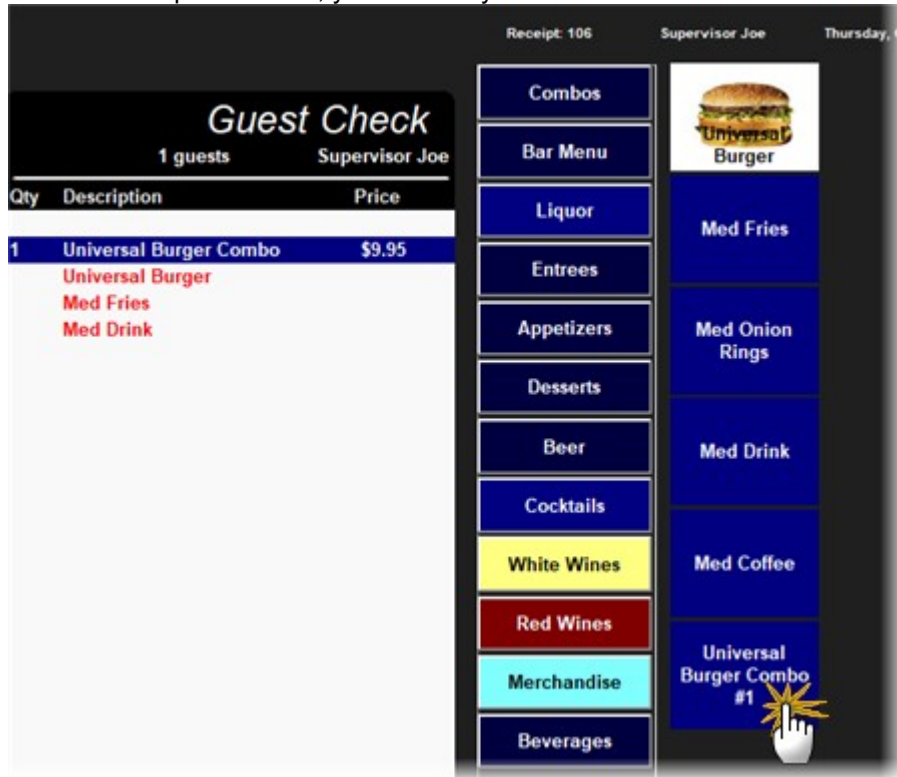
User Field:

Price Table:

Sync Prices

Cost	\$0.00	1
Retail 1	\$12.95	

4. Now from the point of sale, you can sell your combo.



Enhanced Combo Setup

Note: Currently Combos Do Not Support the following features.

- **Group Similar Items on the Screen must be disabled.**
- **The cashier must not sell multiple items using the @ or X button. For example never sell 6 x Medium Fries.**

Using these functions will have unpredictable results.

Now this is a very basic combo. We can enhance the combo by adding options to allow for upsizing and also have combo recognition. Combo recognition basically means, if we sell the burger, fries and drink individually, the POS will see that this is a combo and automatically convert these items to the combo and charge the new price.

1. Go to Administration → Language Setup and change the language for Price Levels – Retail 6 to Combo Up Charge.

2. Click on Products → Combo's → Combo Tags and create two tags

Name

Medium Drink

Medium Side

3. Create four new Product Types as normal.

Name

Sides

Drink

Combo's

Burgers

Combo Tag

Medium Side.

Medium Drink

Leave Blank

Leave Blank

4. Create several products as normal and place them all on your POS screen.

Name	Retail 1	Up Charge	Product Type
Universal Burger Combo #1	\$9.95	\$0.00	Combo's
Universal Burger	\$6.95	\$0.00	Burgers
Small Fries	\$2.00	\$0.00	Sides
Medium Fries	\$3.00	\$0.00	Sides
Large Fries	\$4.00	\$1.00	Sides
Small Onion Rings	\$2.50	\$0.50	Sides
Medium Onion Rings	\$3.50	\$1.50	Sides
Large Onion Rings	\$4.50	\$2.50	Sides
Small Drink	\$1.00	\$0.00	Drink
Medium Drink	\$2.00	\$0.00	Drink
Large Drink	\$3.00	\$1.00	Drink

5. Create two modifier tables and assign.

Name	Min	Max	Auto Accept	Assign
Choose a Side	1	1	Checked	All Sides Created Above
Choose a Beverage	1	1	Checked	All Drinks Created Above

6. Click on Combo's → Combo Setup and create a Combo as shown below.
 - Universal Burger Combo
 - Assign the product Universal Burger and the tags Medium Side and Medium Drink
 - Select the Price Level to Combo Up Charge
 - Set the Product for Auto Combo Recognition to Universal Burger Combo #1.

Combo Setup

Sample Combo
Universal Burger Combo

Combo Name: Universal Burger Combo

Product For Auto Combo Recognition: Universal Burger Combo

Price Level for Combo Upcharges: Combo Upcharge

3 Selections

- Cheese Burger
- Medium Fries
- Medium Drink

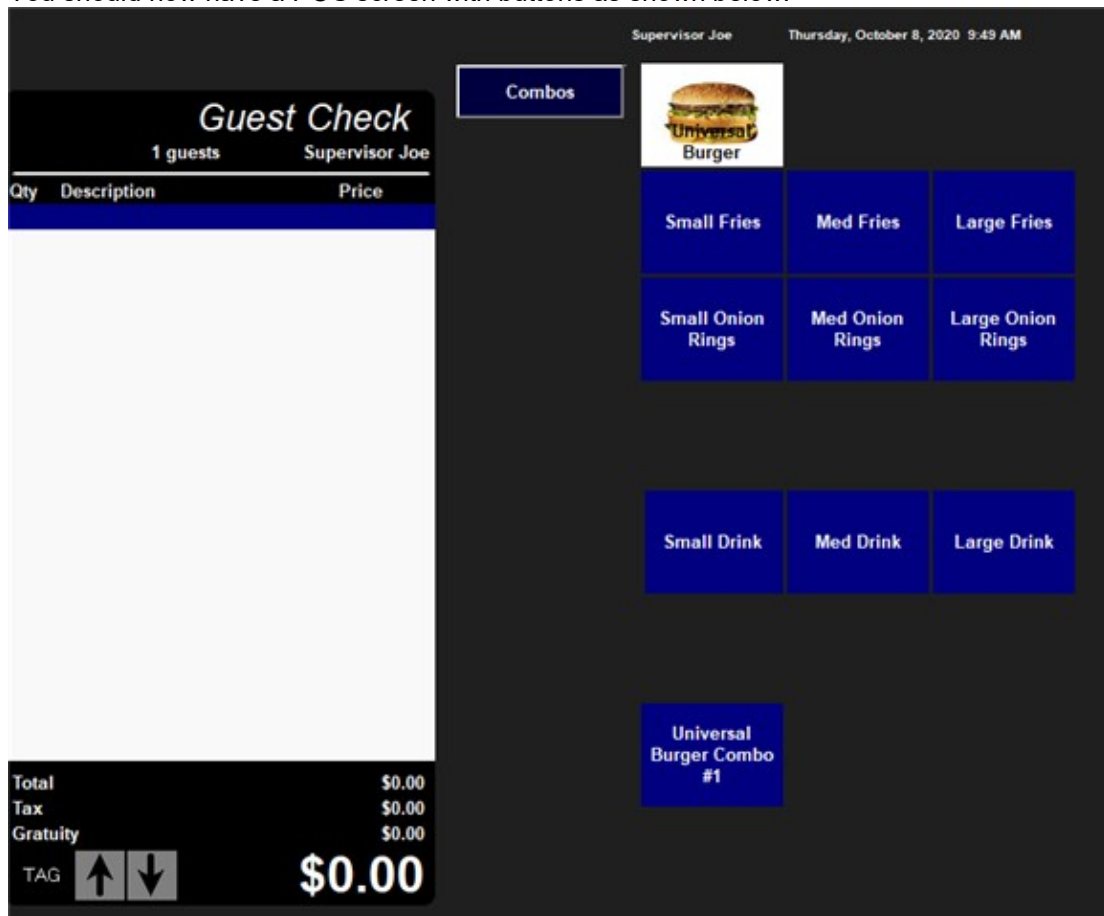
Product List

- * 1000 Island
- * Add Chili
- * Add Gravy
- * Add Guacamole
- * Add Jalapeno Peppers
- * Bacon
- * Baked
- * Balsamic
- * Black Olives
- * Blue Cheese
- * Blue Rare
- * Caesar Salad
- * Double Cheese
- * French

Buttons: Delete, Copy, Add New, Exit

7. Go to product setup and edit the product Universal Burger Combo #1 and make the following changes.
 - Set Classification to Combo and assign the Combo Universal Burger Combo
 - Set Modifier 1 to Choose a Side
 - Set Modifier 2 to Choose a Beverage

You should now have a POS screen with buttons as shown below.



Sale scenario 1

1. Sell the Universal Burger Combo #1
2. The POS will prompt for the Side → Select Medium Fries
3. The POS will prompt for the Drink → Select Medium Drink
4. The sale will look as follows

Guest Check		
1 guests		Supervisor Joe
Qty	Description	Price
1	Universal Burger Combo	\$9.95
1	Universal Burger	
	Med Fries	
	Med Drink	

Sale scenario 2

1. Sell the Universal Burger Combo #1
2. The POS will prompt for the Side → Select Large Onion Rings
3. The POS will prompt for the Drink → Select Medium Drink
4. The sale will look as follows

Guest Check		
1 guests		Supervisor Joe
Qty	Description	Price
1	Universal Burger Combo	\$9.95
	Universal Burger	
	Large Onion Rings	\$2.50
	Med Drink	

Sale scenario 3

1. Sell the Universal Burger
2. Sell the Medium Fries
3. Sell the Medium Drink
4. The POS will recognize the as a Combo and convert it automatically and the sale will look as follows.

Guest Check		
1 guests		Supervisor Joe
Qty	Description	Price
1	Universal Burger Combo	\$9.95
1	Universal Burger	
	Med Fries	
	Med Drink	

Combo Setup (Old Method)

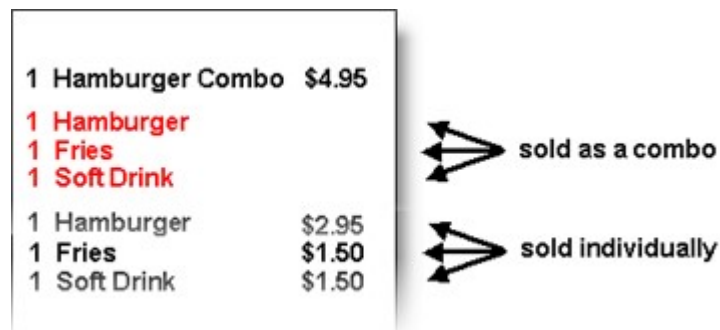
A typical scenario to describe a combo is a hamburger meal. The hamburger meal automatically sells the Hamburger, Fries and Drink for a discounted price. Combos can also be used to create gift baskets or packages.

Create a Hamburger Combo Example

- 1) Create a product called Hamburger with a retail price of \$2.95 and a modifier price of \$0.00.
- 2) Create a product called Fries with a retail price of \$1.50 and a modifier price of \$0.00.
- 3) Create a product call Soft Drink with a retail price of \$1.50 and a modifier price of \$0.00.
- 4) Create a Modifier Table called Burger Combo.
 - a) Assign the products Hamburger, Fries and Soft Drink to the table.
 - b) Set the Minimum Choices to three.
 - c) Set the Maximum Choices to three.
 - d) Check Auto Accept and Is Combo.
 - e) Uncheck Roll-Up Price.
- 5) Create a product called Hamburger Combo with a retail price of \$4.95. Assign the Modifier Table *Burger Combo* to the product.

Selling the Combo

If the items are sold individually, the customer is charged \$5.95 for the products. If the items are purchased through the combo, the discounted price of \$4.95 will be charged.



Super Button Setup

The Super Button is an expanded modifier option for restaurants. It allows for multiple products to apply to a single modifier question. For example, you sell a pizza and wing combo that consists of 2 medium pizzas with a total of 4 free toppings and 20 wings with your choice of sauce. The Super Button can easily handle this combo. The super button also handles scenarios such as pepperoni on one whole pizza and onions only on one half. The Super Button works in conjunction with the Modifier Tables.

The screenshot shows the 'Super Button Setup' window. On the left is a list of items, with '2 Med 6 Top 20 Wings' selected. The main area contains the following fields and controls:

- Name:** 2 Med 6 Top 20 Wings
- RollUp Price:** ☒
- Product:** 8 Slice Pizza
- Can Split eg Left Side, Right:** ☒
- How Many Of This Item:** 2 ☐ Free Least Expensive Item
- Modifier:** What Medium Pizza Topping ?
- Price Level:** Medium Pizza Topping
- Number Of Free Choices:** 6
- Free Choice Based On Price:** Regular Topping
- Always Print:** ☒

Buttons: Add New Tab, Remove Selected Tab, Delete, Add New, Exit.

To illustrate how to configure a Super Button, we will use the following example,

1 Medium Pizza, 3 free toppings, 10 Wings, 2 Cans Pop

- 1) Click Administration and Language Setup.
 - Click on Retail 2 and change its name to Small Topping Price
 - Click on Retail 3 and change its name to Medium Topping Price
 - Click on Retail 4 and change its name to Large Topping Price

Price Levels	
Descriptor	Retail 3
Canadian English	Medium Topping Price
Ontario Winery	Duty Free Price

- 2) Create a product and call it *12 Slice Pizza*. If you are only going to sell the pizza using the Super Button, then you do not need to include any pricing or modifier tables.
- 3) Create a product and call it *10 Wings*. If you are only going to sell the 10 Wings using the Super Button, then you do not need to include any pricing or modifier tables.
- 4) Create a product and call it *Cans of Pop*. If you are only going to sell the Cans of Pop using the Super Button, you do not need to include any pricing or modifier tables.
- 5) Create a modifier table and call it *How Cook Wings*. Create and assign the choices Mild, Medium and Hot to the modifier table.
- 6) Create 2 price tables called *Regular Topping* and *Double Topping*. Uncheck *Is Mix n Match* and assign the appropriate prices to the various price levels.

- 7) Create another price table called *Can of Pop*. Uncheck *Is Mix n Match* and assign the price for a can of pop to Retail 1.
- 8) Create a modifier table and call it *Pizza Toppings*. Create and assign the available topping choices to the modifier table. Example: Pepperoni, Onions, Olives. When creating the topping choices, make sure you assign the appropriate price table created in step 6 to each topping.
- 9) Create a modifier table and call it *What Pop*. Create and assign the available pop choices to the modifier table. Example: Coke, Sprite, Orange. When creating each pop, make sure you assign the price table Can of Pop created in step 7 to each pop.
- 10) Create a Super Button similar to the illustrations.

The screenshot shows the 'Super Button Setup' window. On the left, a list of buttons includes '12 Slice 10 Wings 2 Can Pop' (highlighted) and '2 Med 6 Top 20 Wings'. The main area is titled 'Super Button Setup' and contains the following fields and options:

- Name:** 12 Slice 10 Wings 2 Can Pop
- RollUp Price:** ☒
- Tab Selection:** 12 Slice Pizza | 10 Chicken Wings | Can of Pop
- Buttons:** Add New Tab, Remove Selected Tab
- Product:** 12 Slice Pizza
- Can Split eg Left Side, Right:** ☒
- How Many Of This Item:** 1
- Modifier:** What Medium Pizza Topping ?
- Price Level:** Medium Pizza Topping
- Number Of Free Choices:** 3
- Free Choice Based On Price:** Regular Topping
- Always Print:** ☒

At the bottom, there are navigation buttons (back, forward, etc.) and action buttons: Delete, Add New, and Exit.

11) On the Item #1 tab (Pizza Page)

- Select the product this page applies to, in our case 12 Slice Pizza
- Can Split refers to whether the topping can be split (Example ½ onions, ½ olives)
- Enter 1 for How Many Of This Item because our combo is one 12 slice pizza
- Select the Price Level. In our case it's a Medium Pizza so select the Medium Pizza Topping level.
- Number Of Free Choices is 3
- Select the Regular Topping for Free Choice Based On Price Table. This is because we are allowing 3 free regular priced toppings.

The screenshot shows a configuration window for 'Item #1' with three tabs: '12 Slice Pizza', '10 Chicken Wings', and 'Can of Pop'. The '12 Slice Pizza' tab is selected. Below the tabs are two buttons: 'Add New Tab' and 'Remove Selected Tab'. The configuration fields are as follows:

- Product:** A text box containing '12 Slice Pizza' with a dropdown arrow on the right.
- Can Split eg Left Side, Right:** A checkbox that is checked.
- How Many Of This Item:** A text box containing the number '1'.
- Modifier:** A text box containing 'What Medium Pizza Topping ?' with a dropdown arrow on the right.
- Price Level:** A dropdown menu showing 'Medium Pizza Topping'.
- Number Of Free Choices:** A text box containing the number '3'.
- Free Choice Based On Price:** A dropdown menu showing 'Regular Topping'.
- Always Print:** A checkbox that is checked.

On the Item #2 tab (Wings Page)

- Select the product this page applies to, in our case 10 Wings
- Can Split refers to whether the wings can be split (Example ½ Mild, ½ Hot)
- Enter 1 for How Many Of This Item because our combo is 1 order of 10 wings
- The remaining options are not needed for the wings

The screenshot shows the '10 Chicken Wings' tab selected in a tabbed interface. The form contains the following fields and values:

- Product:** 10 Chicken Wings
- Can Split eg Left Side, Right:** ☐
- How Many Of This Item:** 1
- Modifier:** How Cook Wings
- Price Level:** Retail 1
- Number Of Free Choices:** 0
- Free Choice Based On Price:** (empty dropdown)
- Always Print:** ☒

On the Item #3 tab (Pop Page)

- Complete the pop page as shown.

The screenshot shows the 'Can of Pop' tab selected in a tabbed interface. The form contains the following fields and values:

- Product:** Can of Pop
- Can Split eg Left Side, Right:** ☐
- How Many Of This Item:** 2 ☐ Free Least Expensive Item
- Modifier:** What Can of Pop?
- Price Level:** Retail 1
- Number Of Free Choices:** 2
- Free Choice Based On Price:** Can of Pop
- Always Print:** ☒

12) Lastly, create one final product called Pizza Wing Pop Combo.

The screenshot shows the 'Product Setup' window for a product named 'Pizza Wing Pop Combo'. The window has multiple tabs: General, Advanced, Product Type, How To Make, Images & Notes, Price Levels, Web / Online, Statistics, History, Promotions, and a 'Sync Names Now' button. The 'General' tab is active.

Description: Pizza Wing Pop Combo

Prep Printer Text: Pizza Wing Pop Combo

Product Type: Pizza

Classification: Super Button, 12 Slice 10 Wings 2 Can Pop

Report Group:

User Field:

Price Table:

Sync Prices:

Cost/Qty	\$3.95	1
Retail 1	\$20.00	101.%
Retail 2	\$20.00	101.%
Retail 3	\$20.00	101.%
Medium Pizza Topping	\$20.00	101.%
Retail 5	\$20.00	101.%
Combo Upcharge	\$20.00	101.%
Modifier Price	\$0.00	

POS Button: Pizza Wing Pop Combo

Modifier Table: Ask All At Once

Course Sorting:

- ☒ Appetizer
- ☐ Entree
- ☐ Dessert
- ☐ 4th Course
- ☐ No Course

The bottom of the window features a toolbar with buttons: List, Find UPC, Find Part#, Find Image, Delete, Copy, Add New, Refresh, and Exit.

- Description is Pizza Wing Pop Combo
- Classification is Super Button and select 12 Slice 10 Wings 2 Cans Pop Combo
- Enter a Retail 1 price of \$20.00

The Super Button can now be placed on your POS screen and is ready to sell.

Menu Pages

Menu pages are a way of organizing or grouping products on your POS screen.

If you are a restaurant, you may have categories such as Appetizers, Entrees, Beverages, Beer. On each of these pages, you would have the corresponding items. For example, on the Beer Page you would have Budweiser, Coors Light, etc. and on the Beverages Page you would have Coffee, Tea, and Soda etc.

In a convenience store your pages might be lottery, tobacco, candy.

It doesn't really matter what the pages are, as long as they make it easy for the cashier or server to locate the products to sell. Putting Budweiser on the Appetizers page would not be user friendly to the cashier.

It is important to note Menu Pages have no other function in the system other than organizing products on the POS screen. No reports use these groups for any purpose.

See Menu Designer for additional information.

Menu Designer

Adding Products, Discounts and Other Buttons to your POS Screen

Menu Designer is a specialized tool that helps you design your menu order screens. The order screens allow you to categorize your products onto pages and display these pages and corresponding products on the point of sale screen, making it easy to locate and sell the product. This is especially useful for restaurants, but also for any business where not all products have UPC codes. You can have some, all, or none of your products located on the screen.

The Menu Designer allows you to create and modify Menu Pages, Products, and Discounts as well as assign them to a position on the screen.

The Menu Designer is divided into three sections.

1) Menu Pages

The Menu Page contains one or more Page Buttons. When you click on a Page Button, the products assigned to the page appear in the Product Page section.

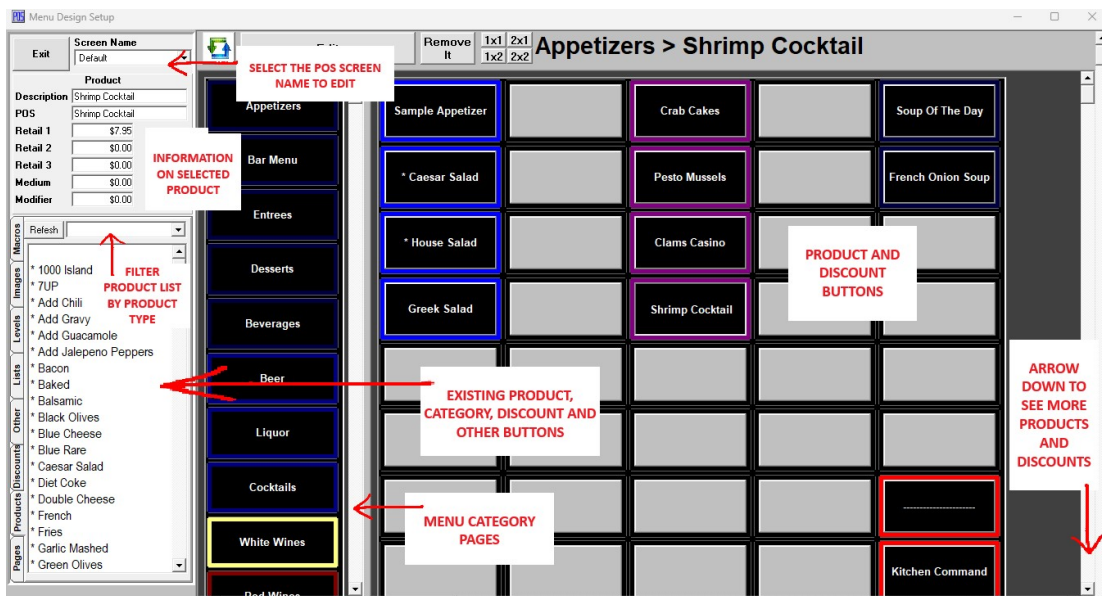
2) Product & Discount Pages

The Product & Discount Page contains the products for the current selected Menu Category Button.

3) Lists

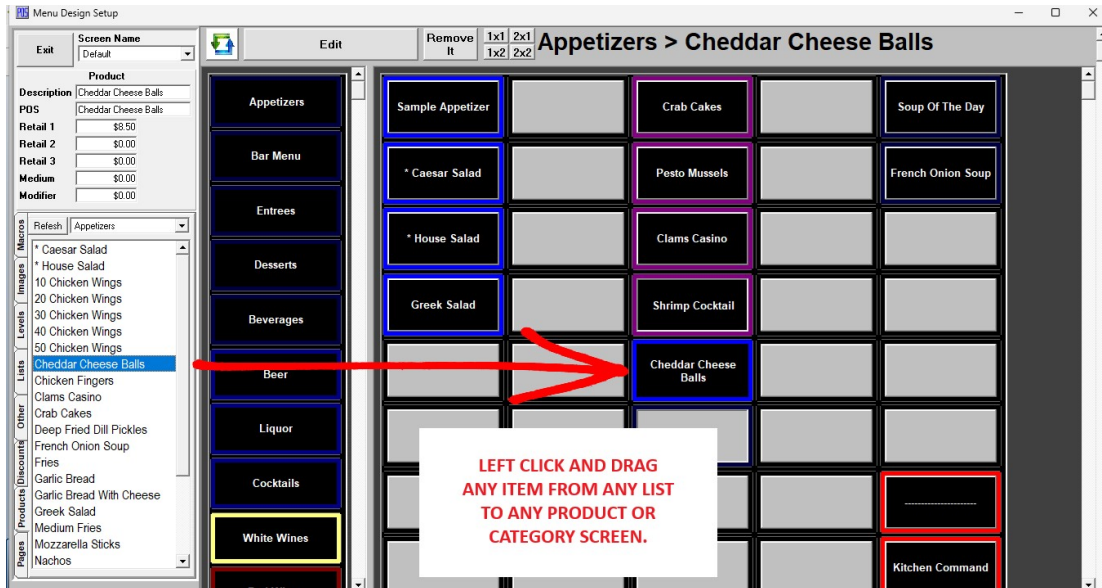
- **Product** displays a list of all products currently in your system.
- **Pages** displays a list of all Menu Pages currently in your system.
- **Discount** displays a list of all Discounts currently in your system.
- **Other** displays a list of other buttons you can place on your point of sale menu. (Gift Certificate Sale buttons, Get UPC button)

You can drag the items from the lists to vacant positions on the Menu Page or Product Page section.

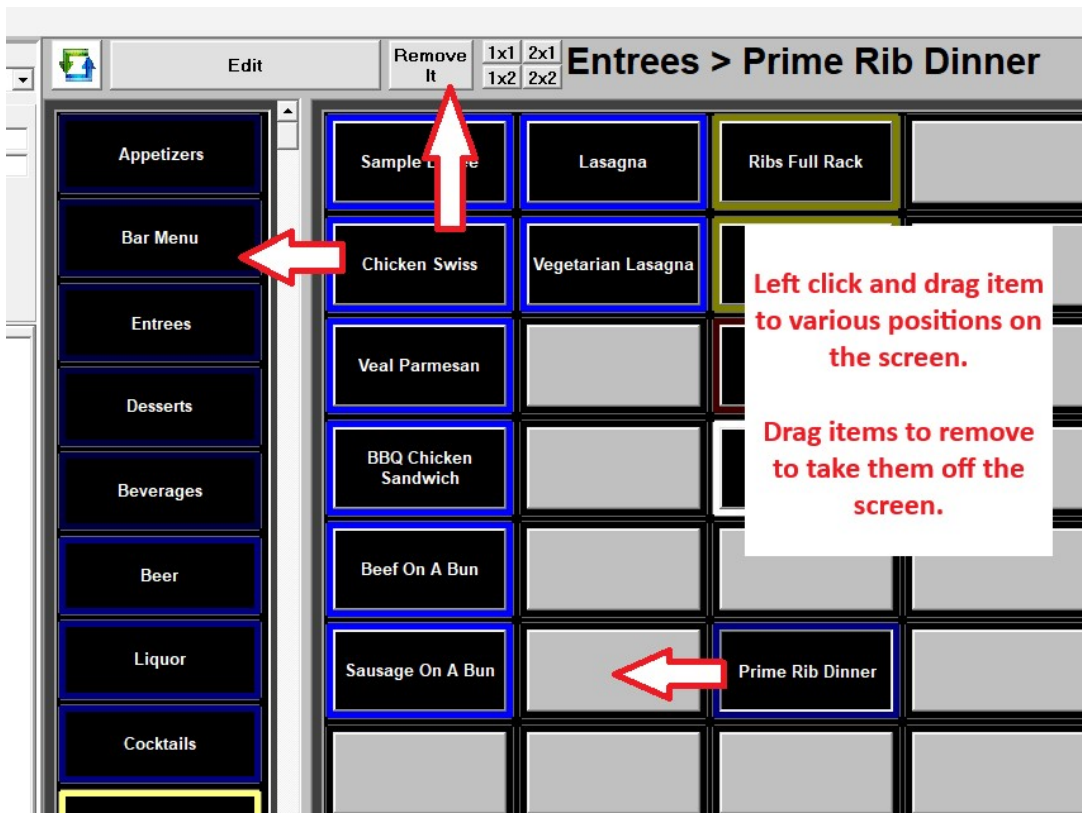


Note: You determine the number of Category Buttons and Product Pages in POS Screen Design. You can have one category with one hundred products or fifteen categories, each with fifty products. The only limits to your design are the size of your computer screen.

- Start the Menu Designer by clicking the *Menu Designer* icon or click Menu Designer from the Product Menu in POS Setup.
- Select the *Screen Name* that you want to work with from the dropdown list.
- Click on any Menu Page Button to view the Products on that page.
- To create or modify a Page Button, click the appropriate button and then click the Menu Page Setup button.
- To create or modify a Product Button, click the appropriate button and then click the Product Setup button.
- To create or modify a Discount Button, click the appropriate button and then click the Discount Setup button.
- To remove any buttons from the screen, drag them to the Remove It button or Right Click on the button and select Remove. *Removing a product or menu page button from a menu does not delete it from the corresponding data file. It just removes it from the menu.*
- To move any buttons, click and drag them to the new position.
- To move a product from one menu page screen to another, click and drag the product to the menu page button you would like it to appear on.
- To change the color of a product button, right click and select change background color. To change the color of multiple product buttons at once, hold the ctrl key and select all of the buttons you wish to change then right click and select change background color. This also works for changing the text color.
- The system automatically saves all changes so when you are done, simply click the Exit Button.



To add existing items to a screen, left click on the item you want to add to the screen and drag it to the position you want. When you are over the position, release the mouse button.



Right Click on any button in use on the Product & Discount Page to bring up the Edit Menu.

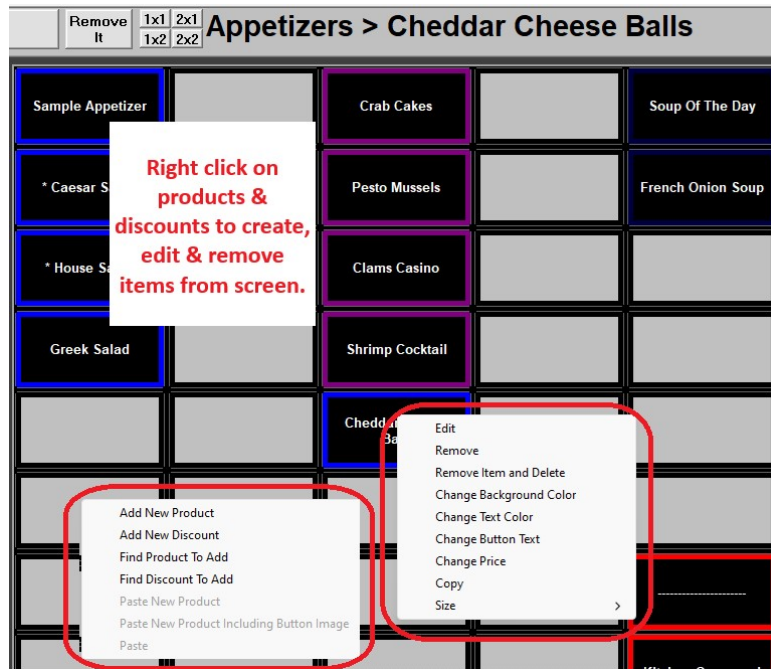
This menu allows you to:

- Edit the button
- Remove the button from the Product & Discount Page
- Change the button's background color
- Change the button's text color
- Change the button's text
- Change the retail price
- Change the modifier price

Right Click on any vacant button on the Product & Discount Page to bring up the Edit Menu.

This menu allows you to:

- Create a new product on that button
- Create a new discount on that button



Note: To multi-select several items, hold down the CTRL key and click on several product buttons. When all the items have been selected, right click on one selected item to display the multi-select menu.



- Change Background Color on Group
- Change Text Color on Group
- Change Price for Group
- Change Product Type for Group
- Change Text Position on Group

Point Of Sale Screen Examples

Joe
1 guest

Qty	Description	Price
Seat 1		
1	Coke	\$1.75
1	Shrimp Cocktail	\$7.95
1	Beef On A Bun	\$12.50
Seat 2		
1	Crab Cakes	\$8.95
1	Ribs Full Rack	\$15.95
1	* Jack Daniels BBQ Sa	
1	Corona	\$4.50
Total		\$51.60
Tax		\$6.71
TAG		\$58.31

6 Items

ManagerStaff

Receipt: 67

March 17, 2025 12:32 PM

Sale Is Active

Appetizers

Bar Menu

Entrees

Desserts

Beverages

Beer

Liquor

Cocktails

White Wines

Red Wines

Merchandise

▲

△

▽

▼

Add Seat

Group

2

Sample Appetizer

* Caesar Salad

* House Salad

Greek Salad

Crab Cakes

Pesto Mussels

Clams Casino

Shrimp Cocktail

Cheddar Cheese Balls

Soup Of The Day

French Onion Soup

Category Pages

Product Pages

Kitchen Command

More Functions

Customer

Void Item

Future Order

Substitute Modifier

Reorder

Split Check

Print Check

Send to Kitchen

Pay

Inventory - Receiving & Adjusting Stock Levels

Maintaining stock levels is an important aspect of the *POS* system. The *POS* has the ability to track stock across up to 20 warehouses.

A typical restaurant or retail store will keep all their stock within the premises of the building and maintain stock within the building. In this case, the business will only use one warehouse. Other businesses may maintain stock off premises as well as on premises so they may need to maintain more than one warehouse. You could also have a locked stock room on premises so that could be classified as a separate warehouse.

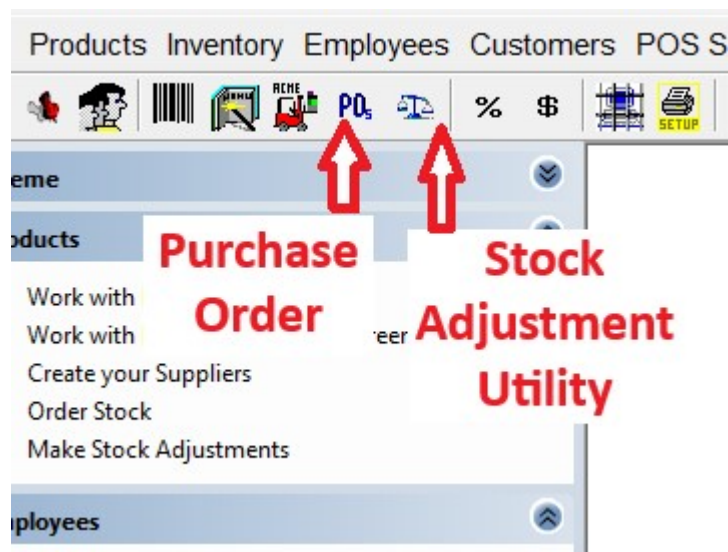
Whatever the configuration you choose, the *POS* can work with you.

Several things must be kept in mind when working with inventory.

- Under Station Setup, you select the warehouse each POS station will use for stock depletion
- Any of the methods listed below will allow you to make stock adjustments to a warehouse
- Stock can only be moved between warehouses using Stock Transfers
- A detailed stock history for any product can be found under Product Setup → History → Load Details

There are several methods available to adjust stock levels.

- Click Inventory → Stock Adjustment Utilities
- Click Inventory → Purchase orders
- Click Inventory → Stock Transfers
- Click Inventory → Stock Adjustments
- POS Stock Adjustments (*see the Point Of Sale User Guide*)
- Click Products → Locate the product → Click Quick Receive
- Click Inventory → Suppliers → Locate the products supplier → Click the products tab → Locate the product → Click Adjust Stock
- Sales from the Point Of Sale and Invoicing will always adjust stock levels



Warehouse Setup

The POS has the ability to track stock across single or multiple warehouses. Typically, your stock is located within your store, but sometimes it becomes necessary to keep your stock in various areas.

For example,

A restaurant may keep liquor behind the bar as well as a locked stock room. Management can transfer liquor from the stock room to the bar as required. At shift end, it would only be necessary for bartenders to count bar stock because they never accessed the stock room.

The screenshot shows a software window titled "Warehouse Setup" with a "General" tab. It contains a table with 20 rows for warehouse configuration. The first two rows are pre-filled: "Main Store" and "Stock Room", both with "Include In QOH" checked. The remaining 18 rows are empty. To the right of the table is a "Default Warehouse For" dropdown menu set to "Main Store" and a checkbox for "Lock Invoice Warehouse" which is currently unchecked. An "Exit" button is located in the bottom right corner.

	Warehouse Name	Include In QOH
1	Main Store	☒
2	Stock Room	☒
3	Off Site Warehouse	☐
4		☐
5		☐
6		☐
7		☐
8		☐
9		☐
10		☐
11		☐
12		☐
13		☐
14		☐
15		☐
16		☐
17		☐
18		☐
19		☐
20		☐

Default Warehouse For: Main Store

☐ Lock Invoice Warehouse

Exit

Warehouse Fields

Warehouse Name

Enter the name of the warehouse. *Remember warehouse 1 is always your main store.*

Include In QOH

Check this box if you want the quantity of stock in this warehouse to be reflected in your quantity on hand. You may have an off-site warehouse with stock that is not readily available for sale, so you may not want it included in your quantity on hand totals.

Default Warehouse For Invoicing

Select the warehouse invoicing will default to at the start of each transaction. You can optionally modify the warehouse.

Lock Invoicing Warehouse

Check this box if you do not want staff to be able to modify the default warehouse in invoicing.

Stock Adjustment Reasons

Stock Adjustment Reasons are used to create a descriptive history for all adjustments made to inventory levels. Stock adjustment reports will be broken down into these categories. Typical adjustment reasons could include,

- Shrinkage
- Stock Transfers
- Damaged

Stock Adjustment Reason Fields

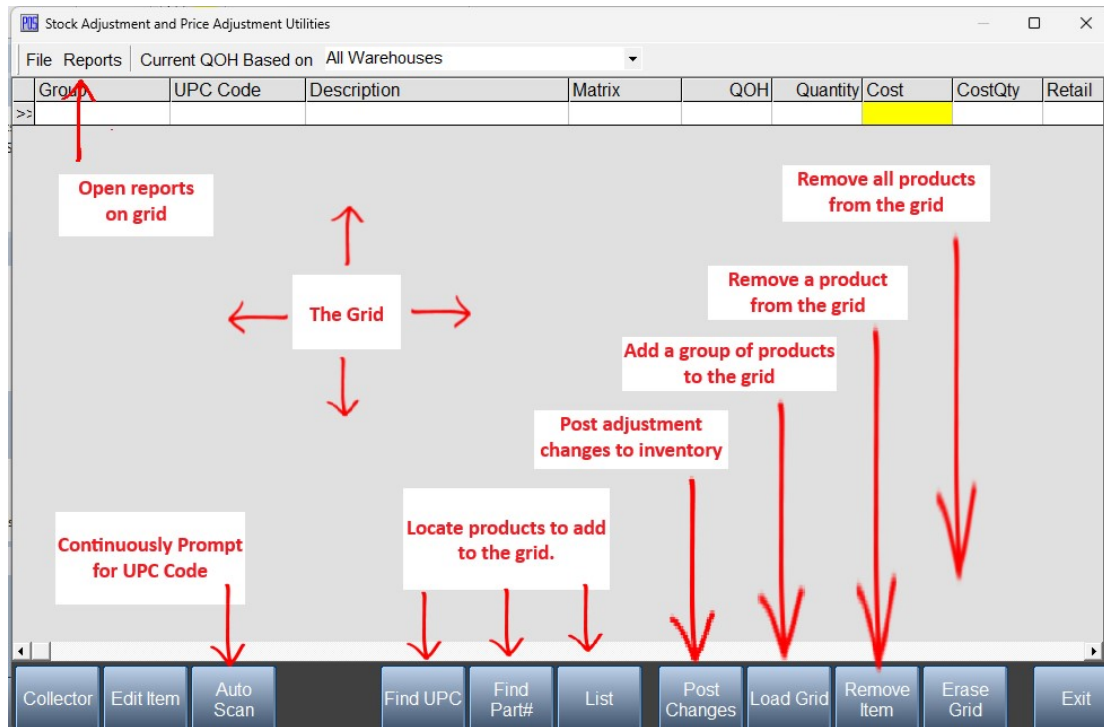
Reason Description

Enter a descriptive name for the adjustment reason.

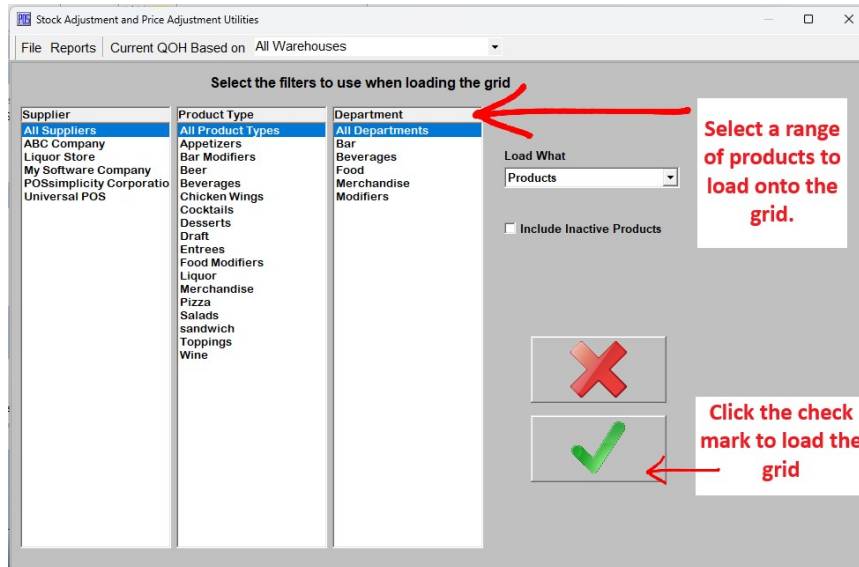
Stock Adjustment Utilities

Stock Adjustment Utilities are used to perform stock maintenance on a selected group of products.

- Stock Transfers
- Stock Receiving
- Stock Adjustments
- Physical Stock Counts

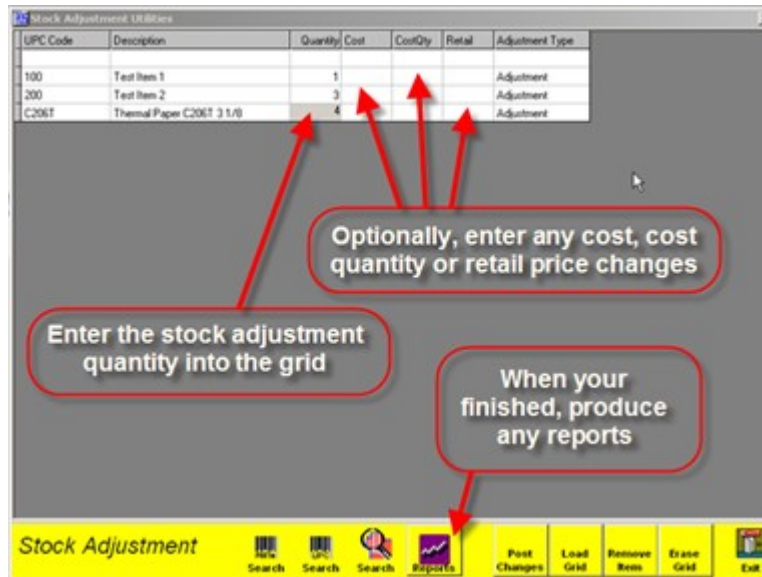


- 1) Start Stock Adjustment Utilities by clicking the Inventory Menu and then Stock Adjustment Utilities.
- 2) Fill the grid with products. You can add products individually using any of the search buttons or click *Load Grid* to add a group of products.

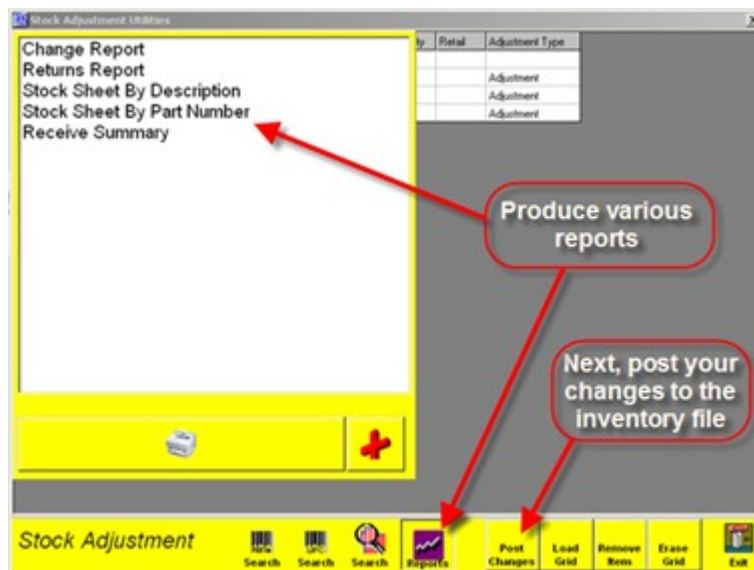


To select multiple items from any one column, hold down the CTRL key on your keyboard as you click each item.

3) Enter the adjustment quantities.



4) Print any adjustment reports.



5) *Post Changes* to inventory.

No changes are ever made to the inventory until the changes are posted.

The Yes button will not enable until you have selected a Posting Method, Stock Source & Destination, and a Reason. The comment is optional.

Stock Adjustment Utilities

This process will post the changes these changes to the inventory file.
Please confirm the information before continuing.

Quantities will be posted as entered

Posting Method	Transfer	Select the adjustment method
Stock Source	Stock Room	Select where the stock will come from and where it is going to
Stock Destination	Main Store	
Reason	Refill Shelves	Select the reason for the adjustment
Comment	Refill Main Cooler	

Enter any additional notes

Post changes to inventory

Posting Methods

Stock Adjustment: When you post the changes, the adjustment quantity you entered will be added or subtracted from the current quantity on hand. A positive adjustment value will be added and a negative adjustment value will be subtracted. Under stock adjustment, any changes to retail price, cost price, or cost quantity will be ignored.

Quick Receive: When you post the changes, the adjustment quantity you entered will be added or subtracted from the current quantity on hand. A positive adjustment value will be added and a negative adjustment value will be subtracted.

Physical Count: When you post the changes, the adjustment quantity you entered will become the current quantity on hand.

Stock Transfer: When you post the changes, the adjustment quantity you entered will be removed from the source warehouse and will be added to the destination warehouse.

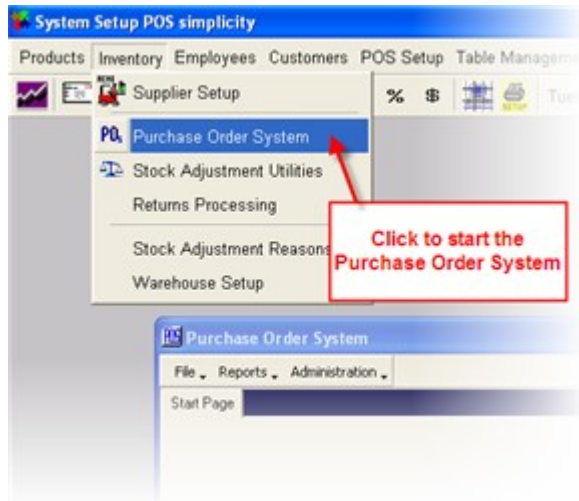
- 6) Once the adjustments have been posted to inventory, the grid will automatically erase itself.

See Stock Adjustment Reasons and Warehouse Setup for additional information.

The Purchase Order System

The POS contains a powerful, full-featured purchase order system. The purchase orders system allows you to create and issue order for stock to your suppliers and then quickly receive the stock when the merchandise arrives at your store.

Purchase order can be accessed directly from POSsetup by clicking Inventory → Purchase Orders or through Supplier Setup → Purchase Order tab.



To access purchase orders, *click Inventory → Purchase Order System* from POSsetup.

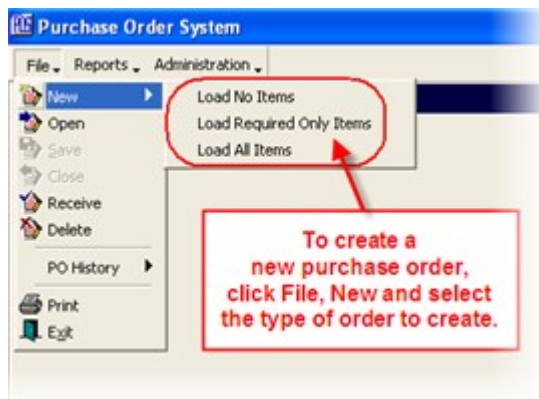
Purchase Order Features:

- Create stock orders for your suppliers
- Modify your orders
- Receive the purchase order when the goods arrive at your door
- Process back orders
- Print or email your orders to your suppliers
- Work multiple orders at the same time
- Print various reports
- Print product labels when stock is received

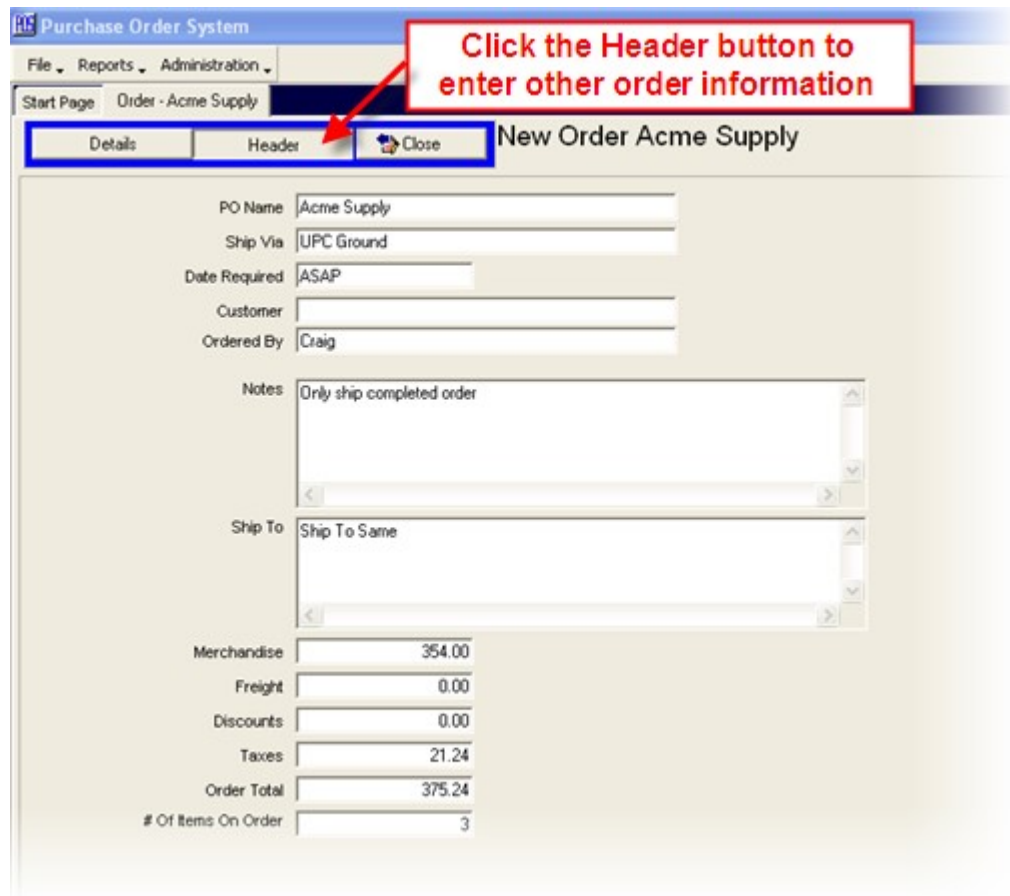
Creating a Purchase Order

There are several steps in generating a purchase order.

- 1) Start the Purchase Order system by clicking *Inventory* → *Purchase Orders*.
- 2) Click **File** → **New** and select the type of order to create.
 - **Load No Items:** Create a new purchase order for a particular supplier but don't preload any information into the order. The items can be manually added to the order.
 - **Load Required Only Items:** Create a new purchase order for a particular supplier and load any items into the order that require stock based upon each product's Minimum and Reorder Quantities.
 - **Load All Items:** Create a new purchase order for a particular supplier and load all items purchased from the supplier into the order.
 - **Load All – No Filter:** Create a new purchase order for a particular supplier and load all items purchased from the supplier including items with Track Stock turned off.



- 5) Enter any other purchase order information on the Header Screen.



Purchase Order System

File Reports Administration

Start Page Order - Acme Supply

Details Header Close New Order Acme Supply

PO Name Acme Supply

Ship Via UPC Ground

Date Required ASAP

Customer

Ordered By Craig

Notes Only ship completed order

Ship To Ship To Same

Merchandise 354.00

Freight 0.00

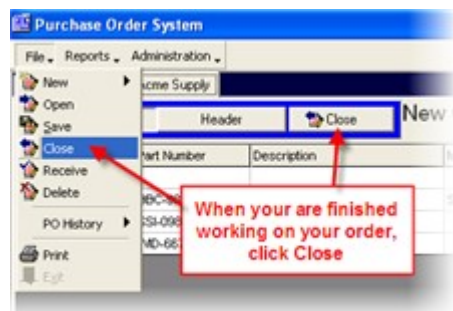
Discounts 0.00

Taxes 21.24

Order Total 375.24

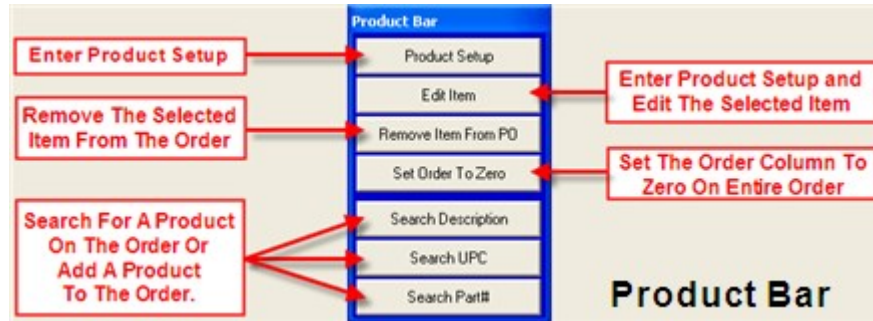
Of Items On Order 3

- 6) Click File → Close to save and print the order.



Product Bar

The product bar allows access to several functions of the purchase order systems.



Modifying a Purchase Order

- 1) Start the Purchase Order system.
- 2) Click File → Modify.
- 3) Select the Purchase Order you wish to open from the list.
- 4) Modify the order as required.
- 5) Click File → Close to save the order.

Print a Purchase Order

- 1) Start the Purchase Order system.
- 2) Click File → Print.
- 3) Select the Purchase Order you wish to print from the list.

Delete a Purchase Order Without Receiving Stock

- 1) Start the Purchase Order system.
- 2) Click File → Delete.
- 3) Select the Purchase Order you wish to delete from the list.
- 4) Confirm by selecting Yes when prompted.

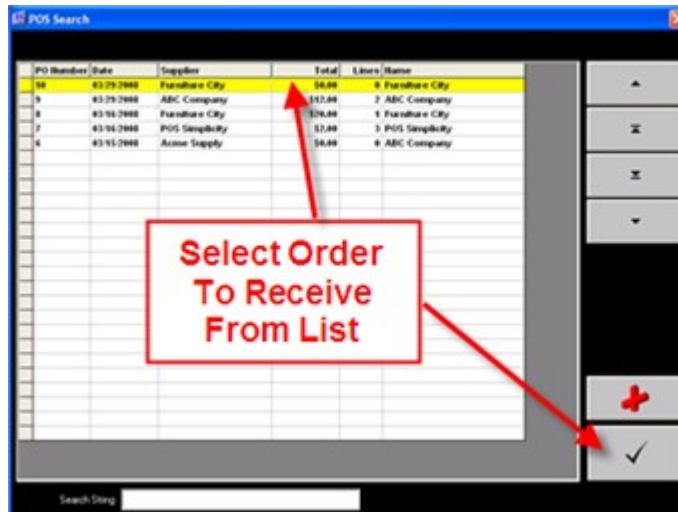
Receiving a Purchase Order and Update Stock Levels

When your stock arrives at your back door, you need to receive your purchase order. Receiving the order will update your stock levels and print any product labels that are required.

- 1) Start the Purchase Order system.
- 2) Click File → Receive.



- 3) Select from the list, the order you wish to receive.



- 4) Under the Receive column, enter the actual quantity that you received for each item. Optionally, modify the cost and retail prices if required.

Purchase Order System

File Reports Administration

Start Page Order #12 - Acme Supply Order - Furniture City

Details Header Close **Receive Order Acme Supply**

UPC Code	Part Number	Description	Matrix	GOH	QOO	Order	Receive	Cost	For	Retail	Expiry Date
7723653271	VMD-6678	vidget		5	0	20	20	14.95	1	125.99	
100	SSA-0987	Sample Item		0	0	10	5	\$0.00	1	\$9.95	
123	BBC-98761			57			5	\$2.00	3	\$4.00	

- 5) Click File → Close to Save The Order. When prompted select Yes to Post the order. The posting process will update your stock and print any product labels that are required.

Do you want to post order # 20 ?

Select Yes to
Update the Inventory File
with the Stock Adjustments.

Yes No

Back Order Processing

The POS can create a back order if the entire purchase order is not received. For example, you ordered 10 hammers and only 8 were shipped. A back order of 2 hammers can be created.

When you receive a purchase order, you will be prompted to generate a back order if all the goods were not received.



When a back order is generated, the POS will create a new purchase order with the back ordered quantities.



The back-order purchase order is treated the same as any other purchase order.

Stock Transfer

Stock Transfer allows a quick method to transfer stock between warehouses for individual items. To access Stock Transfer, click the Inventory Menu followed by Stock Transfer.

Location	Quantity
Main Store	16
Stock Room	0
Off Site Warehouse	125
	0
	0
	0
	0
	0
	0
	0
	0
	0

- 1) Enter/Scan the Product UPC code or press the search button to list products
- 2) Select the Stock Source (where is the product coming from)
- 3) Select the Stock Destination (where is the stock going to)
- 4) Select a reason for the adjustment
- 5) Enter the quantity of stock to transfer
- 6) Post the Transfer

Note: You will not see the adjustment take place automatically in the quantity list. If you wish to see the stock transfer result, you may need to press the Refresh List button several times.

Stock Adjustment

Stock Adjustment allows a quick method to increase or decrease stock levels for a warehouse. To access Stock Adjustment, click the Inventory Menu followed by Stock Adjustment.

Stock Adjustment	
Product UPC	123
Description	Baseball Cap
Stock Destination	Main Store
Adjustment Reason	Loss/Theft
Adjustment Quantity	-1

Location	Quantity
Main Store	16
Stock Room	0
Off Site Warehouse	125
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0

- 1) Enter/Scan the Product UPC code or press the search button to list products
- 2) Select the Stock Destination (where is the stock going to)
- 3) Select a reason for the adjustment
- 4) Enter the adjustment quantity
- 5) Post the Adjustment

Note: You will not see the adjustment take place automatically in the quantity list. If you wish to see the stock adjustment result, you may need to press the Refresh List button several times.

Stock Receive

Stock Receive allows a quick method to receive stock for an individual warehouse. To access Stock Receive, click the Inventory Menu followed by Stock Receive.

Location	Quantity
Main Store	16
Stock Room	0
Off Site Warehouse	125
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0

- 1) Enter/Scan the Product UPC code or press the search button to list products
- 2) Select the Stock Destination (where is the stock going to)
- 3) Select a reason for the adjustment
- 4) Enter the quantity of stock to receive
- 5) Post Receive

Note: You will not see the adjustment take place automatically in the quantity list. If you wish to see the stock receive result, you may need to press the Refresh List button several times.

Setting Up and Using Your Portable Data Collector

Portable data collectors provide an efficient and accurate method of verifying stock levels and receiving stock. They allow you to walk throughout your business, collect the stock information into the collector and then have the collector update or verify your stock levels. The data collector can also be used to verify product barcodes and prices.

```
[PortableDataCollector]
CollectorIniLocal=False
```

If you purchase your Data Collector from the POS, it will come to you pre-programmed with all applicable software. If you purchase the product elsewhere, then you must program the unit yourself with any required software.

Unitech PT630 Data Collector Basic Installation & System Configuration

- 1) Install Job Generator Software to C:\JGPlus5.
- 2) Install PTComm Software to c:\JGPlus5.
- 3) Program your data collector using directions that accompanied your data collector. The required programming files are located in the C:\POSEDGE\3rdParty directory on your main point of sale computer.
- 4) Add or verify the following lines exist in the POSEDGE.INI file located in the POSEDGE directory on your main point of sale computer.

```
[PortableDataCollector]
CollectorIniLocal=False
DataCollectorFiles={enter the path name here; usually c:\posedge\3rdparty}
JobPath={enter the path to the job file, usually c:\posedge\3rdparty\DoPT630.bat
DataFormat=UQ           for entering UPC and Quantity
    ---or---
DataFormat=UMQ           for entering UPC, Matrix and Quantity
```

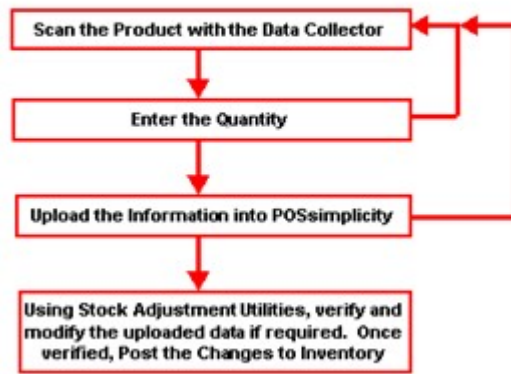
Note:

You can add the files to your local POSEDGE.INI if you set CollectorIniLocal=True

- 5) Connect your data collector to *COM Port One* on your computer.
If you need to connect the data collector to a different port, then you must manually edit the file C:\POSEDGE\3rdParty\GetPT630Data.bat using any text editor and adjust the section *ComPort:1* to be the appropriate ComPort number.

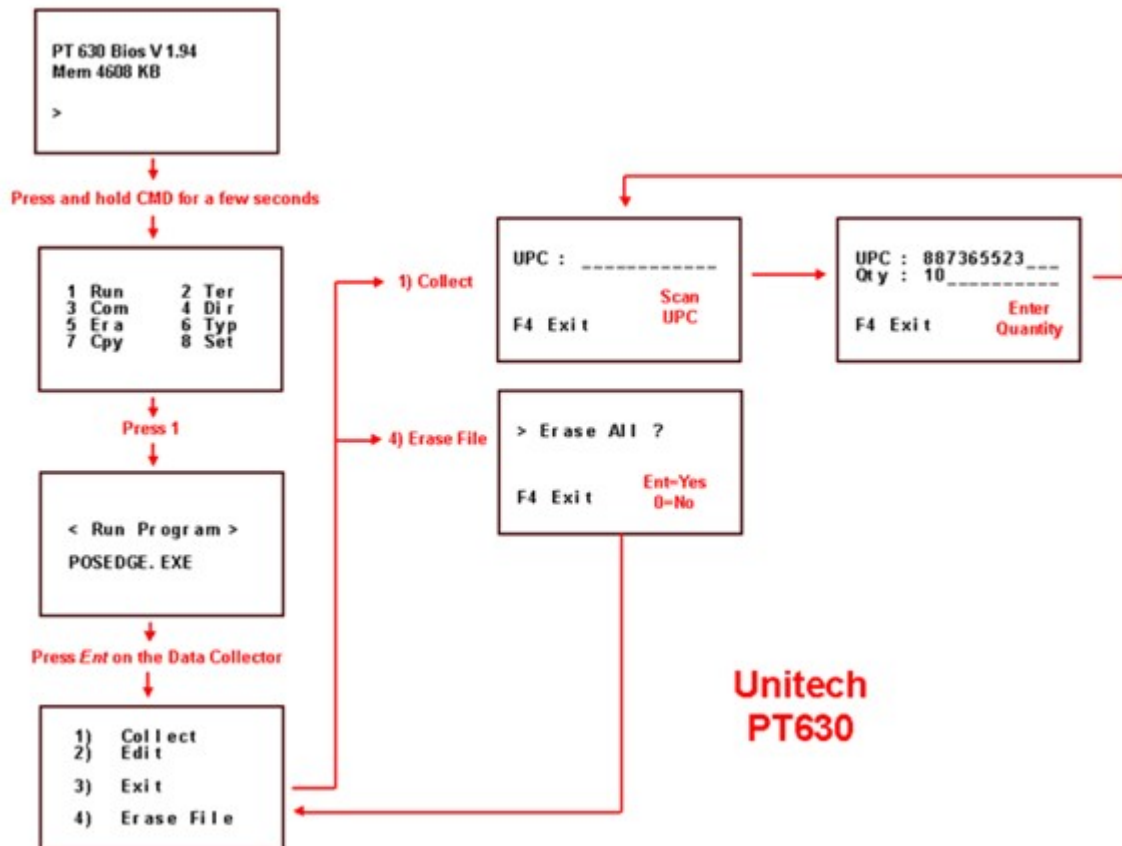
Basic Usage for Data Collection

Data Collector Flowchart



Using Your Portable Data Collector for Stock Taking

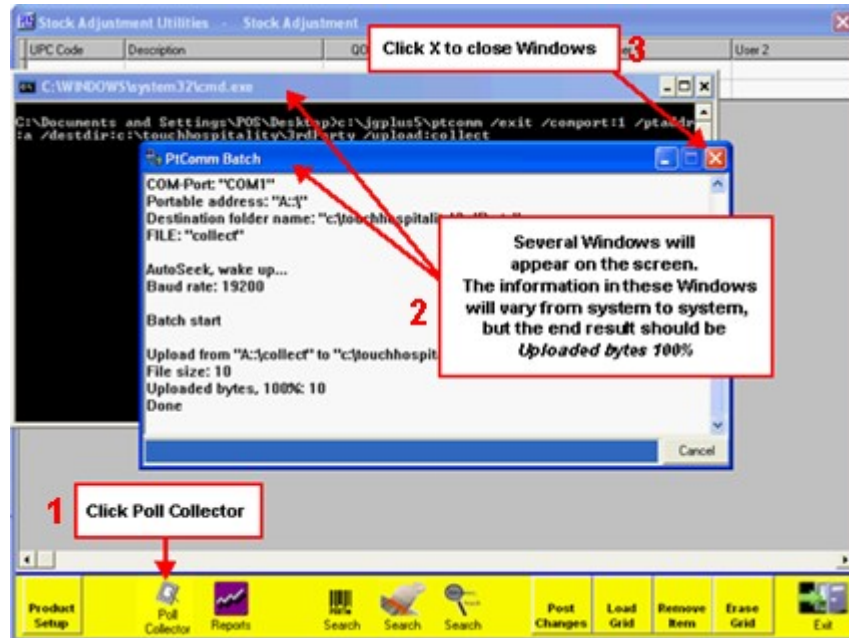
The following flow chart describes how to **Collect Data** into your data collector and also how to **erase the Poll File** from the data collector after the information has been uploaded into your computer.



Uploading Data Collector Information

Once you have collected information using the data collector, you need to get the information into the point of sale system. The following steps outline the basic procedure.

- 1) Connect the data collector to the computer using the cables provided or by placing the data collector into its cradle.
- 2) Click Poll Collector. Several Windows will appear on the screen. When you see *Uploaded bytes 100%*, Click the X to close the Windows.



- 3) Click Yes to perform the update from the poll file. This will take the information that was received from the data collector and place it in the *Stock Adjustment Grid*.



- 4) Click **Yes** to erase the Data Collector Poll File. This file contains all the information that was received from the data collector. The only time you would click **No**, is if any errors occurred earlier in this process.



- 5) You must now erase the *Poll File* from the data collector. Use the flow chart on **Using Your Portable Data Collector** which explains the process on erasing this file.

Repeat the steps on collecting data using the Data Collector and uploading the information into the POS. Once completed, Post Changes to inventory. For more information, see Stock Adjustment Utilities in this manual.

Customer Setup

The customer module allows you to enter information about each person who is purchasing from your establishment. A customer is the most valuable asset any business has. Tracking their buying habits, remembering names, birthdays, previous orders and direct-targeted mail help to keep your customers coming back.

The screenshot displays the 'Customer Maintenance' application window. On the left, a list of customers includes 'Brown Kevin', 'Jason', and 'Smith Joe', with 'Jason' selected. The main area contains a 'General' tab with various input fields for customer information. At the bottom, there is a navigation bar with buttons for 'Add New Record', a save icon, a delete icon, 'Finished', and 'Refresh'.

Field	Value
Last Name	Jackson
First Name	Jason
Salutation	[Dropdown]
Address 1	23 Smith Road
Address 2	[Empty]
City	Welland
Province	Ontario
Postal Code	L0R 1T9
Country	Canada
Phone Number	(905)123-4567
Toll Free	() - [Empty]
Fax Number	() - [Empty]
Mobile	() - [Empty]
Email Address	info@universalpos.ca
Web Address	www.universalpos.ca
Card Number	[Empty]
Customer Type	[Dropdown]
Account Expiry	01/01/3000
Contact Method	By Email
Terms	Due On Delivery
Contact	[Empty]
Credit Limit	\$100.00
Price Level	Retail 1
Default Sales Type	[Dropdown]

Customer Fields

Last Name, First Name

Enter the customer's name.

Salutation

Select from the dropdown list any salutation that applies to this customer.

Address, City.....Country

Enter the mailing information for the customer.

Phone and Fax Numbers

Enter the customer's telephone numbers.

Email Address

Enter the customer's email address.

Web Address

Enter the customer's web site address.

Customer Number

Enter any customer number used to identify the customer. This information is usually from a customer membership card or a customer loyalty card. This provides a quick method of locating the customer in the system. If you don't use a customer number, you can still search for customers by their name or phone number.

Customer Type

Select from the dropdown list any customer type that applies to this customer. Customer Types allow you to group your customers for reporting purposes. You could create customer types for male or female, seniors etc.

Credit Limit

Enter the dollar amount credit limit that you are extending to this customer. This credit limit determines how much they can charge on their account when they purchase from your establishment. If their current charges plus the amount they are purchasing exceed their credit limit, the purchase will not be able to be charged on their account. If you don't extend credit to your customers, enter \$0.00 here.

Spouses and Child's Names and Birthdays

Enter any family information you have for this customer. Again, any information you have can be used in targeted direct mailings to customers.

Notes

Enter any information you want here.

I.D. 1 and I.D. 2

UniversalPOS

Enter any identification information you have on hand for this customer (i.e. Driver's License number).

Automatic Discounts

Enter the percent discount this customer automatically received on his entire purchase. (20 would be a 20% premium, -20 would be a 20% discount). These discounts are calculated automatically when the customer is assigned to the sale.

See Customer Auto Discounts for additional information.

Account Expiry

Select or enter the date that this account should become inactive. If your accounts do not expire, leave this date as its default.

Retail Price Level

Select from the dropdown list the retail price this customer should be charged when they purchase a product. When you create products, you assign a Retail Price 1, through Retail Price 15 to the product. You can assign one of these price levels to the customer. Retail Price 1 would be your normal selling price and Retail Price 2 might be your wholesale selling price. If this was a wholesale customer, then assign Price Level Retail 2. This way when they make purchases, they are always charged the wholesale rate.

Note: You must select Customer Price Level as the Price Structure under Station Setup for this function to operate in the point of sale.

The Price Level can also be set to Cost Plus. When selected, a text box will appear allowing you to enter the percent rate to mark up a product at the point of sale. Cost plus pricing overrides all price schedules, price tables and promotions.

For Cost Price pricing to work,

- Enable Cost Plus Pricing under Policy Setup.
- The Cost of the product cannot be zero.
- The Cost Price Markup for the customer cannot be zero.

Otherwise, the item will be sold for the standard retail price.

Photo

Customer Photo.

Ship To Address

Enter the shipping or delivery address for the customer if it varies from their home address. Optionally, you can enter a secondary shipping address for the customer.

Tax Exempt

Check any taxes that this customer is exempt from. The tax exemption will be applied automatically at the point of sale.

Tax Exempt Number

Enter any tax-exempt number for the customer that you wish to keep on file.

Exclude Customer From Reward Systems

Check to exclude the customer from all reward systems.

Bonus Buck % Rate

Enter the Bonus Buck loyalty rate this customer is to receive when they make a purchase. The rate entered here will override any rates setup up under Customer Types and System Setup. Leave this field blank to use the default rate from Customer Type or System Setup. *See Customer Rewards for additional information.*

Exclude Customer From Frequent Buyer Programs

Check to exclude the customer from the Frequent Buyer Program.

Sales Representative

Select from the dropdown list any sales representative that looks after this customers account.

Correspondence Preference

Select from the dropdown list the preferred method to send correspondence to the customer. Select Mail or Email or No Correspondence.

Purchase Order Number Required

Check this box if this customer required a purchase order number for all purchases. This function only applies to Invoicing.

Contact

Enter any contact information for this customer. This field would normally be used if the customer is a company and not a person. The contact would be the individual at the company you deal with on a regular basis. You can also have additional contact information for the company by clicking the ●●● button at the end of the field. *See Contacts for additional information.*

For Additional Information see Customer Type Setup and Sales Representative Setup.

Customer Type Setup

Customer Types allow for a means of grouping your customers for reporting purposes. How you would do this or if you require it would depend greatly on the type of business you are running.

For example,

A clothing store may group their customers by Gender.

A golf course could group their customers by member type.

Setting these types now and assigning them to your customers will make it easier to generate specific customer reports later.

The screenshot shows a software window titled "Customer Type Setup". On the left is a list box containing "Bronze", "Gold", "Silver", and "Wholesale", with "Gold" selected. The main area is the "General" tab for the "Gold" customer type. It includes a "Customer Type Name" field with "Gold" entered, a "Bonus Buck % Rate" field, a "Customer Auto Discount" dropdown menu showing "Loyalty Discount", and an "Auto Disc Rate" field with "5" entered. A note below the rate field reads "eg 10 for a premium -10 for a discount". At the bottom right are "Delete", "Add New", and "Exit" buttons. At the bottom left are navigation buttons: a list box, a back arrow, a forward arrow, and a double back arrow.

Customer Type Fields

Customer Type Name

Enter the name to describe the customer type.

Bonus Buck % Rate

Enter the Bonus Buck loyalty rate this customer type is to receive when they make a purchase. The rate entered here will override any rates set up under System Setup. Leave this field blank to use the default rate from System Setup. *See Customer Rewards for additional information.*

Customer Auto Discount

Select the automatic discount to apply when any customer is assigned this customer type. The discount rate applied is the greater of the value assigned to the customer type or the Auto Discount value assigned to the customer under the Customer Setup → Advanced Tab → Auto Discount. *See Customer Auto Discounts for additional information.*

Auto Discount Rate

Enter the default auto discount rate to apply. The discount rate applied is the greater of the value assigned here or the Auto Discount value assigned to the customer under the Customer Setup → Advanced Tab

For Additional Information see Customer Setup.

Customer Auto Discounts

Customer Auto Discounts are percent discounts that are automatically calculated when the customer is assigned to a sale.

To setup the auto discount,

1. Go to Discount Setup and create a new discount similar to below. Make sure the discount type is either
 - a) 4 - Sale Percent Discount.
 - b) 6 - Group Percent Discount

The screenshot shows the 'Discount Setup' window with the 'General' tab selected. The 'Discount Name' is 'Loyalty Discount'. The 'Type' is '4 - Sale Percent Discount'. The 'Amount' is '10'. The 'Open Entry Allowed' checkbox is unchecked. The 'Security Level Required' is set to '1'. The 'Prompt' is empty. The 'Bar Code' is empty. The 'Bonus Bucks' is '0'. The 'Sign' section has 'Minus' selected. The 'Tax' section has 'H.S.T.' selected. The 'Always Print Receipt' checkbox is unchecked. The 'Once Only Per Transaction' checkbox is unchecked. The 'Cannot Be Combined With Another Discount' checkbox is unchecked. The 'Can Only Be Applied To Regular Priced Items' checkbox is unchecked.

2. Go to Customer Types and assign this discount to Customer Auto Discount. You can also enter the default Auto Discount Rate to apply. The rate applied at the point of sale will be the greater of
 - a) the discount rate applied under customer types or
 - b) the discount rate applied under customer setup. (see step 3 below)

The screenshot shows the 'Customer Type' setup window for 'Gold'. The 'Customer Type Name' is 'Gold'. The 'Bonus Buck % Rate' is empty. The 'Customer Auto Discount' is 'Loyalty Discount'. The 'Auto Disc Rate' is '5'. Below the 'Auto Disc Rate' field, there is a note: 'eg 10 for a premium -10 for a discount'.

3. Optionally, go to Customer Setup on the Advanced Tab and enter the percent discount this customer automatically received on his entire purchase. (20 would be a 20% premium, -20 would be a 20% discount). These discounts are calculated automatically when the customer is assigned to the sale.

Sales Representative		
Automatic Discount	20	eg 10 for a premium -10 for a discount
Bonus Buck % Rate		

The rate applied at the point of sale will be the greater of
a) the discount rate applied under customer types or
b) the discount rate applied under customer setup

Auto Discount will now be automatically calculated for a customer when they are assigned to a sale purchase.

Guest Check		
Supervisor Joe		
Qty	Description	Price
1	Baseball Cap	\$19.95
1	Widget #1	\$5.59
1	Customer Disc	-5.11

Contact Setup

Under Construction.

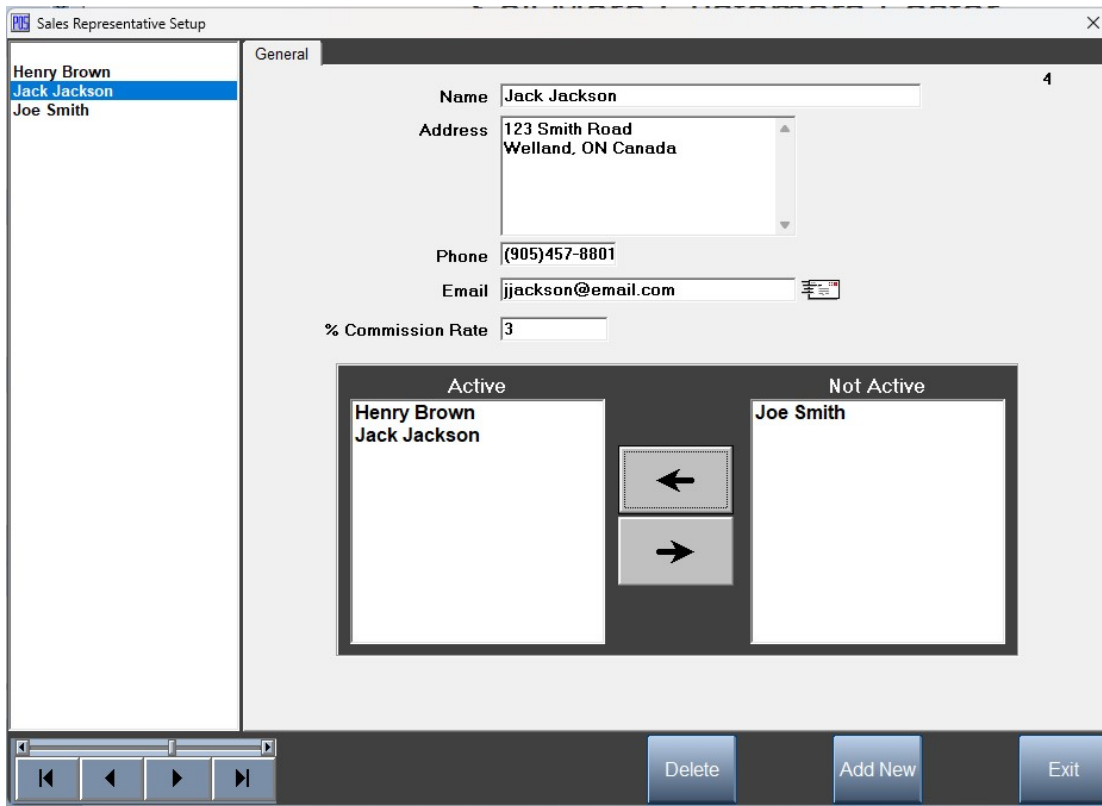
Marketing Tools

The POS has many built in functions to help market your products to your customers.

- Customer Tracking
- Loyalty / Reward Points
- Gift Card Management
- Auto Sale Email Feature

Sales Representative Setup

Sales Representatives can be assigned to sales transactions for reporting and commission purposes.



The screenshot shows the 'Sales Representative Setup' window. On the left, a list of representatives includes Henry Brown, Jack Jackson (highlighted), and Joe Smith. The main area, under the 'General' tab, contains the following information for Jack Jackson:

- Name: Jack Jackson
- Address: 123 Smith Road, Welland, ON Canada
- Phone: (905)457-8801
- Email: jjackson@email.com
- % Commission Rate: 3

Below the fields, there are two boxes: 'Active' (containing Henry Brown and Jack Jackson) and 'Not Active' (containing Joe Smith). Between these boxes are left and right arrow buttons. At the bottom of the window are navigation buttons (back, forward, etc.) and action buttons (Delete, Add New, Exit).

% Commission Rate

Enter the commission rate the sales rep will receive on transactions totals.

Commissions due to sales representatives are calculated by

- The commission % rate assigned to the Sales Representative or
- The commission % rate assigned to the various Product Types.

There are two back end reports which can be run to show the commission rates due for each calculation method.

Customer Rewards (POS Processed)

Customer Rewards is a means of giving your customer something in return for their patronage. The POS provides three built in Reward Systems.

- **Bonus Buck** values based on a percentage of the pre-tax value of the sale. For example, if you are offering a 5% reward and the customer spends \$100, they would receive 5 Bonus Bucks on their account to be used against future purchases. The total points earned are stored in the customer's profile. The default rate for bonus bucks is set up under System Setup → Customer Features. An override rate can be set up under Customer Types or Customer Setup.
- **Reward Point** values can be assigned to individual products. When a customer purchases these products, they earn the point value. The total points earned are stored in the customer's profile.
- **Gift Card Point** values based on a percentage of the pre-tax value of a range of product types. The total points earned are assigned to a new or pre-existing gift card.

Note

All Rewards can only be redeemed on future purchases. They cannot be applied against the transaction on which they are earned.

A valid Customer must be assigned to the sale to use the rewards points.

All Reward Systems can be disabled in System Setup → Customer Features Tab.

Setting up Reward Points

Under the *Customer Tab in System Setup*, enter the percentage value for your reward system and a name for your reward system. Entering a value of zero will disable the reward system. You can also create rates under customer types and customer setup. The default rate is overridden by any rates set under customer types. The rate set under customer types is overridden by any rate set at the customer level.

Go to Administration → System Setup → Gift Card / Credit Note / Loyalty Tab and select the Product Types and the Loyalty will be applied to when earning the rewards.

You must also create a *Payment Method* called Bonus Bucks Redeem or similar and set its *Authorization Method to Bonus Buck Redeem*. This Payment Method will be used at the point of sale to redeem Bonus Bucks.

Earning and Redeeming Reward Points

Reward points are accumulated automatically every time a customer makes a purchase.

Reward points are treated as money so they are redeemed using a payment method. At the point of sale, simply click the Redeem button you created. Any reward points the customer has on their account will be applied against their purchase and their reward points total will be adjusted appropriately. Any new reward points they received on the current purchase will then be applied to their account for use against future purchases. Reward points can also be redeemed using discounts.

Setting Up Gift Card Points

Click Administration → System Setup → Gift Card Tab

- 1) Enter the percent rate to apply to the gift card.
- 2) Select the product types that the percent rate applies to. Only items purchased that belong to selected categories will earn points.
- 3) Select the minimum value or floor limit that must be purchased within these product types to earn points. You can override the floor limit by adding the Gift Card Promo button to your payment screen under the POS Screen Designer.
- 4) If you want the POS to track the gift cards, uncheck *Untracked Gift Cards*. Untracked gift cards are typically tracked through your bank's credit card terminal.

The screenshot displays the 'System Setup' window for UniversalPOS, specifically the 'Gift Card' tab. The top navigation bar includes links to Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, Email Setup, Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, and POS & Sys.

Gift Card Configuration:

- Sale Prompt For RA:** Email (dropdown)
- Convenience Card Name:** Convenience Card
- Gift Card Preset Values:** 5.00, 10.00, 20.00, 50.00, 100.00
- Gift Card Promo % Rate:** 10.00, 0.00, 0.00
- Gift Card Promo Floor Limit:** 5.00, 0.00, 0.00
- Gift Card Number Length:** 8

Gift Card Promo and Loyalty Applies To:

- ☒ Appetizers
- ☒ Bar Modifiers
- ☒ Beer
- ☒ Beverages
- ☒ Cocktails
- ☒ Desserts
- ☒ Draft
- ☒ Entrees
- ☒ Food Modifiers
- ☒ Liquor
- ☒ Merchandise
- ☒ Pizza
- ☒ Salads

Bonus Loyalty:

- Method:** None (dropdown)
- Date From:** 03/11/2024 (calendar icon)
- On Special To:** 03/11/2024 (calendar icon)
- Points:** 0

Earning and Redeeming Gift Card Points

If Gift Card Points were earned during the sales transaction and the customer purchased enough products to meet the floor limit, the POS will prompt for the gift card number to assign the points to.

If the customer did not purchase enough products to meet the floor limit, but you still want to give them the rewards, you can press the Gift Card Promo button on your payment screen prior to finalizing the transaction.

If you want to cancel the assignment of points, click the X button when prompted for the gift card number. Gift card points can be assigned to new or existing gift cards.

Gift Card points are redeemed as a normal gift card.

Your day end reports all Gift Card Points issued.

Customer Rewards (Ackroo Processed)

Customer Rewards is a means of giving your customer something in return for their patronage. Ackroo provides an integrated solution for loyalty that can be used in a single store/multi store environment. The actual types of loyalty and setup of same are configured through Ackroo.

For more information visit www.ackroo.com and see Gift Cards (Ackroo Processed)

Setting Up Ackroo Rewards

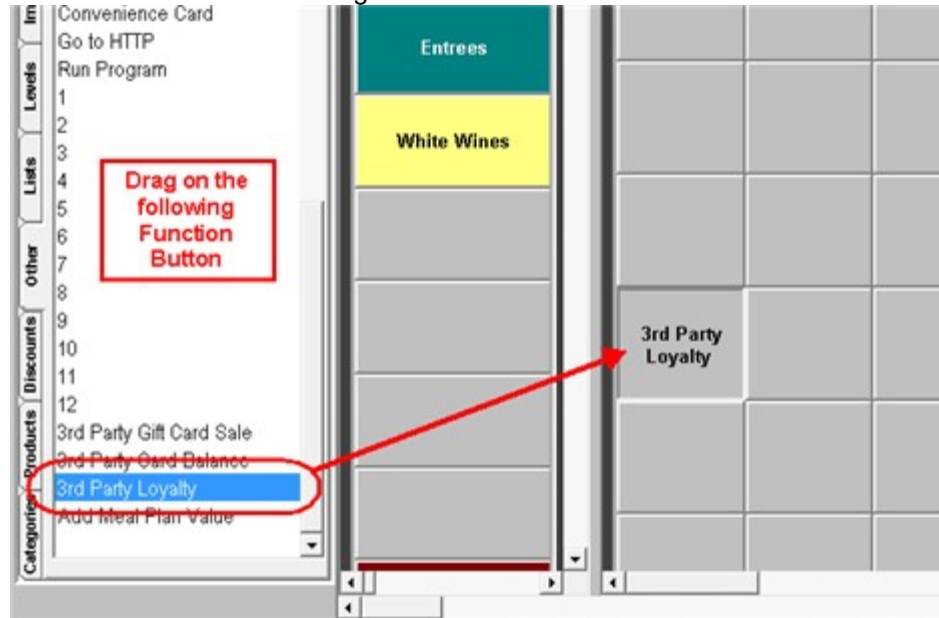
- 1) POSSetup → Administration → Station Setup → Credit / Loyalty Card Tab

The screenshot shows the 'Station Setup' window with the 'Credit / Loyalty' tab selected. The left sidebar lists stations from Station #1 to Station #38 Office. The main panel has tabs for General, Keyboard, Devices, Printers and Cash Drawers, Advanced, and Credit / Loyalty. The 'Credit / Loyalty' tab is active, showing a 'Debug Mode' checkbox checked. Below this, there are two sections. The first section contains 'Debit/Credit Processor' set to 'None' and 'Terminal Receipt Print Location' set to 'On Pinpad'. The second section contains 'Gift Card Processor' set to 'None' and '3rd Party Gift Card' set to 'Ackroo Gift & Loyalty'. This second section is highlighted with a red rounded rectangle. Below the red rectangle, there are three text input fields: 'URL' with the value 'https://api.sandbox.ackroolabs.com', 'API Key or UID' with the value 'a854c2374911548', and 'Token' with the value 'bc14411c2080aca6ac1c3a5b0abc892d61d2408addc1923fe0ee1666f1f1bd'. Below these fields are 'Card Prefix' and 'Prompt' checkboxes, both of which are unchecked.

Field	Value
Debit/Credit Processor	None
Terminal Receipt Print Location	On Pinpad
Gift Card Processor	None
3rd Party Gift Card	Ackroo Gift & Loyalty
URL	https://api.sandbox.ackroolabs.com
API Key or UID	a854c2374911548
Token	bc14411c2080aca6ac1c3a5b0abc892d61d2408addc1923fe0ee1666f1f1bd
Card Prefix	
Prompt	

1. Select Ackroo Gift & Loyalty for the 3rd Party Gift Card Processor.
2. Enter the Connection URL provided by Ackroo on the URL line.
(usually <https://api.ackroo.net>)
3. Enter the Device ID provided by Ackroo on the API Key or UID line.
(must be unique for each station)
4. Enter Access Token provided by Ackroo on the Token line.
(usually the same for all stations)
5. Check Prompt to have each Quick Order prompt for the Ackroo Card.
6. Repeat for each station.

2) From Products → Menu Design → Other Buttons Tab

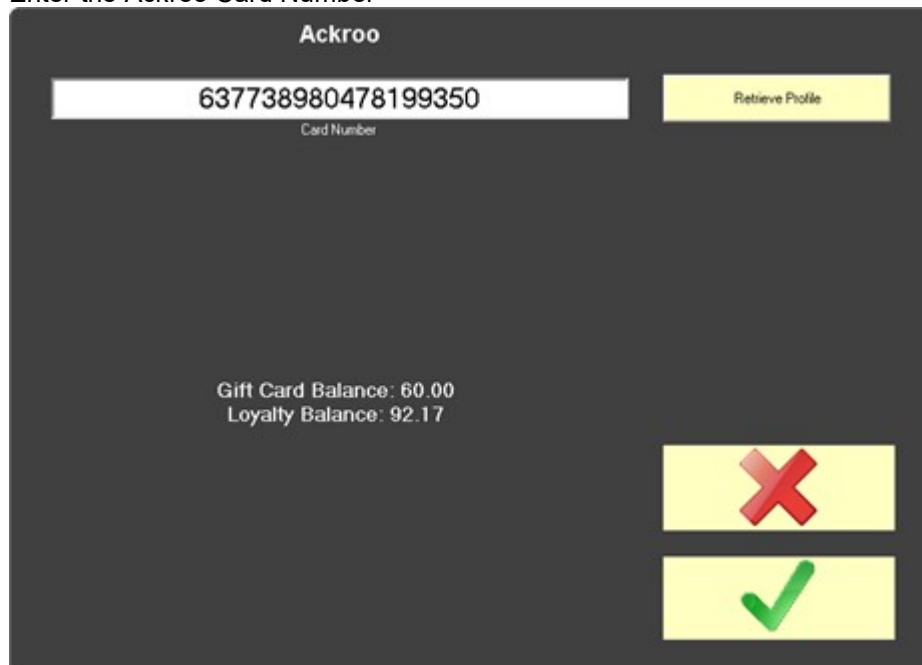


Drag on the 3rd Party Loyalty button.
See *POS Menu Design* for additional information.

- 3) Click POS Setup → Payment Methods
Create a Payment Method called Ackroo Loyalty, which will be used to redeem loyalty points.
 - Set the Authorization Method to 3rd Party Loyalty Redeem.
 - Check Tender Allowed.
 - Uncheck Over Tender Allowed.

Using Ackroo Rewards

- 1) Enter the Ackroo Card Number

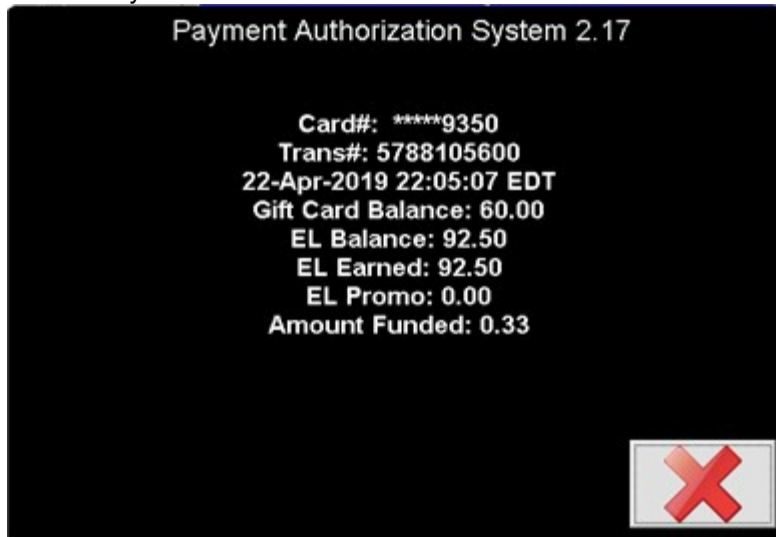


The image shows a dark-themed interface for Ackroo Rewards. At the top, the word "Ackroo" is centered. Below it, a white input field contains the card number "637738980478199350", with the label "Card Number" centered below the field. To the right of the input field is a yellow button labeled "Retrieve Profile". In the center of the screen, the text "Gift Card Balance: 60.00" and "Loyalty Balance: 92.17" is displayed. On the right side, there are two yellow buttons: the top one contains a red "X" and the bottom one contains a green checkmark.

Note: If form is not displayed, press the 3rd Party Loyalty Button

- 2) Sell the items the customer wants to purchase.
- 3) Finish the sale with the appropriate payment method or press the Ackroo Loyalty payment method to redeem points. If redeeming points, the system will only redeem up to the maximum points available.

- 4) A summary screen will detail the results.



5) Sample Customer Receipt

Visit Us At
www.universalpointofsale.com
1.844.500.8767

Apr 22, 2019 10:13 PM
Server Supervisor Joes
Transaction # 27 Station # 1

Qty	Description	Price
1	Coke	\$1.75
1	Coke	\$1.75
	Total	\$3.50
	H.S.T.	\$0.46
	Sale Total	\$3.96
	Ackroo Loyalty	\$3.96
	Total Tendered	\$3.96

Card#: *****9350
Trans#: 1351544530
22-Apr-2019 22:13:51 EDT
Redeemed: 3.96

Card#: *****9350
Trans#: 1352972997
22-Apr-2019 22:13:52 EDT
Gift Card Balance: 60.00
EL Balance: 88.72
EL Earned: 88.72
EL Promo: 0.00
Amount Funded: 0.18

Visit Us At
www.universalpointofsale.com
1.844.500.8767

Apr 22, 2019 10:05 PM
Server Supervisor Joes
Transaction # 26 Station # 1

Qty	Description	Price
1	Coffee	\$1.50
1	Coffee	\$1.50
1	Coke	\$1.75
1	7 Up	\$1.75
	Total	\$6.50
	H.S.T.	\$0.85
	Sale Total	\$7.35
	Cash	\$7.35
	Total Tendered	\$7.35

Card#: *****9350
Trans#: 5788105600
22-Apr-2019 22:05:07 EDT
Gift Card Balance: 60.00
EL Balance: 92.50
EL Earned: 92.50
EL Promo: 0.00
Amount Funded: 0.33

Rewards / Stamp Card

Reward / Stamp Cards are program offered by the POS very similar to the old coffee punch card that are available in many coffee shops. For example, pre purchase 10 coffees and get 2 free.

Rewards and stamps are tracked by within the customer database so no physical cards are required.

Reward Card Setup

General

12 Cups Coffee Card
Burger Card

Name: 12 Cups Coffee Card
Value: 12
Discount to Apply: Reward Card
Type: Prepaid - Prompt for Apply

Applies To

- Coffee
- Tea

Products

- * 1000 Island
- * Add Chili
- * Add Gravy
- * Add Guacamole
- * Bacon
- * Baked
- * Balsamic
- * Black Olives
- * Blue Cheese
- * Blue Flare
- * Caesar Salad
- * Double Cheese
- * French
- * Fries
- * Garlic Mashed
- * Green Olives
- * Green Onions
- * Green Peppers

1. Create a Percent Item Discount similar to below.

Discount Setup

241
AutoCouponTest
Loyalty Discount
Open Item % Discount
Redeem Points
Reward Card
Seniors Discount
Staff Discount

General | Advanced Settings

Discount Name: Reward Card

Type: 2 - Item Percent Discount

Open Entry Allowed: ☐

Amount: 100

Security Level Required:

Prompt:

GL Account:

Bar Code:

Bonus Bucks: 0

Always Print Receipt: ☐

Once Only Per Transaction: ☐

Cannot Be Combined With Another Discount: ☐

Can Only Be Applied To Regular Priced Items: ☐

Sign: ☐ Plus ☒ Minus ☐ Cost Plus

Tax: ☒ H.S.T.

Non Discountable Product Types

Product Types

Appetizers
Bar Modifiers
Beer
Beverages
Burger
Cocktails
Combos
Desserts
Draft

2. Under Products → Reward/Stamp Cards, create your reward programs.
 - a) **Name**
Create a unique name for your program.
 - b) **Value**
Enter the total quantity the customer gets with the program. eg 12 cups of coffee
 - c) **Discount to Apply**
Select the discount you created in step 1.
 - d) **Type**
Select the program type:
 -Prepaid Auto Apply – the discount is applied automatically if available
 -Prepaid Prompt to Apply – the discount is applied only if the cashier approved it and if available
 - e) **Applies To**
Select the products that qualify for the program.

When an item that applies to a stamp card is sold in the POS, the applicable discount will apply provided the customer is selected prior to selling the item and the customer has a balance on their card to cover the purchase.

3. Under Product Setup, create the Reward/Stamp Card product.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Statistics | History | Sync

Description: 12 Coffee Card

Prep Printer Text: 12 Coffee Card ☐ Print In Red

Product Type: Appetizers

Classification: Reward Card 12 Cups Coffee Card

Report Group:

User Field:

Price Table:

Sync Price Levels

Cost/Qty	
\$0.00	1
Retail 1	\$10.00
Retail 2	\$0.00
Retail 3	\$0.00

POS Button

12 Coffee Card

Text Middle:

Modifier Table

Course Sorting

4. Under Menu Design, place the product you created on the screen.

Customer Survey

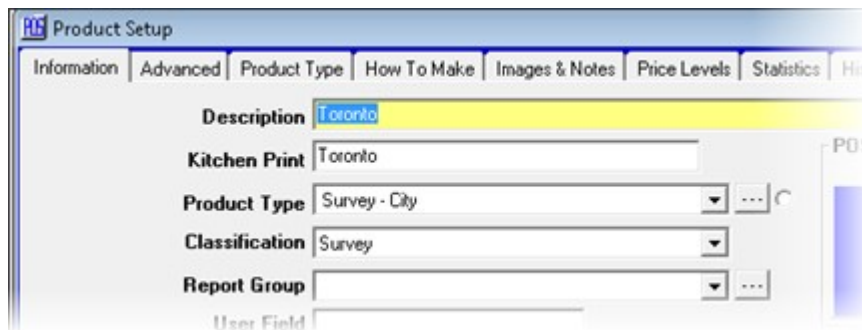
Customer surveys allow you to gather valuable information regarding your customers. A good example would be to ask you customer, 'How did you hear about us?'. Using the POS, you can quickly complete the survey and report it as needed.

Surveys are completed using our Modifier process. *See Modifier Setup for additional information.*

To illustrate this, we will create a 2-question survey.

- How did you hear about us?
 - What city are you from?
1. Create a sales department called *Survey* and check Hash Department.
 2. Create a product type called *Survey - How Did You Hear About Us* assigned to the department Survey.
 3. Create a product type called *Survey – City* assigned to the department Survey.
 4. Create a product type called *Survey* and assign to the department Survey.
 5. Create multiple responses for How Did You Hear About Us.
 - Newspaper
 - Web Site
 - Friend Referred

These responses are created as products assigned to the product type *Survey - How Did You Hear About Us* assigned to the classification *Survey*.



The screenshot shows the 'Product Setup' window in UniversalPOS. The 'Product Type' tab is selected. The 'Description' field is highlighted in yellow and contains the text 'Toronto'. The 'Kitchen Print' field also contains 'Toronto'. The 'Product Type' dropdown menu is set to 'Survey - City'. The 'Classification' dropdown menu is set to 'Survey'. The 'Report Group' dropdown menu is empty. There is a 'User Field' label at the bottom.

6. Create multiple responses for what city are you from.

- Toronto
- Hamilton
- Niagara

These responses are created as products assigned to the product type *Survey - City* assigned to the classification *Survey*.

7. Create two new modifier tables

- How did you hear about us?
- What city are you from?

and assign the appropriate product responses.

Modifier Table Setup

General | Advanced

Table Name: **What City Are You From**

Minimum Choices: 1 | Maximum Choices: 1

Allow How Many Splits: 0

Number Free Choices: 0

Max. Price For Free: \$0.00

Price Level: Modifier

Auto Accept: ☒ | Roll Up Price: ☐ | Auto Sell Items: ☐ | Constant Button: ☐ | Show Price On: ☐ | Splits Charge Full Price: ☐ | Font Size: 10

5 Selections

- Toronto
- Niagara
- Welland
- Oakville
- Other City

Product List

- Mint Julep
- Mojito
- Molsons Canadian
- Molsons Export
- Moscow Mule
- Mozzarella Sticks
- Nachos
- New York Striploin
- Newcastle Brown Ale
- Niagara
- No Ice
- No Rim
- Oakville
- Old Fashion
- Other City

Buttons: Delete, Copy, Add New, Exit

8. Under Menu Design, create a new product called Survey
assign the two modifier tables to the product
assign the product type Survey
assign classification Modifier.
9. Under Station Setup, check Survey Required.

That completes the setup of the survey. From the point of sale, click the survey button on the screen. The system will prompt for the two surveys allowing the cashier to select one response from each list.

You can quickly change the survey questions by creating new modifiers and assigning them to the product Survey.

Survey selections will not print on the customers receipt.

Survey results can be viewed under reports using the Survey Report under Misc. Reports.

POS Mail

The POS contains an internal email system that provides an efficient method of sending messages to your staff and computer stations.

You can send mail to:

- Selected Employees
- Selected Job Positions
- Selected Computer Stations

The screenshot shows a window titled "Mail" with a "General" tab. On the left, under "Send To", there are two radio buttons: "Employee" (selected) and "Job Position". Below them is a list of recipients: "All Employees" (highlighted in blue), "Donald - Donald Duck", "Mickey - Mickey Mouse", and "Supervisor Joe - Joe Supe". To the right of the list, there are fields for "Mail Type" (set to "Yes-No Response"), "Mail Title" (set to "New years Eve"), and "Expiry" (set to "10/29/2025"). Below these fields is a "Message" text area containing the text: "Please let me know if you can work new years eve." and "Thank you, Management". At the bottom right of the window is a "Finished" button.

Hold the CTRL key on your keyboard while clicking to select multiple items from the list

There are three types of mail that you can send.

- 1) **View Anytime Mail** - will appear in your Inbox under Employee Tasks in the Point Of Sale.
- 2) **View At Login** - appears automatically any time you login to the Point Of Sale.
- 3) **Yes/No Response** - appears automatically any time you login to the Point Of Sale and requires you to reply with a Yes or No response to the mail. Your response will be sent to the sender and will appear in their Inbox as mail.

Expiry

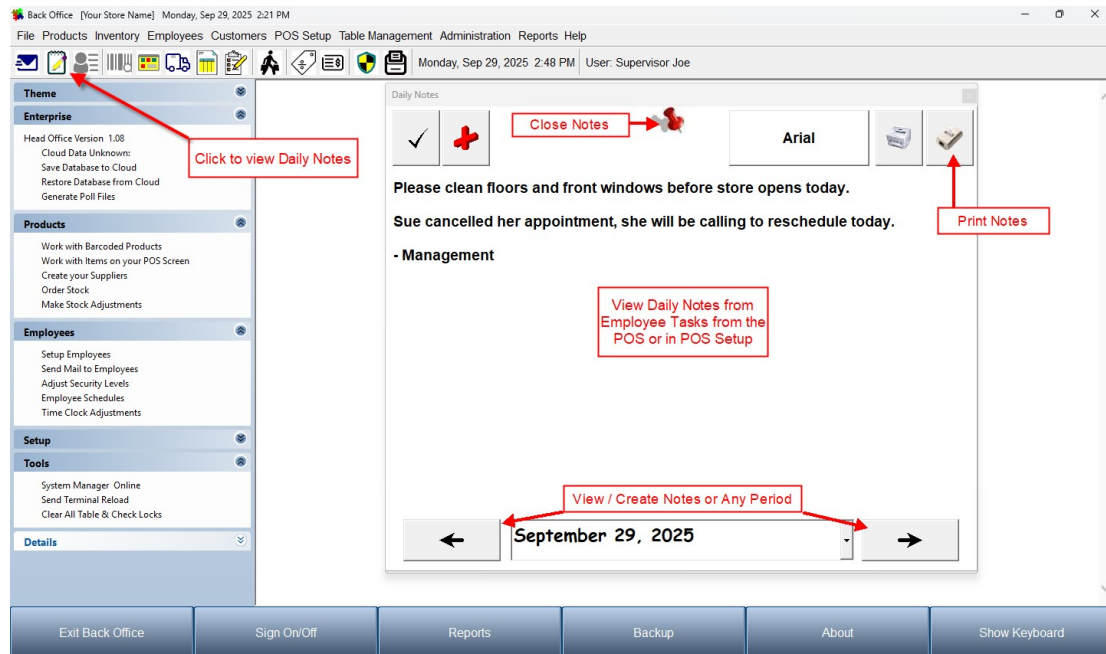
Enter any expiry date for the mail. Once the expiry date has been reached, the message will not appear to any staff that have not already viewed it.

Daily Notes

Daily notes provide a convenient method to get messages to all employees. The notepad can be accessed from

- POSsetup by click Employees → Notes
- Employee Tasks in the Point Of Sale

Notes can be created and viewed for any time period in the past or future.



Payment Method Setup

Under Payment Methods, you can create the various currencies that your establishment accepts, such as Cash, Visa and Checks.

The screenshot shows the 'Payment Method Setup' window with the 'General' tab selected. On the left, a list of payment methods includes Cash, Debit, Gift Card, Master Card (highlighted), U.S. Cash, and Visa. The main area is configured for 'Master Card' with the following settings:

- Name: Master Card
- Exchange Rate: 1.
- Change Is: Domestic Currency
- Number Decimals: 2
- Security Level Required: (empty dropdown)
- Prompt: (empty dropdown)
- Card Type: Master Card
- Authorization Method: No Authorize
- Currency Symbol: \$
- Tender Required: ☐
- Tender Allowed: ☒
- Over Tender Allowed: ☒
- Print On Pre-Pay Receipt: ☐
- Print Extra Receipt: ☐
- Always Print Receipt: ☐
- Refund This Currency: ☒
- Customer Required: ☐
- Prompt For Cash Back: ☐
- Prompt For Tip: ☐
- Get Reference Number: ☐
- Change Is Tip: ☐

The 'POS Button' section includes a button image of the Master Card logo, 'Text Color' and 'Back Color' buttons, 'New Image' and 'Delete Image' buttons, a 'Text Middle' dropdown, and a 'Display Order' field set to 5. The 'Cash Drawer' section has checkboxes for 1 (checked) and 2.

At the bottom, there are navigation buttons (back, forward, etc.) and 'Delete', 'Add New', and 'Exit' buttons.

Payment Method Fields

Name

Enter the name of the currency. i.e. Cash, Visa

Exchange Rate

If this is a foreign currency, enter the current rate of exchange. For example, for 25%, enter 1.25

Change Is

This field determines how to deal with the over tender on a payment method. Select from the dropdown list one of the following choices:

- **Domestic Currency**
Change will be given as your domestic Cash.
- **This Currency**
Change will be given back using the currency tendered.

Number Of Decimals

Enter the number of decimal points this currency uses, usually 2.

Security Level Required

Select from the dropdown list and level of security that is required to use this currency.

Tender Required

Enable this feature to require employees to tender how much money the customer is giving you. This allows the system to always calculate the change due, thus eliminating errors.

Tender Allowed

Enable this feature to allow tendering on a currency. Payment methods such as credit cards normally would not require tendering because the complete sales total is normally charged.

Over Tender Allowed

Enable this feature to allow employees to over tender the amount of money the customer is giving.

Print On Receipt

This feature is normally used only in a restaurant environment. When the final bill is printed for the customer, would you want this payment method to appear? This would be useful if you wanted the customer to see the total due in a foreign currency. *The total due in domestic currency always appears on the receipt.*

Print Extra Receipt

Enabling this feature allows the system to automatically print an extra copy of the sales receipt.

Float In Required

Enable this feature to make it mandatory that the initial float of this currency is entered before any sales can be made.

Float Entry Method

Select the method to use when entering a float or declaration

- Standard
- Denomination
- Add Up

Card Prefixes

Enter the credit card prefix codes for this payment method. For example, if this is a North American installation and the payment method is Visa, the prefix code would be 4 because all Visa cards begin with the number 4. For Master Card, the prefix codes would be 50,51,52,53,54 because all Master Cards begin with one of these sequences.

Visa	4
Master Card	51,52,53,54,55
American Express	34,37
Diners Club/Carte Blanche	36,38
EnRoute	2014,2149
JCB	2031,1800

Card Type

Select the card type that is appropriate for the selected currency. For example,

Visa → Visa

Master Card → Mastercard

Debit → U.S. Debit Cards

Interac → Canadian Debit Cards

Refund Domestic Currency

When a refund transaction is made using this payment method, do you want to refund this payment method or domestic cash?

Accounting Code

Enter the GL Account Number that this payment method applies to in an optional accounting package. This is an optional feature.

Prompt

Select from the dropdown list any prompt you want to appear when you use this payment method. *For Additional Information see Prompt Setup.*

Cash Drawer 1 or 2

Select what cash drawers should be opened when this payment method is used. If you want the cash drawer to open and have enabled *Prompt For Cash Drawer When Employee Clocks In* under System Setup, then you must check both drawers one and two.

POS Button Appearance

Design how this payment method button will appear to the cashier. The POS button can contain text, a graphic image or both. To modify the button text, click on the button and use the backspace key to remove characters and then type the new characters.

Refund This Currency

This feature relates to refund transactions only. Enabling this feature for a payment method forces the system to refund the same currency in the event of a refund, otherwise the domestic currency is refunded.

Service Fee % Rate

This feature is normally used in conjunction with *Tips* and *Credit Cards*. The Service Fee Rate is the percent rate that your bank charges for using their system. Normally this rate is between 2 and 4 percent. This percentage amount will be deducted from Tips due to a cashier.

*For example,
the Tips Collected on Visa were \$20.00
the Bank Charges you 3.5%
the Total Tips Due to the cashier would be \$19.30 or (\$20. less 3.5%)
If you do not wish to use this feature, set the rate to zero.*

Receipt Text

Enter any special text that you want to appear on the sales receipt when this payment method is used. *See Format Receipt Text for additional information.*

Card Type

Select from the dropdown the type of payment card (i.e. Visa, MasterCard, Debit). Leave blank if it does not apply. This will allow for a credit card total on your Day End Sales Report and is also utilized when credit/debit processing is integrated into the POS.

Prompt for Cash Back

Check this box if you want to add cash back to the transaction. This is useful for debit transactions.

Always Print Receipt

Enable this to force a receipt to print whenever the payment method is used in a sales transaction, even if receipt printing is turned off.

Hide In POS

This will prevent the payment method from appearing in the point of sale. This would be useful if the payment method is only to be used in the invoicing module.

Prompt for Tip

Enable this to force this payment method to request a gratuity amount. The gratuity amount can be entered as a dollar or percent amount. If a tip has already been added to the bill, then the tip prompt will be ignored.

Change Is Tip

Enable this if you want any change to be issued on this payment method to be regarded as a gratuity amount.

Is Currency

Check this option if the selected payment method is a currency. Non-currency items will not appear on cash declarations and float out entries. A good example of a payment method that is not a currency would be a house charge. It is a payment method, but it is not physically in our cash drawer.

Authorization Method

Select any authorization that must be performed and approved before this payment method can be used.

Note: The Tendering Allowed option is disabled for Gift Certificate Redeem, Bonus Buck Redeem, Credit Note Redeem and Customer Account Authorize.

- **No Authorize**
No authorization is required.
- **Customer Account**
The customer's account balance is checked to make sure any additional charges to their account will not exceed their credit limit
- **Bank Authorize Credit/Debit**
Electronic authorization of a credit and debit card.
For more information, see Credit and Debit Integration
- **EBT**
Electronic Redemption of EBT (Food Stamps)
- **Front Desk (Print on PMS Printer)**
The system will prompt for a room number and will then print a room charge chit to the Property Management Printer that has been set up under System Setup.
- **Gift Card Pre-Auth**
The Gift Card Pre-Auth works with Gift Card Redeem. As with Gift Card Redeem, the card is charge and closed using the gift card, but it allows you to print a receipt with a tip line so the client can enter the tip they would like to apply to the check.
- **Gift Card Redeem**
The system will verify the tendered amount against the gift certificate amount available in the system. *See Gift Certificates for more information.*
- **3rd Party Gift Card Redeem**
Authorization of 3rd party gift card transactions.
- **3rd Party Loyalty Redeem**
Authorization of 3rd party loyalty transactions.
- **Front Desk (Authorize Folio)**
This feature is used in a hotel environment. The system will post the transaction to a customer's room folio.
- **Bonus Buck Redeem**
Select this to have the system redeem the Bonus Bucks a customer has on their account. *See Reward Systems for more information.*
- **Credit Note Redeem (Customer Based)**
The system will verify the payment against a customers accounts and their available credit notes.
- **Credit Note Redeem (Card Based)**
The system will verify the tendered amount against the credit note amount available in the system

- **Convenience Card Redeem**
The system will verify the total due against the balance available on the convenience card. *See Convenience Cards for more information.*
- **Meal Plan**
The system will verify the total due against the balance available on the customers meal plan. *See Meal Plan for more information.*

Credit and Debit Integration / Pay at the Table

NOTE: SMP is required for all Credit and Debit Integrations

The POS allows you to integrate your Credit and Debit Card authorization system directly into your point of sale. This allows for fast, error free processing of credit and debit card transactions. There are two primary types of integration available.

- 1) **Push Mode** allows for integration where the point of sale sends the information to the credit/ debit terminal for processing. This is a standard interface for a retail or quick service hospitality environment.
- 2) **Pull Mode**, also known as Pay at the Table, allows for integration where the credit/debit terminal requests the information from the point of sale. This is a standard interface for a table service restaurant.

Preliminary Setup

- 1) Contact your installing dealer to get a list of financial institutions currently available.
- 2) Contact the financial institution and set up an account with them. They will provide you with the appropriate pin pad. Once the hardware and passwords arrive at your establishment, you can continue with the setup of your system.
- 3) Create the necessary payment methods under Payment Method Setup. Debit, Visa, Master Card, American Express etc

Payment Method Setup

General Advanced Stations

Cash
Debit
Gift Card
Master Card
U.S. Cash
Visa

Name Visa

Exchange Rate 1.

Change Is Domestic Currency

Number Decimals 2

Security Level Required

Prompt

Card Type Visa

Authorization Method No Authorize

Currency Symbol \$

Tender Required ☐

Tender Allowed ☒

Over Tender Allowed ☒

Print On Pre-Pay Receipt ☐

Print Extra Receipt ☐

Always Print Receipt ☐

Refund This Currency ☒

Customer Required ☐

Prompt For Cash Back ☐

Prompt For Tip ☐

Get Reference Number ☐

Change Is Tip ☐

POS Button



Text Color Back Color

New Image Delete Image

Text Middle

Display Order 4

Cash Drawer

☒ 1

☐ 2

Navigation buttons: Previous, Next, First, Last

Delete Add New Exit

Make sure each Payment Method has the appropriate Card Type selected and the Authorization Method is set correctly.

Push Mode Setup

- 1) Set up the credit/debit processing for each station under Station Setup → Credit/Loyalty tab.
 - Select the processor and pin pad type.
 - Enter the requested information based on the processor selected.
 - **Delay:** The default rate for this terminal is 3. Increase this time only if you experience communication or timeout issues..
- 2) Install and program the Credit Authorization Software if needed.
- 3) Create the credit and debit payment methods that you require and set the authorization methods for each to Bank Authorize Credit or Bank Authorize Debit.
 - A. Create a Payment Method called Visa
 - Set the Card Type to Visa
 - Set the Authorization Type to Authorize Credit/Debit
 - On the Stations Tab, Hide this Payment Method
 - B. Repeat Step A for MasterCard, Discover, Amex, JCB, Diners and Enroute.
 - C. If you are located in the U.S.,
 - Create a Payment Method called Debit.
 - Set the Card Type to US Debit.
 - Set the Authorization Type to Authorize Credit/Debit
 - Create a Payment Method called Credit
 - Set the Authorization Method to Authorize Credit/Debit
 - Set the Card Type to Determined by Bank Terminal
 - D. If you are located in Canada,
 - Create a Payment Method called Interac.
 - Set the Card Type to Interac.
 - Set the Authorization Type to Authorize Credit/Debit
 - On the Stations Tab, Hide this Payment Method
 - Create a Payment Method called Debit / Credit
 - Set the Authorization Method to Authorize Credit/Debit
 - Set the Card Type to Determined by Bank Terminal

Pull Mode (Pay at the Table) Setup

NOTE: It is extremely important that once a table has been accessed by the pin pad for pay at the table, that the transaction is not opened on any POS terminals.

- 1) Set up the pay at the table under System Setup → PATT tab.
 - Select the processor.
 - No other information needs to be modified.
- 2) Install, program and license the Pay at the Table Software. (Sold Separately)
- 3) Create the credit and debit payment methods that you require and set the authorization methods for each to Bank Authorize Credit or Bank Authorize Debit. *See Payment Methods for additional information*
 - A. Create a Payment Method called Visa
 - Set the Card Type to Visa
 - Set the Authorization Type to Authorize Credit/Debit
 - On the Stations Tab, Hide this Payment Method
 - B. Repeat Step A for MasterCard, Discover, Amex, JCB, Diners and Enroute.

- 4) Make sure all employees have a Pinpad Access Number. Typically this number should be the same number that the employee uses to access the point of sale. See *Employee Setup for additional information*. Under Employee Setup, make sure all employees have the correct Pinpad Access Number. This is the employee code that is entered into the move 5000 when retrieving tables. **Employee codes must be numeric with no leading zeros.**

The screenshot shows the 'Employee Maintenance' window with the 'General' tab selected. On the left, a list of employees includes 'Supervisor Joe', which is highlighted. The main area shows the details for 'Supervisor Joe'. The 'Last Name' is 'Supervisor', 'First Name' is 'Joe', and 'PDS Name' is 'Supervisor Joe'. A red rectangle highlights the 'PDS Access Number' field (containing '100'), the 'Alternate PDS Access Number' field (empty), and the 'Pinpad Access Number' field (containing '100'). Below these fields is the 'Job Position' section, which includes a dropdown menu currently set to 'Owner/Administrator'.

- 5) Under Employee Setup, set the *Return What for Pay at the Table Server Request*.
- Your Checks
 - Your Printed Checks
 - All Checks
 - All Printed Checks

DataCap (Push Mode)

Datacap requires the following,

- Microsoft Windows Server 2012 R2, Windows Server 2016, Windows 7 SP1, Windows 10 or Windows 11. All latest service packs, updates and hot fixes must be applied.
- 4 GB of RAM minimum, 8 GB or higher recommended
- 50 GB of available hard-disk space
- TCP/IP network connectivity.

The following are the basic steps in setting up Datacap

1. Setup an account with a processor that is supported by Datacap.
2. Perform the standard UniversalPOS Credit Card Integration Setup described in preliminary Setup at the start of this section of the manual.
If you wish to allow for Manual Entry of the Card Number on the Pin Pad, create an additional Payment Method called Credit (Manual). Set the Authorization Method to Authorize Debit/Credit and set the Card Type to Determined by Bank Terminal. Record the Payment Method IDL and enter this in Step 6 for ManualIdl=##
3. For U.S. customer,
When ordering an EMV Reader for Datacap, you will need the following encryption uploaded for the Ingenico Lane 3000, 5000, 700 with no pin pad.
a) UPP version **7.80.44** as of 8.8.2024
b) E2E Encryption **TDSTDESDUKPT** on **Slot 4** as of 8.8.2024
4. Set a Static IP on the Main Server Computer.
5. Install the Datacap software on the Main Server following their directions.
a) Navigate to <https://datacapsystems.com/download>
b) Download and Install Client Controls → dsiEMVUS
c) Download and Install e-Pay Software → ePayDirector
6. Install the Datacap software on each workstation following their directions.
a) Navigate to <https://datacapsystems.com/download>
b) Download and Install Client Controls → dsiEMVUS

7. Add the following information to the c:\poslocal\posedge.ini file on every computer that will be using credit and debit card processing.

NOTE: All Information entered here is case sensitive

Field in RED are required. All other fields are optional.

[Datacap]
MID= Your Merchant ID
Device=EMV_LANE3000_DATACAP_E2E
DeviceEBT=INGENICOLANE3000_DATACAP_E2E
AllowManual=SecureDevice
ManualIdl=
ManualMode=EMVX
IPPORT=9000
AllowPartial=Allow
Port=4
IP=127.0.0.1
Tip=Prompt
SuggestGrat=10%:1.00,15%:1.50,18%:1.80,20%:2.00
ForceOffLine=N
MaxTrans=0
TransLimit=0
OKamount=Y
Surcharge=Fee

- MID Enter your Merchant ID
- Device Enter your Device Name
See Device List Below
- DeviceEBT Enter the Device Name for EBT
See Device List Below
- AllowManual SecureDevice / Prompt
- Manualidl Enter the Payment Method IDL for a Manual Entry Credit Card Button. This would allow for a credit card number to be manually entered on the device.
- ManualMode EMVX (default if not included) or PDCX
- IPPort Leave as 9000 unless otherwise instructed
- Port Enter the Comm Port created by the device. Once you connect the USB from the pinpad, look in your Windows Device Manager to view the Comm Port created. For IDTech devices always enter a value of 1 (one).
- AllowPartial Allow or Nothing
- IP On the Server 127.0.0.1
- Tip On each work station, enter the servers static IP
Prompt causes Pin pad to Prompt Cardholder
PrintBlankLine will print Blank Tip Line on Receipt
SuggestivePrompt will give tip options
NOTIP
- SuggestGrat Display Percentage : Value, etc
eg, 10%:1.00,15%:1.50,18%:1.80,20%:2.00
- ForceOffLine Y (yes) N (no). This should always be omitted or N
- MaxTrans Enter how many transactions can be taken in Store and Forward Mode 0 to 1000
- TransLimit Enter the Maximum Dollar Value for a Store and Forward Transaction.
- OKamount Y(yes or blank) Pinpad will prompt customer to OK the transaction. N(no) Pinpad will not prompt customer to OK the transaction.
- Surcharge Enter the text you wish to print in place of the work Surcharge.

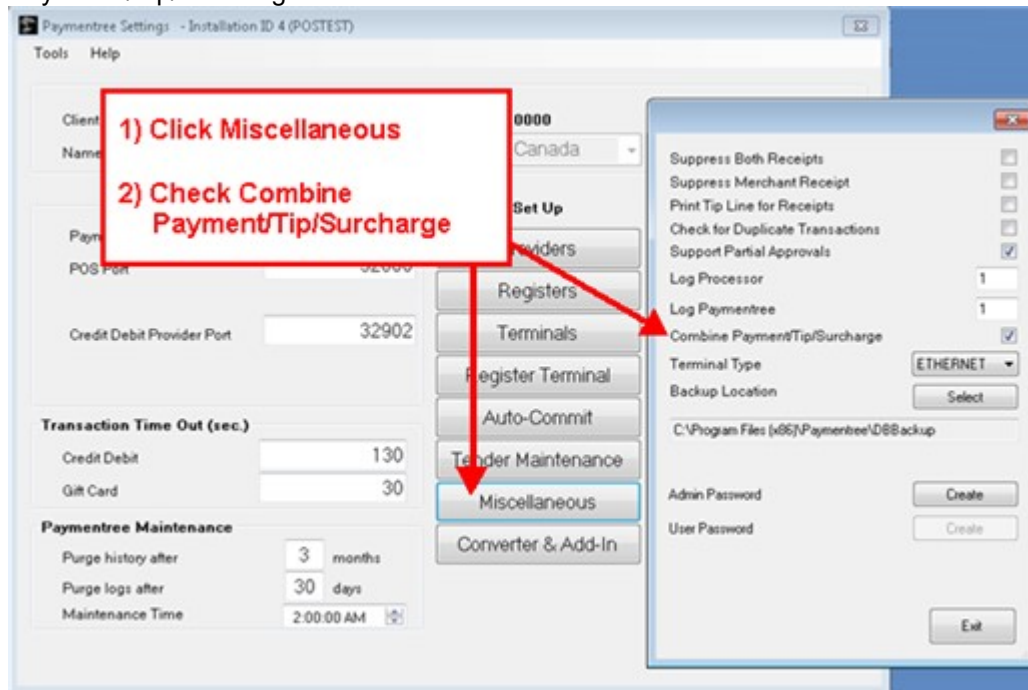
8. Perform a download on the Pin Pad. Log in to the POS > Click Manager > Pin Pad > Reset Pin Pad. The Pin Pad should indicate it is downloading or loading. Wait until the process is completed.

Datacap Device List

EMV_LINK2500_DATACAP_E2E
EMV_MOVE3500_DATACAP_E2E
EMV_MOVE5000_DATACAP_E2E
EMV_LANE3000_DATACAP_E2E
EMV_LANE5000_DATACAP_E2E
EMV_LANE7000_DATACAP_E2E
EMV_LANE8000_DATACAP_E2E
EMV_IPP320_DATACAP_E2E
EMV_IPP350_DATACAP_E2E
EMV_ISC250_DATACAP_E2E
EMV_ISC480_DATACAP_E2E
EMV_ISMP4_DATACAP_E2E
EMV_IUC285_DATACAP_E2E
EMV_IUP250_DATACAP_E2E
EMV_ICMP_DATACAP_E2E
EMV_IWL258_DATACAP_E2E
EMV_P400_DATACAP_E2E
EMV_M400_DATACAP_E2E
EMV_MINISMART_DATACAP
EMV_AUGUSTA_DATACAP
EMV_VP3300_DATACAP
EMV_P200_DATACAP_E2E
EMV_VP8300_DATACAP
EMV_VP6800_DATACAP
EMV_A30_DATACAP_E2E
EMV_A60_DATACAP_E2E
EMV_A77_DATACAP_E2E
EMV_A920PRO_DATACAP_E2E
EMV_ARIES6_DATACAP_E2E
EMV_ARIES8_DATACAP_E2E

Paymenttree (Canada & USA – Push Mode)

Make sure in the Paymenttree Configuration Utility, you check Combine Payments/Tip/Surcharge.



Station Setup

Station #1
Station #2
Station #3
Station #4
Station #5
Station #6
Station #7
Station #8
Station #9
Station #10
Station #11
Station #12
Station #13
Station #14
Station #15
Station #16
Station #17
Station #18
Station #19
Station #20
Station #21
Station #22
Station #23
Station #24
Station #25
Station #26 Office
Station #27 Office
Station #28 Office
Station #29 Office
Station #30 Office

General Keyboard Devices Printers and Cash Drawers Advanced Credit / Loyalty Floor Plan

Debit/Credit Processor: 5 - Paymenttree Canada
Terminal Receipt Print Location: On POS (Both Copies)
Time Out in Seconds: 3

Register #: R001
Location: Shop
Port: 32000
IP Address: 192.168.1.67

Make sure you check Combine Payment/Tip/Surcharge in Paymenttree Configuration

Gift Card Processor: POS Processed
3rd Party Gift Card: None

Station #4

Exit

Under Station Setup in the POS

- Select Paymenttree as the processor
- Set the Register Number and Location for each Station. These can be found in the Paymenttree Configuration Utility.
- Enter the Port Number.

Paymenttree Settings - Installation ID 43 (vadtent)

Tools Help

Client ID: Name: Location: 0000 Country: USA Currency: USD Language: English

Paymenttree IP: 10.0.0.32
POS Port: 32000
Credit Debit Provider Port: 32902

Transaction Time Out(sec.):
Debit/Credit: 130
Gift/Loyalty: 30

Paymenttree Maintenance

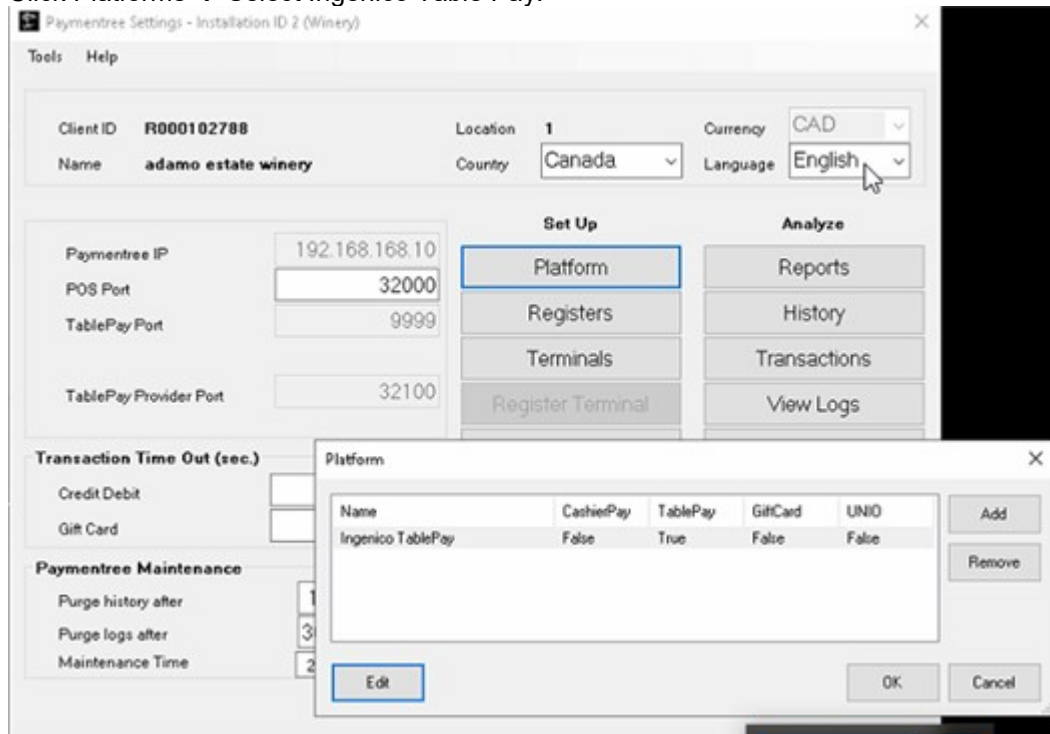
Set Up: Providers, Registers, Terminals, Register Terminal, Auto-Commit, Tender Maintenance, Miscellaneous

Analyze: Reports, History, Transactions, View Logs

- Enter the IP Address of the computer that is running Paymenttree.

Paymenttree (Canada & USA – Pay at the Table – Tetra Devices)

7. Set a Static IP on the computer running the Paymenttree Software. This normally should be the network server.
8. Install the latest version of Paymenttree.
9. Open the Paymenttree Configuration Utility and enter the clients Paymenttree credentials.
10. Click Platforms → Select Ingenico Table Pay.



11. Click Edit and set the Table Pay Port to 9999 and Click OK.

Edit Platform ✕

Platform Port

TablePay/UNIO Port

Use SSL for Terminals ☐

Cashier ☒

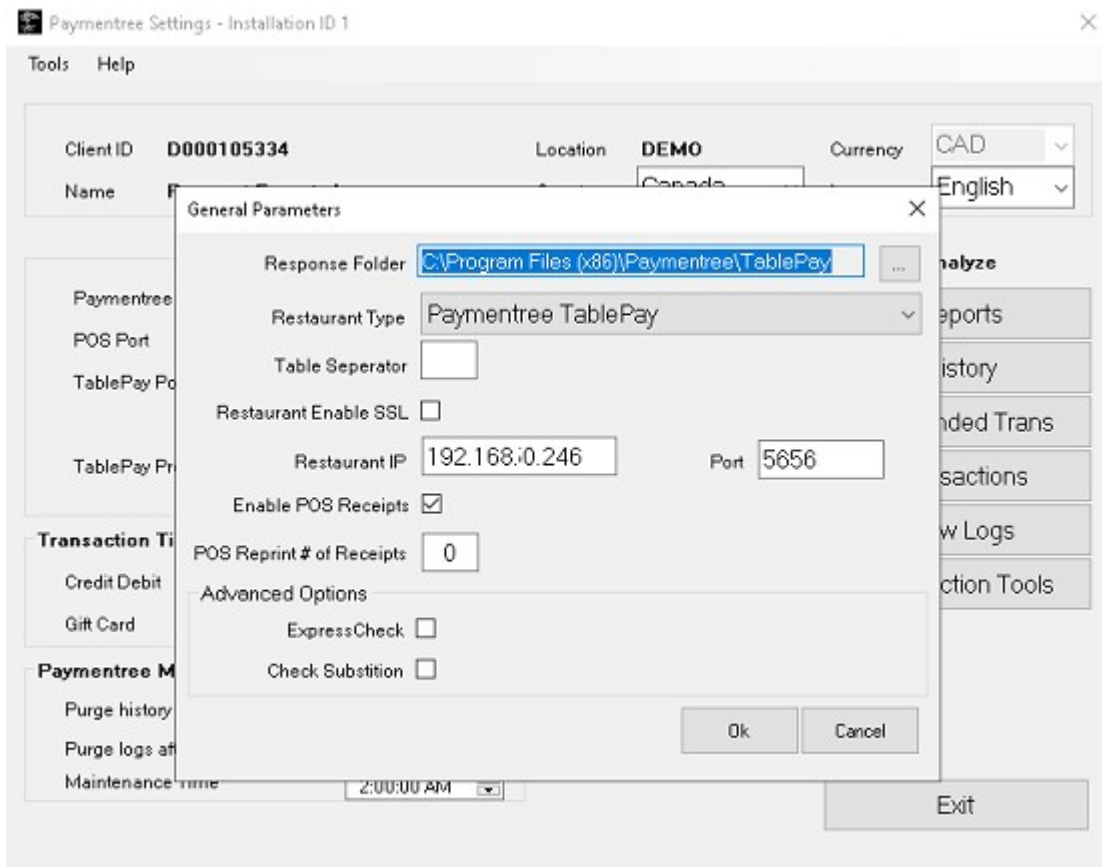
Table ☒

Check ☒

Note: Some processors require SSL On and some SSL Off. You may need to experiment with this. Make sure the Device and Paymenttree are both set the same. Initially test with SSL On.

12. Click Table Pay → General

- a) Set the Restaurant Type to Paymenttree TablePay.
- b) Set the IP to the Static IP of the terminal running PayAtTheTable.exe.
- c) Set the Port to 5656
- d) Click OK



13. Click Misc Options and Check Combine Payment/Tip/Surcharge and then click Exit and Save.

Paymenttree Settings - Installation

Tools Help

Client ID **R000102788**
Name **adamo estate w**

Paymenttree IP
POS Port
TablePay Port
TablePay Provider Port

Transaction Time Out (sec.)
Credit Debit
Gift Card

Paymenttree Maintenance
Purge history after
Purge logs after
Maintenance Time

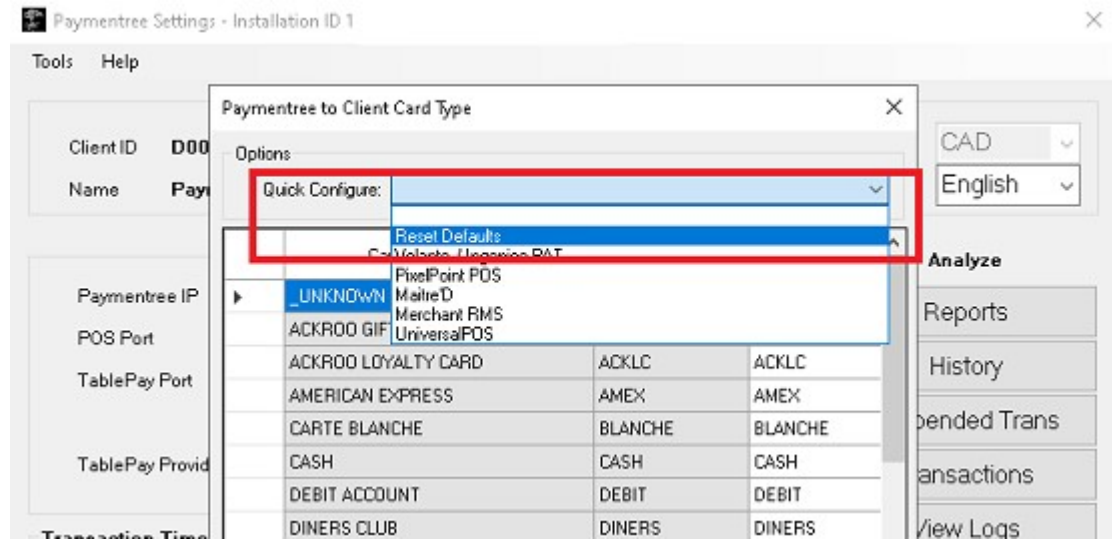
Suppress Both Receipts ☐
Suppress Merchant Receipt ☐
Print Tip Line for Receipts ☐
Check for Duplicate Transactions ☐
Support Partial Approvals ☒
Log Processor
Log Paymenttree
Combine Payment/Tip/Surcharge ☒
Terminal Type **ETHERNET**
Backup Location
Network Backup Location

Admin Password
User Password
Use Terminal Receipts ☐
Receipt Format
Remove header/footer blank Receipt lines ☐
Auto-Close Delivery Orders ☐

Currency **CAD**
Language **English**

Analyze

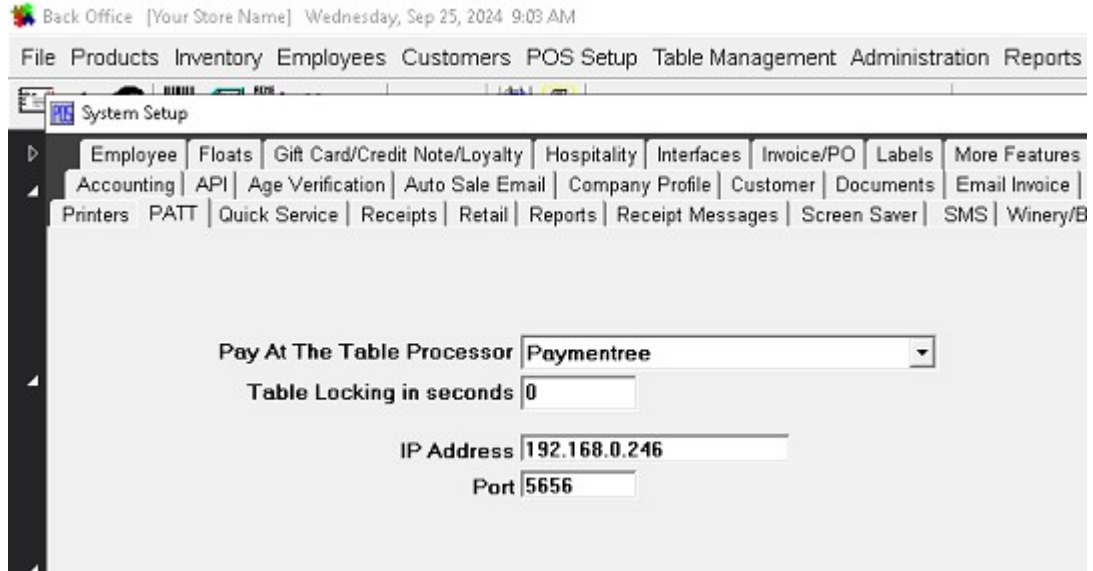
14. Click Tender Maintenance and Reset Defaults.



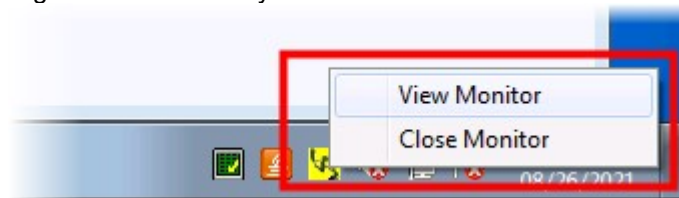
15. Click End Configuration and allow the Paymenttree Service to start.

16. Open the Back Office.

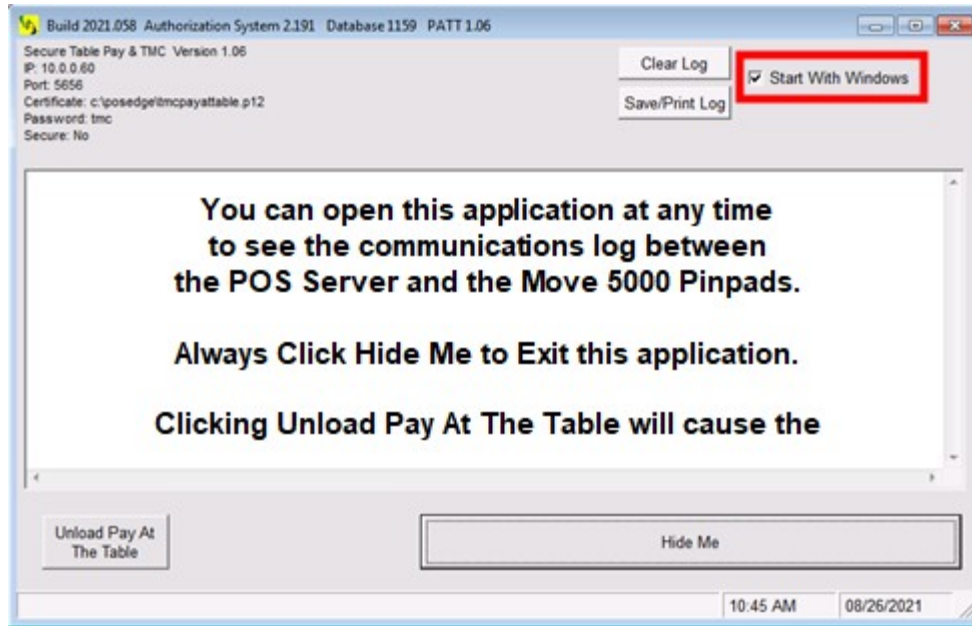
17. Click Administration → System Setup → PATT Tab
 - a) Select Paymenttree for the Processor.
 - b) Enter the IP Address of the computer running the Paymenttree Software.
 - c) Enter Port 5656.
 - d) Click Save and then Exit the Back Office.



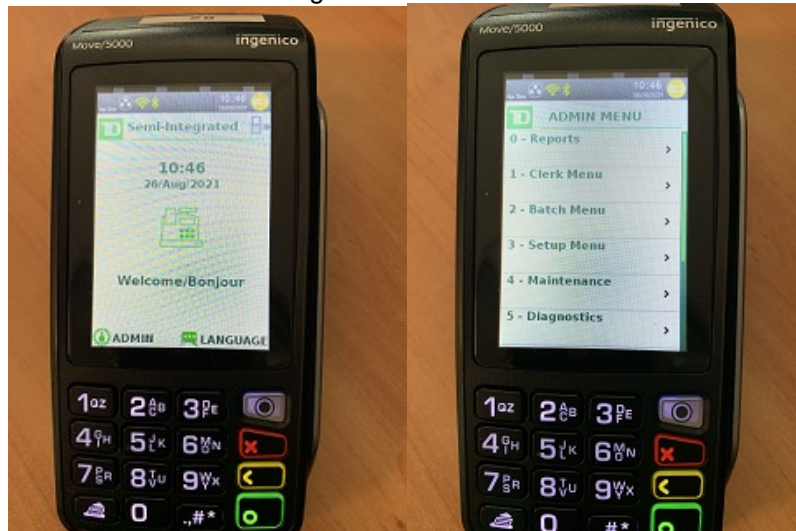
18. Open Windows Explorer and navigate to the POSEDGE root folder.
19. Locate and double click PayAtTheTable.exe.
 - a) Check Start With Windows.
 - b) Click Hide Me.
20. Right Click on the Pay at the Table Icon  and Left Click View Monitor.



21. Check Start With Windows and then Click Hide Me.



22. Turn on the move 5000. Go to the Admin Menu → Setup Menu → Communications → WIFI. Select and configure the WIFI.

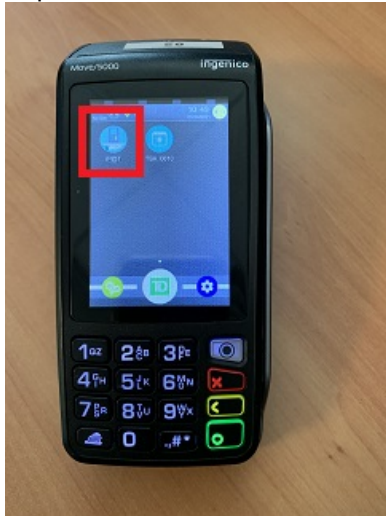




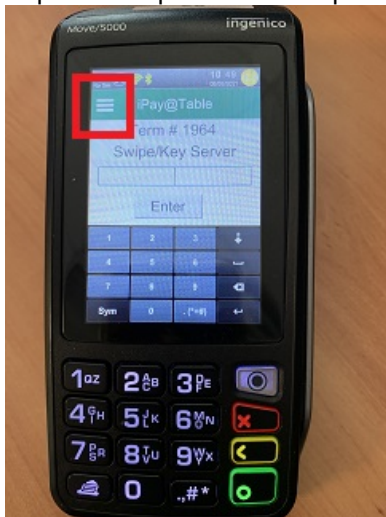
23. Cancel back to the Main Screen and Click the Grey Button



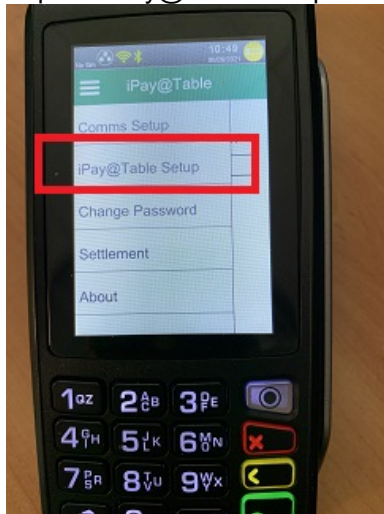
24. Tap the IPAY Icon.



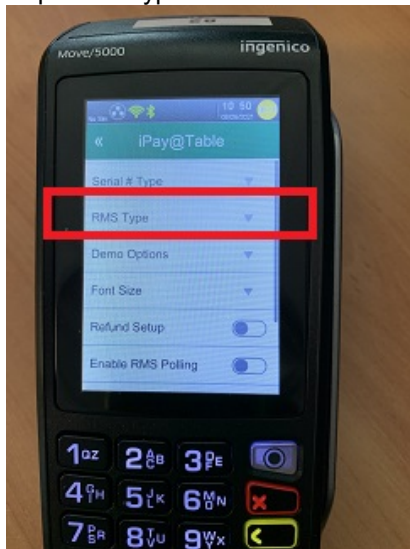
25. Tap the Setup Icon in the top left of the screen.



26. Tap the iPay@Table Setup.



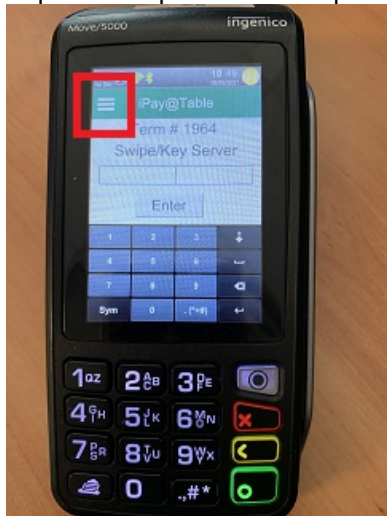
27. Tap RMS Type.



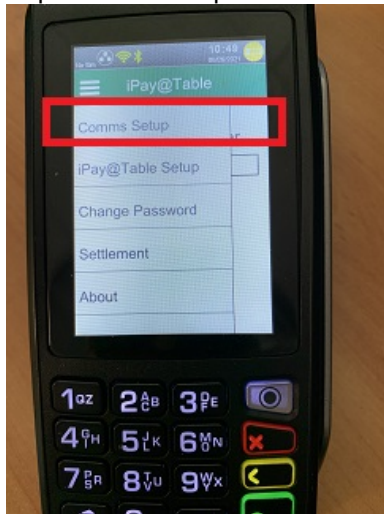
28. Select RMS Type 1 and back up to the main screen.



29. Tap the Setup Icon in the top left of the screen.



30. Tap Comms Setup.



31. Enter the IP Address of the Server you setup in step 1
Enter RMS Client Port 9999

Note: Some processors require SSL On and some SSL Off. You may need to experiment with this. Make sure the Device and Paymentree are both set the same. Initially test with SSL On.



32. Setup any other options you want on the device such as Tip prompting.

33. Return to the main screen on the device. It should look similar to below.



34. We are now ready to try a test transaction. This following is an example of making a test sales transaction. Your POS may not be configured in a similar fashion.

35. Start the Point Of Sale and Login.



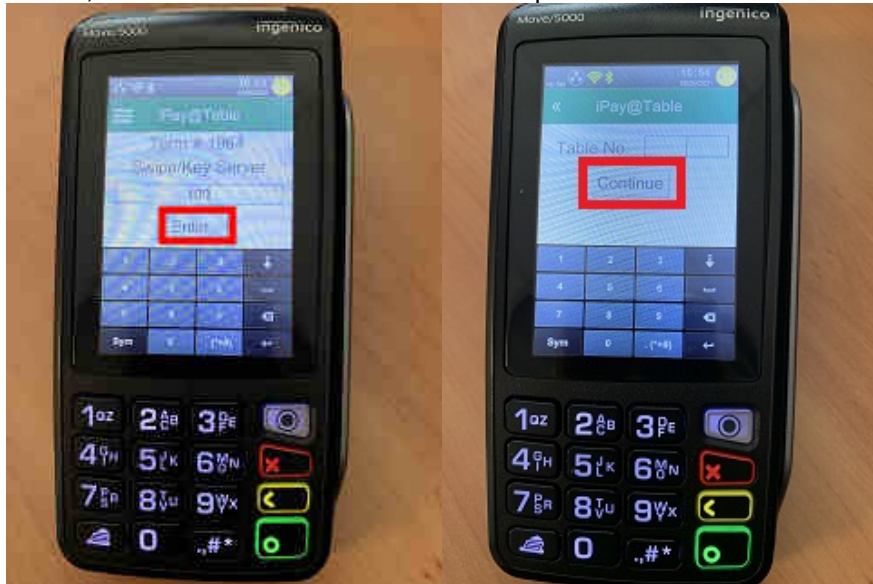
36. Open a new table.



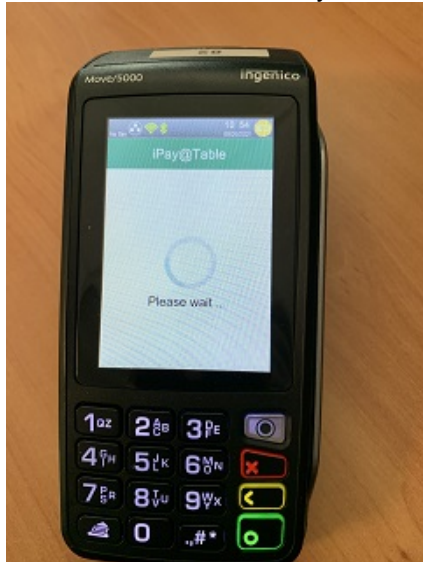
37. Sell something and leave the check.



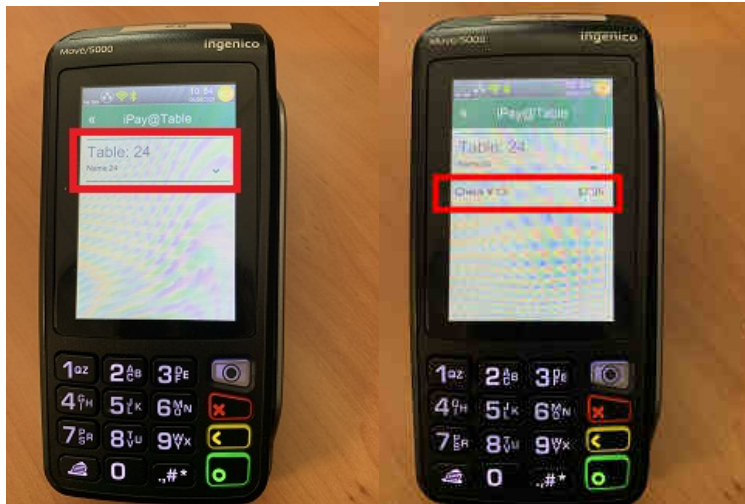
38. On the Move 5000, enter your POS Employee Code and tap Enter. On the next screen, do not enter a Table Number. Just tap Continue.



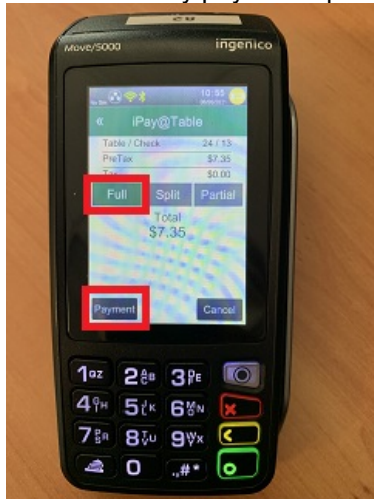
39. The Move 5000 will now try to communicate with our Pay at the Table App .



40. The device will display the table we started in the POS. Select this table. The Move 5000 will then confirm the Table with the Check Amount. Select to continue.



41. There are many payment options. For the test, select Full and then Payment.



42. Follow the on screen prompt to complete the transaction. Once completed, remove your card and print any receipts.



43. Once you see the following screen, the table should close on the POS.



44. In the POS, go to the transaction viewer, locate the transaction and print the receipt to the screen to verify the transaction is closed and also closed to the correct payment method.

```
^Z14
^C^DPaymenttree
^CPaymenttree
^CPaymenttree
^CPaymenttree
^CEnter Your Text Here
Aug 26, 2021 11:18 AM
Server Supervisor Joe
Transaction # 14
Table # 24
Station # 1
# Customers 2
```

Qty	Description	Price
1	Greek Salad	\$6.50
	Total	\$6.50
	H.S.T.	\$0.85
	Sale Total	\$7.45
	Visa	\$7.45
	Total Tendered	\$7.45

Secure Table Pay with Clover (Pull Mode)

Secure Table Pay and Clover provide a fast and efficient option for Pay at the Table for restaurant. See our Secure Table Pay with Clover manual available on the UniversalPOS web site.

Make sure table numbers in the POS are strictly numeric. Alpha Numeric table numbers cause the Clover terminals to display Fatal Error.

Back Door TGI Password on Clover DDMM

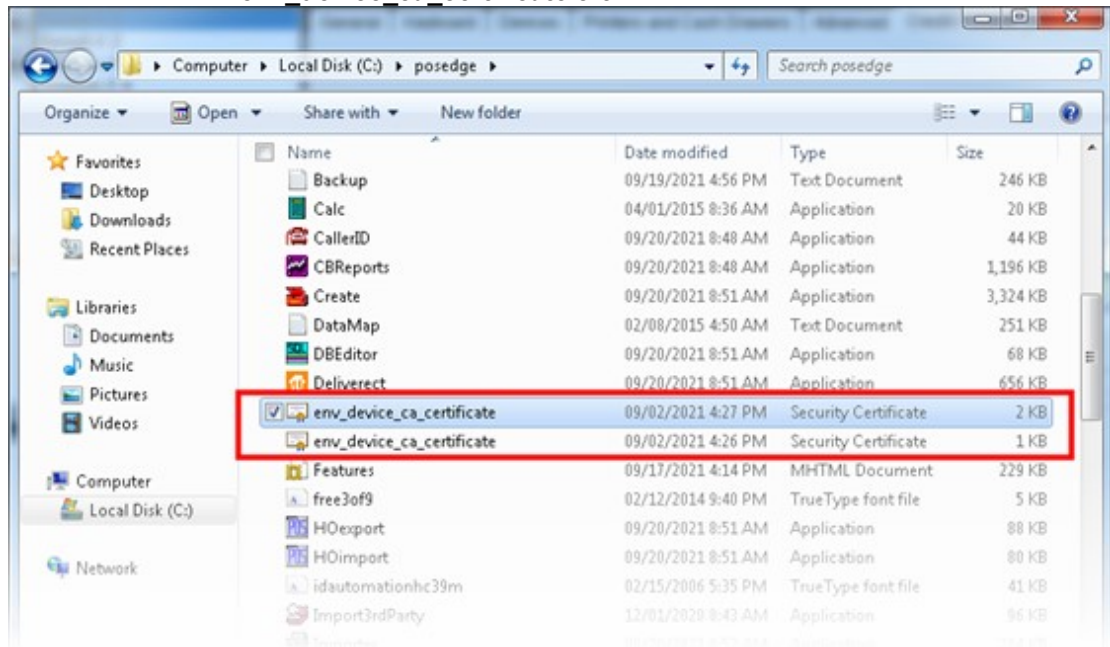
Clover (Push Mode Direct)

Installation Process

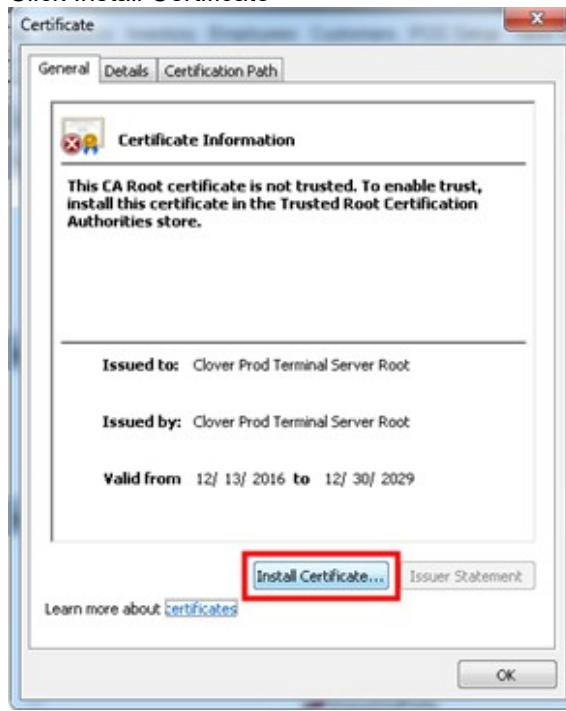
1. Install Certificates on each POS Computer Terminal
2. Set up each Clover Pinpad
3. Obtain the Token
4. Complete Station Setup for each POS Terminal.
5. Complete Payment Method Setup

Install the 2 Clover Certificates on Each POS Terminal.

1. Locate the POSEDE root folder.
2. Double left click on ***env_device_ca_certificate.crt***



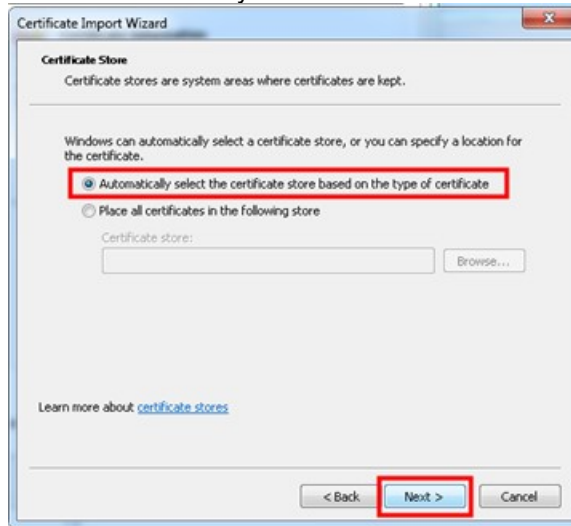
3. Click Install Certificate



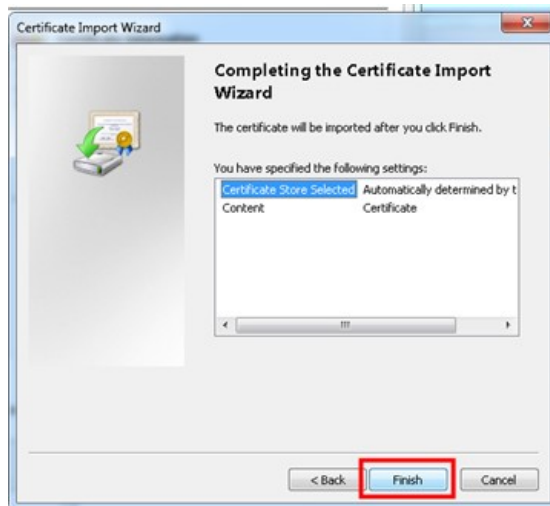
4. Click Next



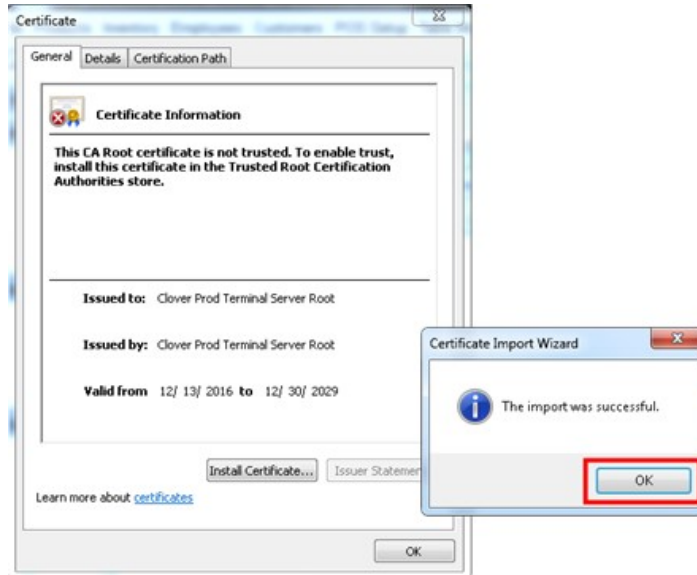
5. Check Automatically select the certificate store and click Next



6. Click Finish



7. Click Ok



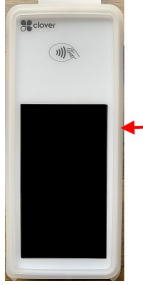
8. Repeat from Step 2 for ***env_device_ca_certificate.der***

9. Repeat from Step 1 for each computer that requires access to a Clover Device.

This completes the integration of the Clover Device to the POS.

Setup Your Clover Device

1. Turn on the Clover Device by pressing and holding the on button.

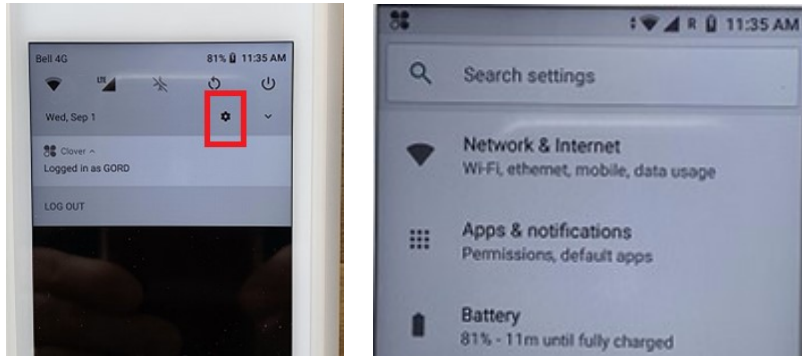


2. The Clover Device will start and perform some update, ask to create passwords and test the printer. Follow the on screen directions to complete this setup. You will also need to configure device to connect through Ethernet (you must connect the Clover Ethernet Adapter Cable to the Clover Device) or WIFI. Complete the network connections as requested by the device.
3. Once the general setup of the Clover device is completed, you will see a screen similar to the image below.

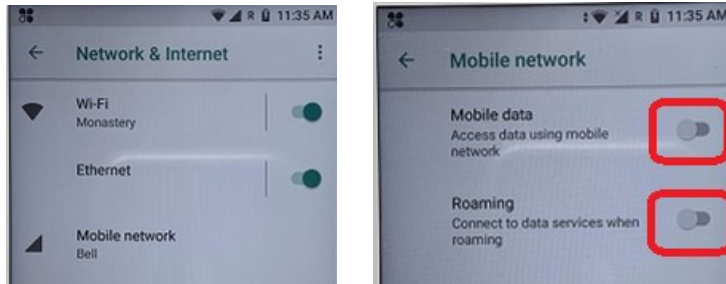


- From this screen, swipe down from the top of the screen to display the device menu.

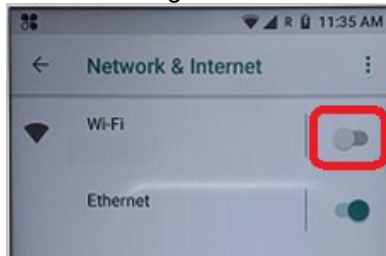
Click the Gear Icon.  and then select Network & Internet



- Select Mobile Network and Disable the Mobile Networks

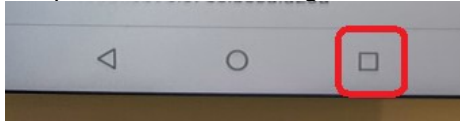


- Click the Back Arrow to return to the previous menu.
- In step 2, you setup the Clover device to connect through Ethernet or WIFI. Disable now the connection you are not using. Our example assumes you are going to connect through Ethernet so Disable WIFI now.

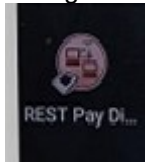


- Click on Ethernet and input the Static IP Settings for this device.

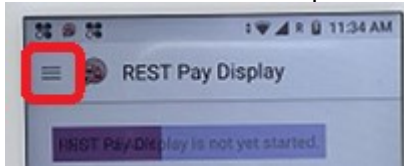
9. Close all open Windows by clicking the square at the bottom of the screen and sliding all open windows to the right.



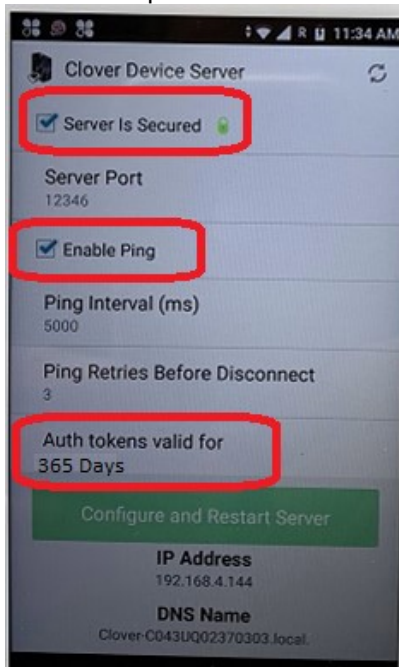
10. Click on the Rest Pay Icon. If the Rest Pay Display icon not on the Clover device, then go to Tools, locate, download and install the app.



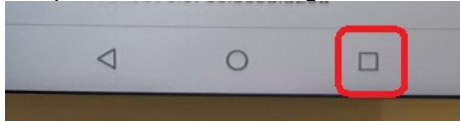
11. Click the 3 Lines in the Top Left of the screen.



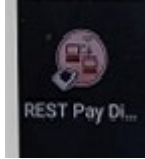
12. Set the setup as shown below and the Click Configure and Restart Server



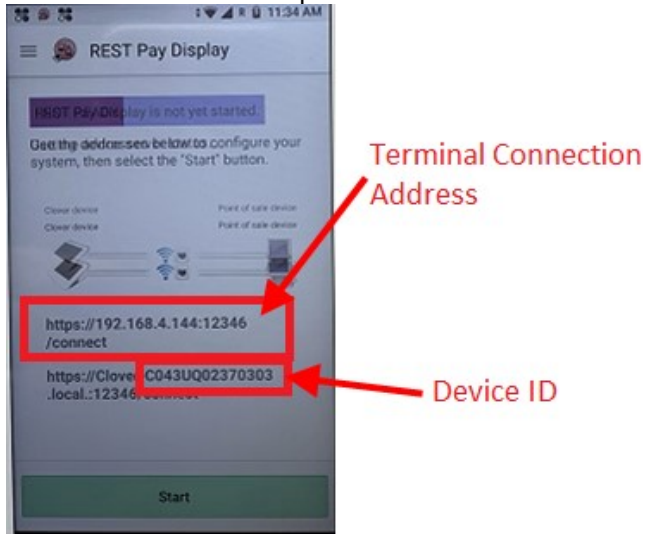
13. Close all open Windows by clicking the square at the bottom of the screen and sliding all open windows to the right.



14. Click on the Rest Pay Icon.



15. Take note of the Terminal Connection Address and the Device ID. These must be entered into Station Setup.

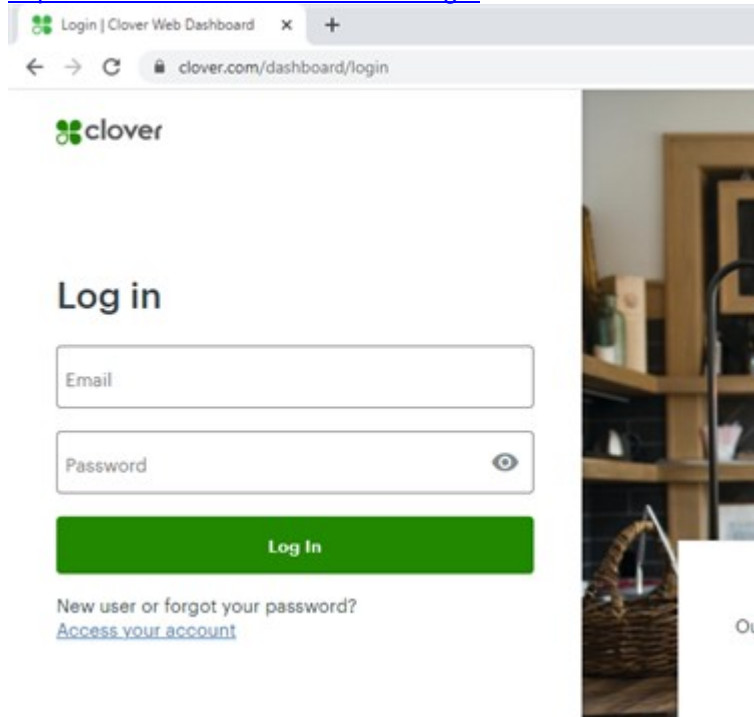


16. Click Start to begin the Rest Pay Display.

Obtain a Token and Configure Station Setup

Note: Tokens are valid for approx 6 hours and will refresh automatically.

1. Login to your Clover Dashboard using your Clover credentials.
<https://www.clover.com/dashboard/login>

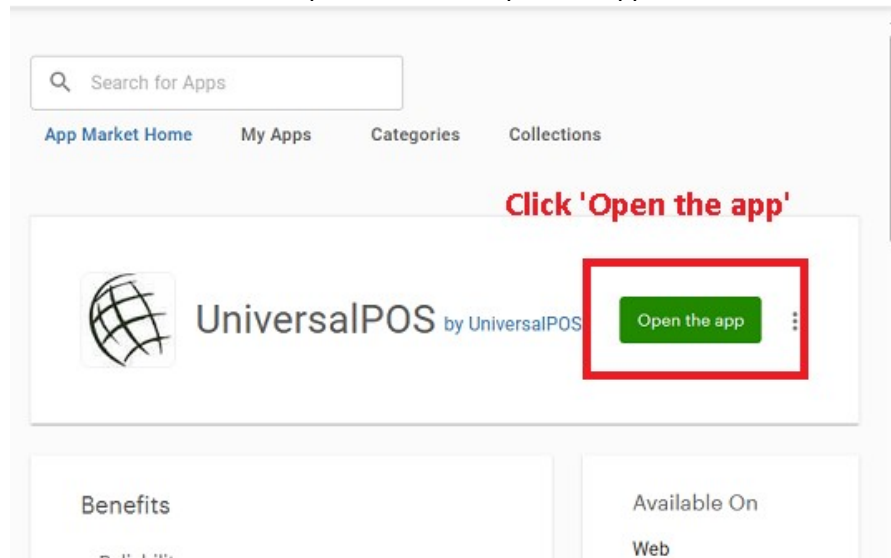


2. Click or copy this link to another tab in your browser
https://www.clover.com/oauth/v2/authorize?client_id=F746HZ7RKNBTA&redirect_uri=https://www.universalpointofsale.com

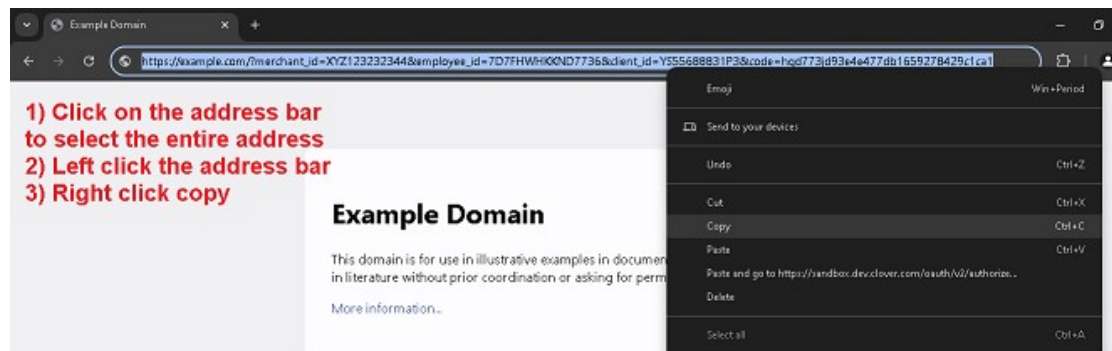
Note: Do not use the UniversalPOS link on the clients Clover Dashboard.

3. You may or may not see a screen similar to below. If not proceed to Step 4.

In the new Window that opens, click the Open the app Button.



4. On the tab that opens, click on the address bar to highlight and select all the text. Right click on the highlighted text and left click copy.



5. You can now close your browser windows.
6. Launch the UniversalPOS Back Office → Login → Click Administration → Station Setup
7. a) On the left side pane, select the station the first Clover device will be connected to.
b) Select 14- Clover – Push Direct for the processor.
c) Click Get Token.

Note: All Stations use the same Token. The Token is automatically allocated to all Stations in the background so when setting up other stations, ignore the Get Token Process.

8. Depending on many factors, you will either receive back a token or an error message will appear. If you did not receive back a token, repeat the process from the beginning.

General | Keyboard | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screen

Debit/Credit Processor: 14 - Clover - Push Direct
Terminal Receipt Print Location: On POS (Both Copies)
Connect Time Out in Seconds: 3 Read Time Out in Seconds (min 60): 80
Terminal Connection Address: [Redacted]
Token: Token Valid Until 01/09/2025 5:59:06 PM
Get Token
Device ID: [Redacted]
Prompt For Tip: ☐ Advanced: None

Note: Ignore the Token Expiry Date. The POS automatically refreshes the Token when required.

9. Enter the Terminal Connection Address and Device ID that was referenced in Step 15 under Setup Your Clover Device. This should be similar to

HTTPS:// **your IP** :12346/connect

Set the Connect Time Out in Seconds to 10.

Set the Read Time Out in Seconds to 80.

Debit/Credit Processor: 14 - Clover - Push Direct
Terminal Receipt Print Location: On Pinpad
Connect Time Out in Seconds: 10 Read Time Out in Seconds: 80
Terminal Connection Address: https://192.168.1.121:12346/connect
Token: b7a9ee1d-b57d-311f-4f6e-f18b1324876a
Device ID: C032UQ95150467
Get Token
Prompt For Tip: ☒

10. You can confirm your Device ID on your Clover Dashboard by clicking Account & Setup → Devices

The screenshot shows the Clover Dashboard for 'MONASTERY CELLARS'. The left sidebar contains a menu with items: Virtual Terminal, Dashboard, Reporting, Transactions, Closeout, Disputes, Customers, Employees, UniversalPOS, More Tools, and Account & Setup. The 'Account & Setup' item is highlighted with a red box. The main content area shows the 'Profile' section with user information and a 'Two-factor authentication is on' status. Below this is the 'About Your Business' section, where the 'Devices' link is highlighted with a red box. Other links like 'Business Information' and 'Business Operations' are also visible.

The screenshot shows the 'Devices' page in the Clover Dashboard. The left sidebar is the same as the previous screenshot, with 'Account & Setup' highlighted. The main content area has a header with a 'Back to Account & Setup' link. Below the header is a table with the following columns: Name, Model, ID, and Order Title Prefix. The table contains two rows of device information. The 'ID' for the second device, 'C043U0044', is highlighted with a red box. A red arrow points from the text 'Clover Device ID' to this highlighted ID. The table also includes a 'Back' and 'Next' link at the bottom right.

Name	Model	ID	Order Title Prefix
—	Flex(2nd Generation)	C043'0303	—
—	Flex(2nd Generation)	C043U0044	—

Partial Payments

To stop partial payments from being accepted on a Clover Flex payment terminal, you can follow these steps:

1. Access the Clover Dashboard:
 - Log in to your Clover account on a computer or use the Clover app on your device.
2. Go to Settings:
 - Navigate to the “Settings” section.
3. Payment Settings:
 - Look for a section related to “Payments” or “Payment Settings.”
4. Enable/Disable Partial Payments:
 - Find the option for “Partial Payments” and toggle it off. This may be labeled differently depending on your Clover software version.
5. Save Changes:
 - Make sure to save any changes you make.
6. Test the Changes:
 - Perform a test transaction to ensure that partial payments are no longer accepted.

Global Payments (Canada - Push Mode)

Available Devices

- Ingenico ICT250 Tethered Serial Pinpad
- Ingenico Move 5000 Wireless IP Terminal
- Ingenico Desktop 5000 Tethered IP Terminal

Ingenico Move 5000

Before beginning, obtain from Global Payments you Admin Name and Password. These will be required to setup the device. In the setup, we refer to them as your credentials.

1. Turn on the Pinpad by pressing and holding the Green Power Button.
2. Touch Admin on the screen.
3. Touch 3 for Setup Menu and enter your credentials.
4. Touch 2 for Communications and 3 for WIFI.
5. Touch 1 for WIFI Easy Conn.
6. Easy Conn should locate your WIFI connection. Select it from the list and enter your WIFI password. Once connection is established, proceed to set 7. If connection is not established, check your internal WIFI Setup.
7. Press X until you return to the WIFI Menu.
8. Press 2 for Advanced Setup.
9. Make sure Option 3, WIFI is set to ON
10. Press 2 for IP Settings.
11. Select 2 for WIFI Static IP
12. Enter or confirm your WIFI Static Setup. Record the Terminal IP for future reference. Once completed, press the Green Button to Save the settings.
13. Press the X Button to return to the Admin Menu.
14. Press 8 for Misc. Options and enter your credentials.
15. Press 1 for Semi Integrated.
16. Press 1 to set Semi Integrated to ON.
17. Press 2 to set Communication Type to WIFI and press Enter.
18. Confirm the Terminals IP Address and enter 9999 for the Port and touch Enter.
19. Press 3 for Receipt Options and set to ECR.
20. Press the X button to return to the Welcome/Bonjour Screen.
21. Go to the Back Office in the POS and select Administration→Station Setup.
22. Select your station and click the Credit/Loyalty Tab.

23. Set the following and enter the IP Address you recorded in step 12.

The screenshot shows the 'Credit / Loyalty' tab selected in the top navigation bar. The settings are as follows:

Debit/Credit Processor	1 - Global Payments Canada - Desktop & Move 5000 (Ethernet)
Terminal Receipt Print Location	On POS (Both Copies)
Time Out in Seconds	3
Port	9999
IP / Host Address	192.168.1.114

Save your Station Settings.

24. Setup your Payment Methods

Ingenico Desktop 5000

Before beginning, obtain from Global Payments you Admin Name and Password. These will be required to setup the device. In the setup, we refer to them as your credentials.

1. Turn on the Pinpad by pressing and holding the Green Power Button.
2. Touch Admin on the screen.
3. Select Setup Menu and enter your credentials.
4. Select Communications.
5. Select an Print Current Configuration
6. Select Ethernet
7. Select Static
8. Enter the IP information you printed in step 5
9. Save your settings
10. Press the X Button to return to the Admin Menu.
11. Press 8 for Misc. Options and enter your credentials.
12. Press 1 for Semi Integrated.
13. Press 1 to set Semi Integrated to ON.
14. Press 2 to set Communication Type to Ethernet and press Enter.
15. Confirm the Terminals IP Address and enter 9999 for the Port and touch Enter.
16. Press 3 for Receipt Options and set to ECR.
17. Press the X button to return to the Welcome/Bonjour Screen.
18. Go to the Back Office in the POS and select Administration→Station Setup.
19. Select your station and click the Credit/Loyalty Tab.

20. Set the following and enter the IP Address you recorded in step 6.

The screenshot shows the 'Advanced' tab in the UniversalPOS settings. The 'Debit/Credit Processor' is set to '1 - Global Payments Canada - Desktop & Move 5000 (Ethernet)'. The 'Terminal Receipt Print Location' is set to 'On POS (Both Copies)'. The 'Time Out in Seconds' is set to '3'. The 'Port' is set to '9999'. The 'IP / Host Address' is set to '192.168.1.114'.

General	Keyboard	Devices	Printers and Cash Drawers	Advanced	Credit / Loyalty
---------	----------	---------	---------------------------	----------	------------------

Debit/Credit Processor	1 - Global Payments Canada - Desktop & Move 5000 (Ethernet)
Terminal Receipt Print Location	On POS (Both Copies)
Time Out in Seconds	3
Port	9999
IP / Host Address	192.168.1.114

21. Save your Station Settings

22. Setup your Payment methods.

Payment Sense (Europe - Push Mode)

This documentation will be completed shortly.
Please call for directions.

Scotch Payments (Push & Pull Mode)

This documentation will be completed shortly.

- 1) Set a Static IP on the Device and set the Port to 6565.
- 2) In Station Setup,
 - a) Set the Debit/Credit Processor to 9) Scotch Pay.
 - b) Enter the IP Address and Port for the Pinpad as the Host Address
for example 192.168.0.20:6565
 - c) Enter the API Key provided by Scotch Payments
- 3) Scotch Payment does not support the 'determined by bank terminal' functionality in Payment Method Setup. You must provide each appropriate Payment Method (Visa, Master Card, AMEX, Debit)

TD - Toronto Dominion (Canada - Push Mode – Desktop 5000)

Pinpad Setup

1. Connect the Pinpad to the internet and power.
2. Touch ADMIN and enter your Admin Name & Password.
(provided by TD)
3. Touch 3 for Setup Menu.
4. Touch 1 for Communications.
5. Touch 3 For Ethernet
6. Touch 1 for Current Setup and click Print
7. Touch 2 for Ethernet Setup.
8. Touch 2 for Static.
9. Enter and/or verify that the Terminal IP Address, Gateway ID, IP Subnet Mask and the Primary & Secondary DSN are correct. You can enter your own values or use the information from the printout in step 5.
10. Touch the Red X button until you return to the Setup Menu.
11. Touch 2 for Receipts.
12. Touch 3 for Receipt Options
13. Touch 4 for None.
14. Touch the RED X four times to return to the Welcome Screen.

POS Setup

1. Go to the Back Office
2. Click Administration
3. Click Station Setup
4. Click the Credit/Loyalty Tab
5. Select the appropriate POS station from the list on the left.
6. Select the appropriate Toronto Dominion Pinpad
7. Enter the Port Number (usually 9999) and Pinpad IP address.
8. Set Terminal Receipt Print Location to On POS (Both Copies)

Station Setup

General | Keyboard | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

Debit/Credit Processor: 11 - Toronto Dominion - Ingenico Desktop 5000 (Ethernet)

Terminal Receipt Print: On POS (Both Copies)

Connect Time Out in Seconds: 3 Read Time Out in Seconds (min 60): 80

Port: 9999

IP / Host Address: 192.168.1.118

Gift Card Processor: POS Processed

3rd Party Gift Card: None

Enter the port and IP

Station #1

Exit

9. Repeat from Step 6 for each POS station.

Credit Notes

The POS can track credit notes for your customers. When a customer returns a product, you can issue them a credit note instead of cash, which they can redeem against future purchases.

Setting Up Credit Notes

Create a Payment Method and call it Credit Note or similar and set the authorization method to Credit Note Redeem.

Gift Cards

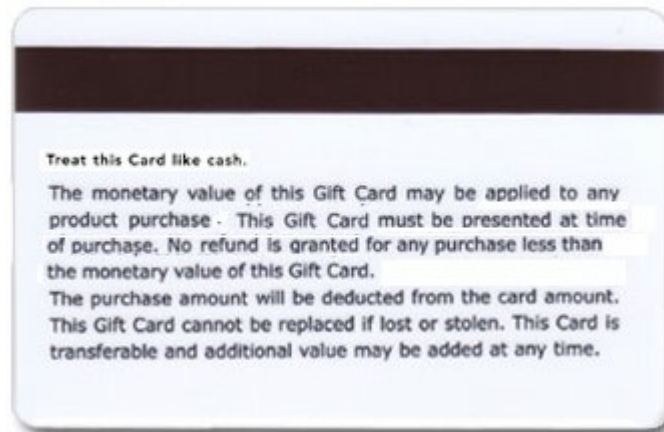
The POS has complete gift card tracking. Gift cards can be sold in preset denominations or random amounts. Once issued, the gift card can be redeemed in part or in full against orders



Several Gift Card Integrations are Available

- POS Gift Cards (Tracked & Untracked)
- POS Multi Store Gift Cards
- Ackroo Gift Cards

Sample
Back of
Card



POS Gift Cards Tracked

UniversalPOS

The POS has complete gift card tracking. Gift cards can be sold in preset denominations or random amounts. Once issued, the gift card can be redeemed in part or in full against future purchases. Customers can also add value to their gift card as the cards value is depleted.

Gift Cards are configured by Station.

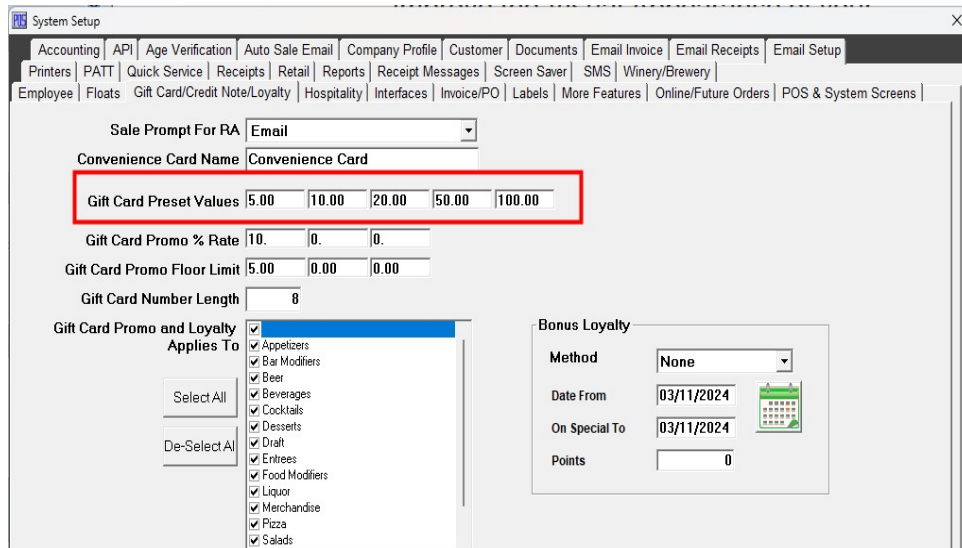
1. Go to Administration → Station Setup → Credit Loyalty Tab.
2. Select the Gift Card Processor.
3. Repeat this step for each Station.

The screenshot shows the 'Station Setup' window with the 'Credit / Loyalty' tab selected. On the left, a list of stations from Station #1 to Station #30 is shown, with Station #1 highlighted. The main area contains configuration fields for Station #1. A red rectangle highlights the 'Gift Card Processor' and '3rd Party Gift Card' dropdown menus. The 'Gift Card Processor' is set to 'POS Processed'. The '3rd Party Gift Card' dropdown is open, showing three options: 'None', 'POS Processed' (which is selected and highlighted in blue), and 'POS Processed (Untracked)'.

Field	Value
Debit/Credit Processor	11 - Toronto Dominion - Ingenico Desktop 5000 (Ethernet)
Terminal Receipt Print	On POS (Both Copies)
Connect Time Out in Seconds	3
Read Time Out in Seconds (min 60)	80
Port	9999
IP / Host Address	192.168.1.118
Gift Card Processor	POS Processed
3rd Party Gift Card	POS Processed

At the bottom of the window, there is a dark bar with the text 'Modify Current Record' on the left, 'Station #1' in the center, and three buttons on the right: a floppy disk icon, a document with a red X icon, and a button labeled 'Finished'.

4. Go to Administration → System Setup → Gift Card Tab and enter the preset values.



System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

Sale Prompt For RA: Email

Convenience Card Name: Convenience Card

Gift Card Preset Values: 5.00 10.00 20.00 50.00 100.00

Gift Card Promo % Rate: 10.00 0.00 0.00

Gift Card Promo Floor Limit: 5.00 0.00 0.00

Gift Card Number Length: 8

Gift Card Promo and Loyalty Applies To:

- ☒ Appetizers
- ☒ Bar Modifiers
- ☒ Beer
- ☒ Beverages
- ☒ Cocktails
- ☒ Desserts
- ☒ Draft
- ☒ Entrees
- ☒ Food Modifiers
- ☒ Liquor
- ☒ Merchandise
- ☒ Pizza
- ☒ Salads

Select All

De-Select All

Bonus Loyalty

Method: None

Date From: 03/11/2024

On Special To: 03/11/2024

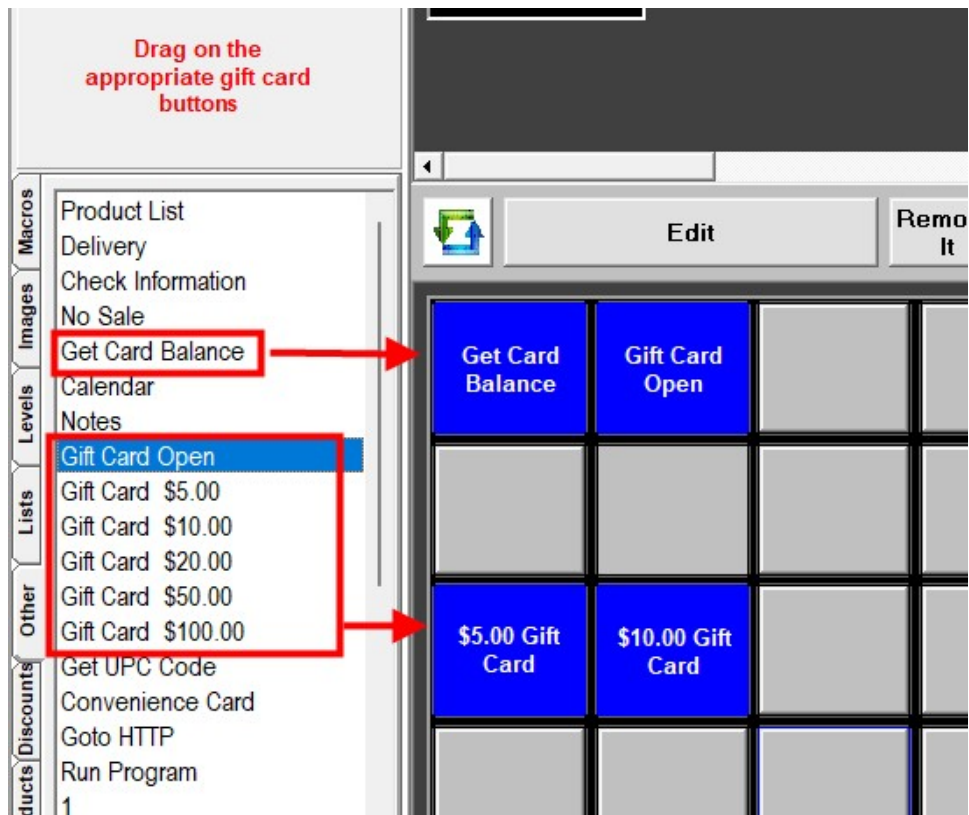
Points: 0

5. Enter the length of the Gift Card number. Usually POS Tracked Gift Card will be 8 digits in length. Gift card numbers are usually stores in track 1 or track 2 of the magnetic strip and start with an identifier of 777 followed by a 5 digit card number. For example Card1 > 77700001, Card 2 > 77700002 etc.

6. Go to Products → Menu Design → Other Button Tab
Drag the appropriate gift card function buttons on to any menu page you wish.

- Get Card Balance is used to see the balance and history of a gift card.
- Gift Card Open allows for a manually entered value for the gift card.
- Gift Card Preset amounts are for fixed gift card values.

See POS Menu Design for additional information.



7. Go to POS Setup → Payment Methods.
Create a Payment Method called Gift Card which will be used to redeem the Gift Cards.
 - a. Set the Authorization Method to Gift Certificate Redeem
 - b. Check Tender Allowed
 - c. Check Change is Tip

The screenshot shows the 'Payment Method Setup' window with the 'General' tab selected. On the left, a list of payment methods includes 'Cash', 'Debit', 'Gift Card' (highlighted), 'Master Card', 'U.S. Cash', and 'Visa'. The main area contains the following fields and options:

- Name:** Gift Card
- Exchange Rate:** 1.
- Change Is:** Domestic Currency
- Number Decimals:** 2
- Security Level Required:** (dropdown menu)
- Prompt:** (dropdown menu)
- Card Type:** None
- Authorization Method:** Gift Card Redeem
- Currency Symbol:** \$
- Tender Required:** ☐
- Tender Allowed:** ☐
- Over Tender Allowed:** ☐
- Print On Pre-Pay Receipt:** ☐
- Print Extra Receipt:** ☐
- Always Print Receipt:** ☐
- Refund This Currency:** ☐
- Customer Required:** ☐
- Prompt For Cash Back:** ☐
- Prompt For Tip:** ☐
- Get Reference Number:** ☐
- Change Is Tip:** ☐

The **POS Button** section includes a button labeled 'Gift Card', a 'Text Color' selector, a 'Back Color' selector, a 'New Image' button, a 'Delete Image' button, a 'Text Middle' dropdown, and a 'Display Order' field set to 7.

The **Cash Drawer** section has a checked box for '1' and an unchecked box for '2'.

At the bottom, there are navigation buttons: 'Delete', 'Add New', and 'Exit'.

A red callout box with arrows pointing to the 'Name' and 'Authorization Method' fields contains the text: 'Create a payment method called Gift Card and set the authorization method to Gift Card Redeem'.

POS Gift Cards Untracked

The following process describes setting up and using gift cards that are not tracked by the POS. These would typically include gift cards that are sold through your Banks Credit Card Terminal.

The POS offers no reporting on untracked gift cards other than the basic information that appears on day end and cashier reports.

Setting Up Untracked Gift Card

1) POSSetup → Administration → Station Setup → Credit / Loyalty Card Tab

Station Setup

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

General | Keyboard | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Debit/Credit Processor: 11 - Toronto Dominion - Ingenico Desktop 5000 (Ethernet)

Terminal Receipt Print: On POS (Both Copies)

Connect Time Out in Seconds: 3 Read Time Out in Seconds (min 60): 80

Port: 9999

IP / Host Address: 192.168.1.118

Gift Card Processor: POS Processed (Untracked)

3rd Party Gift Card: None

Select Gift Card Mode

Station #1

Exit

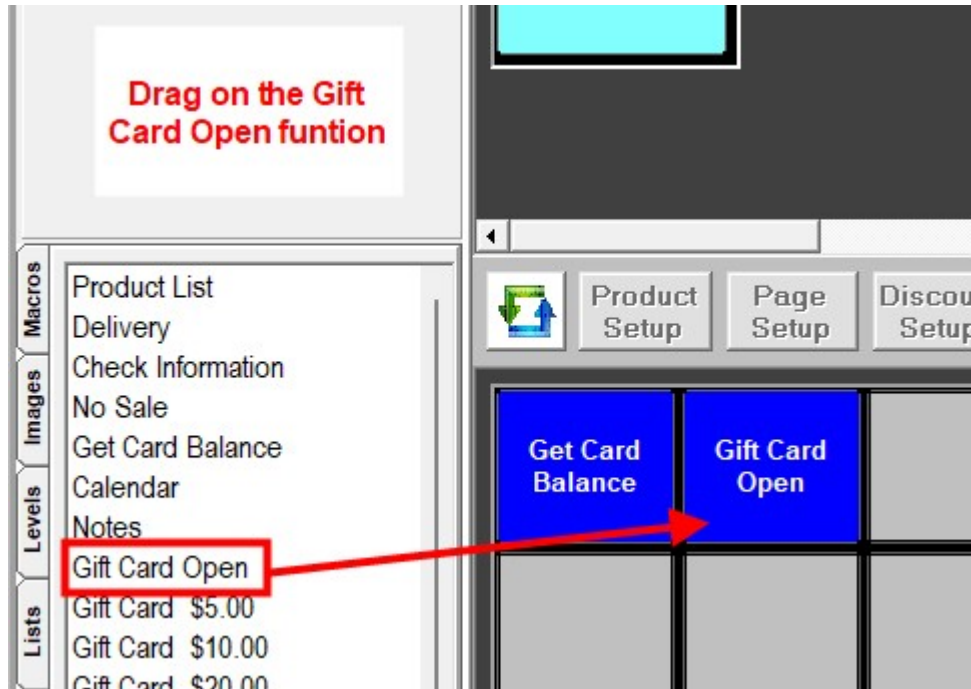
- Select POS Processed (Untracked) for the Gift Card Processor.
- Repeat for each POS station.

2) From Products → Menu Design → Other Buttons Tab

Drag the gift card open button on to any menu page screen you wish.

- Gift Card Open allows for a manually entered value for the gift card.

See POS Menu Design for additional information.



- 3) Click POS Setup → Payment Methods
Create a Payment Method called Gift Certificate, which will be used to redeem the gift certificates.

POS Multi Store Gift Cards

POS Multi Store Gift Cards allow for a simple and affordable method of sharing gift cards amongst stores in different locations.

The multi store gift card program requires one location to store and process all gift card transactions. This location must

- have a static external IP address
(later referred to as Store Static IP Address)
- have a port open on the router
- have very good, stable internet
- The server computer at this location must always be running

At this location,

1. Install UniversalPOS
2. Go to Administration → System Setup → API Tab
3. Set a Static IP Address on the server terminal at this location.
4. Set Port Forwarding on your Router to forward port 5657 (or whatever port you choose) to the Static IP Address you set up in Step 3.
See Port Forwarding for additional information.
5. Under System Setup → API Tab → Check Enable API
6. Enter the IP Address you setup in Step 3
7. Enter the Port you setup in Step 4

The screenshot shows the 'System Setup' window with the 'API' tab selected. The 'Enable API' checkbox is checked. The 'IP Address Of PC Running the' field is set to '127.0.0.1'. The 'Port Monitored By the API Monitor' field is set to '5656'. The 'AUTH token' field displays a long alphanumeric string: '67C5D8856F481683B1E794EA8598CCD6E1EC2CA1450C6EFF884879C1', with a 'Generate' button to its right. The 'Your POS Serial Number' field is set to '7700000013', with a 'Copy to Clipboard' button to its right. Below these fields is a box labeled 'API Authorized Users'. An 'Exit' button is located at the bottom right of the window.

8. Check Generate to create the API Token. ***Do Not Share This Token Publically.
Do Not Share This Token With Your Store Locations.***
9. Record Your POS Serial Number and provide this to each location that will need to access Gift Cards.
10. Click Save.

11. Click API Authorized Users.

The screenshot shows a window titled "API User Setup" with a close button (X) in the top right corner. On the left is a list of stores: "Sandbox Store", "Store #201 Toronto" (which is highlighted in blue), and "Store #202 Ottawa". The main area of the window is labeled "General" and contains the following fields:

- "Store Name / Number" with the value "Store #201 Toronto".
- "Token" with a long alphanumeric string: "0F6BFAD74B271CD175A2CBA67EAECD564D3116C061D07924A951159".
- A "Copy to Clipboard" button located below the token field.

A small number "3" is visible in the top right corner of the main content area.

12. Create an API user for every location that will require access to Gift Cards. Create a unique name for each location. A unique token (which we will refer to later as the Store Token) will be generated automatically for the location when you save the record. Provide this Token to the location which it relates to.

***It is very important you only provide this token to the location it relates to.
Do Not Share This Token Publically.***

13. Close API Authorized Users and the Close System Setup.

14. At each store location, go to Administration → Station Setup

Station Setup

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

General | Keyboard | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Debit/Credit Processor: 11 - Toronto Dominion - Ingenico Desktop 5000 (Ethernet)

Terminal Receipt Print: On POS (Both Copies)

Connect Time Out in Seconds: 3 Read Time Out in Seconds (min 60): 80

Port: 9999

IP / Host Address: 192.168.1.118

Gift Card Processor: POS Processed (Untracked)

3rd Party Gift Card: POS Multi Store Gift

IP: 99.249.27.34

Port: 5657

Processing POS Serial#: 7700000013

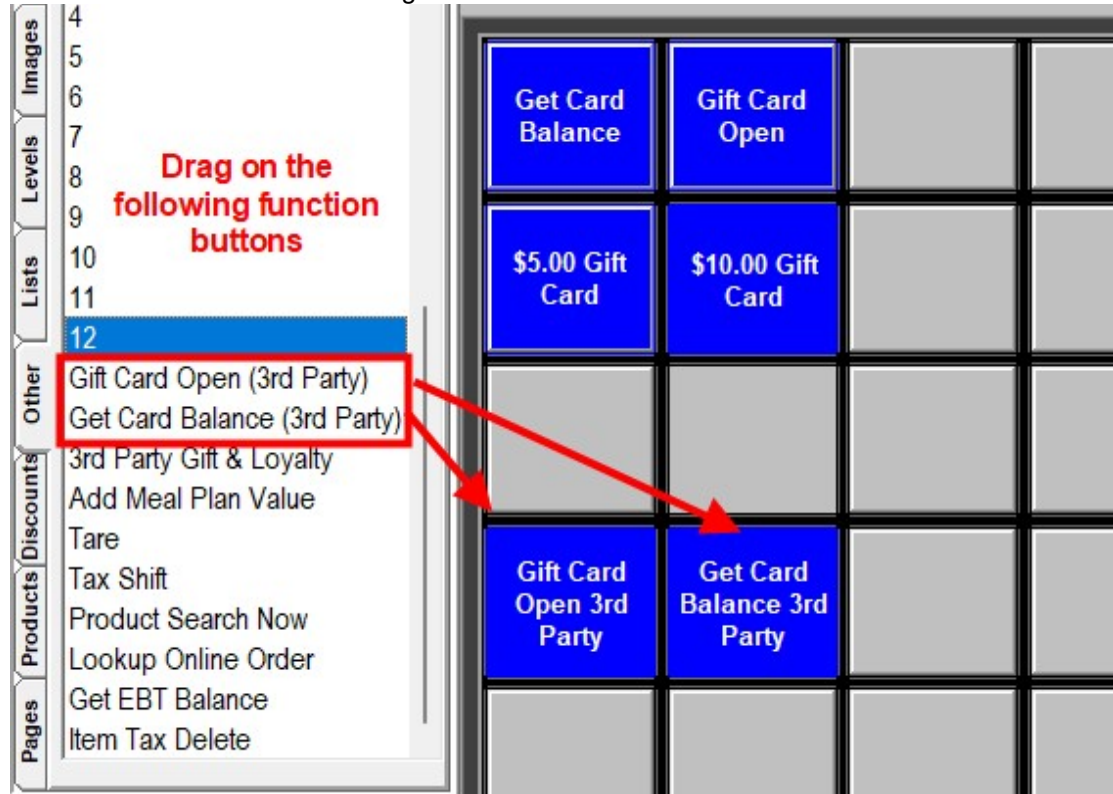
Token: 0F6BFAD74B271CD175A2CBA67EAECD564D3116C061D07924A951159C2B49437B

Station #1

Exit

15. Select POS Multi Store Gift Card for the 3rd Party Gift Card Processor.
16. Enter the Store Static IP Address. This is the Static External IP Address of the main server that will be processing and storing the Gift Cards
17. Enter the Port you created in Step 4.
18. Enter the serial number you recorded in Step 9.
19. Enter the Store Location Token created in step 12.
20. Save the Station and repeat for each applicable station.

21. From Products → Menu Design → Other Buttons Tab



Drag on the 3rd Party Gift Card Sale and 3rd Party Card Balance buttons.
See *POS Menu Design* for additional information.

22. Click POS Setup → Payment Methods

Create a Payment Method called UPOS Gift Card which will be used to redeem the gift certificates.

- Set the Authorization Method to 3rd Party Gift Card Redeem.
- Check Tender Allowed.
- Uncheck Over Tender Allowed.

Gift Cards (Ackroo Processed)

The following process describes setting up and using gift cards that are processed by Ackroo.

For more information visit www.ackroo.com and see *Customer Rewards (Ackroo Processed)*

Setting Up Ackroo Gift Card

- 1) POSSetup → Administration → Station Setup → Credit / Loyalty Card Tab

The screenshot shows the 'Station Setup' window with the 'Credit / Loyalty' tab selected. The left sidebar lists stations from Station #1 to Station #30 Office. The main area contains configuration fields for gift cards. A red rectangle highlights the '3rd Party Gift Card' section, which includes the following fields:

- Gift Card Processor: None
- 3rd Party Gift Card: Ackroo Gift
- URL: <https://api.ackroo.net>
- API Key / UID: a538sab3345ba1
- Token: 9172CC1FF9429BE06F82419212A951F77837D688F4321
- Card Prefix: (empty field)
- Prompt: ☐

Other visible fields include:

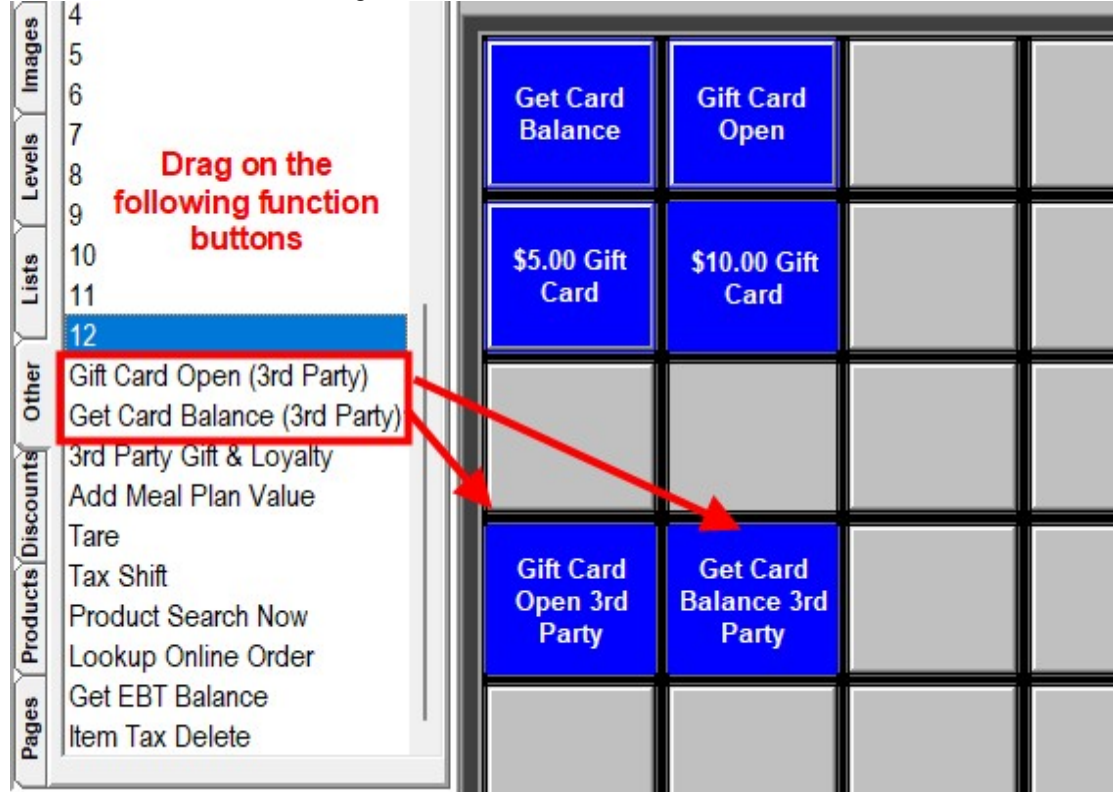
- Debit/Credit Processor: None
- Terminal Receipt Print: On POS (Both Copies)
- Connect Time Out in Seconds: 3
- Read Time Out in Seconds (min 60): 80

The bottom of the window shows 'Station #2' and an 'Exit' button.

23. Select Ackroo Gift for the 3rd Party Gift Card Processor.

24. Enter the Connection URL provided by Ackroo on the URL line.
(usually *https://api.ackroo.net*)
25. Enter the Device ID provided by Ackroo on the API Key or UID line.
(must be unique for each station)
26. Enter Access Token provided by Ackroo on the Token line.
(usually the same for all stations)
27. Repeat for each station.

2) From Products → Menu Design → Other Buttons Tab



Drag on the 3rd Party Gift Card Sale and 3rd Party Card Balance buttons.
See *POS Menu Design* for additional information.

- 3) Click POS Setup → Payment Methods
Create a Payment Method called Ackroo Gift Card which will be used to redeem the gift certificates.
- Set the Authorization Method to 3rd Party Gift Card Redeem.
 - Check Tender Allowed.
 - Uncheck Over Tender Allowed.

Buying your Gift Cards

Gift cards can usually be purchased from local printers. The front of the card should carry your business name and logo. The back of the card should contain a legal blurb as well as an identification number.

This I.D. number can be represented in several formats.

1. Code 3 of 9 barcode
2. Magnetic stripe - Typical encoding format example %77800001?
3. Number physically printed on card
4. All or some of the above

We recommend the I.D. numbers run unique but in a random order in the range 77800001 to 77899999. If you are using Multi Store Gift Cards, numbers should be in the range of 7780000000000001 to 7789999999999999

Gift Card Reports

Under Analysis Report,

- **All Gift Card Summary** displays all gift cards (Active and Closed).
- **Active Gift Card Summary** displays all gift cards that have an outstanding balance.
- **Active Gift Card Summary With Details** displays the details of all outstanding gift cards.

From the Point of Sale → Manager → Other Report Tab

- **Gift Card Summary** will display all the gift cards that have an outstanding balance.

Meal Plans

Meal Plans must be enabled under Policy Setup.

Meal Plans in UniversalPOS come in 2 options.

1. Standard Prepaid Plan.

People can pre-purchase the Meal Plan. They can redeem by buying the product and then pay for it using their meal plan. Standard meal plans will apply to various product types.

For example, they may only apply to food items. Liquor and merchandise may not be included.

- a) Setup the Meal Plans under Products > Meal Plans.
- b) Create a Payment Method and set its Authorization Method to Meal Plan,

2. Account Plans.

With account plans, people would buy the product and pay for it on their account. A Back Office function would be to run monthly reports to determine who owes what. You can select what Product Types are allowed in the Account Plans by selecting the Product Types in System Setup on the Interfaces Tab.

- a) Create a Payment Method and set its Authorization Method to Meal Plan.
- b) If any liquor taxes must be prepaid, then the liquor tax must be tax 7. If not then tax 7 must not be used.
- c) Put the Report 'Transaction Summary by Customer' into Favorites and change its Basic Query property to `{SalesPay.Type}<>'V' and {SalesPay.Authmethod}='11'` and Save the report. This will be the monthly report to show who owes what.

Floats

There are many options when working with floats in the POS. There are three main aspects with regards to floats.

Float In Entry

The Float In Entry allows the employee to specify the amount of currency in the till.

Float Out Entry

The Float Out Entry allows you to remove money from a till throughout the shift.

Cash Declaration Entry

The Cash Declaration allows for a blind reconciliation of monies at the end of the shift.

Discount Setup

Discount setup allows you to create the various discounts your establishment offers. Discounts can include:

- Dollar Amount Discounts
- Percentage Discounts
- Reward Points Redemption

There is no limit to how many discounts you can create. This allows you to create specific discounts such as Managers Complimentary or Staff Discount. By creating the various discounts, you can monitor the amounts of various discounts you are offering.

General Tab

Thursday, Oct 23, 2025 2:54 PM

Click for Discount Setup

Discount Setup

89

Loyalty Discount

Open Item % Discount

Seniors Discount

Staff Discount

General

Advanced Settings

Discount Name Staff Discount

Type 6 - Group Percent Discount by Product Type

Open Entry Allowed ☐

Amount 50

Sign

☐ Plus

☒ Minus

☐ Cost Plus

Security Level Required [Dropdown]

Prompt [Dropdown]

Tax

☒ H.S.T.

☐

☐

☐

☐

☐ Deposit

Bar Code [Input]

Bonus Bucks 0

☐ Always Print Receipt

☐ Once Only Per Transaction

☐ Cannot Be Combined With Another Discount

☐ Can Only Be Applied To Regular Priced Items

Discountable Product Types

Appetizers

Beverages

Desserts

Entrees

Food Modifiers

Pizza

Salads

Toppings

←

⇐

⇒

→

Product Types

Bar Modifiers

Beer

Cocktails

Draft

Liquor

Merchandise

Wine

⏪ ⏩ ⏴ ⏵

Delete

Add New

Exit

Discount Name

Enter the name for the discount. For example, Staff Discount.

Discount Type

- 1) **Item Dollar Discount** applies a dollar discount off the selected item.
- 2) **Item Percent Discount** applies a percentage discount off the selected item.
- 3) **Sale Dollar Discount Max Pre-Tax Total** applies a dollar discount off the sale that does not exceed the merchandise sales total.
- 4) **Sale Percent Discount** applies a percentage discount off the sales total.
- 5) **Item Dollar Discount (Paid by Loyalty)** applies a dollar value discount to the selected product. The value of the applied discount is deducted from the customer current available loyalty points. If the customer has insufficient loyalty points, the discount is not applied. Additional loyalty points can be charged using the Bonus Buck field on the discount.
- 6) **Group Percent Discount** applies a percentage discount off all the items in the sale that belong to a certain product type.
- 7) **Specific Item Dollar Discount** applies a dollar discount to one particular item.
- 8) **Specific Item Percent Discount** applies a percentage discount to one particular item.
- 9) **Item % Override Discount**
- 10) **Item Percent Discount (Paid by Loyalty)** applies a percent discount to the selected product. . The value of the applied discount is deducted from the customer current available loyalty points. If the customer has insufficient loyalty points, the discount is not applied. Additional loyalty points can be charged using the Bonus Buck field on the discount.
- 11) **Zero Sale** will discount everything so the sale total is zero.
- 12) **Sale Dollar Discount Maximum Sales Total** applies a dollar amount off the sale that does not exceed the sales total.
- 13) **Discount Item to Value of Amount Field** will apply a dollar discount to the selected item so the net value of the item is the value of the amount field. A good example would be offering a penny sale. You would have the amount of the discount as one cent. If you sold an item for a dollar, the discount would be 99 cents netting the value to one cent.
- 14) **Group Dollar Discount** applies a dollar discount off all the items in the sale that belong to certain product types.
- 15) **Item % Discount including Forced Modifiers** applies a percent discount off the selected item including any chargeable forced modifiers for that item.
- 16) **3rd Party Item % Discount** applies a percent discount off the selected item. This discount will be authorized on line by a 3rd party loyalty application.
- 17) **2 for 1 (Least Expensive Items In Group)** applies a percent discount to the lowest price of 2 products that belong to certain product types. This discount can only be applied once per check and when applied, will discount all applicable items on the check. The discount rate is typically set to 100%.

- 18) **2 for 1** (Comparative Discount) applies a percent discount to the lowest price of 2 products that belong to certain product types. This discount can only be applied once per check and when applied, will discount all applicable items on the check. The discount rate is typically set to 100%.

Open Entry Allowed

Check this box to enable manual entry of the discount amount. If checked, the value entered into the *Amount Field* becomes the upper limit or maximum value that can be manually entered as the discount amount.

Amount

Enter the preset amount of the discount. For example, 10 would be 10 percent.

Note: If open entry is enabled, then the Amount field represents the maximum discount allowed. For example, if the amount field was set to 20%, then entering any amount of 21% or greater at the point of sale would produce an entry exceeded error.

Sign

- **Plus**
Discount Premium.
- **Minus**
Normal Discount.

Security Level Required

Select from the dropdown list the level of security that is required to use this discount. For example, a cashier may be able to give a 10% discount but requires a manager's authorization to give a 100% discount.

Prompt

Select from the dropdown list any prompt you want to appear when you use this discount.

GL Account

Enter the general ledgers account number to apply this discount to when creating reports.

Barcode

Enter the barcode number of the discount. Use this feature if you are scanning your coupons with a barcode scanner. *This eliminates cashier error.*

Bonus Bucks

Enter the amount of bonus bucks to be redeemed or applied when the discount is used.
Example, -500 to use 500 points.

Always Print Receipt

Enable this to force a receipt to print whenever the discount is used in a sales transaction, even if receipt printing is turned off.

Once Only Per Transaction

Enable this to only allow this discount to appear once per transaction.

Cannot Be Combined With Another Discount

Enable this to only allow this discount to be used if no other discounts are applied to the sales transaction.

Can Only Be Applied To Regular Priced Items

Enable this to only allow the discount to items to occur if the item is being sold at regular price.

Tax

Check the taxes that will be deducted if the discount is used.

For example, we sell an item for one dollar and it charges Tax1 and we deduct 10 percent using a discount so we are selling the item for 90 cents.

- *Tax 1 is checked; we charge Tax1 on \$0.90*
- *Tax 1 is not checked, we charge Tax1 on \$1.00*

Note: Governments apply various rules that determine if discounts can deduct taxes or not. You should verify with your local government to determine tax rules on discounts.

Advanced Settings

Discount Setup

Loyalty Discount
Open Item % Discount
Seniors Discount
Staff Discount

General Advanced Settings

Receipt Text

Use the following format codes

^C Center Text
^B Bold Text
^D Double Width Text
^R Red Text

Valid From 01/01/1900
Valid To 01/01/3000

Discount Schedule

POS Button

Staff Discount

Text Color Back Color
New Image Delete Image

GL Account
POS Keyboard Shortcut
3rd Party Loyalty ID
Can Exceed Total ☐
Maximum Discount Allowed 99999.99
Use Check File ☐

Delete Add New Exit

POS Button Appearance

Design how this discount button will appear to the cashier.

Receipt Text

Enter any special text that you want to appear on the sales receipt when this discount is used. *See Format Receipt Text for additional information.*

Valid From, Valid To

Enter the date range between which the discount is valid.

Can Exceed Total

Check if the discount amount can exceed the total of the sale.

3rd Party ID

Enter the unique 3rd Party ID for this product. *See 3rd Party Integration for additional information.*

Use Check File

A check file is used to validate that a discount coupon is valid. When a discount coupon is purchased on line, the ticket will usually have a unique barcode or identifier. These codes can be programmed into the system so when the coupon is presented it can be validated. Once a coupon has been validated and used, it can never be used again. Check file codes can be uploaded from a CSV file or entered as a range of numbers. Check files are also used in conjunction with the Auto Coupon feature.

POS Shortcut Key

You can create a shortcut to a particular discount. This allows for quick access to the discount by pressing a key on the keyboard.

Shortcuts can be applied to the following keys:

- F1 ~ F12
- Alt F1 ~ Alt F12
- Ctrl F1 ~ Ctrl F12
- Shift F1 ~ Shift F12

Various Discount Filter Screens

Bonus Bucks 0

Once C
Cannot Be Combined W
Can Only Be Applied To R

Select the Various Product Types That Can Be Discounted

Discountable Product Types		Product Types
Appetizers	←	Bar Modifiers
	⇐	Beer
	⇒	Beverages
	→	Cocktails
		Desserts
		Draft
		Entrees
		Food Modifiers
		Liquor

Always Print Receipt

Once C
Cannot Be Combined
Can Only Be Applied To

Select The Various Product Types That Cannot Be Discounted

Non Discountable Product Types		Product Types
Bar Modifiers	←	Appetizers
Beer	⇐	Beverages
Cocktails	⇒	Desserts
Draft	→	Entrees
Liquor		Food Modifiers
Wine		Merchandise
		Pizza
		Salads
		Test

Always Print Receipt

Cannot Be Comb
Can Only Be Applie

Select The Specific Item That Can Be Discounted

Discount Applies To

Shrimp Cocktail

Negative Check Files

Negative check files allow a simple means in which an item can only be scanned once.

Let's outline an example of this scenario. You are a restaurant and you sell a large pizza for ten dollars. You offer a web coupon for the pizza that can be purchased on line for five dollars. When a client purchases the pizza coupon, they print out the coupon which can be redeemed at the restaurant. Each coupon printed will have a unique barcode, e.g. 52010001, 52010002 etc. When the customer presents the coupon, the barcode number is entered or scanned to sell the discounted pizza. Once the barcode number is entered into the point of sale, it cannot be entered again so double coupons can never be used. This means no matter how many copies of the coupon the customer prints, they can only redeem it once.

To set this up,

1. Under System Setup, set the Negative Check File prefix code. This is the unique number sequence to identify the code entered as a Negative Check File item. For example, 52##. This prefix would indicate any product starting with a UPC code of 52 would be a Negative Check File item. The 52 with ## would identify the specific product.
2. Create the Products or Discount as needed. In our example above, our pizza coupon could have a UPC code of 5201. Maybe we offered a Chicken Wing coupon. Its UPC code could have a UPC code of 5202

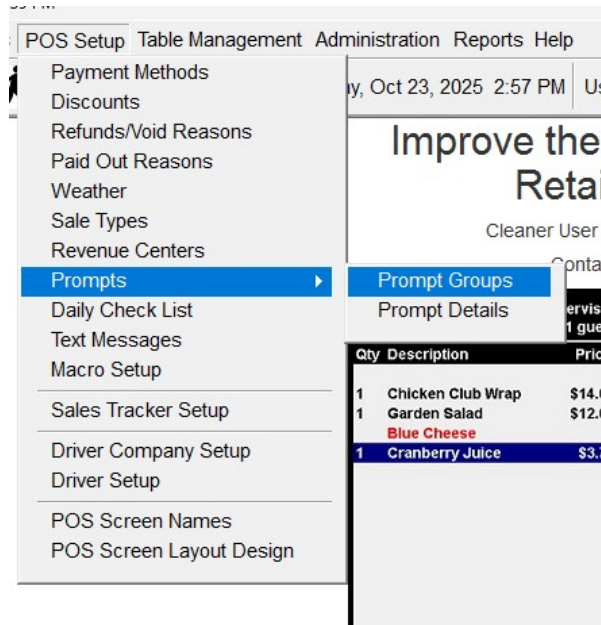
Our online coupons for the pizza could have barcodes that range from 52010001 to 52019999.

Our online coupons for the wings could have barcodes that range from 52020001 to 52029999.

Refer to product or discount setup for more information.

Prompt Setup

Prompts are a method of capturing specific data when a particular task is performed at the point of sale. For example, you could create a prompt to ask for a 'Drivers Licence and Passport Number' when you accept traveler's checks or a prompt to ask for a Postal or Zip Code before a transaction is completed.



Prompts can optionally print on the customers receipt. See Policy Setup to enable this option.

You can create prompts that are required before a transaction can be completed or are required when you use a specific product, discount or payment method.

For Additional Information see

Product Setup

Discount Setup

Payment Method Setup

Station Setup

There are four steps in creating and using prompts.

- 1) Create the **Prompt Details**, such as *Drivers Licence*, *Passport Number*, *Postal Code*.
- 2) Create the **Prompt Groups**, such as *Get I.D.* or *Get Customer Location*.

- 3) Assign the appropriate *Prompt Details to the Prompt Groups*. For example, you could create a group called *Ask For I.D.* and assign the details *Drivers Licence* and *Passport Number* to that group.
- 4) Assign the **Prompt Groups** to the products, discounts and payment methods that you wish to collect information on. For example, you might assign the *Ask For I.D. Prompt Group* to a payment method called *Traveler's Checks* so every time you accept a traveler's check, you get the appropriate identification from the customer.

Prompt Details

The screenshot shows a window titled 'Prompts' with a sidebar on the left and a main area on the right. The sidebar contains a list of prompts: 'Ask For Passport #', 'DL' (which is selected and highlighted in blue), and 'Email'. The main area is titled 'General' and contains the following fields:

- Short Name:** A text box containing 'DL'.
- Prompt:** A text box containing 'Ask For Drivers Licence Number'.
- Input Type:** A dropdown menu with 'Alpha Numeric' selected.
- Is Required:** A checkbox that is checked.

At the bottom of the window, there are four buttons: 'Delete', 'Add New', and 'Exit'.

Prompt Detail Fields

Short Name

Enter a name to describe this prompt. For example, Drivers Licence. This name appears on reports and optionally on the customer's sales receipt.

Prompt

Enter what should appear on the screen for the cashier when the information is being requested. For Example, *Ask the customer for their driver's licence number.*

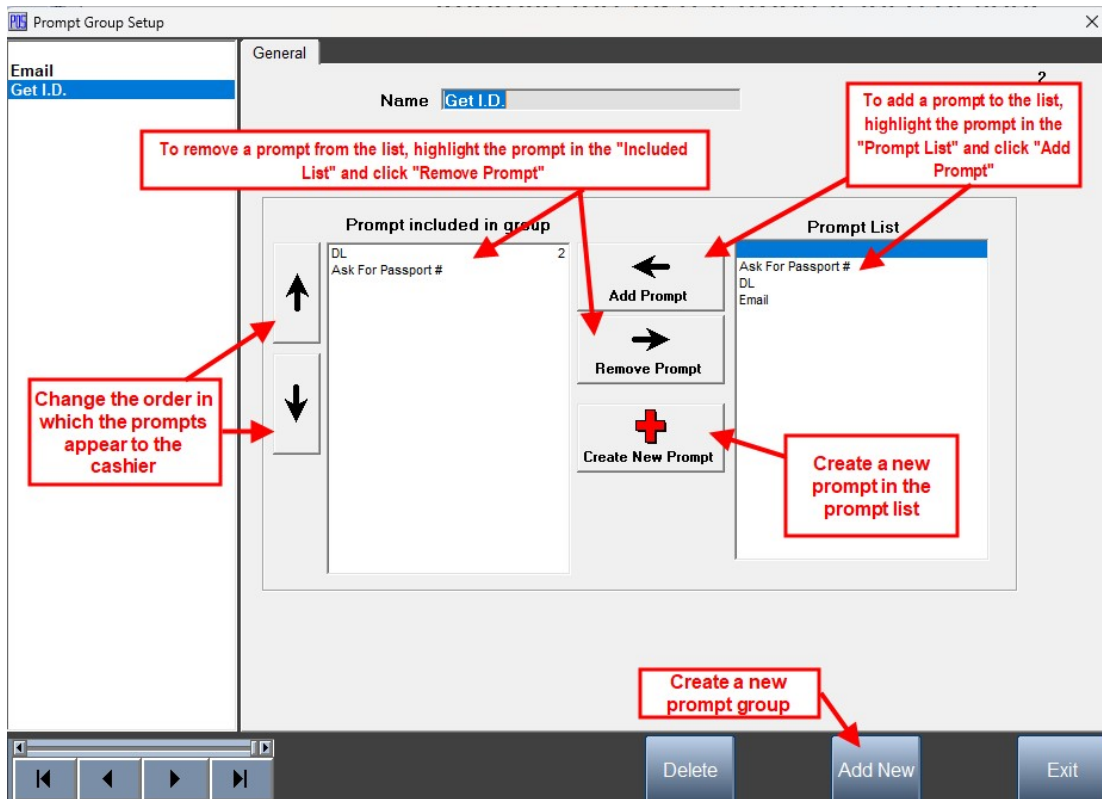
Input Type

Select the type of data the cashier should enter, *Numeric*, *Alpha*, or *Alphanumeric*.

Is Required

Check this box if the prompt details are required information. Required information must be entered or the function will be cancelled.

Prompt Groups



Prompt Group Fields

Name

Enter a descriptive name for the group. For example, 'Ask For I.D.'.

Assign Prompt Details

Move the prompts you want to include in the group from the *Prompt List* to the 'Prompts Included in Group' list.

Sale Start Prompts

A sale start prompt is useful for tracking where your customer base is coming from. Typically, a sale start prompt would be asking for the customers Postal or Zip Code. Once this information is captured, you can graphically report what physical locations support your business. This information can be extremely valuable when planning marketing strategies.

Creating A Sale Start Prompt

- 1) Under Prompt Setup, create a prompt group called '*Sale Prompt*' with one prompt detail called '*Get Postal/Zip Code*'.
- 2) Under Station Setup, assign the prompt group '*Sale Prompt*' to all point of sale stations.

You can report the information that is collected by running the report '*Where are my customers coming from by Sales Start Prompt*'.

See Prompt Setup for additional information.

Note: A Sale Start Prompt as described here can only be useful when accepting a single piece of information such as a Postal or Zip Code. If you try to capture additional information such as a phone number, the reporting will be very limited.

Refund & Void Reason Setup

Refund and Void Reasons give you some control and security with regard to refunds and voids.

- Control who can perform the Voids and Refunds.
- Determine if the product is returned to stock. For example, Damaged Goods.
- Create a Returns List for the supplier of the product.
- Control if the correction appears on the customers receipt. In a restaurant, the void may be due to a staff error and you may not wish to remind the customer of the incident.
- In a restaurant, control whether correction should print on the kitchen, bar or prep printers.

A refund or void reason is required anytime a product is:

- ✓ Refunded
- ✓ Voided after the receipt has been printed
- ✓ Voided after it has printed to a remote printer
- ✓ Voided after the transaction was parked or closed

Refund Reason Fields

Name

Enter a name for the refund reason or void.

Security Level Required

Select from the dropdown list the security level that is required to access this refund or void reason.

Prompt

Select from the dropdown list, any prompts that you want this refund reason to ask. You could create prompts to get identification from a customer for refunds without a sales receipt or to get a description of the damage for a defective product return. See Prompts in this manual for more information.

Return To Stock

Check this box if you want the product to be returned to your stock. If it is a damaged or defective product being returned, you would not want the product returned to your stock.

Print To All Required Printer Destinations

Check this box if you want this refund or void to print to kitchen, bar or prep printers.

Add To Returns List

A Returns List is a list of products that need to be returned to a supplier. When the product is returned, it is added to the appropriate supplier's returns list. *See Returns System for additional information.*

Generate RMA Number

Check this box if you want an automatic return authorization number generated for the product. *See Returns System for additional information.*

Print On Customer's Receipt

Check this box if you want this correction to appear on the customer's receipt.

On Us Text

The text you enter here will print on the customers receipt in the price field. *Print on Customers Receipt must also be checked.*



Refund Printing On Customer's Receipt

Sales Type Setup

Sales Types are basically used to group your sales for reporting purposes. For example, you might create sales types as:

- Dine-In
- Pick Up
- Delivery

The screenshot shows a software window titled "Sale Type Setup". On the left is a list box containing "Delivery", "Dine In", and "Take Out", with "Delivery" selected. The main area has two tabs: "General" (active) and "Advanced". In the "General" tab, the "Sale Type Name" field contains "Delivery". To its right is a checkbox labeled "Print In Red" which is checked. Below this, the "Next Invoice Number" field contains "1". Further down, the "Delivery Fee" dropdown menu is set to "Required", and the "Price Level" dropdown menu is set to "Follow Station Setup". At the bottom of the main area is a section titled "Tax Exempt" containing a list of checkboxes, with the first one labeled "H.S.T." checked. At the very bottom of the window is a dark bar with navigation buttons: "Previous", "First", "Next", "Last", "Delete", "Add New", and "Exit".

When you are making a sale, you can select the appropriate Sales Type by pressing the Sales Type button. This type will be recorded for the transaction so you can generate reports to determine the percentage of sales that were delivery as opposed to pick up.

Sales Type Fields (General Tab)

Name

Enter a descriptive name for the sales type.

Next Invoice Number

Set the next invoice number for this sales type.

Price Level

This field allows you to set price levels by sales type. For example, the price of a sandwich could vary based on the type of sale:

- Pick Up \$5
- Dine-In \$6
- Delivery \$7

The default setting for this field forces the system to use the price level that has been established by some other method.

Note: You must select Sales Type Price Level as the Price Structure under Station Setup for this function to operate in the point of sale.

Note:

You can set the default sales type for each station under Station Setup.

Customers can have their own default sales type. The customers default sales type will override the stations default sales type unless the station sales type is locked. Set the customers default sales type in customer setup.

Sales Type Fields (Advanced Tab)

	Local Receipt	Kitchen	Bar	KDS Device
	No Printer	No Printer	No Printer	1
	No Printer	No Printer	No Printer	2
	No Printer	No Printer	No Printer	3
	No Printer	No Printer	No Printer	4
	No Printer	No Printer	No Printer	5
	No Printer	No Printer	No Printer	6
	No Printer	No Printer	No Printer	7
	No Printer	No Printer	No Printer	8

Print How Many Extra Receipt Copies: 0

Drink Minimums Required: No

Ticket Printer Enabled: ☐

Prompt for Customer/Label: No

Prompt for Customer Count: Prompt

Print How Many Extra Receipt Copies

Under station setup, you specify how many receipt copies automatically print. Here you can specify how many additional copies need to print.

Drink Minimums required

See Drink Minimums for additional information.

Prompt for Customer/Label

Enable this function if you want to prompt for a customer for each transaction.

Prompt For Customer Count

Prompt for the number of customers at the table when a new transaction is started.

Ticket Printer Enabled

If unchecked, ticket printing, such as cup label printing will be disabled for the sales channel. This overrides the ticket printing configured under Station Setup.

Override Printer settings

If checked, the standard print destinations selected under station setup are overridden if this Sales Type is selected.

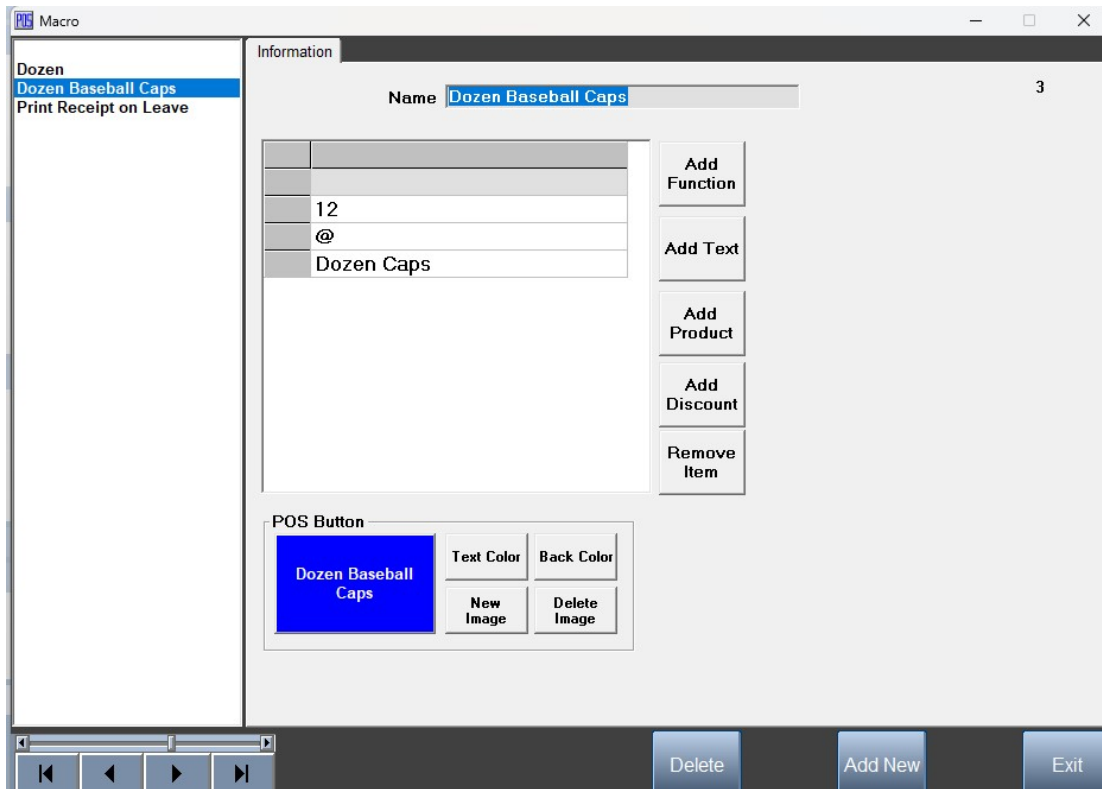
Note: The Local Receipt channel is only overridden for all copies of the receipt on the initial printing of the receipt. After, all reprints of the receipt will follow the local receipt selected under station setup.

Macro's Setup

Macro's give the POS the ability to perform several functions with the press of one button. For example, you could create a simple macro that would change the quantity button to 12. The macro would basically be text of 12 and the function button @.

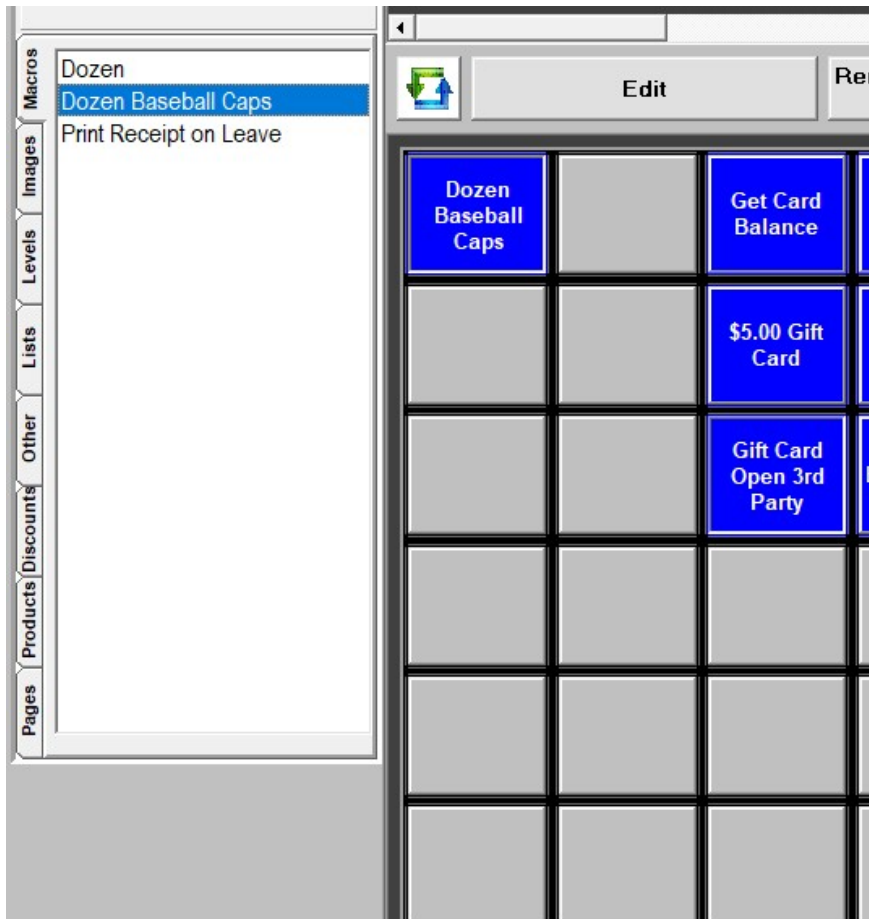
Macros can contain

- Text
- POS Function Buttons
- Products
- Discounts



The above example shows a Macro that would sell 12 Baseball Caps with the press of one button,

Macros as placed on the POS screen using the Menu Designer.



Most of the Function Buttons you can add are self explanatory. The Multiplier option allows you to multiply a products price by a value. For example you can add a Macro called *Make it a Double*. Add a text value of 1.5* and add the Function Multiplier.

The screenshot shows the 'Macro' editor window in UniversalPOS. On the left is a list of available macros: 'Dozen', 'Dozen Baseball Caps', 'Make It A Double' (which is highlighted in blue), and 'Print Receipt on Leave'. The main area is titled 'Information' and contains a 'Name' field with the text 'Make It A Double'. Below this is a table with two columns. The first column has three empty rows. The second column contains the text '1.5*' in the second row and 'Multiplier' in the third row. To the right of the table are two buttons: 'Add Function' and 'Add Text'.

Information	
Name: Make It A Double	
	1.5*
	Multiplier

In this example, you could sell a Scotch for \$5.00, hit the Make it a Double Button and the price of the Scotch would change to \$7.50.

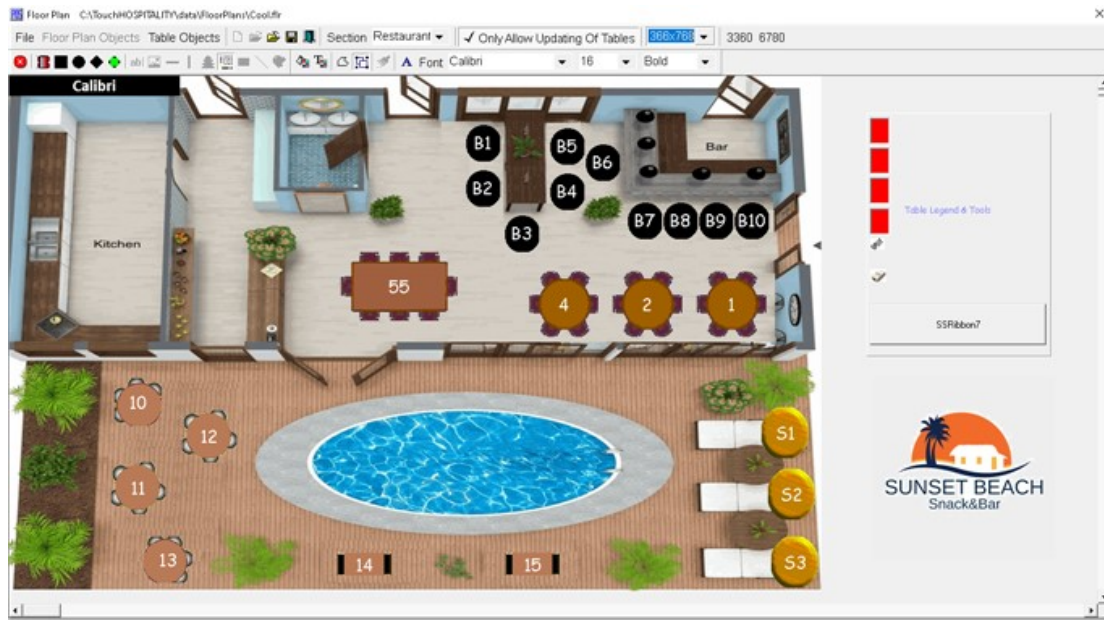
Setting Up Your Table Management

Table Management is the tracking of tables in a restaurant. There are several steps involved in setting this system up.

- 1) In System Setup under the *Hospitality Features tab*, set the *Check Show Hospitality*. You will need to restart POS Setup to activate these features.
- 2) Under Table Management, label the various sections in your restaurant.
- 3) You must create a Floor Plan Design of your restaurant.
- 4) In Station Setup for all applicable stations, set the Station Type to Hospitality.
- 5) In Station Setup for all applicable stations, select your Floor Plan Design.
- 6) In Station Setup for all applicable stations, enable or disable the Table Inactivity Timer.
- 7) In POS Screen Design, make sure you have all the appropriate Table Management keys on your POS desktop. For example, Service, Change Table Number, Split Check.

Floor PlanError! Bookmark not defined. / Table Management Setup

Floor Plan Design is a feature used by the hospitality industry. This feature gives restaurants the ability to have an on screen graphical representation of their restaurant for quick and easy table access.



Right click on object on the floor plan to bring up sub menus. Sub menus allow you to modify colors, font, copy, paste, plus various other features.

Add New Tables



Confirm your Font, Font Size, and Text Color before adding your table to your floor plan.
To add a new table to your floor plan, click the appropriate table button (Graphic, Square, Round or Diamond Shape or Custom) and then click on your floor plan. When prompted, enter a table number for the table.

Custom Tables can be any JPG or BMP file you create. These image files must be located in the POSEDGE\Data\FloorPlans\Images\Tables folder. There must be 4 unique image files for each custom table you create. These 4 image files represent

- a Vacant Table
- a Occupied Table that is Owned by the Current Server
- a Occupied Table that is Owned by Another Server
- a Table that has been Seated in Reservations but not yet assigned to a Server

Each of these 4 files must have the same name, each with a specific prefix. For example, your table name could be Square4Seats.bmp. Your file name would then be

- V_Square4Seats.bmp for a Vacant Table
- M_Square4Seats.bmp for Occupied and Owned by Current Server
- O_Square4Seats.bmp for Occupied and Owned by Another Server
- W_Square4Seats.bmp for Seated in Reservations by currently unassigned.

Add Walls



Confirm your background color before adding walls to your floor plan.
To add a wall to your floor plan, click the wall button and then click on your floor plan.

Add Boxes



Confirm your background color before adding boxes to your floor plan.
To add a box to your floor plan, click the box button and then click on your floor plan.

Add Text



Confirm your Font, Font Size, Text and Background Colors before adding the text to your floor plan.

To add text to your floor plan, click the text button and then click on your floor plan. Enter your text in the area provided.

Add Plants



To add a plant to your floor plan, click the Plant button and then click on your floor plan.

Add a Graphical Image



Graphical Images can be any BMP or JPG that you want displayed on your floor plan. You can add images that would represent different floor coverings, restroom signs or a pool table. These images will assist your staff in identifying your establishment.

***All graphical images used in your floor plan must be stored in the folder
\\POSSERVER\POSEDGE\FLOORPLANS\IMAGES\ ...***

To add a graphical image to your floor plan, click the Image button and then click on your floor plan. You will be prompted with a Standard Open File Window. Locate your image to display it on the screen.

Add Go To Section



Confirm your Font, Font Size, Text and Background Colors before adding the go to section to your floor plan.

To add a Go To Section to your floor plan, click the Go To button and then click on your floor plan. Select the section you wish this button to link to from the list provided.

Delete Next Object



To remove an object from the screen, click the Delete button and then click the object you wish to delete.

Change Background and Text Colors of Objects and Fonts



Click these buttons to change the current background and text colors

Resizing Objects



You can resize objects once they are on your floor plan. Move your mouse to the top left corner of the object and when your mouse turns to the 'cross size pointer', click and hold your

left mouse button and drag the mouse to resize the object. Releasing your mouse button will stop the resizing.

Moving Objects

Click your left mouse button on any object and drag the object to where you want it on the screen. Releasing the mouse button will stop the dragging.

Snap to Grid or Free Form Moving



POS Screen Name Setup

POS Screen Names are a convenient way to identify the various screens your point of sale system uses. Each POS Screen Name has a reference to a POS Screen Layout file and each POS Screen Name can have a different menu associated with it. Each Point Of Sale station is assigned a particular POS Screen Name. Using this method, you can have all of your POS stations using the same screen layout and menu or one or more can have a different screen layout. Most retail establishments would only require one POS Screen Name because generally, all screens and menus would appear the same. Restaurants on the other hand may require several screen layouts. For example, a bartender terminal would have a different screen and menu layout than the floor terminal.

For Additional Information see POS Screen Layout Design & Menu Designer.

POS Screen Samples

Guest Check

Table # B11 3 guests Server Supervisor Joe

Qty	Description	Price
1	40 Chicken Wings	\$7.85
	* Hot	
1	Nachos	\$0.14
1	Carlsberg	\$3.04
1	Coors Light	\$3.26
1	12 Slice Pizza	\$8.86
	* Regular Crust	
1	* Bacon	\$0.52
1	* Pineapple	\$1.00

↑

↓

\$27.97

10 Chicken Wings

Potato Skins

Chicken Fingers

20 Chicken Wings

Mozzarella Sticks

Nachos

30 Chicken Wings

Cheddar Cheese Balls

Deep Fried Dill Pickles

40 Chicken Wings

Garlic Bread

Popcorn Shrimp

50 Chicken Wings

Garlic Bread With Cheese

Poutine

Fries

8 Slice Pizza

12 Slice Pizza

2 Medium Pizzas 6 Toppings 20 Wings

* Add Chili

* Add Guacamole

* Add Jalapeno Peppers

* Add Gravy

Kitchen Command

Appetizers

Bar Menu

Merchandise

White Wines

Entrees

Red Wines

Desserts

Beverages

Beer

Liquor

Cocktails

Receipt: 11

Supervisor Joe

Wednesday, September 09, 2015 3:32 AM

Sale Is Active

Misc. Functions

Void

1 @

Hold

View Check By Seat

Split Check

Receipt

Service

Finished

Guest Check

1 guests POS Support

Qty	Description	Price
Seat Number 1		
1	Large Burrito	\$8.00
1	Grilled Chicken	\$4.99
	Pinto Beans	
	Brown Rice	
1	Regular Burrito	\$8.00
1	Grilled Chicken	\$4.99
	Pinto Beans	
	Cheddar Cheese	
	Salsa	
	Sour Cream	
	+ Chipotle	
1	Coke	\$2.49

Tax \$2.43

\$20.50

Receipt: 92 POS Support May 26-18 11:55 PM Sale is Active More Functions

BURRITOS & BOWLS

APPS & SALADS

PASTA

SIDES

JUICE

DRINKS

DESSERTS

Coke
 Diet Coke
 Iced Tea
 Dr. Pepper

Bottled Water
 Root Beer
 Sprite
 Orange

COFFEE

TEA

2

3

4

Open Item % Discount

3 Items Void Item

HOME Manager Staff Customer

Future Order

Substitute Modifier

Reorder

Split Check

Print Check

Send to Kitchen

Pay

Guest Check

Supervisor Joe

Qty	Description	Price
1	Green Peppers	\$0.58
1	Red Peppers	\$0.29
1	Yellow Peppers	\$0.30
1	Orange Peppers	\$0.77

Total\$1.95

Tax\$0.00

↑

↓

\$1.95

4 Items

Void Item

HOME

Manager

Staff

Customer

Receipt: 10

Supervisor Joe

May 27-18 12:06 AM

Sale Is Active

More Functions

Test Category

Clothing

Cigarettes

Confectionary

Other Buttons

Sample Sales Item

Peppers

Grocery

Another Sample Item

Open Taxable Sale

7

8

9

←

4

5

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Cash

Debit

VISA

MasterCard

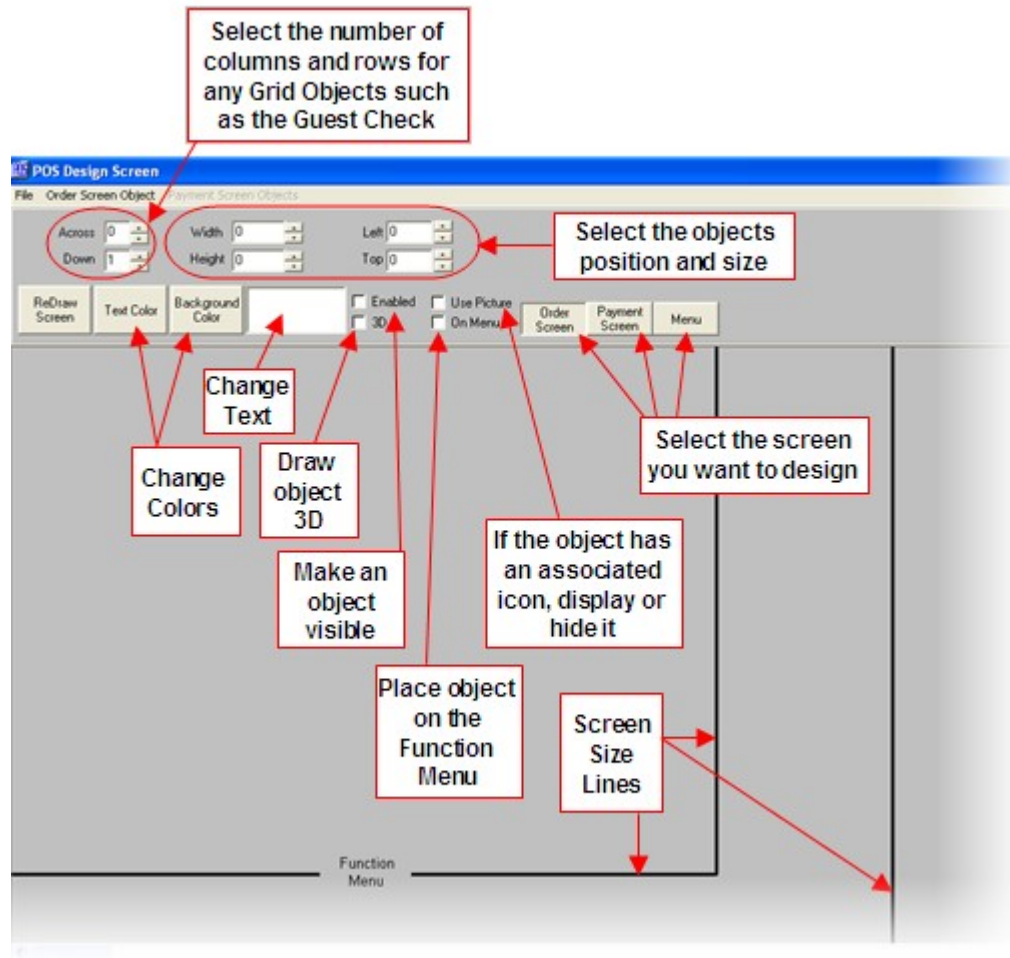
U.S. Cash

Print Check

POS Screen Layout Designer

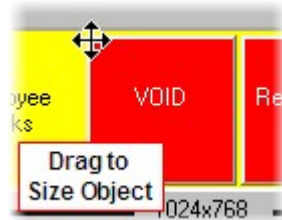
The POS allows for complete customization of your point of sale and payment screens. This allows you to create screens that are optimally designed for your business. The POS comes with a variety of pre-designed screens that you can use and modify or you can create one of your own.

All layout files use a file extension of **.lay** and are located in the folder {drive:}\{pos directory}\data\layouts\filename.lay



Find new objects by clicking on **Order Screen Objects** or **Payment Screen Objects**
Change the position of an object by clicking and dragging the object around the screen or by clicking the object and manually adjusting the **Top** and **Left** positions and clicking the **ReDraw Screen Button**. Top and Left refer to the position of the Top Left corner of the object.

Change the size of an object by clicking on the object and manually adjusting the **Width** and **Height** and click the **ReDraw Screen Button** or hold the mouse over the top left corner of the object. When the mouse changes to the cross-arrow mark, click the mouse and adjust the size of the object.



POS Screen Layout Designer Objects

The following is a list and description of all the objects you can place on the POS screen.

Order Screen Objects

- **Menu Pages**
Menu pages are a group of buttons that organize your products on the screen. You can have as many pages on the screen as you wish. You can design how the buttons are configured by selecting how many across and how many down. You can optionally set the scroll option. This allows you to have more pages available than you have space for and vertically scroll through the available pages. If you select the scroll option, scroll bars will appear at the point of sale and you can also add the larger Page Scroll Buttons. *See Menu Pages for additional information.*
- **Menu Items**
Menu items are the products you wish to have placed on the screen. You can design how the buttons are configured by selecting how many across and how many down.
- **Sales Totals Window**
Display totals such as Subtotal, Taxes, Deposits.
- **Frame #1 and #2**
These frames are cosmetic only. They allow you to frame a group of buttons together.
- **Customer Picture Frame**
Displays the current store image of the customer.
- **Payment Frame**
Displays a keypad and assorted media keys to close a sales transaction from the order screen.
- **# Items Sold**
Displays the number of items sold in the current transaction.
- **Guest Check Grid**
Displays the running total of what has been sold on the current transaction.
- **Customer Information**
Displays the information about the customer currently attached to the transaction.
- **Payment Grid**
Displays any tendered amounts currently on the transaction.
- **Keyboard Input Window**
Displays the current keyboard input.
- **Item Sold Window**
Displays the UPC, description, and price of the last item sold.

- **Subtotal Window**
Displays the subtotal of the current sale.
- **Scale**
Displays the status of any integrated weigh scale.
- **Course**
Displays the course sorting buttons for restaurants.
- **Seat Position Bar**
Displays the seat bar for seat positioning in a restaurant.
- **Sales Tracker Information**
Displays the Sales Tracker that is currently being used. *See Sales Tracker for additional information.*
- **Check Information**
Displays the current receipt number, date, time, and the employee currently logged into the point of sale.
- **Finish Button**
Takes you to the Payment screen to complete a sales transaction.
- **Leave Button**
Suspends a sale in a hospitality environment and typically returns you to the Floor Plan screen.
- **Split Check**
Allows you to split a check into multiple checks in a hospitality environment.
- **Delivery**
Suspends the current transaction to deliveries or recalls all active deliveries.
- **Re-Order**
Brings up a list of the items currently saved on the sales transaction. This allows for easy reordering of items such as *another round* in a restaurant.
- **Print Receipt**
Prints the receipt for the current transaction or for the previous transaction if there is no current sale.
- **Void**
Voids the currently selected item.
- **Park**
Suspends the current sales transaction or recalls suspended transactions.
- **Order Type**
Toggle between the various sales types. i.e. Dine In, Delivery
- **@**
Multiply button when customer is buying more than one of a product.
- **Label Check**
Enter a label to identify a check.
- **Item Information**
Will display information regarding the next item clicked on the screen or scanned.

- **POS Button**
Logs the current user off the system.
- **Sales Tracker**
Displays a list of the available sales trackers.
- **Inquire Button**
Displays the product inquire screen.
- **Cancel Sale**
Cancels the current sales transaction.
- **Employee Tasks**
Displays the employee tasks screen.
- **Discount**
Displays a list of the available discounts.
- **Refund Sale**
Allows the next entire sale to be treated as a refund.
- **Price Override**
Overrides the price of the selected screen item.
- **Refund Item**
Refunds the next item clicked on the screen or scanned.
- **Manager Tasks**
Displays the manager tasks screen.
- **Paid Out**
Displays the paid in/out screen.
- **Customer search**
Displays information regarding the current customer or prompts for a customer.
- **Function Menu**
Displays the miscellaneous functions screen. A variety of order object buttons can be placed on the menu to conserve space on the order entry screen.
- **Customer Count Change**
Allows the current customer count to be changed.
- **Price Change**
Overrides and permanently changes the price of the selected item.
- **Hold / Fire**
Toggles the selected item between holding and firing to prep printers.
- **Sales Rep**
Displays the sales representative associated with the selected customer.
- **Change Table Number**
Change or assign a table number associated with the current transaction.
- **Open Carton**
Opens a carton of cigarettes and transfers the carton stock to pack stock.
- **Close Cash**
Closes the current sales transaction to Cash.

- **Move Item**
Allows the server to move an item from one customers bill to another.
- **View Check By Seat**
Allows the server to view and modify the current transaction based on seat position.
- **Check Information**
Displays information relevant to the current transaction.
- **Save Check (Drive Thru)**
Saves a drive thru order once the order is placed.
- **Recall Check (Drive Thru)**
Recalls a drive thru order to accept payment.
- **Pick Up**
Suspends or recalls transactions for pick up.
- **Send Now**
Allows the server to send items to prep printers immediately.
- **Menu Page Scroll Up**
Allows larger buttons to scroll between hidden menu pages.
- **Menu Page Scroll Down**
Allows larger buttons to scroll between hidden menu pages.

Payment Screen Objects

- **Keypad**
Displays the keypad to tender the amount of money the customer gives you and displays transaction totals.
- **Payment Buttons**
Display the various payment methods you accept. You can design how the buttons are configured by selecting how many across and how many down.
- **Quick Tender**
Displays the quick tender denomination you have programmed. Quick tenders always close to the domestic currency. You can design how the buttons are configured by selecting how many across and how many down.
- **Tip**
Allows entry or modification of the gratuity to charge on the current transaction.
- **Receipt**
Prints a receipt for the current transaction.
- **Tax Delete**
Displays the delete window to exempt a customer from taxes.
- **Gift Receipt**
Toggles to prompt for a gift receipt once the transaction is closed.
- **Divide By**
Reserved for future use.
- **Green Receipt**
Emails a copy of the receipt to the current customer provided they have an email address.
- **Gift Card Promo**
Assigns gift card promo point.
- **Check Information**
Displays the current receipt number, date, time, and the employee currently logged into the point of sale.

Setting Up Your Printers

For the purposes of setting up your point of sale software, there are only three types of printers.

1) Report Printers

Your POS system requires at least one report printer to print back office reports. This printer is installed using the installation CD that came with the printer or using the Microsoft Windows Add Printer Wizard.

2) Receipt Printers

Normally, each POS station will have a *Receipt Printer* physically connected to it to print customer receipts and bills.

3) Preparation Printers

'Prep' Printers are printers that are located in kitchens and at the bar to print chits showing what the customer ordered so the cooks and bartenders know what to prepare. *'Prep' Printers* are normally connected to the POS station that is closest to the location of that printer. Printers can also share tasks. For example, a *Receipt Printer* connected to the Bars POS Station could also double as the *Bar 'Prep' Printer*.

Note: Do not create receipt and prep printers as Windows printers unless the manual instructs you to do so. If you click Start, Settings, Printers, you should not see any receipt or prep printers.

Report Printers

The report printer is installed using the installation CD that came with the printer or using the Microsoft Add Printer Wizard. Report printers require no setup within the point of sale software.

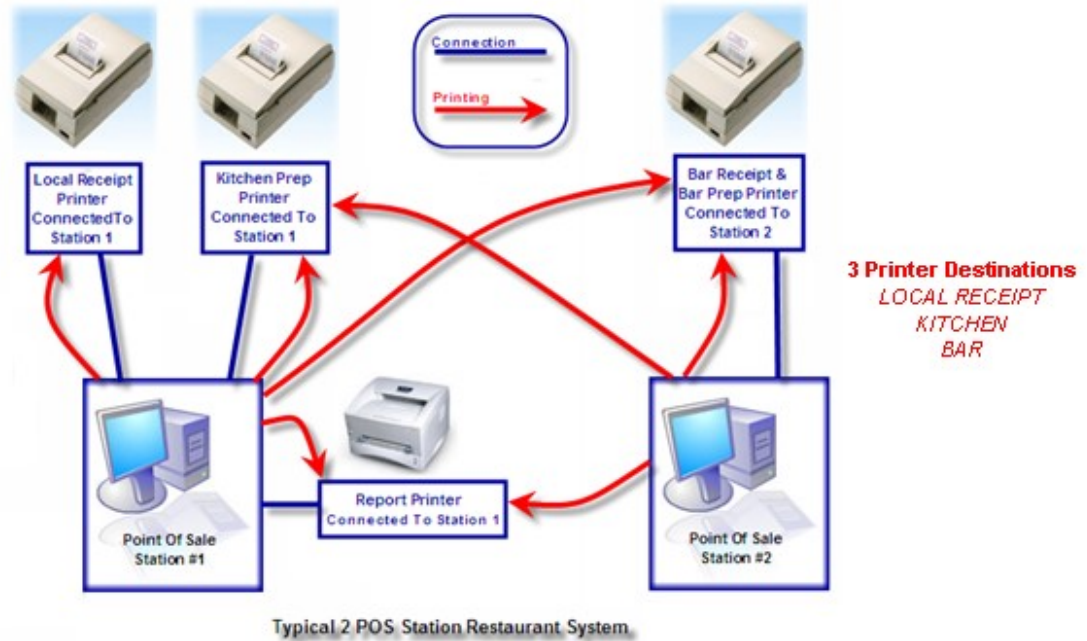
Receipt & 'Prep' Printers

There are several steps you must follow in order to set up your system printers.

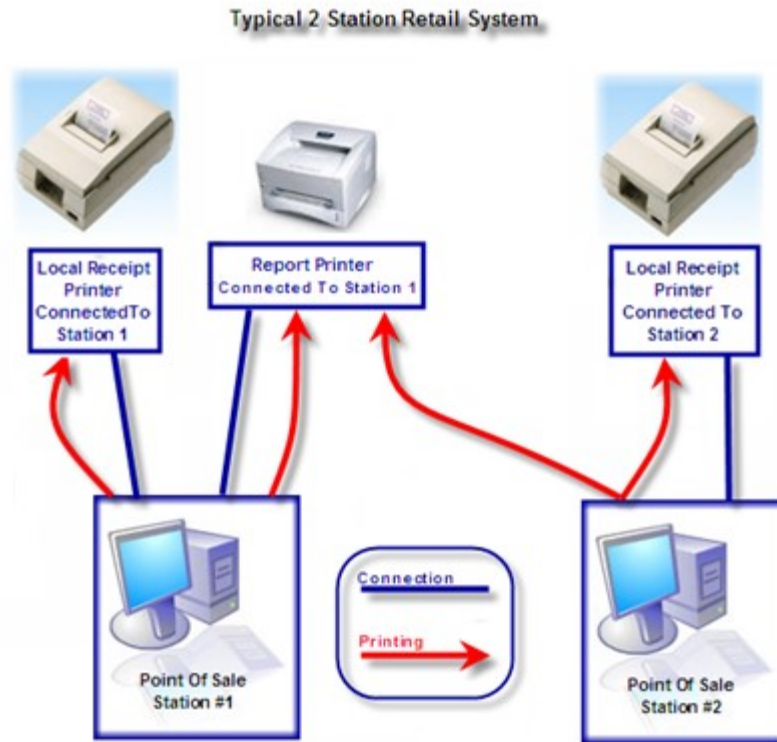
1) Determine and Create Your Printer Destination Names

Printer Destinations have nothing to do with the physical printers your business uses.

A restaurant may have 3 kitchen printers, 2 bar printers and 6 receipt or guest check printers, but this typical scenario would probably only have 3 different printer destinations; Kitchen, Bar and Local Receipt.



A general retailer would probably only have one printer destination; the Local Receipt.



To create the Print Destination Names,

- Go to POSsetup
- Click Administration
- Click System Setup
- Click the Printers Tab
- If you are using any Prep Printers, Check Show Optional Printers
- Enter your Printer Destination Name and Click Save

2) **Create Your System Printers**

System printers are the physical printers your business uses. If you have five receipt/prep printers, you should have five System Printers. You create these printers under System Printers. You must create one System Printer for each physical printer you are using.

To create the System Printers:

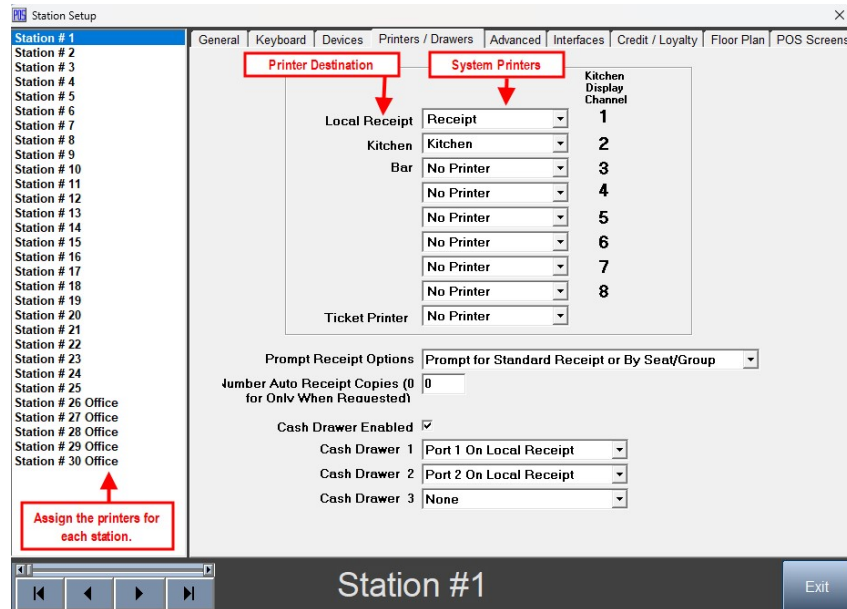
- Go to POSsetup
- Click Administration
- Click System Printers
- Create and Save Each Printer

See System Printer Setup for additional detailed information.

3) Assign the Printer Destination to each POS Station

Assign the appropriate System Printers for each Printer Destination to each computer station. In Station Setup, under the Printers tab, select the appropriate printer from the dropdown list for each destination.

- Go to POSsetup
- Click Administration
- Click Station Setup
- Click the Receipt Printer / Cash Drawer Tab
- Assign to each Station, the appropriate printer for each print destination



4) Assign Prep Printer Destinations to Product Types

This step is only required if you are using Prep Printers.

The final setup is to assign the appropriate Printer Destinations to your Product Types so the system knows to send food items to the kitchen printer and bar items to the bar printer.

Note 1: You Do Not have to assign Product Types to your local receipt in order to have receipts. Receipt printing is standard automatically on all products.

Note 2: The printer selection window on the product types screen can be hidden if not required. See System Setup, Show Optional Printers

- Go to POSsetup
- Click Products
- Click Product Type
- Assign the appropriate Prep Printers to each Product Type.

Product Type Setup

General | Advanced | Auto Coupon | Modifier Table

Name: Entrees

Sales Department: Food

Loyalty Applies: ☒

Is Drink: ☐

Use Age Verification 1: ☐

Use Age Verification 2: ☐

Food Stamps Allowed: ☐

Commission Rate: 0

Link To:

3rd Party Loyalty ID:

Deposit: 0.00

Other Fee 1: 0.00

Other Fee 2: 0.00

Combo Tag:

Prep Printers

☒ Local Receipt

☒ Kitchen

☐ Bar

☐ Ticket Printer

Taxes

☒ H.S.T.

Price Schedule

Delete Add New Exit

System Printer Setup

System Printer Setup is used to configure the various Receipt and 'Prep' Printers that are connected to your point of sale system. Different types of businesses will require different types of printers. General retailers will usually only require local receipt printers connected to each POS station while a restaurant would also require 'Prep' printers such as Kitchen and Bar.

Whatever configuration you require, you create these printers under System Printer Setup.

You need one system printer for each physical printer in your business For example, if you have two receipt printers and one kitchen printer, you need to have three system Printers setup here..

The screenshot shows the 'System Printer Setup' window with the 'General' tab selected. On the left, a list contains 'Kitchen', 'No Printer', and 'Receipt', with 'Kitchen' highlighted. The main area contains the following fields:

- Descriptive Name:** Kitchen (with a small '2' icon to the right)
- Spooling Path Name:** Kitchen
- Printer Type:** Screen Emulation (dropdown menu)
- What Port:** On Screen (Debug Mode) (dropdown menu)
- What Station:** Station # 1 (dropdown menu)
- Course Division Line:** No Line (dropdown menu)
- Print Format:** Default (dropdown menu)
- Print Sale Total On Chits:** ☐

At the bottom, there are navigation buttons: a set of four arrows (back, forward, etc.) and three buttons labeled 'Delete', 'Add New', and 'Exit'.

System Printers

Important:

Local Receipt Printers should always be physically connected to the computer they are assigned to.

In General, Prep Printers should be physically connected to the computer that is closest to their location. However, if you have multiple Prep Printers, it is a good practice to physically connect them to different computers. If you have all your Prep Printers connected to one computer and that computer goes down, you would lose all printing to Prep Printers. By connecting the Prep Printers to different computers, you can always redirect printing to another printer if a computer goes down.

System Printer Fields

Name

You can call these printers whatever you wish but it is generally a good idea to have the printer name describe the printer's function. (For example, Bar, Kitchen, Receipt)

Printer Type

Select from the drop-down list, the make and model of the printer. If your printer type is not listed, you can try one of the models listed and experiment or you can create your specific printer under Printer Definitions.

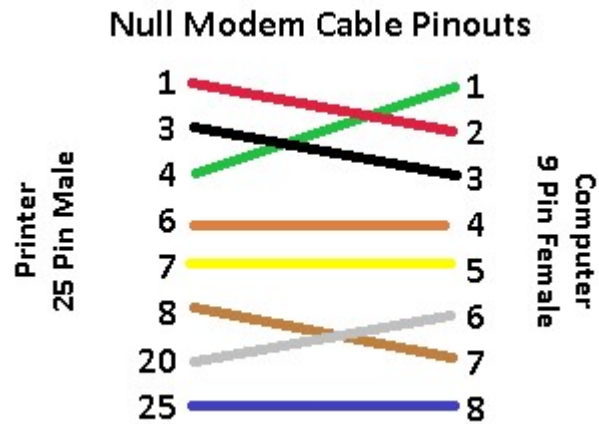
What Station

Select from the dropdown list the station the printer is physically connected to.

What Port

Select from the drop down list the physical communication port the printer is connected to. (Usually Com1 or Com2 on a standard PC)

If your computer needs additional serial ports, you can purchase a USB to Serial adapter. These simply connect to any vacant USB port on your PC and provide you with an additional serial port.



Port Parameters

This field is used to adjust the speed at which the printer is designed to accept information from the computer. The information is expressed in the format (BaudRate,Parity,Data Bits,Stop Bits). The system and most receipt printers default to 9600,n, 8,1 so generally no information should be entered here.

Print Format (Hospitality Feature)

Select various formats for printing on remote printers. For example, in a restaurant, a kitchen chit contains a lot of information. The consolidation totals critical information to help expedite the preparation of products.

Note: Some print format is determined under system setup → printers tab → Prep Printers Header.



Course Division Line (Hospitality Feature)

Place a separator between the various courses that are sent to remote printers. For example, place a division between Appetizers and Entrees.

Use Windows Printer

Check this box to utilize a Windows printer as a receipt or prep printer. To do this, you must create the appropriate printer using the Add Printer Wizard in Windows. The name that you assign to the printer in Windows must be the same as the *Name* you assign to the printer in System Printer Setup.

Windows Printer Name

If you have checked *Use Windows Printer*, enter the name you assigned to the printer in the Add Printer Wizard.

Conditional Printing

Conditional printing is a feature in which you can have items print to a specific printer only if certain conditions are met. Do not check anything here unless you fully understand how it works.

Note: Conditional printing must be enabled under Policy Setup (AllowConditionalPrinting)

For example

- You have two kitchen printers (Kitchen Fry and Kitchen Grill)
- Kitchen Grill only receives the Steak orders
- Kitchen Fry only receives the French Fry Orders
- Salads do not print to any printer

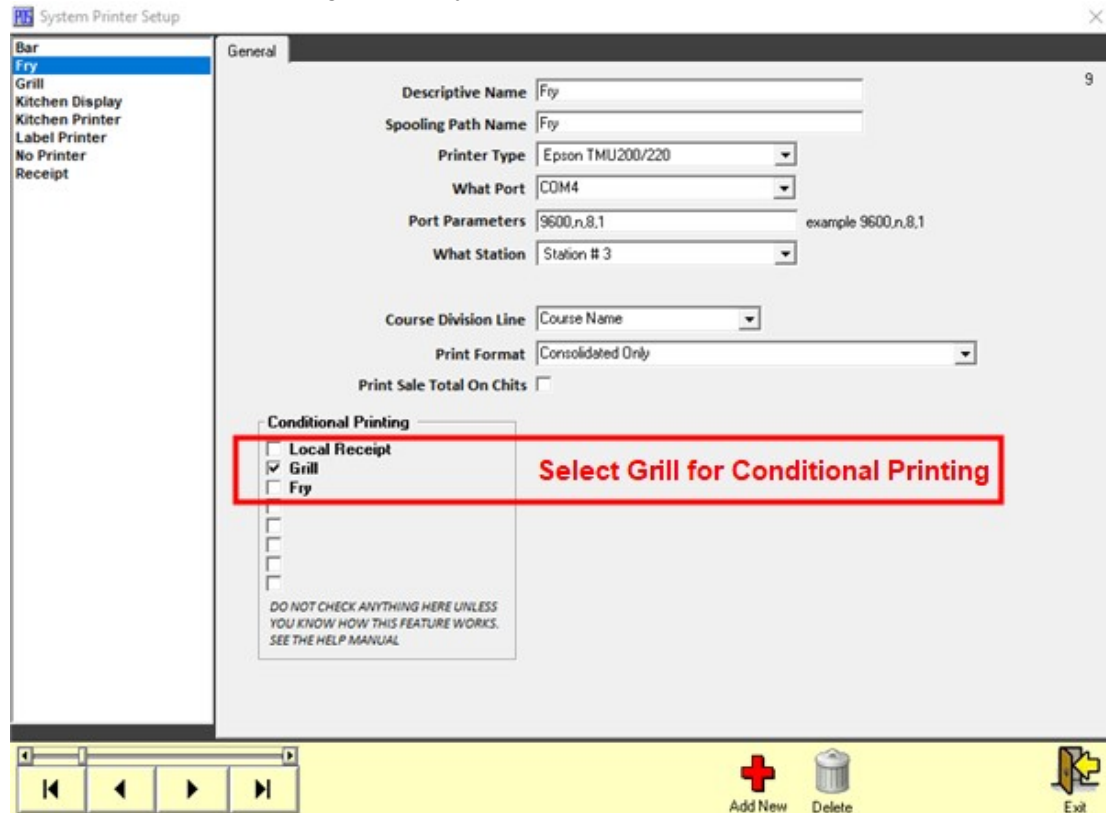
Scenario 1 with No Conditional Printing → Order one steak with fries



Each printer receives what it has been programmed to receive and the cook at each station immediately prepares the food that is printed. Since the steak takes much longer to prepare than the fries, the fries will be ready too quickly.

Conditional printing allows the cooks to be knowledgeable with the entire order if needed.

Turn on Conditional Printing for the Fry Printer.



Scenario 2 with Conditional Printing → Order one steak with fries

Kitchen Fry
1 Steak
Medium
1 French Fries

Kitchen Grill
1 Steak
Medium

With conditional printing turned on, the fry printer is notified only if the order also contains a grill item. Now the cook at the fry station knows that they can hold off dropping the fries for several minutes to allow time for the steak to be cooked.

Scenario 3 with Conditional Printing → Order one steak with salad

Kitchen Fry
Prints Nothing

Kitchen Grill
1 Steak
Medium

With conditional printing turned on, the steak prints on the grill printer, but nothing is printed at the fry station because no fries were ordered so the cook does not need to be notified about the steak.

Note: System Printer Setup is only to be used to create receipt and 'prep' printers. Do not create your back-office report printer here. It should be created as a standard Windows Printer using Windows printer setup.

Note: You Do Not create any receipt or 'prep' printers as Windows Printers unless you select Windows Printer under What Port.

For Additional Information see Printer Definition Setup.

Printer Definition Setup

The point of sale utilizes its own print spooler to print sales receipts and all POS reports. Because we are not using standard Windows printer drivers, we must create our own. These drivers are created as Printer Definitions. Standard POS receipt printers use a variety of *decimal codes* to determine if the text should be bold, double size, red etc. A variety of printer definitions have been pre-created for you but if you wish to use a printer that is not listed, you can easily create your own. The manual that comes with your printer should contain all the information that you require.

Printer Definition Fields

Name

Enter the name of the printer.

Advance Lines

Enter the number of lines the printer must feed to eject the receipt from the printer.

Enter the decimal codes that the printer uses for the following functions:

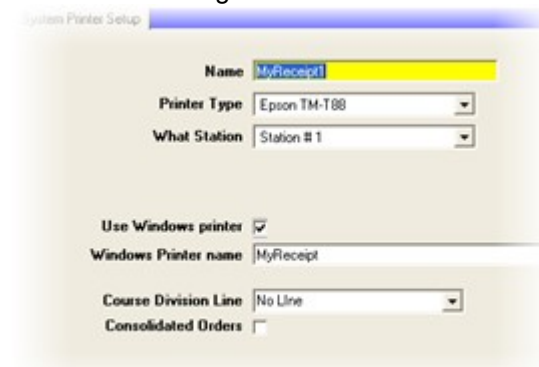
- Initialize Printer
- Finalize Print Job
- Bold Print On and Bold Print Off
- Red Print On and Red Print Off
- Double Width Print On and Double Width Print Off
- Kitchen Text Print On and Kitchen Text Print Off
- Normal Text Print
- Cutter Code (if the printer has an auto page cutter)
- Open Cash Drawer 1 codes
- Open Cash Drawer 2 codes
- Print Graphic Logo codes
- Print Barcode On and Print Barcode Off

For Additional Information see System Printer Setup

Quick Create Windows Receipt Printer Example

The following process will quickly allow you to set up and create your Windows receipt printer on point of sale station #1.

- 1) Connect your hardware.
 - Plug your cash drawer into the back of your receipt printer.
 - Plug your receipt printer into the back of your PC.
 - Connect the receipt printer's power connection.
- 2) From your Windows desktop, create the printer in Windows.
 - Click *Start → Control Panel → Printers & Faxes*.
 - Click *Add New Printer*.
 - Follow the on-screen directions to create a **Generic/Text Only** printer. Name the printer **MyReceipt** and specify the Port the printer is physically connected to on your computer. Do not share the printer.
 - When prompted, click *Yes to Print Test Page*. If the test page prints correctly, you have completed this step successfully. If the test page fails to print, then you must diagnose the problem. The problem normally lies in the physical port you selected.
- 3) Start POSsetup to create the printer in the point of sale system.
 - Enter your employee code to Sign On to the system.
 - Click *Administration → System Printers*.
 - Click *Add New*.
 - Enter the following information:



System Printer Setup

Name:

Printer Type:

What Station:

Use Windows printer: ☒

Windows Printer name:

Course Division Line:

Consolidated Orders: ☐

The printer type may vary depending on the make and model of printer you purchased.

- Click *Save and Exit*.

- 4) Click *Administration* → *System Setup* → *Printers Tab*.
- 5) Set the local receipt for station #1 to MyReceipt1.



Click *Save* and *Exit*.

- 6) Go to the Point Of Sale and test your printer.

Kitchen Display Setup

As well as having printers in your prep areas, you can also have display monitors that show the items that need to be prepared.

Your POS system supports 3 Kitchen Display Systems.

Note: When setting up your KDS, you cannot have more than one type of KDS system running on the same network.

- Touch KDS
 - Standard & Consolidated Mode
 - Professional Mode
- Posera KDS
- Microplus KDS

Touch KDS Standard & Consolidated Mode

Touch KDS Standard provides a simple replacement for any printer in a quick service environment. Entire orders can be quickly displayed and bumped off the screen once prepared.

Touch KDS Standard and Consolidated Mode require a license to operate. This license can be purchased through your installing dealer. The KDS will operate without a license for a limited time, but it will only display every other order.

Check#4 Table #24 18:08:23	Check#21 Table #32 18:08:22	Check#150 Table #24 00:51:00	Check#152 Table #24 00:49:36	Check#192 00:49:26
4 <i>In Store Purchase</i> Nov 17 2019 8:51:34 PM Server Supervisor Joes #PP... Seat 1 1 Glass Cabernet 1 Bottle Cabernet 1 Sample Red Wine B 1 * Lib 1 Ginoer 1 Coke 1 MD Peasi	9 <i>In Store Purchase</i> Nov 21 2019 9:48:32 AM Server Supervisor Joes #PP... Seat 1 1 Shrimo Cocktail 1 Shrimo Cocktail TEST Kitchen Command	1 <i>In Store Purchase</i> Nov 7 2019 12:02:40 AM Server Supervisor Joes #PP... Seat 1 1 Greek Salad	3 <i>In Store Purchase</i> Nov 7 2019 1:09:18 AM Server Supervisor Joes #PP... Seat 1 1 * Caesar Salad 1 * Caesar Salad	34 <i>Delivery</i> Nov 8 2019 4:30:37 PM Server Supervisor Joes #PP... Seat 1 1 Sm SOup 1 Sm SOup 1 Sm SOup
Check#184 00:49:26				
26 <i>In Store Purchase</i> Nov 8 2019 2:30:29 PM Server Supervisor Joes #PP... Seat 1 1 Sample Appetizer Baked				
Swap Language	Left	Right	Up	Down
			Bump	Restore
				Function Menu
Total Orders Waiting: 6 Total Visible Tickets: 6 Total Hidden Tickets: 0 04/05/2020 11:16:13 AM Touch-Kitchen Display Systems Version 2.0				

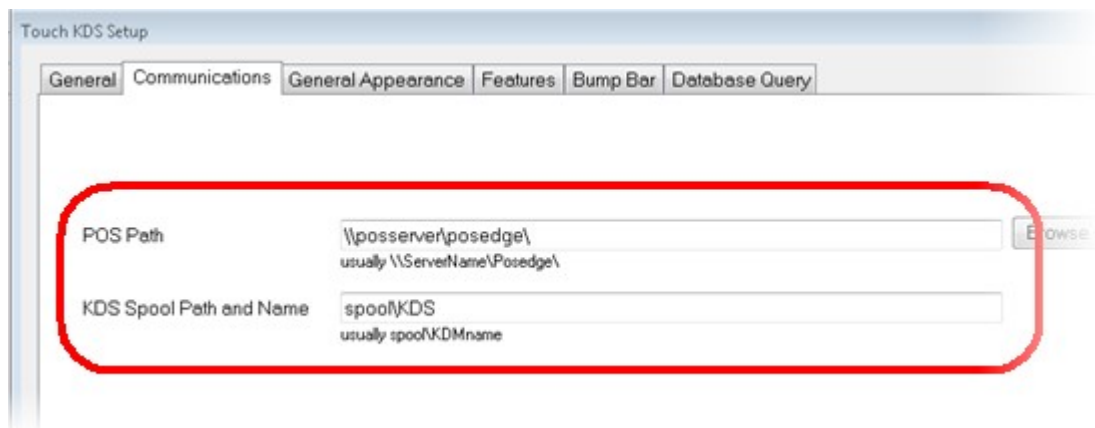
In the POS, create a printer as normal called KDS. Assign this printer to each station and also to the appropriate product types.

KDS Setup Process

1. Click Function Menu.
2. Click Setup
3. On the General Tab, select the Emulation
 - a. Touch Standard
 - b. Touch Consolidated



4. On the Communications Tab, enter the
 - a. POS Path: this is the path to the Point of Sale Software. Usually \\POSSERVER\POSEDGE\
 - b. KDS Spool Path and Name: this is the path to the Point of Sale Software spool path followed by the printer channel name that you setup under Administration → System Printers for example spool\KDS



5. Save your changes → Close Setup → Exit to Windows
6. Re-launch the KDS and you should be operational.

You can configure many other appearance functions under setup.

- Select how many columns and rows of cells appear on the screen
- Change colors
- Position of cell headers
- Font sizes

Some of these changes will take place immediately while others may require the KDS to be restarted.

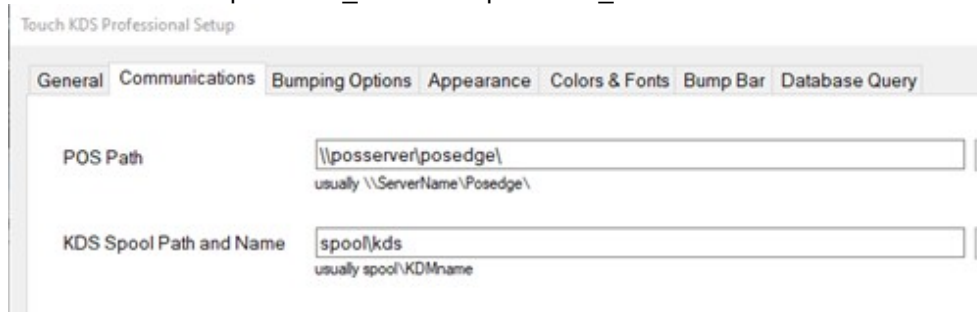
Touch KDS professional

Touch KDS Professional is a versatile kitchen display system for any quick service or table service restaurant.

For detailed directions on configuring Touch KDS Pro, please see the Touch KDS Professional documentation.

Setup Touch KDS Pro

- 1) Go to Administration → System Printers.
- 2) Create your printer channels. For example
 - a) create a new printer called KDS_HOT with a Port of Touch KDS Pro
 - b) create a printer called KDS_COLD with a Port of Touch KDS Pro
 - c) Assign these printers to your stations and products
- 3) Install Touch KDS Pro on your KDS computers.
- 4) Launch KDS Pro and click Setup
- 5) Enter the POS Path to the POS and enter the spool path to the KDS Channel created in step 2. In our example in step 2, the spool paths would have been spool\KDS_HOT and spool\KDS_COLD



The screenshot shows the 'Touch KDS Professional Setup' dialog box with the 'General' tab selected. It contains two text input fields. The first field is labeled 'POS Path' and contains the text '\\posserver\posedge\'. Below this field is a hint text: 'usually \\ServerName\Posedge\'. The second field is labeled 'KDS Spool Path and Name' and contains the text 'spool\kds'. Below this field is a hint text: 'usually spool\KDName'.

- 6) Save the changes, exit Touch KDS and re-launch Touch KDS Pro.
- 7) Repeat from step 3 for each KDS computer.

Posera KDS

The following example demonstrates setting up the Posera KDS for one kitchen monitor and one kitchen expo screen. The expo screen can be real or fictitious. The POS requires the expo screen to be set up and configured even if the establishment does not require it

Our example shows the kitchen monitor is on IP address 192.168.1.110. The following four screens show the setup for the kitchen monitor.

Getting the Posera KDS up and running requires the following steps.

- Posera Setup
- POS Setup
- Running KDS.EXE

Posera Setup

Kitchen Display General Tab

The screenshot shows the KDSUtility - Main Utility window. The left sidebar displays a list of devices with their IP addresses and status. The main area shows the 'Programming' tab with various configuration options for the kitchen display.

My IP Address is: 192.168.1.117

Devices	Status
192.168.1.110	Off-Line
192.168.1.118	Off-Line
192.168.1.119	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

Programming

General | Order Display | Bump Box | Colors | Printer | Expo/Prep | Dashboard | Images | Touch

IP Address: [Text Box] KDS Version: [Text Box]
Device ID: [Dropdown: 02] Network Group: [Dropdown: 01]
Language: [Dropdown: English] Report Reset Time: [Dropdown: 03:00 AM]
Functions As: [Dropdown: Monitor 2] Report Interval: [Dropdown: 15]
Span Letter: [Dropdown: None] ☐ Reboot at Reset Time
Default Mode: [Dropdown: Item View] ☐ Clear Orders at Reset Time
Warning Time: [Text Box: 150] ☒ Retain Orders on reboot
Target Time: [Text Box: 180] ☐ Retain Redirection on reboot
Warn at %: [Text Box: 25] ☐ Retain Statistics on reboot
☐ Use Countdown Timer
☒ Show Screen Name
Screen Name: [Text Box: Kitchen #1]
☒ Show Average Order Time
of orders: [Text Box: 10]
☒ Show Time of Day
☒ Show Bump Numbers
☐ Bump By Number
[Default]

[ReDirection] [Reports]
[Programming] [Request Screen Shot]

[Load New KDS Version] [Send Options to KDS] [Get Options from KDS]

Kitchen Display Order Display Tab

KDSUtility - File Options Message Recipe Overlay Test Help Main Utility

My IP Address is: 192.168.1.117

Devices	Status
	Off-Line
192.168.1.110	
192.168.1.118	
192.168.1.119	
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

KDS
BY POSERA

ReDirection Reports
Programming Request Screen Shot

Programming

General Order Display Bump Box Colors Printer Expo/Prep Dashboard Images Touch

☐ Show Server name in order
☐ Show Revenue name in order
☐ Show Mode name in order
☐ Show Customer name in order
☐ Show Paid
☐ Show Alternate Text
☐ Show StatusBox at top of order
☐ Show Client/Seat Number
☐ Show Completed Line in order
☒ Show Remark ☐ at bottom of order
☐ Show Modifier Quantity of One

Consolidate: None
Prioritize: None

☒ Append to existing order
☐ OTF-Start time on first item received
☐ OTF-Use one item delay
☐ OTF-Emulate Batch Mode
☒ OTF-Show Cancelled orders
☐ Separate Order for each Client

Split Screen by: Server Configuration
Location: Top
Text:
Summary by: Items and modifiers

StatusBox data fields

Terminal Number	Order Amount
Order Number	Elapsed Time

StatusBox color by: Terminal Number
 Digits of order#: 5
 Font Name: Arial
 Font Style: Bold
 Item Size: 14
 StatusBox Size: 14

Load New KDS Version Send Options to KDS Get Options from KDS

Kitchen Display Bump Box Tab

KDSUtility -

File Options Message Recipe Overlay Test Help **Main Utility**

My IP Address is: 192.168.1.117

Devices	Status
	Off-Line
192.168.1.110	
192.168.1.118	
192.168.1.119	
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

KDS
BY POSERA

ReDirection Reports
Programming Request Screen Shot

Programming

General | Order Display | **Bump Box** | Colors | Printer | Expo/Prep | Dashboard | Images | Touch

☒ Enable x1 button ☒ Enable x2 button ☒ Enable Split button ☒ Enable Summary button ☒ Enable change number of columns ☒ Enable Preview ☒ Enable Recall Preview/Recall: Multiple Boxes Park Function: Park ☒ Beep on new order ☒ Beep on order complete ☐ Beep only when there are no orders ☐ Beep using PC Speakers ☐ Send Global Bump to: ☒ Receive Global Bump ☐ Send Bump to Server ☐ Send Global Park to: ☒ Receive Global Park ☐ Send Mode Change to: ☒ Receive Mode Change	☒ Enable Notification mode ☒ Enable Item View mode ☐ Enable OCS mode ☒ Show Promo Images Configuration: Receipt Text Area: 0,0,500,600 Promo Area: 500,0,300,600 ☒ Incomplete orders can be bumped ☒ Allow orders to be Un-Bumped ☐ Enable bump confirmation ☐ Show on-screen bump box Forward on Bump: None Forward on Fire: None ☐ Forward with elapsed time Type of BB: KRS 10x2 Key Layout: Item View ☐ Invert buttons
---	--

Load New KDS Version Send Options to KDS Get Options from KDS

Kitchen Display Expo/Prep Tab

KDSUtility -

File Options Message Recipe Overlay Test Help **Main Utility**

My IP Address is: 192.168.1.117

Devices	Status
	Off-Line
192.168.1.110	
192.168.1.118	
192.168.1.119	
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

KDS
BY POSERA

ReDirection Reports
Programming Request Screen Shot

Programming

General | Order Display | Bump Box | Colors | Printer | Expo/Prep | Dashboard | Images | Touch

Expo/Prep Mode: Prep 1

- ☒ Enable Order Fire
- ☐ On Order fired, send Global Bump (for dual cook lines)
- ☐ Sort by time
- ☐ Show Course Number
- ☐ Print Course Number
- ☒ Expo - Ready Orders appear first
- ☐ Expo - Show Ready Items in MaitreD color
- ☐ MgrExpo - Restart time when order is ready

Load New KDS Version Send Options to KDS Get Options from KDS

Again, the expo screen can be real or fictitious, but it must be configured. Our example shows the expo screen is on IP address 192.168.1.119. If your expo screen is fictitious, the status will be displayed as Off-Line. The following four screens show the setup for the expo monitor.

Expo Screen General Tab

The screenshot shows the KDSUtility - Main Utility window. The left sidebar displays a list of devices with their IP addresses and status. The main area shows the 'Expo/Prep' tab under the 'Programming' section. The configuration includes fields for IP Address, Device ID, KDS Version, Network Group, Language, Functions As, Span Letter, Default Mode, Warning Time, Target Time, Warn at %, and various checkboxes for system settings like 'Use Countdown Timer', 'Show Screen Name', 'Show Average Order Time', 'Show Time of Day', 'Show Bump Numbers', and 'Bump By Number'. There are also buttons for 'ReDirection', 'Reports', 'Programming', 'Request Screen Shot', 'Load New KDS Version', 'Send Options to KDS', and 'Get Options from KDS'.

Devices	Status
192.168.1.110	Off-Line
192.168.1.118	Off-Line
192.168.1.119	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Off-Line	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

Programming - Expo/Prep Tab

IP Address: KDS Version:
 Device ID: Network Group:
 Language: Report Reset Time:
 Functions As: Report Interval:
 Span Letter: ☐ Reboot at Reset Time
 Default Mode: ☐ Clear Orders at Reset Time
 Warning Time: ☒ Retain Orders on reboot
 Target Time: ☐ Retain Redirection on reboot
 Warn at %: ☐ Retain Statistics on reboot
☐ Use Countdown Timer
☒ Show Screen Name
 Screen Name:
☒ Show Average Order Time
 # of orders:
☒ Show Time of Day
☒ Show Bump Numbers
☐ Bump By Number

Buttons: ReDirection, Reports, Programming, Request Screen Shot, Load New KDS Version, Send Options to KDS, Get Options from KDS

Expo Screen Order Display Tab

KDSUtility -

File Options Message Recipe Overlay Test Help **Main Utility**

My IP Address is: 192.168.1.117

Devices	Status
	Off-Line
192.168.1.110	
192.168.1.118	
192.168.1.119	
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

KDS
BY POSERA

ReDirection Reports

Programming Request Screen Shot

Programming

General Order Display Bump Box Colors Printer Expo/Prep Dashboard Images Touch

☒ Show Server name in order
☐ Show Revenue name in order
☐ Show Mode name in order
☐ Show Customer name in order
☐ Show Paid
☐ Show Alternate Text
☐ Show StatusBox at top of order
☐ Show Client/Seat Number
☐ Show Completed Line in order
☒ Show Remark ☐ at bottom of order
☐ Show Modifier Quantity of One

Consolidate: None

Prioritize: None

☒ Append to existing order
☐ DTF-Start time on first item received
☐ DTF-Use one item delay
☐ DTF-Emulate Batch Mode
☒ DTF-Show Cancelled orders
☐ Separate Order for each Client

Split Screen by: Server Configuration

Location: Top

Text:

Summary by: Items and modifiers

StatusBox data fields

Terminal Number Order Amount

Order Number Elapsed Time

StatusBox color by: Terminal Number

Digits of order#: 5

Font Name: Arial

Font Style: Bold

Item Size: 11

StatusBox Size: 14

Load New KDS Version Send Options to KDS Get Options from KDS

Expo Screen Bump Box Tab

KDSUtility -

File Options Message Recipe Overlay Test Help **Main Utility**

My IP Address is: 192.168.1.117

Devices	Status
	Off-Line
192.1681.110	
192.168.1.118	
192.168.1.119	
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
	Off-Line
Main Utility	192.168.1.117
Backup Utility	Off-Line

KDS
BY POSERA

ReDirection Reports
Programming Request Screen Shot

Programming

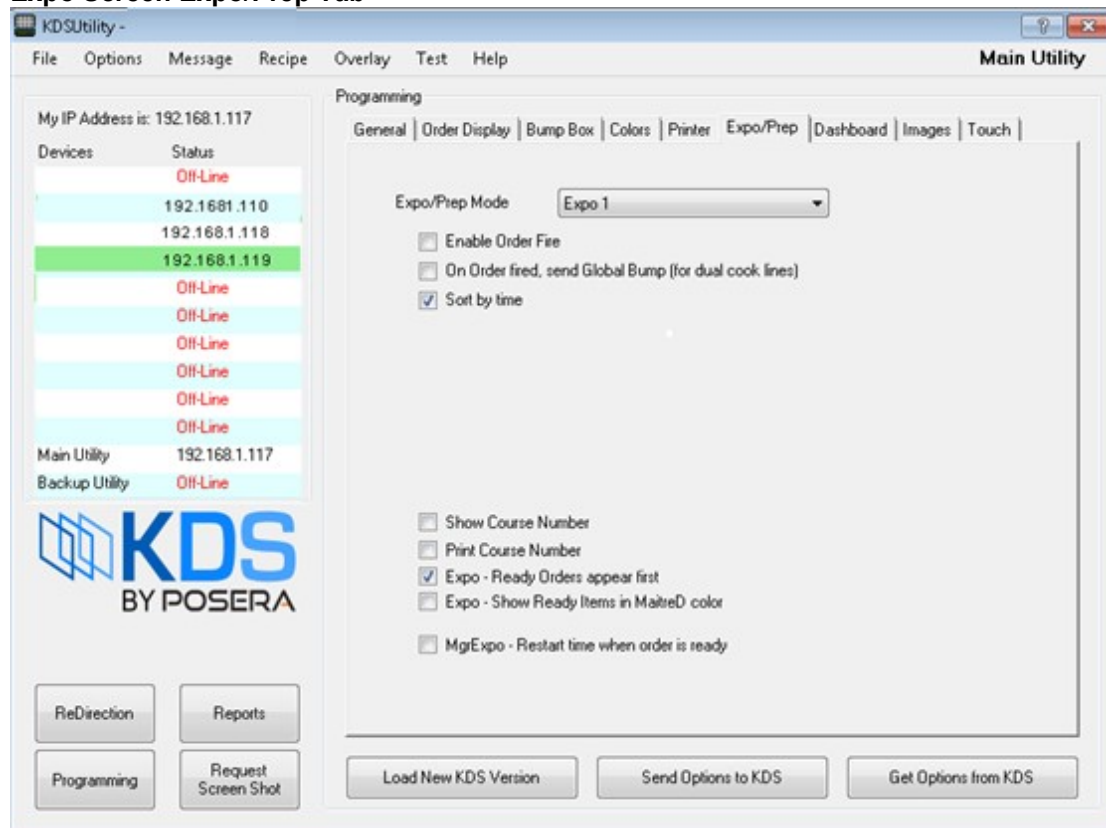
General | Order Display | Bump Box | Colors | Printer | Expo/Prep | Dashboard | Images | Touch

☒ Enable x1 button
☒ Enable x2 button
☒ Enable Split button
☒ Enable Summary button
☒ Enable change number of columns
☒ Enable Preview
☒ Enable Recall
☒ Enable Notification mode
☒ Enable Item View mode
☐ Enable OCS mode
☒ Show Promo Images
 Configuration: Receipt
 Text Area: 0,0,500,600
 Promo Area: 500,0,300,600

Preview/Recall: Multiple Boxes
 Park Function: Park
☒ Beep on new order
☒ Beep on order complete
☐ Beep only when there are no orders
☐ Beep using PC Speakers
☒ Send Global Bump to: 2,3,4
☐ Receive Global Bump
☐ Send Bump to Server
☐ Send Global Park to:
☐ Receive Global Park
☐ Send Mode Change to:
☐ Receive Mode Change
☒ Incomplete orders can be bumped
☒ Allow orders to be Un-Bumped
☐ Enable bump confirmation
☐ Show on-screen bump box
 Forward on Bump: None
 Forward on Fire: None
☐ Forward with elapsed time
 Type of BB: KRS 10x2
 Key Layout: Default
☐ Invert buttons

Load New KDS Version
 Send Options to KDS
 Get Options from KDS

Expo Screen Expo/Prep Tab



POS Setup

1. Go to Administration → System Printers.
2. Create a new printer called Posera
 Spool Path: Posera
 What Port: Posera KDS
3. Save this and assign this printer channel to each station as you would any other printer.

Running KDS.EXE

1. Locate the program KDS.exe in the POSEDGE folder. Create a shortcut to this application and add it to your Windows startup folder.
2. Right click on this shortcut and left click on properties.
3. At the end of the target line add,
 - a) the path to the Posera Spool Folder
 - b) the IP Address to the Posera KDS
 - c) the port 9100

for example, a typical target line would be as follows

c:\posedge\KDS.exe \\posserver\posedge\spool\posera 192.168.1.110 9100

where

\\posserver\posedge\spool\posera is the path to the Posera spool folder

192.168.1.110 is the IP address of one of the Posera kitchen displays

9100 is the standard printer port

4. Launch the KDS shortcut.

Labels & Barcode Labels

The POS can produce tags and labels for many purposes.

- **Shelf tags**
- **Product Tags and Labels**
 - For example
 - Barcode labels or hang tags to identify merchandise at the point of sale
 - Pricing labels or hang tags

- **Customer Shipping Labels**

- **Product Identification Labels**

- For example
 - a coffee cup identification label in a quick service environment
 - a label to identify a product in for repair in an electronic store
 - ski lift tickets
 - attraction admission labels or tags

- **Quick Tags**

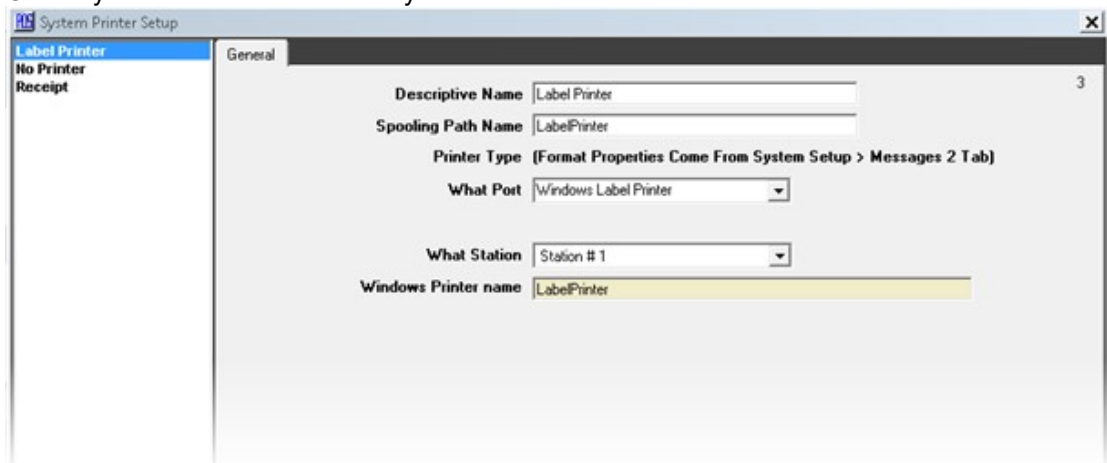
Quick tags print on the receipt printer and can easily be converted into Shelf Tags.

The POS has been tested and supports

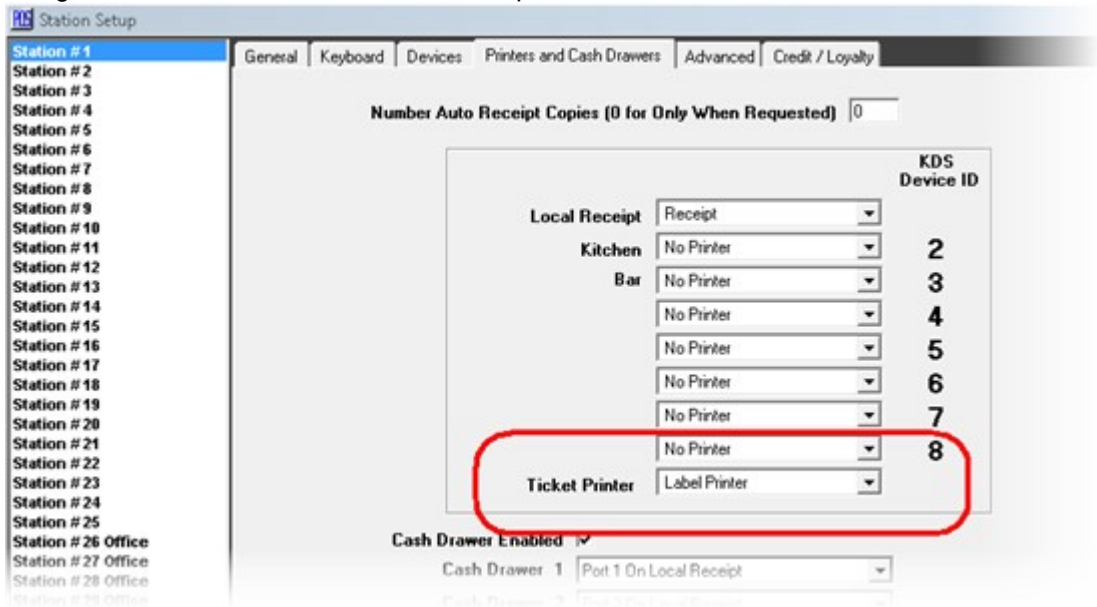
- Cognitive Brand Barcode Label Printers
- Zebra Brand Barcode Label Printers
- Inkjet Laser Printers using Avery Type Labels
- And although not tested, we should easily support any printer that utilized the ZPL Label Programming Language.

Product Identification Labels

1. Install your label printer in Windows.
2. Create your Label Printer under System Printers.



3. Assign the Label Printer under Station Setup.



4. Select the Printer Label Type Under System Setup → Printers Tab.

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Mes

Receipt Destination Name: Local Receipt

Printer Destination 2 Name: Kitchen

Printer Destination 3 Name: Bar

Printer Destination 4 Name:

Printer Destination 5 Name:

Printer Destination 6 Name:

Printer Destination 7 Name:

Printer Destination 8 Name:

Ticket / Label Printer: Product Identification Label ▼

5. Design the Label under System Setup → Labels Tab.

Available Codes:

/LABEL1/	Check Label
/TRANNUM/	Transaction Number (This could appear as a number and or a barcode)
/CUSTFNAME/	Customers First Name
/CUSTLNAME/	Customers Last Name
/CUSTPHONE/	Customers Phone Number
/ITEM/	Product Description Long Format
/ITEM_S/	Product Description Short Format
/QUANTITY/	Quantity Purchased
/MODIFIER#/	Modifier Name Long Format where # is 1 ~ 100
/MODIFIER_S#/	Modifier Name Short Format where # is 1 ~ 100
/DATESTAMP/	Current Date & Time
/DATE/	Current Date

6. Assign the Ticket Printer to the appropriate Product Types.

The screenshot shows the 'Product Type Setup' window with the 'Beverages' product type selected. The 'General' tab is active, displaying various configuration options. The 'Name' field is set to 'Beverages'. The 'Sales Department' is set to 'Beverages'. The 'Loyalty Applies' checkbox is checked. The 'Is Drink' checkbox is unchecked. The 'Use Age Verification 1' and 'Use Age Verification 2' checkboxes are unchecked. The 'Food Stamps Allowed' checkbox is unchecked. The 'Comission Rate' is set to '0.'. The 'Link To' field is empty. The '3rd Party Loyalty ID' field is empty. The 'Deposit' is set to '0.00'. The 'Other Fee 1' is set to '0.00'. The 'Other Fee 2' is set to '0.00'. The 'Combo Tag' dropdown is set to 'None'. The 'Prep Printers' section shows 'Local Receipt', 'Kitchen', and 'Bar' as options, with 'Ticket Printer' checked and highlighted by a red box. The 'Taxes' section shows 'H.S.T.' as an option, which is checked. The 'Price Schedule' button is visible at the bottom. The window has a standard Windows-style title bar and a toolbar at the bottom with 'Delete', 'Add New', and 'Exit' buttons.

7. The Label Printer is now set up. When you sell a Beverage, a Label will print similar to below that can be affixed to the cup for Prep and Identification.

The screenshot shows a printed label for a beverage. The label is rectangular with a dark border. It contains the following text: 'CRAIG 7654' at the top, followed by 'Green Tea Latte', 'Tall', 'Unsweetened', and 'Coconut Milk' on separate lines.

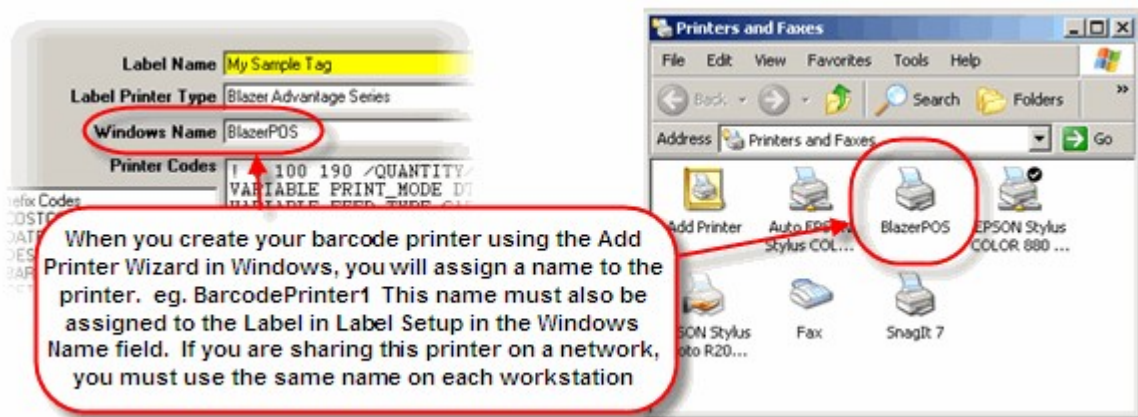
Install Your Barcode Label Printer in Windows

You can connect a barcode label printer to any station within the system. This will allow you the ability to produce labels and tags for your store. Under Label Setup, you can design a variety of label formats, so various products can have different looking tags if you wish. Tags can also be printed on your laser or inkjet printer using standard label sheets or be exported to third party label applications.

Most barcode printers are programmable devices which use a command language that has become an industry standard. This means that we can work with most barcode printers on the market. Currently, the POS is certified with several Cognitive Solutions printers and Zebra printers. You can use any format of barcode printer, such as serial, parallel, or USB.

The barcode printer is installed using the Add Printer Wizard that comes standard with Microsoft Windows. **Do not install the printer using the installation CD that comes with the printer.** Always install the printer in Windows as a **Generic Text Only** printer.

Each printer created in Windows requires a unique name. You can assign any name you wish to the printer, but this name must also be the same on all work stations that share this printer as well as in the label itself under the Windows Name



This printer can be shared between the various POS stations running on your network but the name of the printer on each networked station must be the same. Refer to your Microsoft Windows Help on Sharing Printers.

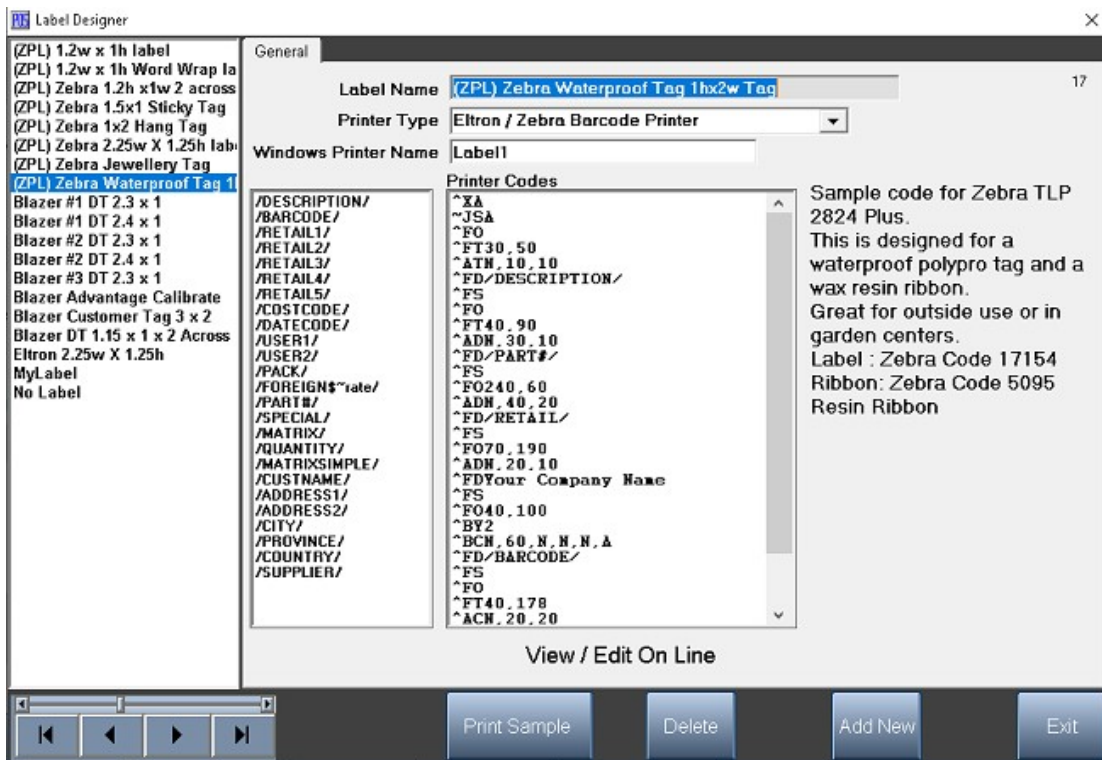
Configure Zebra TLP 2824 Plus

1. Connect the printer to the computer using a serial, parallel or USB cable. (USB is preferred).
2. Connect the power source to the printer.
3. Install the printer using the Windows Printer Setup Wizard and use the Generic Text Only Driver.
4. Install your labels.
5. Optionally, install your ribbon if it's a thermal transfer print.
6. Turn the printer on and wait until the light turns solid green.
7. Hold down the feed button. The light will flash once, then twice, then three times, then four times. Release the feed button. This will calibrate the printer.
8. The printer will stutter and print some text. Once the light goes solid green again, press the feed button once to feed a single label.
9. Optionally, if the label text that prints is of a poor quality, hold down the feed button. The light will flash once, then twice, then three times, then four times, then five times, then six times. Release the feed button. The printer will slowly start printing labels, one at a time, with each one getting better in quality. Once a label prints and you're good with the quality, press the feed button once to select that setting.
10. The printer is now ready to print.

Configure Zebra ZD410 and ZD420 printers

1. Connect the printer to the computer using a serial, parallel or USB cable. (USB is preferred).
2. Connect the power source to the printer.
3. Install the printer using the Windows Printer Setup Wizard and use the Generic Text Only Driver.
4. Install your labels.
5. Turn the printer on and wait until the light turns solid green.
6. Hold down the feed and cancel button for two second.
7. The printer will stutter and print some text. Once the light goes solid green again, press the feed button once to feed a single label.
8. The printer is now ready to print.

Creating Your Label Types



Under Label Design, you can create your various labels.

Label Design Fields

Label Name

Enter a descriptive name for the Label. For example, Shelf Tag For Specials.

Label Printer Type

Select from the dropdown list the type of printer. This can be a physical printer or it can also be an export file that can be imported into other label printing software.

- **Export to TAGEXPRT.Dat**
Tag information is exported to a file which can be used by a third-party label printing application. No Printer Codes are required.
- **Export to TAGEXPR1.Dat**
Tag information is exported to a file which can be used by a third-party label printing application. No Printer Codes are required.
- **Print to Zebra Series Barcode Printer**
Tag is printed directly to a Eltron Barcode Printer.
- **Print to Blazer Advantage Barcode Printer**
Tag is printed directly to a Blazer Barcode Printer.
- **Standard Laser / Injet Printer**
Tag information is saved and automatically printed on standard label sheets that can be used with your laser or inkjet printer. You must select your Label Format and Shelf Tag Format under System Setup. No Printer Codes are required.

Windows Name

Enter the name you assigned to the Barcode Printer when the printer was created in Windows using the Add Printer Wizard.

Printer Codes

The printer codes are the command language that is sent to the printer to tell the printer how the label should look. *Refer to the manual that accompanied the printer for a list of printer codes*

/DESCRIPTION/	Product Description
/BARCODE/	UPC Code
/RETAIL1/	Retail 1
/RETAIL2/	Retail 2
/RETAIL3/	Retail 3
/RETAIL4/	Retail 4
/RETAIL5/	Retail 5
/COSTCODE/	Product Cost Code. By default the Cost Code is ABESLOTKIN (1234567890). These values can be modified in the POSEGE.INI file in the POSEDE folder in the Cost Code Section.
/DATECODE/	Date Label Printed Code. The Date Code is MDDY. M is A thru L representing the month eg A would be January, B is February etc. DD is the day of the month. Y is the last digit of the Year, eg E would be 5.
/USER1/	User Field 1
/USER2/	User Field 2
/PACK/	Product Pack Size
/FOREIGN\$~rate/	Retail 1 represented as a foreign currency calculated at rate
/PART#/	Supplier Part Number 1
/SPECIAL/	Current On Special Price
/MATRIX/	
/QUANTITY/	
/MATRIXSIMPLE/	
/CUSTNAME/	Customer Name for Shipping Labels
/ADDRESS1/	Customer Address 1 for Shipping Labels
/ADDRESS2/	Customer Address 2 for Shipping Labels
/CITY/	Customer City for Shipping Labels
/PROVINCE/	Customer Province/State for Shipping Labels
/COUNTRY/	Customer Country for Shipping Labels

Assign Label Types to your Products

The next step is to assign the *Label Types* to any products that require tags. Under Product Setup, select from the *Label Type* dropdown list, the appropriate tag or select No Label for no tags.



The screenshot shows a software interface for product setup. It includes several input fields: 'Quantity On Hand' with a value of 0, 'Minimum Stock Levels' with a value of 0, and 'Re-order Quantity' with a value of 0. There is a checked checkbox for 'Track Stock'. A dropdown menu for 'Label Type' is currently set to 'MyLabel' and is highlighted with a red rectangular box. Below the dropdown is a partially visible 'Package Size' field. At the bottom of the form are three buttons: 'Print Shelf Tag', 'Print Product Tag', and 'Quick Stock'.

Assign the Shelf Tag Label Type

Under System Setup, select from the dropdown list the appropriate label type for the Shelf Tag if required.

Note:

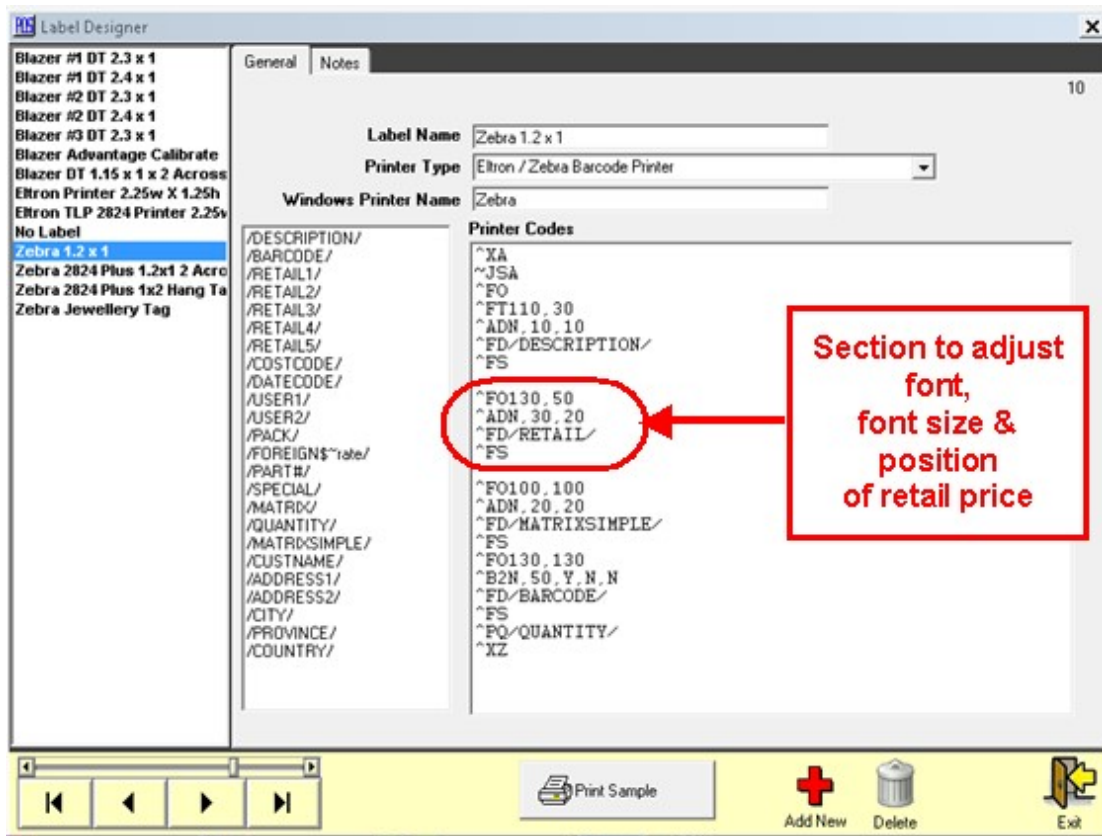
Under System Setup, you can Tag Printing *On* or *Off*. This can be used to disable tag printing if your tag printer breaks.

You can manually print tags advanced Tab in Product Setup using the *Print Shelf Tag* and *Print Product Tag* buttons.

You can print a range of labels under Stock Adjustment Utilities.

Zebra ZPL Programming Label Design

We have several Zebra printer labels created for you in the Label Designer. You can use or modify these to make them suit your needs.



Here are some simple tips on modifying an existing Zebra label.

Our example is modifying the following price field.

```
^FO130, 50
^ADN, 30, 20
^FD/RETAIL/
^FS
```

Position of Price Field ^FOx,y,z

Where

x is the horizontal position on the label in Dots.

y is the vertical position on the label in Dots.

z is optional justification where 0 is left and 1 is right justified.

Eg ^FO130,50

Saleable Font ^Afo,h,w

Where

f is the font name

(accepted values are A through Z or 0 to 9)

o is the field orientation

(accepted values are N is normal, R is rotate 90 degrees, I is rotate 180 degrees, B is rotate 270 degrees)

h is the font height

(accepted values are 10 to 32000)

w is the font width

(accepted values are 10 to 32000)

Eg ^ADN,30,20

Field Block (allows for word wrapping) ^FBabcde

See Zebra Example Code 2 Below

Where

a is the width of the text block

b is the maximum number of lines

c is the number of spaces between lines (normally blank)

d is the justification L (left) R (Right) C(Center) (normally blank)

e is ignored

^FO20,40

^ADN,30,10

^FB450,4,,

^FD/DESCRIPTION/

^FS

Field Data ^FDa

Where

a is the field data name

eg /RETAIL/

EG ^FD/RETAIL/

Field Separator ^FS

Is a field separator and is required to end a field definition. In our example, this ends the definition for the retail price.

Backfeed Sequence ~JS

~JS0 Backfeed Sequence Off

~JSA 100% Backfeed

Barcode Scale Ratio ^BYw,r,h

Where

W is the Width value 1 to 10 default 2

R is the wide barcode to narrow barcode width ratio 2.0 to 3.0 01 increments

H is the barcode height

EG ^BY1,2

Must be placed before the Barcode Line

Media Tracking ^MN

^MNM Non-continuous media mark sensing

Zebra Example Code 1

```
^XA
~JSA

^FB300,,C
^FO
^FT20,30
^APN,40,10
^FD/DESCRIPTION/
^FS

^FO130,50
^ADN,30,20
^FD/RETAIL/
^FS

^FO30,90
^BY1,3
^B3N,N,60,N,N,N
^FD/BARCODE/
^FS

^FO
^FT30,180
^APN,40,10
^FD/BARCODE/
^FS

^PQ/QUANTITY/
^XZ
```



Zebra Example Code 2

^XA
~JSA

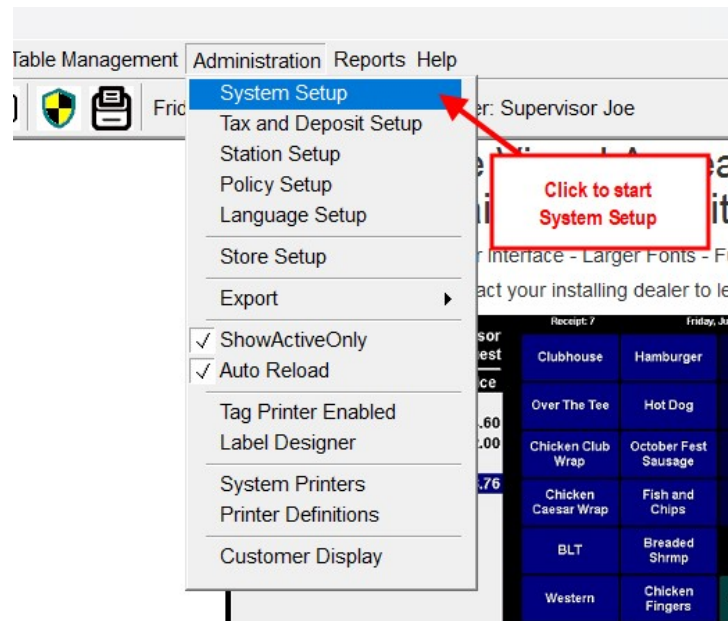
^FO20,40
^ADN,30,10
^FB450,4,,
^FD/DESCRIPTION/
^FS

^FO450,120,1
^ADN,30,25
^FD/RETAIL/
^FS

^FO30,130,1
^B2N,50,Y,N,N
^FD/BARCODE/
^FS
^PQ/QUANTITY/
^XZ



System Setup



System Setup gives you the opportunity to customize the software to meet your needs. Here you can enable and disable many of the POS features.

Accounting Tab

The screenshot shows the 'System Setup' window with the 'Accounting' tab selected. The 'Accounting Program' dropdown is set to 'Simply Accounting'. Below this, there are fields for 'Create Accounting Export' (unchecked), 'A/R Monthly Interest Rate' (2.00), 'Dollar Mask' (0.00), and 'Accounting Date Format' (MM/DD/YY). A section titled 'Misc. Accounting' contains several input fields: 'Paid Out', 'Received On', 'Tips', 'Payment On Account', 'VAT Adjust', 'Shipping', 'Gift Card Sales', 'Gift Card Promo', and 'Penny Round'. To the right of these fields is the 'Next Fiscal Period Start Date' field, which is set to '01/01/3000'. An 'Exit' button is located at the bottom right of the window.

Next Fiscal Period Start Date

Enter the next date that you want the system to transfer product sales statistics and customer purchase statistics from the current year to the previous year. These statistics are found in *Product and Customer Setup* under the *Statistics Tab*.

Accounting Program

Select from the dropdown list, the accounting program you use. The POS can create a General Ledger Import File at the end of each business day. This file can be imported into your accounting program to record your daily sales, taxes, Cash, Credit Card, etc. *See Accounting for additional information.*

Create Accounting Export File

When selected, the POS will create an accounting export file when the Day Close is performed. This file can be imported into your accounting package. *See Accounting Interface for additional information.*

A/R Monthly Interest Rate

Enter the monthly interest rate to charge on Past Due accounts. The interest will appear on their monthly statement selected, provided the customer has *Charge Interest* enabled in their profile.

Misc. Accounting Codes

Enter the General Ledger Accounting code for the applicable fields.
See Accounting for additional information.

API Tab

The screenshot shows the 'API' tab within a 'System Setup' window. The window has a menu bar with various options like Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, and Email Setup. The main area contains the following fields:

- Enable API**: A checkbox that is checked.
- IP Address Of PC Running the**: A text box containing '127.0.0.1'.
- Port Monitored By the APImonitor**: A text box containing '5656'.
- AUTH token**: A text box containing a long alphanumeric string '67C5D8856F481683B1E794EA8598CCD6E1EC2CA1450C6EFF884879C1'. To the right of this box is a 'Generate' button.
- Your POS Serial Number**: A text box containing '7700000013'. To the right of this box is a 'Copy to Clipboard' button.

Below these fields is a large empty box labeled 'API Authorized Users'. At the bottom right of the window is an 'Exit' button.

The API allows for other programs to interact with the POS to create, modify and retrieve information from the database.

Age Verification Tab

The screenshot shows the 'System Setup' window with the 'Age Verification' tab selected. The window has a menu bar at the top with various options like Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, and Email Setup. The main area contains two sections for age verification. The first section is for 'Minimum Age 1' set to 19, with a 'Cashier Warning Message' that reads: 'The customer must be born this date or earlier to be allowed to purchase tobacco products. We I.D. all customers under 25 years of age !'. The second section is for 'Minimum Age 2' set to 18, with a 'Cashier Warning Message' that reads: 'The customer must be born this date or earlier to purchase Lottery Tickets'. At the bottom, there is a note: 'To Accept the Yes button in the age verification window at the Point of Sale press the function key F2'. An 'Exit' button is located in the bottom right corner.

Age Verification Method	Basic
Minimum Age 1	19
Cashier Warning Message	The customer must be born this date or earlier to be allowed to purchase tobacco products. We I.D. all customers under 25 years of age !
Minimum Age 2	18
Cashier Warning Message	The customer must be born this date or earlier to purchase Lottery Tickets

To Accept the Yes button in the age verification window at the Point of Sale press the function key F2

Exit

The Age Verification Feature helps to control the sale of products to minors. You program in the minimum age required to purchase products and any message you want to appear to the cashier when these products are being purchased. The POS system will display your message and the date the customer should be born on or before in order to be allowed to purchase the product. The cashier can quickly cancel the sale if the customer does not meet the age requirements.

Minimum Age

Enter the minimum age required in order to be allowed to purchase the products.

Cashier Message

Enter any message that you want to appear on the screen to the cashier when tobacco products are being purchased. This message could contain information about the types of I.D. that are acceptable.

Age Verification Method

Select from the dropdown the age verification method to use.

- Basic will display the minimum age required to purchase the product. You select Yes or No to accept.
- Ontario Driver's License offers the same features as the basic method with the added ability to scan an Ontario Driver's License.
- Date Entry Method prompts you to enter the customer's date of birth.

Auto Sale Email Tab

![Screenshot of the 'System Setup' window, 'Auto Sale Email' tab. The window has a menu bar with options like Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, and Email Setup. The 'Auto Sale Email' section has a checkbox 'Use Auto Sale Email' which is unchecked. Below it is a text field 'Auto Sale Email Subject Line' containing 'Thank You.' and a 'Show In Browser' button. The 'Auto Sale Body' section has a large text area containing HTML code: <!DOCTYPE HTML PUBLIC \](cid:/LOGOPATH/>
Thanks)

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup

Use Auto Sale Email ☐

Auto Sale Email Subject Line

Auto Sale Body

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
</HEAD>
<BODY>
<IMG SRC=cid:/LOGOPATH/><br>
Thanks for your purchase today.<br>
We have attached some helpful hints to this email.
</BODY>
</HTML>
```

Auto Sale Alternate Text

Thanks for your purchase today. We have attached some helpful hints to this email.

Exit

The Auto Sale Email feature allows for thank you emails to be sent automatically after a sales transaction has been completed.

See Marketing Tools for additional information.

Use Auto Sale Email Feature

Check this to enable the auto email feature.

Auto Email Subject Line

Enter the subject line to appear in the customers email.

Auto Sale Body

Enter the HTML code that will make up the email the customer will receive. You can view the email by clicking View In Browser.

See HTML Email Basics for additional information.

Auto Sale Alternate Text

Computer security sometimes prevents HTML emails from displaying correctly. You can enter here a simple text email that will appear if the HTML cannot be displayed.

Company Profile Tab

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | **Company Profile** | Customer | Documents | Email Invoice | Email Receipts | Email Setup |

Store Name: Your Store Name

Store Address: ...Your company address here, should be single line

Shipping Name and Address: Ship To Same

	Start Time	End Time
Monday	6:00 AM	11:00 PM
Tuesday	6:00 AM	11:00 PM
Wednesday	6:00 AM	11:00 PM
Thursday	6:00 AM	11:00 PM
Friday	6:00 AM	11:00 PM
Saturday	6:00 AM	11:00 PM
Sunday	6:00 AM	11:00 PM

Units Of Measure: Imperial

System Language: Canadian English

Domestic Currency: Cash

Weight Unit Of Measure (lb or kg): lb

Liquid Unit Of Measure (Ltr or Gal): Ltr

Phone Number Mask: (##)###-####

Date Format: MM/DD/YYYY

Exit

Your Company Name and Address

Enter your company's mailing information. This will appear on some various documents.

System Language

Select from the dropdown list the language you want the program to display. You can select one of the predefined languages or create your own under Language Setup.

Domestic Currency

Select from the dropdown list your domestic currency, usually *Cash*.

Shipping Address

Enter your shipping address for purchase orders.

Weight Unit Of Measure Display

Enter the unit of measure for your region (LB or KG).

Unit Of Measure Display

Select the countries unit of measure (Imperial or Metric).

Start Time & End Time

Enter your stores business hours.

Customers Tab

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup

Customer Prefix

Default City: Welland

Default Province: Ontario

Default Country: Canada

Default Credit Limit: 0.00

Default Terms

Default Customer Search Method: Phone Number

Bonus Bucks % Rate: 0

Bonus Bucks Name: Bonus Bucks

Default Sale Type For New Customer: Dine In

Default Customer Type For New: Bronze

Default Customer Expiry: 01/01/3000

Override Credit Limit Allowed: ☐

Show Reward Points On Receipt: ☒

Use Quick Customer Create: ☒

Disable All Reward Systems: ☐

Ignore Customer Expiry Date: ☒

Email Confirmation: ☐

Initial Customer Screen: Information

Customer Shipping Label: Avery 5164

Customer Information On POS Screen

/NAME/ /PHONE1/

Customer Information On Receipt

/NAME/ /PHONE1/ Card #: /CARDNO/

Customer Information On Prep Printers

/NAME/ /PHONE1/ /ADDRESS1/ /ADDRESS2/ /CITY/

SHOW CODES

Exit

Customer Prefix

The customer prefix code is used if you scan customer I.D. cards. The prefix code represents up to the first 6 digits of the customer code. When you scan a customer I.D. card at the point of sale, the system will check the first 6 digits of the bar code to see if they equal this prefix code. If they do, then the system will assume you are scanning a customer I.D. card and will look for an exact match to the bar code in the customer file. If you are using bar-coded customer I.D. cards, then all the customer codes should begin with this prefix code.

Default City

Enter the city name you want to appear when adding a new customer record.

Default Province

Enter the province name you want to appear when adding a new customer record.

Default Country

Enter the country name you want to appear when adding a new customer record.

Default Terms

Enter the terms you want to appear when adding a new customer record (i.e. Net 30 or COD).

Default Credit Limit

Enter the credit limit you want to appear when adding a new customer record.

Default Customer Search Method

When the Customer Query button is pressed and if no customer is currently active, what customer search screen do you wish to appear as default:

- None
- Customer Name List
- Search by Customer Code
- Search by Customer Phone Number

Bonus Buck % Rate

Bonus Bucks are a reward point system based upon the dollar amount a customer spends per transaction. Enter the percent amount that a customer is rewarded, for example, 5% of their purchase.

Zero disables the Bonus Bucks Reward System.

See Reward Systems for more information.

Bonus Buck Name

If you are using the Bonus Buck system, enter the name you want to use for your Bonus Bucks (i.e. Joe's Hardware Rewards).

Default Sales Type for a New Customer

Select from the dropdown list the default sales type to appear when adding a new customer record.

Default Customer Type for a New Customer

Select from the dropdown list the default customer type to appear when adding a new customer record.

Default Customer Expiry Date

Enter the customer expiry date you want to appear when adding a new customer record.

Warn If Customer Is Changed Within An Active Sale

Enable this if you want the system to warn you if you are changing the customer associated with a sales transaction to a new customer. This feature is here to eliminate potential errors.

Override Credit Limit Allowed

If enabled, the system will prompt to override a customer's credit limit if their charges will exceed their limit. The ability to do this will depend on the Security Level of the currently logged on employee.

Initial Customer Screen

Select from the dropdown, the first customer information screen to display when a customer is selected at the point of sale.

Show Reward Points On Receipt

Enable this feature if you want the customer's reward point balance to show on the sales receipt every time the customer makes a purchase.

Ignore Customer Expiry

Check this box to disable the customer account expiry check at the point of sale.

Use Customer Quick Create

Customer Quick Create provides a simpler and faster method of entering customers at the point of sale, but the amount of information that can be entered is limited.

Disable All Reward System

Check this box to turn off all rewards systems. Points can still be redeemed but no points will be awarded.

Show Customer Stats On Day End Report

Check this box if you want a detailed breakdown of each customer's total account charges and payments to appear on the standard day end report.

Customer Information on Receipt

Enter what customer information you wish to appear on the sales receipt if a customer is associated with the sale.

Customer Information on Prep Printers

(add /CUSTOMERINFO/ to prep printer header or footer)

Enter what customer information you wish to appear on prep printers.

Customer Information on POS Screen

Enter what customer information you wish to appear on the point of sale screen.

Available Printer Codes for Customer Information

See Format Receipts for Additional Information

/NAME/	Customer Name
/CARDNO/	Card Number
/PHONE1/	Phone Number 1
/ACCTBAL/	Account Balance
/ADDRESS1/	Address Line 1
/ADDRESS2/	Address Line 2
/NOTES/	Notes Field
/CITY/	City
/PROVINCE/	Province
/COUNTRY/	Country
/POSTAL/	Postal or Zip Code
/SHIPTO/	Ship To Address
/CNBAL/	Credit Note Balance Available
/CCBAL/	Conv/RA Balance Available
/YEAR2DATE/	Year To Date Purchases
/TAXNUM/	Tax Exempt Number
/BPOINTS/	Bonus Bucks
/CUSTTYPE/	Customer Type

Customer format example

^D/NAME/	line 1: customers name double size
/PHONE1/	line 2: customers phone number normal size
Card # /CARDNO/	line 3: <i>Card #</i> followed by the customer card number
Balance: /ACCTBAL/	line 4: <i>Balance:</i> followed by the customer's account balance

John Smith

(905)555-1212

Card # 777628363

Balance: \$123.45

You can also use the following formatting codes.

^C	will center the text on the line
^D	will print the text on the line double width
^R	will print the text in red
^B	will print the text in bold characters
^H	will print the text in extra-large font

Documents Tab

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup |

Logo Header Path

Logo Footer Path

Payment On Account

Invoice Format 1

Invoice Format 2

Statement

Pick List

Packing Slip

Quote

Other Reports

Exit

Logo Header Path

Enter the path and filename to your company logo. This logo prints on select statements and invoices.

Logo Footer Path

Enter the path and filename to your logo footer. This logo footer prints on select statements and invoices.

Payment Receipt Path

Select the format to use for your payment receipts.

Invoice Path

Select the format to use for your invoices.

Statement Path

Select the format to use for your statements.

Purchase Order Path

Select the default format to use for your purchase orders.

Shipping Label Path

Select the format to use for your shipping labels.

Picking List Path

Select the format to use for your warehouse pick list.

Packing List Path

Select the format to use for your packing lists.

Email Invoice Tab

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup

Email Invoice Subject Line: Thank You For Your Purchase

Email Invoice Body: `<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
</HEAD>
<BODY>

Thanks for your purchase today.

We have attached your invoice to this email.
</BODY>
</HTML>`

Show In Browser

Email Invoice Alternate Text: Thanks for your purchase today. We have attached your invoice.

Exit

Email Invoice Subject Line

Enter the subject line to appear in the customers email.

Email Invoice Body

Enter the HTML code that will make up the email the customer will receive. You can view the email by clicking View In Browser.

See *HTML Email Basics* for additional information.

Email Invoice Alternate Text

Computer security sometimes prevents HTML emails from displaying correctly. You can enter here a simple text email that will appear if the HTML cannot be displayed.

Email Receipts Tab

The screenshot shows the 'System Setup' window with the 'Email Receipts' tab selected. The 'Email Receipt Subject Line' field contains the text 'Thanks for your purchase today.' To its right is a 'Show In Browser' button. The 'Email Receipt Body' field contains HTML code for an email body, including a logo placeholder and a 'View In Browser' button. The 'Exit' button is located at the bottom right of the window.

System Setup

Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup

Email Receipt Subject Line: Thanks for your purchase today. Show In Browser

Email Receipt Body: Show In Browser

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
</HEAD>
<BODY>
<IMG SRC=cid:/LOGOPATH/><br>
Thanks for your purchase today.<br>
We have attached your sales receipt to this email.
</BODY>
</HTML>
```

Exit

Email Receipt Subject Line

Enter the subject line to appear in the customers email.

Email Receipt Body

Enter the HTML code that will make up the email the customer will receive. You can view the email by clicking View In Browser.

See [HTML Email Basics](#) for additional information.

Email Setup Tab

The screenshot shows the 'Email Setup' tab within a 'System Setup' window. The window has a menu bar at the top with various options like Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, and Email Setup. The main area contains several input fields and dropdown menus for configuring email settings. The fields are: Email Logo Path (with a browse button), Outgoing Mail Server (c:\posedge\mail\queue), Outgoing Port (25), Use Secure Connection (TLS dropdown), Username (youremail@email.com), Password (masked with asterisks), Domain, Your Company Name (Your Company Name Here), Your Email Address (youremail@email.com), and Email Application (UniversalPOS dropdown). An 'Exit' button is located at the bottom right.

Email Logo Path	
Outgoing Mail Server	c:\posedge\mail\queue
Outgoing Port	25
Use Secure Connection	TLS
Username	youremail@email.com
Password	*****
Domain	
Your Company Name	Your Company Name Here
Your Email Address	youremail@email.com
Email Application	UniversalPOS

Email Logo Path

Select the path to your logo that will appear on all emails.

SMTPQ Queue Path

Enter the path to SMTPQ outgoing mail folder.

Outgoing Mail Server

Enter the address for your outgoing mail server. This information can be obtained from your Internet service provider.

SMTP Port

Enter the port for your mail server. Generally, most outgoing mail servers use port 25, but this can vary between Internet providers. This information can be obtained from your Internet service provider.

Use Secure Connection (SSL)

Check this box if your outgoing mail server requires a secure connection (SSL). This information can be obtained from your Internet service provider.

Username

Enter your username if your outgoing mail server requires it. This information can be obtained from your Internet service provider.

Password

Enter your password if your outgoing mail server requires it. This information can be obtained from your Internet service provider.

Domain

Enter the domain name if required by your computer network.

Your Company Name

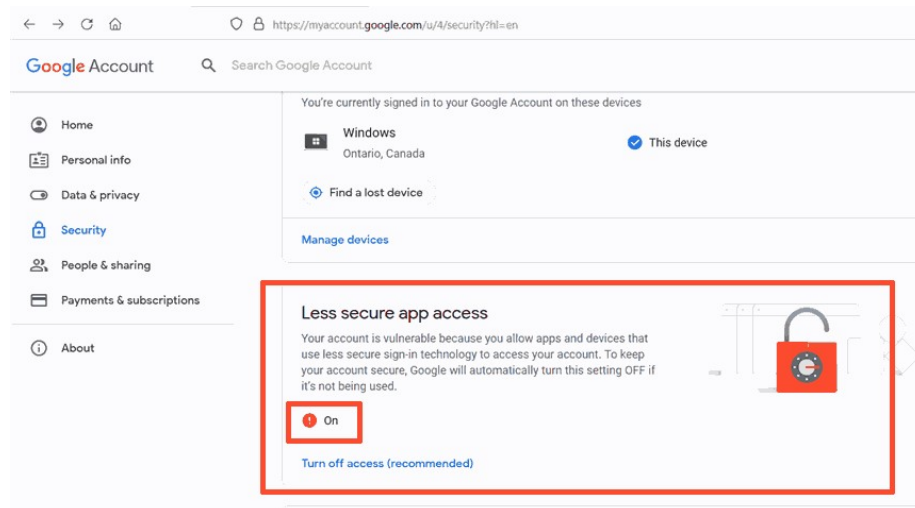
Enter your company name. This name will appear on all emails sent by the POS.

Your Email Address

Enter your email address. This name will appear on all emails sent by the POS.

Gmail Accounts (From your Gmail account dashboard, turn on **Allow Less Secure Apps**)

- Smtg.gmail.com
Port 587
TLS



Employee Tab

Shift Length Presets	Applicable Break
3.00	15
4.00	20
5.00	30
8.00	45
12.00	60

Overtime Hours Daily: 8

Overtime Hours Weekly: 44

Break Method: Manual Breaks

Interval: 1 hour

Schedule Length: 7

Include Closed Periods On: ☐

Week Start Day: [Dropdown]

Time Clock Rounding: 4

Employee Prefix: [Text Box]

Exit

Week Start Day

Select the starting day for your business week. This day will be the first date on calendars and schedules.

Time Clock Rounding

Enter a value from 0 to 14 minutes for time clock rounding. Time clock rounding occurs when employees clock in and out of the system. To disable rounding, enter 0 minutes.

For example, time clock rounding has been set at 4 minutes and an employee's shift begins at 9:00 am. If that employee clocks in between 9:00am and 9:04 am, the system will clock them in at 9:00am. If the same employee clocks in between 9:05 and 9:14am, the system will clock them in at 9:15am.

Employee Prefix

The employee prefix code is used if you scan or swipe employee I.D. cards. The prefix code represents up to the first 6 digits of the employee code. When you scan or swipe an employee I.D. card at the point of sale, the system will check the first 6 digits of the bar code to see if they equal this prefix code. If they do, then the system will assume you are scanning an employee I.D. card and will look for an exact match to the bar code in the employee file. If you are using bar-coded employee I.D. cards, then all the employee codes should begin with this prefix code.

Open & Close Times

Enter the opening and closing times for your business.

Interval

Select the interval for the schedule.

- 15 minutes
- 30 minutes
- 1 hour
- 2 hours
- 4 hours

Schedule Length

Enter the number of days to include on each schedule. Most business work with a 7 or 14 day schedule.

Include Closed Periods On Schedule

Select if you want all periods, even those when you are closed, to appear on the schedules.

Floats Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | **Floats** | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

	Name	Value
Denomination #1	Pennies	0.01
Denomination #2	Nickles	0.05
Denomination #3	Dimes	0.10
Denomination #4	Quarters	0.25
Denomination #5	Half Dollars	0.50
Denomination #6	Dollars	1.00
Denomination #7	Two Dollars	2.00
Denomination #8	Five Dollars	5.00
Denomination #9	Ten Dollars	10.00
Denomination #10	Twenty Dollars	20.00
Denomination #11	Fifty Dollars	50.00
Denomination #12	One Hundred Dollars	100.00
Denomination Other	Other	

Hide Float In/Out and Cash Declaration Buttons ☒

Exit

Hide Float Buttons

Check this box to hide the Float In, Float Out and Cash Declaration buttons on the Employee Tasks Screen.

Float Method

Check if you are going to monitor floats by station or by employee.

Denominations Name and Value

Enter for your domestic currency, the currency names and their corresponding values.

For example,

Penny → .01

Nickel → .05

Dime → .10

.....

Dollar → 1.00

Five Dollar → 5.00

Gift Card / Credit Notes Tab

System Setup

Accounting

API

Age Verification

Auto Sale Email

Company Profile

Customer

Documents

Email Invoice

Email Receipts

Email Setup

Printers

PATT

Quick Service

Receipts

Retail

Reports

Receipt Messages

Screen Saver

SMS

Winery/Brewery

Employee

Floats

Gift Card/Credit Note/Loyalty

Hospitality

Interfaces

Invoice/PO

Labels

More Features

Online/Future Orders

POS & System Screens

Sale Prompt For RA

Email

Convenience Card Name

Convenience Card

Gift Card Preset Values

5.00

10.00

20.00

50.00

100.00

Gift Card Promo % Rate

10.

0.

0.

Gift Card Promo Floor Limit

5.00

0.00

0.00

Gift Card Number Length

8

Gift Card Promo and Loyalty Applies To

Select All

De-Select All

☒ Appetizers

☒ Bar Modifiers

☒ Beer

☒ Beverages

☒ Cocktails

☒ Desserts

☒ Draft

☒ Entrees

☒ Food Modifiers

☒ Liquor

☒ Merchandise

☒ Pizza

☒ Salads

Bonus Loyalty

Method

None

Date From

03/11/2024



On Special To

03/11/2024



Points

0

Exit

Always Issue A Credit Note For A Refund

...

Gift Certificate Preset Values

...

Allow Manual Entry Of Gift Certificate Amount

...

Hospitality Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

Back Color Fore Color

Vacant Table

Your Occupied Table

Occupied Table

Seated - No Server Assigned

Occupied Table - Items On Hold

Reset Colors

Count Down Timer Interval in Seconds (0 to disable) 5

Show Hospitality Features ☒

Clear All Table Locks

Auto Gratuity ☐

% Rate 0

Guest Count 8

Suggest Gratuity Rate 0

Suggest Gratuity Rate 0

Suggest Gratuity Rate 0

Max. Manual Entered 50 %

Exit

Floor Plan Table Colors

Select the various table colors to use to indicate the table status in the Point Of Sale. These colors will visually indicate if a table is Available, Occupied, Available Soon, or Not Your Table.

The *Reset Colors* sets the colors back to their defaults.

Table Inactivity Timer

Enter the number of seconds before the Floor Plan notifies you that a table has had no activity.

Countdown Timer Delay

Countdowns are generally a hospitality feature. For example, you may only have twenty Prime Rib Dinners available for the evening so you could put Prime Rib on a countdown of twenty. The POS monitors all stations for sales of Prime Rib and will sell out the product once all of the twenty are sold. The Timer Delay is the interval that the POS waits before looking to see if any products are sold out. A small delay allows for quicker notification but is also more taxing on computer resources. The recommended value is 3 to 4 seconds. Enter the number of seconds between refreshing all items on countdowns. An entry of zero will disable all countdown checking.

Print Zero Priced Modifiers

Enable this feature if you want zero priced modifiers to print on the customer's receipt. For example, if you order a Steak Medium-Rare, do you want the Medium-Rare to appear on the customer's receipt?

Show Hospitality Features

Check this box if you require hospitality features. In hospitality mode, the system is geared towards restaurants.

Force Voiding Of Master Item

Enabling this feature prevents the direct voiding of product modifiers. When you void the master item, all its associated modifiers are automatically voided.

Auto Create Seat Positions When Customer Count Is Available

Seat Positions will be created automatically when a new table is started. If this feature is disabled, seat positions must be created manually by pressing the Seat # key in your point of sale.

Group Similar Items Together

The computer will try to group items to save screen and receipt space. For example, you press the Coffee button 3 times; the point of sale will increment the quantity counter to 3 instead of showing 3 individual coffees.

Auto Gratuity

- **Number Of People:** Enter the minimum customer count required to force a mandatory gratuity to appear on the customer's bill.
- **% Rate:** Enter the percent rate to charge for the gratuity.

Suggested Gratuity Rate 1 to 3

Enter the suggested gratuity percent rates to appear on the customers. Enter 0 to disable the feature.

Interfaces Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

Liquor Control

System
None

Drop Folder

Select all Bar Product Types

- ☐ Appetizers
- ☒ Bar Modifiers
- ☒ Beer
- ☐ Beverages
- ☒ Cocktails
- ☐ Desserts
- ☒ Draft

Select All

De-Select All

Property Management

Systems
None or Folio Printer

Property Management Printer
No Printer

Exit

Property Management Printer

The property management printer is generally used in a hotel environment. This would be a receipt printer that would be set up at the front desk in the hotel. Charges a customer makes to their room would print on this printer so they could be manually posted to the room folio. Select the printer from the dropdown list. These printers are created under System Printers. See Property Management.

Invoice/PO Tab

The screenshot shows the 'System Setup' window for UniversalPOS, specifically the 'Invoice/PO' tab. The window has a menu bar at the top with various options: Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, Email Setup, Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO (selected), Labels, More Features, Online/Future Orders, and POS & System Screens. The main area contains several settings: 'Force Payment Method Selection For Each' with an unchecked checkbox, 'Copy Suppliers Notes To Purchase Order' with an unchecked checkbox, and 'Invoice Numbering Method' set to 'By Sales Type' in a dropdown menu. Below these are two text input fields: 'Shipping Label Message' containing 'Fragile !!! DO NOT DROP' and 'Invoice Message' containing 'Thanks For Your Purchase.' An 'Exit' button is located in the bottom right corner.

Force Payment Method Selection For Each Sale

You will be required to select the payment method prior to posting an invoice or account payment.

Select Find Method Invoice Module

When using the Invoicing Module, you can look up products quickly using either the product UPC code with a barcode scanner or by entering the product PLU number.

Invoice Numbering Method

Select between standard Invoice Numbers or Invoice Numbers generated by the Sales Type.

Copy Supplier Notes To Purchase Order

If you enable this feature, the notes field in a supplier's record will automatically be added to the notes field for a new purchase order for the supplier.

Shipping label Message

Enter any information to include on the shipping label (i.e. Fragile).

Invoice Message

Enter any message to appear on the Invoice (i.e. 1.5% Charged On Past Due Accounts).

Labels Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

Individual Ticket Text SHOW CODES

^D^CAdmission Ticket
^CValid for one admission to
^C/NAME/
^CThis ticket cannot be reissued to ple
^C^DDo Not Lose

Product Identification Label SHOW CODES

Load Default Cognitive 1x2 Code
Load Default Zebra 1x2 Code
Load Default Epson 1x2 Code

Quick Label Code SHOW CODES

Load Default Receipt Label Code

Tag Printing Enabled ☐

Shelf Tags Use What Label Designer No Label

Laser / Inkjet Printer Shelftag Format ...

Laser / Inkjet Printer Label Format ...

Default Product Label No Label

# Across	# Down
1	1
1	1

Exit

Individual Ticket Text

Enter the information you wish displayed on individual admission tickets. These will usually print the terminals local receipt printers. Specialty codes are,

- /HEADER/ print the receipt header text
- /FOOTER/ print the receipt footer text
- /DATESTAMP/ print the current date and time
- /DATE/ print the current date
- /NAME/ print the products description
- /PRICE/ print the retail price
- /TRANSNO/ print the transaction number

Individual Label Code

Enter the label printer programming code to print to the Windows label printer at the point of sale. See *Product Identification Labels* for more information

More Features Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | **More Features** | Online/Future Orders | POS & System Screens

Auto Size Images On Customer Display ☒ Use Quick Save ☒
Force Employee Clock Out ☒ Allow Transaction Changes From A Previous Day ☒
Allow Cashout With Open Checks ☒ Price Level 15 Open For Classification Multi Price ☐
Force Close Check For Day End ☒ Employee Passwords Visible At Same Security ☒
Auto Load Products and Discounts In Menu ☒ Auto Fill Retail 2~15 with Retail 1 on Add New ☒
Print Time Chit On Employee Clock Out ☒ Master Item Void ☒
Do X/Z Readings By Station ☐
Print to Local Receipt on Stock Adjustments ☐

Cash Tips

View Open Checks Load Method

Cashier Method

Cash Declaration On Employee

Cash Drawer Method

Day Close Process

Exit

Use Frequent Buyer Program

See Frequent Buyer Program for additional information on this feature.

Use Shifts

Shifts are very similar to a standard X and Z reports found on most cash registers. When enabled, you will find a Close Shift button under Manager Tasks in the point of sale. When you close a shift, you will get a report of all sales since the last shift close.

Use Open & Close Store Feature

The Open & Close Store Feature is primarily used for businesses that are open past midnight on any given day. When you *Open the Store* at the start of the day, the system sets the current business date as the date of the computer. All sales that take place will be recorded as taking place on the current business date and the current business date will not be reset until you *Close the Store* at the end of the day. This way, when the computer clock goes past midnight, you are still recording the sales as taking place on the current business date. If you do not use this feature, all sales take place based on the computers date.

Ask For Weather

Check this if you want the system to prompt for the weather conditions when you close the store.

See Weather Setup for additional information.

Use Matrix Feature

Check this if you want to enable the Matrix feature.

See Matrix Setup for additional information.

Force Employee Clock Out

When enabled, the system will force all employees to be clocked out before you can Close the Store at the point of sale.

Auto Create UPC

When enabled, the system will automatically generate the next available UPC code when adding a new product record.

Use Auto Shutdown

When enabled, the Manager Tasks screen at the point of sale will display a Shutdown Station button. Clicking this button will shut down Windows and turn the computer off.

Force Close Check For Day End

When enabled, the system will require that all open checks/transactions be closed before a day end can be performed.

Hide Edit Payment Button

Check this box to hide the Edit Payment button on the POS Payment Screen.

Show Date & Time On Screen Saver

Check this box to display the date & time on the POS screen saver.

Automatically Return to Sales Screen on Change Due Close

Enable this to automatically close the Payment Screen when the Change Due window is closed.

Print Time Chit On Employee Clock Out

Enable this if you would like a time sheet to print out for each employee when they are clocked out at the end of their shift.

Disable Refund Reasons

If you disable refund reasons, then the system will not ask for a reason to void or refund a product.

Cash Drawer Method

Select the method that will determine what cash drawer to open.

1. Open cash drawer based upon the payment method used.
2. Open cash drawer based upon employee. (Only one employee can be assigned to the drawer). Cash drawer assignment takes place when employee clocks into the point of sale and can be changed under employee tasks.
3. Open cash drawer based upon employee. (Multiple employees can be assigned to the drawer.) Cash drawer assignment takes place when employee clocks into the point of sale and can be changed under employee tasks.
4. Open cash drawer based upon employee. (Only one employee can be assigned to the drawer.) Cash drawer assignment takes place manually from employee tasks. The assigned drawer will only open if the payment method also has it selected.
5. Open cash drawer based upon employee. (Multiple employees can be assigned to the drawer.) Cash drawer assignment takes place manually from employee tasks. The assigned drawer will only open if the payment method also has it selected.

See Station Setup for additional information.

Allow Price Updates From Purchase Orders and Stock Adjustments

Disable this if you only want price changes made directly from product setup.

Print to Local Receipt On Stock Adjustments

Print a receive summary on the local receipt printer when stock adjustments are made.

Do Shifts by Station

If you are using shift reports (see above), then do you want the shift to be created by store or by individual station?

Profit Method

Select the calculation method you would prefer when calculating your profit margin.

On Line/Future Order Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

On-Line Order System **None** ☐ **Enable Cuboh**
Select None for Shopify, WooCommerce and Cuboh

OLO Print Method **Print at pickup time less lead time**

Automatically Print Receipt ☐

Text Confirmation **No**

Default Item **...**

Default Modifier **...**

Default Employee **Supervisor Joe**

Default Payment Method **...**

Default Void Reason **Customer Complaint**

Default OLO Sales Type Delivery **Delivery**

Default OLO Sales Type Pickup **...**

Print Poll Time in Sec (0 to disable) **5** Required for Item Hold Timing and Future Order Timing

Station Monitoring Print Jobs **Station # 1**

Paid OLO Remain Active ☐

Default Tax Number **1**

Online Order Poll Time in **15**

ANY CHANGES ON THIS SCREEN REQUIRE RELAUNCHING THE SPECIFIC ONLINE ORDER APP.

Exit

Select and setup the various parameters for your on line ordering system.

See On-Line Ordering for additional information.

POS Screen Tab

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

Quick Tender Key Values: \$1 \$2 \$5 \$10 \$20 \$25 \$50 \$100

Goto HTTP Button URL: [Text Box] Test

Run Program Path and Command Line: [Text Box] Test

Maximum # Item Screens (1 allows category buttons): 4

Transaction Viewer Default Sort Order: Default

POS Screen Button Style: Standard Rounded (Black)

Icon Set: Original

Display Tax Total On POS Screen ☒

Display Shipping Total On POS Screen ☐

Display Gratuity Total On POS Screen ☐

Stretch Product Images On The POS Screen ☐

Display Merchandise Total On POS Screen ☒

Display Deposit Total On POS Screen ☐

Display Other Fee Total On POS Screen ☐

Group Similar Items Together On Screen ☐

Input Box Font

Font Name: MS Sans Serif

Font Size: 10

Bold ☒

Change Font

POS System Button Font

Font Name: Calibri

Font Size: 11

Bold ☒

Change Font

Sample

Exit

Input Box Font

Select the Font that will be used for data input boxes on the back office screens.

Printers Tab

The screenshot shows the 'Printers Tab' in the 'System Setup' window. The top navigation bar includes tabs like Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, Email Setup, Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery. The 'Printers' tab is active.

Under the 'Ticket / Label Printer' dropdown, 'Group Ticket' is selected. A 'SHOW CODES' button is visible.

On the left, there are input fields for printer channel names:

- Receipt Channel Name: Local Receipt
- Printer Channel 2 Name: Kitchen
- Printer Channel 3 Name: Bar
- Printer Channel 4 Name: KDS
- Printer Channel 5 Name: (empty)
- Printer Channel 6 Name: (empty)
- Printer Channel 7 Name: (empty)
- Printer Channel 8 Name: (empty)

Below these fields are checkboxes for:

- Space Items On Chits: No Space (selected)
- Print Price On Chits: ☐
- Consolidated Chits Group Similiar Items: ☐
- Consolidated Chits Show Seat Position: ☐
- Print Modifiers On Consolidated Chits: ☒
- Always Print Modifier Quantity on Prep Chits: ☐

On the right, there are two text areas for printer formatting:

Prep Printer Header

```

^C^D^R/PICKUPNUMBER/
^C^D^R/CHANNELNAME/
^C^DTBL# /TABLENUMBER/ - /TRANSNUM
^C/DATETIMESTAMP/
^C^DServer /SERVER/ #People /CUSTO
^C^D/LABEL/
^C^D-----
  
```

Prep Printer Footer (Default Mode)

```

^C^D*** END ORDER ***
^C^D-----
  
```

An 'Exit' button is located at the bottom right of the window.

The Printers Tab is used to set up Prep Printers in a restaurant environment. These printers would include kitchen and bar printers.

Printer Destinations

Printer Destinations are generally only used in a restaurant environment. A Printer Destination is a pre-determined route an item is going to take when it is to be printed to prep printer so cooks or bartenders know what to prepare. All business require receipt printers, but a restaurant will usually also need prep printers. A typical restaurant would generally have one or more receipt printers; typically one at each POS station, one kitchen printer and one bar printer.

Using this example, we would set our printer channels as follows:

Local Receipt Destination Name	Local Receipt
Printer Destination 2 Name	Kitchen
Printer Destination 3 Name	Bar
Printer Destination 4 Name	
...	
Printer Destination 8 Name	

Note: Local Receipt Destination Name is reserved always to be the stations receipt printer for guest checks and reports.

Ticket / Label Printer

- Group Ticket
- Individual Ticket
- Individual Label – Print a product label at the POS to attach to the merchandise such as a coffee cup label that displays the persons name and what type of coffee they ordered.

Print Price on Chits

Display the item price on the Prep Printer.

Space Items on Chits

Add an extra line between items on the prep printer to improve readability.

Consolidated Chits Group Similar Items

If a Prep Printers is selected as consolidated under system Printers, do you want similar items to group together on that printer, See System Printer Setup for additional information.

Consolidated Chits Print Seat Numbers

Print the seat number on consolidated Prep Printer Chits.

Print Modifiers on Consolidated Chits

Print modifiers on consolidated chits.

Always Print Modifier Quantity on Prep Chits

Always print the modifier quantity on the kitchen and bar chits if the quantity is not one.

Print Price on Ticket Printer

Check this feature if you want the retail price to print on any admission tickets issued.

Print Individual Tickets On Ticket Printer

Check this feature if you want one chit to print for each ticket required. If unchecked, one chit will print with all required tickets listed.

Prep Printers Header & Footer Format

The codes and words entered here determine what prints on the header of chits that print to kitchen and bar prep printers. This gives you some flexibility in formatting your chits.

Specialized Field Codes for Prep Printer Header

/PICKUPNUMBER/	Pickup Number
/PICKUPTIME/	Pickup Time
/NUMBERORDERS/	Number of Items on the Order
/ORDERNUMBER/	Order Number for Individual Chits
/CHANNELNAME/	Printer Channel Name
/COMMENT/	Any Note or Comment Associated with the Sale
/TABLENUMBER/	Table Number
/DATETIMESTAMP/	Date & Time Order Was Placed
/TIME/	Time Order Was Placed
/CUSTOMERCOUNT/	Guest Count
/TRANSNUM/	Transaction Number
/TRANSNUM2/	Last 2 Digits of the Transaction Number
/TRANSNUM3/	Last 3 Digits of the Transaction Number
/TRANSNUM4/	Last 4 Digits of the Transaction Number
/SERVER/	Server Name
/PAGER/	Server's Pager Number
/LABEL/	Check Label
/SALESTYPE/	Sales Type i.e. Takeout, Delivery
/SECTION/	Floor Plan Section i.e. Patio, Dining Room
/CUSTOMERINFO/	Customer Information for Secondary Documents
/PAIDSTATUS/	Displays if an order is Paid in Full or Not Paid (Currently Only Supported if it's an On-Line Order)

You can also use the following formatting codes.

^C	will center the text on the line
^D	will print the text on the line double width
^R	will print the text in red
^B	will print the text in bold characters
^H	will print the text in extra-large font

Kitchen Chit Example

Header Code

^C^D/PICKUPNUMBER/
^C^D/CHANNELNAME/
^C^DTBL# /TABLENUMBER/
^C/DATETIMESTAMP/
^C^D#People /CUSTOMERCOUNT/ SRV /SERVER/

Footer Code

^C^D**** END ORDER ****

75
Kitchen Hot
TBL# 5
March 1, 2016 5:30 pm
#People 4 SRV Mary

DETAILS PRINT HERE

***** END ORDER *****

PATT Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery |

Pay At The Table Processor

Table Locking in seconds

IP Address

Port

SSL / TLS ☒

Certificate Location ...

Certificate Password

Exit

See Credit and Debit Integration / Pay at the Table for additional information.

Quick Service Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

Force a Receipt for Delivery and Takeout ☒

Default Sales Type for Deliveries:

Default Sales Type for Drive Thru:

Default Sales Type for Pick Up:

Default Sales Type for Quick Order:

☒ Use Google Maps API

My Location:

API Key:

Default Delivery Fee:

Delivery Zones

Exit

Print Sale Total On All Kitchen Chits

This feature is mostly used in a restaurant pickup and delivery environment. When enabled, the total amount due on the order is printed on the kitchen printer. This kitchen chit could then be used for the delivery or pickup receipt for the customer.

Print Secondary Customer Information On Kitchen Chit

This feature is mostly used in a restaurant pickup and delivery environment. When enabled, the Customer Information for Secondary Documents will print on the kitchen chit. This can be given to the delivery driver or be used to identify the customer order on pickup orders. See *Receipt Message 2 for additional information*.

Force Receipt for Delivery

Check this if you want to force receipt printing when the Delivery button is pressed.

Default Sales Type for Deliveries

Select from the dropdown list the sales type to use for deliveries.

Google Maps API

The POS can utilize the Google Maps Distance Matrix API to calculate the distance from your establishment's location to your customer's location based on Address and Postal / Zip

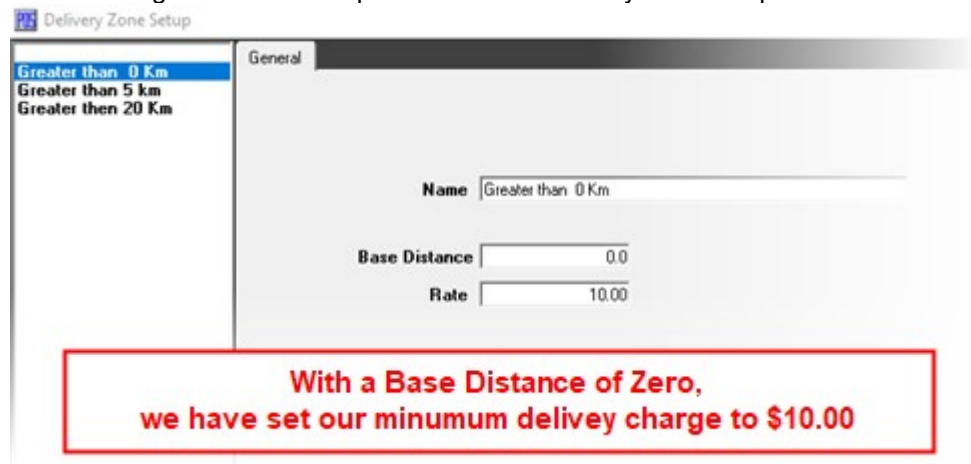
Codes. To use this feature,

1. Create a Google Account.
2. Go to <https://cloud.google.com/maps-platform>
3. Add and Enable the Distance Matrix API
4. Setup your billing information.
5. Under System Setup → Company Profile, set the units of measure for your country. This sets whether the API returns Miles or Kilometers.
6. **My Location:** Enter your businesses location in the format Address City Postal/Zip for example, 123 Main Street Toronto M4E 2V9
Do not include commas or any punctuation.
7. **API Key:** Enter your API Key obtained from your Google account.
8. Check **Use Google API**.
9. Click the Test Button
10. Under City Maintenance, create the required Cities that are within your delivery boundaries.

Delivery Zones with Google Maps API

Delivery zones with the Google Maps API allow the POS to calculate the distance to the delivery address based on postal codes. You program various delivery zones based on a radius extending outwork from your establishment's location.

The following screen shots represent a basic delivery zone setup.



The screenshot shows the 'Delivery Zone Setup' window. On the left, there is a list of zones: 'Greater than 0 Km' (selected), 'Greater than 5 km', and 'Greater than 20 Km'. The main area is titled 'General' and contains three input fields: 'Name' with the value 'Greater than 0 Km', 'Base Distance' with the value '0.0', and 'Rate' with the value '10.00'. A red-bordered box at the bottom of the window contains the text: 'With a Base Distance of Zero, we have set our mininum delivey charge to \$10.00'.

Delivery Zone Setup

General

Greater than 0 Km
Greater than 5 km
Greater than 20 Km

Name Greater than 5 km

Base Distance 5.0

Rate 15.00

After 5km, we will charge a delivery fee of \$15.00

Delivery Zone Setup

General

Greater than 0 Km
Greater than 5 km
Greater than 20 Km

Name Greater than 20 Km

Base Distance 20.0

Rate 20.00

After 20 km, the delivery charge becomes \$20.00

Receipts Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

Contact Your Installing Dealer To Modify This Text

Receipt Line	Text	Format Codes
Receipt Line	UniversalPOS cafe	^C^D
Receipt Line	Address Line 1	^C^D
Receipt Line	Address Line 2	^C
Receipt Line	Phone Number Here	^C

Print Check Labels On Receipt ☐

Print Amount Saved On Receipt ☒

Print Sales Type On Receipts ☐

Group Similar Items On Sales Receipt ☐

Print Receipt For Zero Dollar Sale ☐

Print Zero Priced Modifiers ☐

Receipt Header

SHOW CODES

Receipt Footer

^C^DEnjoy Your Stay
^C^DThank You

DETAIL CODES

Detail Format

/MAINDETAIL/
/DESCRIPTION2/

Exit

When entering the receipt header and receipt footer, it is a good practice to remember that standard receipt printers will print approximately 40 characters on each line for normal print and 20 characters per line for double size print.

You can enter the following codes to format your text.

- ^C will center the text on the line
- ^D will print the text on the line double width
- ^A will print the receipt # as a barcode
- ^R will print the text in Red
- ^L will print the printer's stored graphic logo
- ^B will print the text in bold characters
- ^H will print the text in extra-large characters

(Not all printers support all codes)

For example, ^C^DHave A Nice Day !:
Will print the line centered and double sized

Formatting Receipt Header and Footer Text

You can format receipt text by using control codes.

The following codes are available.

^C	Center the text on the line
^B	Print the line in bold faced text
^D	Print the line in double width text
^R	Print the line in red text
^H	Print the line in extra-large text
^A	Print the receipt number as a barcode on the receipt
^L	Print the logo on the receipt
^QRwww.YourURL.com will print a QR code linking to the URL indicated	
/NUMBERORDERS/	Print the number of orders on the check
/PICKUPNUMBER/	Print the pickup number
/NUMBERITEMSOLD/	Print the number of items on the check
/TRANSNUM/	Print the transaction number
/TRANSNUM2/	Print the last 2 digits of the transaction number
/TRANSNUM3/	Print the last 3 digits of the transaction number
/TRANSNUM4/	Print the last 4 digits of the transaction number

Sample receipt header and associated formatting text

^C^DABC Restaurant
^C123 Main Street
^CAnyCity, Any Town
^C(905)5551212

^C^DPICKUP # /PICKUPNUMBER/



Receipt Header

Enter the text that you want to have printed at the top of the customer's receipt.
Click Show Codes to see available codes.

Receipt Footer

Enter the text that you want to have printed at the bottom of the customer's receipt.
Click Show Codes to see available codes.

Detail Format

Enter the codes to select the line item detail information to print on the customer's receipt.
/MAINDetail/ or /MAINDetailSimple/ is required. All other codes are optional.

- /MAINDetail/

Qty	Description	Price
2 @ 3.25		
	Potato Chips	\$ 6.50
1	Candy Bar	\$ 2.99

- /MAINDetailSimple/

Qty	Description	Price
2	Potato Chips	\$ 6.50
1	Candy Bar	\$ 2.99

- /DESCRIPTION2/
prints any part of the product description after the first 25 characters.
- /UPC/ /ALTUPC1/ /ALTUPC2/ /USERFIELD/ /PACKSIZE/
prints the applicable field.

Print Sales Type on Receipt

Print or hide the sales type on the customers receipt.

Print Amount Saved on Receipt

Print the amount saved on the customer's sales receipt.

Print Receipt for Zero Dollar Sale

Do you want the POS to automatically print receipts for zero dollar transactions if receipt printing is enabled

Print Zero Priced Modifiers on Receipt

Do you want zero priced modifiers to print on the sales receipt.

Print Check Labels on Receipt

Print the sales label on the customers receipt.

.

Retail Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens
Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup
Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

Use SmartScan ☐

Weighted Product UPC Format 0299#####

RX Product UPC Format 0200#####

Lottery Purchase UPC Format 22#####C

Lottery Win UPC Format 980#####C

Quick Receive Method By Each

Warn If Values Entered Exceed 9999

Negative Check File Prefix

Sales Tracker Method Disable Sales Tracker

Sales Tracker Prefix 9999

Scale Tare Setup

Profit Method
☒ Markup
☐ Margin
All reports display Margin

Exit

Weighted and Price Embedded Product UPC Format

The weight product UPC format is commonly used in business where barcodes are assigned by a weight scale such as in a deli counter. The scale at the deli counter will assign a barcode to a product. This barcode will contain sections to identify the product as well as stating the retail price for the particular weight of the product. The formats you set up here identify the various barcode sections.

Weight Embedded Barcode



Weight/price
embedded
barcode

SKU

Weight = 00500 / 1000 = 0.5kg

Price Embedded Barcode



Weight/price
embedded
barcode

SKU

Price = 00200 / 100 = \$2.00

For example, the format `20####*$$$$`

`20####` indicates the UPC starts with 20 and ends in position 6

`*` is an ignored character

`$$$$` indicates the price is located in position 9 to 12

Lottery Ticket Scanning UPC Format (Ontario Lottery Corporation)

Lottery ticket scanning allows for the scanning of lottery sales and lottery pay outs. Lottery ticket scanning must be turned on by the Ontario Lottery Commission for this function to work.

Lottery Purchase UPC	should be 22####\$\$\$\$\$\$C
Lottery Win UPC	should be 980####\$\$\$\$\$\$C

Create Two Products as shown below.

- Name Lottery Sale
 - UPC 228055
 - Classification Price Embedded In Barcode
 - Product Type Lottery
-
- Name Lottery Pay Outs
 - UPC 9808056
 - Classification Price Embedded In Barcode
 - Product Type Lottery Win

With this configured, you can scan the lottery ticket for sales and pay outs.

Shelf Tag Type

Select from the dropdown list, the appropriate shelf label format to print when the *Shelf Tag* button is pressed in product setup.

Tag Printing Enabled

If you print product labels or barcode tags, you can disable tag printing temporarily in the event of a mechanical problem with a printer.

Quick Receive Method

- **By Each**
When you receive stock, your inventory is adjusted by the amount of product you enter.
- **By Cost Quantity**
When you receive stock, your inventory is adjusted by the amount of product you enter multiplied by the 'Cost Quantity' figure.

Tag.DBF Shelf Tag Format

If you are going to produce your own shelf tags on your laser or ink jet printer, then you select the type of tag that will be produced. All label formats use standard media stock.

Tag.DBF Product Tag Format

If you are going to produce your own product labels on your laser or ink jet printer, then you select the type of tag that will be produced. All label formats use standard media stock.

Use Smart Scan

Smart Scan will quickly add a new product to your system if it is not found at the point of sale. Smart Scan will prompt you for a Description, Product Type, and Retail Price and then create the product for a quick sale. By default, an item created using Smart Scan is automatically added to the sales transaction. This feature can be disabled under Policy Setup → SmartScanSellsItem.

Warn If Values Entered Exceed

Enter a maximum number size for receiving stock or tendering cash etc. This is a safety feature to prevent abnormally large quantities or numbers being entered. For example, if you set the limit to 9999 units and then tried to receive 10000 units, the system would prompt you with an 'Are You Sure?'.

Negative Check File Prefix

Enter the first digits that will identify a product as a negative check file. i.e. 56##. See Negative Check Files for more information.

Sales Tracker Method

Select from the dropdown list, the method you wish to use for the sales tracker. This feature is used mostly in the tourism industry where tour bus drivers and companies are paid a commission based on the total amount the passengers on their bus spent in your establishment. The sales tracker will record the purchases made and calculate the commission the driver is due.

Sales Tracker Prefix

If you have enabled the Sales Tracker, enter the prefix code for the bar codes on your sales tracker cards.

Reports Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens
Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup
Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

Day End / Shift Reports

- Cash In Drawer Report ☐
- Tax Summary Report ☐
- Department Summary ☐
- Product Type Summary ☐
- Product Sold Summary ☐
- Full Report With Departments ☒
- Full Report With Product Types ☐
- Full Report With Products ☐
- Include Hourly On Full Reports ☐
- Refund/Void Details ☐
- Paid In/Out Details ☐
- Always Print Transaction Details ☐

Employee Cash Out Reports

- Cash In Drawer Report ☐
- Department Summary ☐
- Product Type Summary ☐
- Product Sold Summary ☐
- Full Report With Departments ☒
- Full Report With Product Types ☐
- Full Report With Products ☐
- Refund/Void Details ☐
- # Copies

Include These Stations On Day End Report

- ☒ All Stations
- ☐ Station # 1
- ☐ Station # 2
- ☐ Station # 3
- ☐ Station # 4
- ☐ Station # 5
- ☐ Station # 6
- ☐ Station # 7

Include Open Transactions In Daily Sales ☐

Hide Sales Rep Summary On Reports ☐

Hide Sales Types On Reports ☒

VAT Tax Removed From Items ☐

Cashier Summary On Reports
Standard

Exit

POS Reports

Select the reports that you want to print when employees cash out and also when you close the store.

Include These Stations On Day End Report

When you close the store at the end of the day, select what POS station sales figures should appear on the report.

Receipt Messages

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

Training

^C^DTRAINING MODE
^C^DNOT A VALID RECEIPT

Duplicate Receipt

^C^DDUPLICATE
^C^DRECEIPT

Paid Out Receipt

X

Refunded Transaction

* Enter Refund Information *
* Employee: *
* Reason : *

Voided Transaction

* Enter Refund Information *
* Employee: *
* Reason : *

Gift Receipt Footer Message

^C^DGift Receipt
^A

Exit

Training Mode

Enter the text to appear on the sales receipt if training mode is enabled.

Duplicate Receipt

Enter the text to appear on the sales receipt to indicate the receipt is not the original.

Paid Out

Enter the text to appear on Paid Out receipts.

Refunded Transaction

Enter the text to appear on the sales receipt for a refund sale.

Voided Transaction

Enter the text to appear on the sales receipt for a void sale.

Gift Receipt Footer Message

Enter the text to appear on the sales receipt footer when a Gift Receipt is issued.

Screen Saver Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

ScreenSaver Logo

Support Information

Dealer
Support
Information
Here

Show Date & Time On Screen ☒

Screen Saver Font Color

Exit

Screen Saver Logo

You can replace our corporate logo at the point of sale with your own logo. Enter the path and file name for your logo. If the file is not found, the system will default to our logo.

Support Information

Support information appears in the top right corner of the POS screen saver screen and usually contains the contact information for POS Support.

Show Date & Time on Screen Saver

Enable if you want the current date and time to appear on the POS Screen Saver at random times.

Screen Saver Font Color

Select the color for the font displayed on the screen saver.

SMS / MMS Tab (Texting) Tab

System Setup

Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens | Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery

SMS Provider: None

URL:

From Telephone Number:

Access Token:

Account SID:

Exit

The POS offers texting capabilities to allow the system to easily communicate information to customers. This is a fee based option.

Provider

Select the texting provider.

- Twilio www.twilio.com
- TextBelt www.textbelt.com

URL

Enter the appropriate URL for the provider.

- Twilio: api.twilio.com
- TextBelt textbelt.com

From Telephone Number

All text messaging comes from a phone number. This number can be randomly assigned, you can pick a number from the provider or you can sometimes use your own number. Enter the phone number without any spaces, brackets or hyphen, that will be displayed as who sent the text message.

- Twilio Required. You can purchase a local number for your country.
- TextBelt Not Required. They assign the number.

Token

Enter the access token that has been assigned by the provider.

Account SID

Enter the Account SID assigned by the provider.

- Twilio Required
- TextBelt Not Required.

Note:

- Under POSSetup → Text Messages, you can create preset messages for texting.
- You can add a text messaging button to the payment screen in the POS Screen Designer.
- Text Messaging can also be accessed in the POS in the Transaction Viewer under the Show More Button as well as on the View Open Checks Screen.

Winery/Brewery Tab

The screenshot shows a software window titled "System Setup" with a menu bar at the top. The menu items are: Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, Email Setup, Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, and an unlabeled item. The "Winery/Brewery" tab is selected. The main area contains the following fields:

- Winery/Brewery Location:** A dropdown menu with "Ontario" selected.
- Do Not Allow Manual Adjustments Of Key Price:** A checkbox that is checked.
- Percentage Cost Of Retail For Wines:** A text input field containing "58.00".
- Default Sale Type For Wine Club Shipments:** A dropdown menu.
- Email Reports (seperate addresses by a comma):** A text input field.
- Store Number:** A text input field.
- Warehouse Number:** A text input field.

An "Exit" button is located in the bottom right corner of the window.

Use Winery Feature

The POS has incorporated many features that are required by wineries in Ontario and other Provinces.

Winery Location

Select from the dropdown, where your winery is located.

Do Not Allow Manual Adjustments Of Key Price Fields

If Enabled, the POS will lock all fields relating to winery pricing, bottle size, and basic selling price. All modifications would be performed by the Winery Pricer.

See Wineries for additional information.

Taxes & Deposits Setup

You can allocate up to 7 different tax rates and 2 deposits within the system. You assign these taxes and deposits to your products under Product Type setup.

Tax System

Select from the dropdown list the tax system to use.

- 1) Standard Tax
- 2) Ontario Tax

Ontario tax is required if you are selling prepared food in the province of Ontario. Certain food items such as pop change their tax status depending on whether it is sold with prepared food or by itself. For example,

To setup Ontario Tax correctly, follow the guidelines below.

Tax Number	Name	Rate	Limit	VAT	Accounting Code	Quantity Limit For Tax Exempt	Group #
1	H.S.T. 5%	5.0000	0.01				1
2	HST 8% pop	8.0000	0.21				2
3	HST 8% Food	8.0000	4.00	☐			3
4	HST 13%	13.0000	0.00	☐			4
5		0.0000	0.00	☐			5
6		0.0000	0.00			0	6
7		0.0000	0.00			0	7

Deposit: Deposit

Other Fee 1:

Other Fee 2:

Combine VAT 4 and 5: ☐

Print VAT on Receipt: ☒

Print Exempt on Receipt: ☒

Tax To Charge On Shipping: H.S.T.

Tax To Charge On Purchases: H.S.T.

Tax On Auto & Manual % Gratuity:

Tax Type: Ontario Pop Tax

General Tax Name: Tax

Tax On Tax: None

Group 1 Name: H.S.T.

Group 2 Name:

Group 3 Name:

Group 4 Name:

Group 5 Name:

Group 6 Name:

Group 7 Name:

Exit

Note: Tax rates may have fluctuated since this manual was printed so check your local government offices.

Using the above example,

- Merchandise and snack foods should be assigned to Tax 4
- Beverages that will swap their taxability if sold with prepared foods should be assigned to Tax 1 and Tax 2
- Prepared foods should be assigned to Tax 1 and Tax 3
- Alcohol should be assigned to Tax 4

Tax Name

Enter the name of the tax.

Tax Rate

Enter the percent rate for this tax. For example, 7.5% would be entered as 7.5.

Tax Limit

Enter lower taxable limit for this tax. For example, in Ontario prepared food is charged 8% tax for any prepared foods that cost more than \$4.00. Once this \$4.00 limit is reached, the entire meal becomes taxable. If the entire meal is under \$4.00, no tax is charged.

Tax VAT

A VAT (Value Added Tax) means the tax amount is actually included in the price of the product. Enable this if you are including your taxes in the price.

Only Taxes 4 or 5 can be set as VAT.

Tax Accounting Code

Enter the GL account code for the tax. This code is used with the systems accounting interfaces as well as appearing on export sales reports.

Charge Tax 1 and 2 on Tax 7

Check this box if you need to make Tax 7 Taxable.

Print Tax on Receipts and Invoices

If the tax is VAT, you can have the tax print on the sales receipt or remain hidden.

Quantity Limit for Tax Exempt

Enter the quantity of items that must be purchased within this tax bracket to become tax-exempt. Enter 0 (zero) to disable this feature.

Tax Group Number 1 to 7

Enter a number between 1 and 7 to group taxes together on reports and sales receipts. For example, you may need to use 2 taxes for your federal tax, but if you assign them to the same group, they will print as a single total on the customers receipt.

Deposit Name

Enter the name for the deposit (i.e. Bottle Deposit).

Deposit Accounting Code

Enter the GL account code for the deposit. This code is used with the systems accounting interfaces and also appears on export sales reports.

Tax To Charge On Purchases

Select from the dropdown list the tax to charge on purchases. For example, in Ontario, if GST is charged when you sell the product, then it is also charged when you purchase the product.

Tax On Shipping

Select up to 2 taxes to be charged on shipping.

Winery Deposit and Tax Structure

Select the appropriate tax structure and bottle deposit for each pricing level.

	Apply Deposit	G.S.T.	P.S.T.	PST Bar	PST Wine	GST Wine
Price A (Retail)	☒	☐	☐	☐	☒	☒
Price B (Licensee)	☒	☒	☐	☐	☐	☐
Price C (Duty Free)	☐	☒	☐	☐	☐	☐
Price D (LCBO)	☐	☒	☐	☐	☐	☐
Price E (Export)	☐	☒	☐	☐	☐	☐
Price F	☐	☒	☐	☒	☐	☐

Select The Appropriate
Tax Structure &
Bottle Deposit
For Each
Price Level

Welcome Email

The POS can send a welcome email when new customers are created in the POS and in the Back Office. Enable this feature under Policy Setup > System > SendWelcomeEmail.

The welcome email template is welcome.html.

The file can be located in \data\HTML\welcome.html

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
</HEAD>
<BODY>
```

Create your own HTML welcome page.


```
<!--
Insert the line shown below if you want your logo inserted. This would be the<br>
logo store in Administration > System Setup > Email Setup > Logo
<IMG SRC=cid:/LOGOPATH/>
Inset /NAME/ where every you want the customers first a last name inserted
--!>
```

```
<IMG SRC=cid:/LOGOPATH/><br>
```

```
Welcome /NAME/ <br><br>
```

```
This is our general Welcome Email Template for welcoming customers after they <br>
join your program.<br><br>
```

```
Thanks for your joining our program.<br>
Please visit us at www.universalpos.net.<br>
</BODY>
</HTML>
```

This file will produce an email similar to

Create your own HTML welcome page.



Welcome John Brown

This is our general Welcome Email Template for welcoming customers after they join your program.

Thanks for your joining our program.

Please visit us at www.universalpos.net.

You can insert the following codes into the HTML

/NAME/	Customers First & Last Name
/COMPANYNAME/	Your Company Name
/HEADER1/	Receipt Header Line 1
/HEADER2/	Receipt Header Line 2
/HEADER3/	Receipt Header Line 3
/HEADER4/	Receipt Header Line 4
/EMAIL/	Your Company Email Address

HTML Email Basics

HTML Email Basics will give you a small introduction into creating a basic HTML email.

HTML Basic Format

<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN>	
<HTML>	Start HTML Document
<HEAD>	Start Heading Section
</HEAD>	End Heading Section
<BODY>	Start Body Section
<i>Enter your information here. Use
 to do a carriage return</i>	Freeform Area
</BODY>	End Body Section
</HTML>	End HTML Document

HTML SAMPLE 1

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN>
<HTML>
<HEAD>
</HEAD>
<BODY>
<IMG SRC=cid:/LOGOPATH/>
<br>Thanks for your purchase today.
<br>We have attached some helpful hints to this email.
</BODY>
</HTML>
```

The line `<IMG SRC=cid:/LOGOPATH/>` inserts the logo you selected in System Setup → SMTP Setup → Email Logo Path into the email.



HTML SAMPLE 2

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
</HEAD>
<BODY>
<IMG SRC=cid:/LOGOPATH/>
<br><br>
Thanks for your purchase today.<br>
<IMG SRC=cid:/IMAGESTART/:c:\touchhospitality\images\burger.jpg/IMAGEEND/>
We have attached your invoice
<IMG SRC=cid:/IMAGESTART/:c:\touchhospitality\images\ballcap.jpg/IMAGEEND/>
to this email.
</BODY>
</HTML>
```

The line `<IMG SRC=cid:/IMAGESTART/:c:\posedge\images\burger.jpg/IMAGEEND/>` inserts an image called burger.jpg into the email.



Station Setup

Station Setup allows you to customize options for each point of sale station. You must complete station setup for each point of sale station. Any functions that you enable only apply to that specific station.

Station Setup

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

General | Keyboard | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Station Name: Station # 1

POS Login Screen: Transparent Keypad Right

Station Type: 1 - Retail or Quick Service

POS Screen Name: Default

POS Screen Name 1:

POS Screen Name 2:

Warehouse For Sales: Main Store

Default Sale Type: Dine In

Sales Type Method: Standard

Revenue Centers: Revenue Center 1

Change Window Timer: 10

Auto Log Off Timer: 0

In Sale Log Off Timer: 0

Price Structure: Customer & Schedule Pricing

Sale Prompt:

Station Has Keyboard: ☐

Screen Resolution: 1024x768

Prompt For Pickup Number: No (Auto Generate - Reset Daily)

Demographics: No

Survey Required: ☐

Perform Compressed Backup On Startup: ☒

Is Backup Server: No

Menu Schedule

Sync All Stations from this Station

Station #1

Exit

General Tab

Station Name

Enter a descriptive name for the POS station. We recommend the name contain a descriptive part followed by the actual station number (i.e. Bar #1 or Wait Station #2).

POS Login Screen

Select the screen saver to use for the point of sale.

- Display the Universal Logo or the logo specified under System Setup as Screen Saver Logo. The logo will move slowly around the screen.
- Display random advertising images at the point of sale.
See Advertising for additional information.
- Display a Fixed Transparent Keypad on the POS Login Screen.

Station Type

The POS has been developed to run in a variety of environments.

- Retail
- Hospitality
- Bar
- Pizza Delivery
- Self Serve Kiosk
- Quick Service Guided

Choose the one that best suits your business.

POS Screen Name

Choose from the dropdown list the point of sale screen to use for this station. Each station can have its own screen designed to suit its specific tasks. The hostess station screen might be completely different from the bar station.

See POS Screen Names for additional information.

Default Warehouse

Select from the dropdown list the default sales type for this station.

Default Sale Type

Select from the dropdown list the default sales type for this station.

Sales Type Method

Check this if you want the Sales Type to remain locked in the default position regardless of the customer's sales type status.

Revenue Centre

Select from the dropdown list the default sales type for this station.

Change Window Timer

Enter the number of seconds the Change Due window remains on the screen.

Valid values are:

- 0 = Change due window must be closed by touching or clicking the window.
- 1 to 65 = Change due window will close automatically after that many seconds.
- Less than 1 = Change due window will flicker for a millisecond and then close.

Auto Log Off Timer

Enter the number of seconds before the current employee is logged off due to inactivity.

In Sale Log Off Timer

Enter the number of seconds before the current employee is logged off due to inactivity.

Pricing Structure

The POS has several pricing structures. You can force a particular station to use a particular structure.

- Sales Type Price Level
- Quantity Break Pricing
- Customer Price Level
- Force A Price
- Force B Price
- Force C Price
- Force D Price
- Force E Price
- Force F Price

Sale Prompt

Select from the dropdown list any prompt you want for each sale (i.e. Postal Code).

See Prompt Setup for additional information.

Station Has Keyboard

The computer will automatically display an on-screen keyboard if keyboard entry is required and the station does not have one attached.

Screen Resolution

The computer will automatically display an on-screen keyboard if keyboard entry is required

Prompt for Pickup Number

- 1) No (Auto Generate – Reset Daily)
Pickup numbers are automatically assigned sequentially to each transaction and reset to 0 at day close.
- 2) Yes (Optional)
A window appears to manually assign pickup numbers to transactions but it is not mandatory to enter any value.
- 3) Yes (Required)
A window appears to manually assign pickup numbers to transactions and it is mandatory to enter a value.

Demographics

The computer will automatically display an on-screen keyboard if keyboard entry is required

Keyboard Tab

Create shortcut keys to various POS functions. Shortcuts can be applied to the following keys:

- F1 ~ F12
- Alt F1 ~ Alt F12
- Ctrl F1 ~ Ctrl F12
- Shift F1 ~ Shift F12

Station Setup

General Keyboard Devices Printers / Drawers Advanced Interfaces Credit / Loyalty Floor Plan POS Screens

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

Use POS: Shift Alt Ctrl with A~Z F1~F12

Payment Method	KeyCode
Cash	F1

KeyCode

Item List
Customer List
@/for
Clear
Paid Out
Discount List
Refund List
Sales Tracker List
Tax Exempt
Subtotal
Inquire Mode
Employee Settings
Price Override
Refund Item
Receipt
Payment On
Repeat
Park Sale
Sale Refund

Station #1

Exit

Devices Tab

Station Setup

Station #1 | Station #2 | Station #3 | Station #4 | Station #5 | Station #6 | Station #7 | Station #8 | Station #9 | Station #10 | Station #11 | Station #12 | Station #13 | Station #14 | Station #15 | Station #16 | Station #17 | Station #18 | Station #19 | Station #20 | Station #21 | Station #22 | Station #23 | Station #24 | Station #25 | Station #26 Office | Station #27 Office | Station #28 Office | Station #29 Office | Station #30 Office

General | Keyboard | **Devices** | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Customer Display

Display Port: 2nd Monitor Display
Time Delay: 5
Pole Display: DSP 800
Pole Message 1: Thank You | Have A Nice Day!
Pole Message 2: Enjoy | Your Day
Pole Message 3: Thanks For Shopping | With Us

Scale

Scale Type: None
Scale String: 9600,e,7,1

Barcode Scanner

Scanner Type: None / USB
Scanner String: #:9600,n,8,1

Station #1 | Exit

Display Port

Select from the dropdown list, the serial port that any 2 line pole display is connected to or select 2nd Monitor Display if you are using a rear LCD Customer Display.

Pole Message

Enter up to 6 lines of text to display on the pole display when a sale is not active.

Time Delay

Enter the number of seconds the *Pole Message* remains before displaying the next message.

Pole Initialization String

Enter any initialization string the pole display requires.

DVR

The POS can output receipt details or item information to a connected DVR system. The output can be a thru a serial connection or an IP connection.

- Serial Connection: Enter the parameters as Port:Parity,Baudrate,DataBits,StopBits
eg 1:9600,n,8,1
- IP Connection: Enter the parameters as IP:Port
eg 192.168.1.25:9997

Scale Type

Select the appropriate weight scale from the dropdown list.

Scale String

Enter the scale port string in the following format.

Port:9600,e,7,1 where Port is the serial port number

or

DEMOMODE

Barcode Scanner

Select the appropriate barcode scanner from the dropdown list.

Printers & Cash Drawer Tab

Station Setup

General | Keyboard | Devices | **Printers / Drawers** | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

		Kitchen Display Channel
Local Receipt	Receipt	1
Kitchen	Kitchen	2
Bar	Receipt	3
KDS	No Printer	4
	No Printer	5
	No Printer	6
	No Printer	7
	No Printer	8
Ticket Printer	No Printer	

Prompt Receipt Options: Prompt for Standard Receipt or By Seat/Group

Number Auto Receipt Copies (0 for Only When Requested): 0

Cash Drawer Enabled: ☒

Cash Drawer 1: Port 1 On Local Receipt

Cash Drawer 2: Port 2 On Local Receipt

Cash Drawer 3: None

Station #1

Exit

Select from the dropdown list, the printers this station should print to for each printer destination.

Receipt Printer Options

1. **Auto Receipt Standard** – The standard default receipt format is printer automatically based on the *Number Auto Receipt Copies Field*.
2. **Prompt for Receipt or Invoice** – The POS will prompt to print a standard default receipt or an 8 ½ x 11 invoice.
3. **Prompt for Receipt or Screen** – The POS will prompt to print a standard default receipt or print the receipt to screen. The screen option allows the receipt to be emailed.
4. **Prompt for Standard Receipt or Receipt by Seat** – The POS will prompt to print a standard default receipt or a receipt by seat position.
5. **Auto Receipt by Seat** – The receipt by seat position receipt is printed automatically based on the *Number Auto Receipt Copies Field*.

Number Auto Receipt Copies

Enter the number of receipt to automatically print. Entering a value of 0 (zero), the POS will only print receipts when requested by the operator by pressing a receipt button. This field works in conjunction with the Receipt Printer Options field.

Cash Drawer Enabled

Check if a cash drawer will operate on the POS station.

Cash Drawer 1, 2, 3

Select the type of cash drawer this station uses.

- Cash Drawer is fired from the receipt printer on Port 1
- Cash Drawer is fired from the receipt printer on Port 2
- Cash Drawer is USB or Serial on Comm. 1 to 9

Advanced Tab

Float In Required

Check this if you want a mandatory float entry on this station. If enabled, you will be required to enter a float for any *Payment Method* that has *Float In Required* checked.

See *Floats* for additional information.

Cash Out Required

Check this if you want mandatory cash out on this station.

Drive thru Table Number

Drive thru orders are automatically saved to the table number specified here when *Save Check* is pressed. Only stations that have the same number programmed here can retrieve orders using the *Recall Order* function.

The screenshot shows the 'Station Setup' window with the 'Advanced' tab selected. On the left, a list of stations from #1 to #30 is shown, with 'Station #1' highlighted. The main area contains the following settings for Station #1:

Float In Required	☐
CashOut Required	Not Required
Drive Thru Table Number	30001
Sales Reps	Not Required
After Sale Process	Return To Sales Screen

At the bottom of the window, there is a navigation bar with buttons for back, forward, and other functions, and a large 'Station #1' label. An 'Exit' button is located in the bottom right corner.

Credit / Loyalty Tab

Station Setup

General Keyboard Devices Printers / Drawers Advanced Interfaces Credit / Loyalty Floor Plan POS Screens

Station # 1
Station # 2
Station # 3
Station # 4
Station # 5
Station # 6
Station # 7
Station # 8
Station # 9
Station # 10
Station # 11
Station # 12
Station # 13
Station # 14
Station # 15
Station # 16
Station # 17
Station # 18
Station # 19
Station # 20
Station # 21
Station # 22
Station # 23
Station # 24
Station # 25
Station # 26 Office
Station # 27 Office
Station # 28 Office
Station # 29 Office
Station # 30 Office

Debit/Credit Processor 11 - Toronto Dominion - Ingenico Desktop 5000 (Ethernet)

Terminal Receipt Print On POS (Both Copies)

Connect Time Out in Seconds 3 Read Time Out in Seconds (min 60) 80

Port 9999

IP / Host Address 192.168.1.118

Gift Card Processor POS Processed (Untracked)

3rd Party Gift Card POS Multi Store Gift

IP 99.249.27.34

Port 5657

Processing POS Serial# 7700000013

Token 0F6BFAD74B271CD175A2CBA67EAECD564D3116C061D07
924A951159C2B49437B

Station #1

Exit

Floor Plan Tab

Floor Plan

Locate the floor plan to use for this station. You must have the station type set to hospitality for this function to work.

Floor Plan Timer

Enable or Disable the floor plan timer on this station.

The screenshot shows the 'Station Setup' dialog box with the 'Floor Plan' tab selected. On the left, a list of stations is shown, with 'Station # 1' highlighted. The main area contains three fields: 'Floor Plan' with a text box containing 'Cool_1024x768.flr' and a folder icon; 'Floor Plan Timer' with a dropdown menu set to 'None'; and 'Time in Minutes' with a text box containing '20'. At the bottom, there is a navigation bar with 'Station #1' and an 'Exit' button.

Station #	General	Keyboard	Devices	Printers / Drawers	Advanced	Interfaces	Credit / Loyalty	Floor Plan	POS Screens
Station # 1									
Station # 2									
Station # 3									
Station # 4									
Station # 5									
Station # 6									
Station # 7									
Station # 8									
Station # 9									
Station # 10									
Station # 11									
Station # 12									
Station # 13									
Station # 14									
Station # 15									
Station # 16									
Station # 17									
Station # 18									
Station # 19									
Station # 20									
Station # 21									
Station # 22									
Station # 23									
Station # 24									
Station # 25									
Station # 26 Office									
Station # 27 Office									
Station # 28 Office									
Station # 29 Office									
Station # 30 Office									

Floor Plan: Cool_1024x768.flr

Floor Plan Timer: None

Time in Minutes: 20

Station #1

Exit

POS Screen Tab

The screenshot shows the 'Station Setup' window with the 'POS Screens' tab selected. On the left, a list of stations from Station #1 to Station #30 Office is visible, with Station #1 highlighted. The main area contains settings for 'Item Button Font', 'Menu Page Button Font', 'Payment Button Font', and 'POS Guest Check & Modifier Check Font'. Each font setting includes fields for Name, Size, and Bold, along with a 'Change Font' button. To the right, there are percentage settings for % Width Qty, % Width Description, % Width Price, % Width Hold/Fire/Tag, and % Width Time. At the bottom, there is a 'POS Screen Background Image' field showing 'BlackBack.jpg' and a navigation bar with 'Station #1' and an 'Exit' button.

Font Setting	Name	Size	Bold	Change Font
Item Button Font	Arial	10	☒	Change Font
Menu Page Button Font	Arial	10	☒	Change Font
Payment Button Font	Arial	10	☒	Change Font
POS Guest Check & Modifier Check Font	Arial	11	☒	Change Font

Percentage Setting	Value
% Width Qty	12
% Width Description	51
% Width Price	27
% Width Hold/Fire/Tag	10
% Width Time	0
	100%

POS Screen Background Image: BlackBack.jpg

Station #1

Exit

Item Button Font on POS Screen

Select the font to use for the Item Buttons at the point of sale.

Menu Page Font on POS Screen

Select the font to use for the Menu Pages at the point of sale.

Payment Button Font on POS Screen

Select the font to use for the Payment Buttons at the point of sale.

Guest Check Font on POS Screen

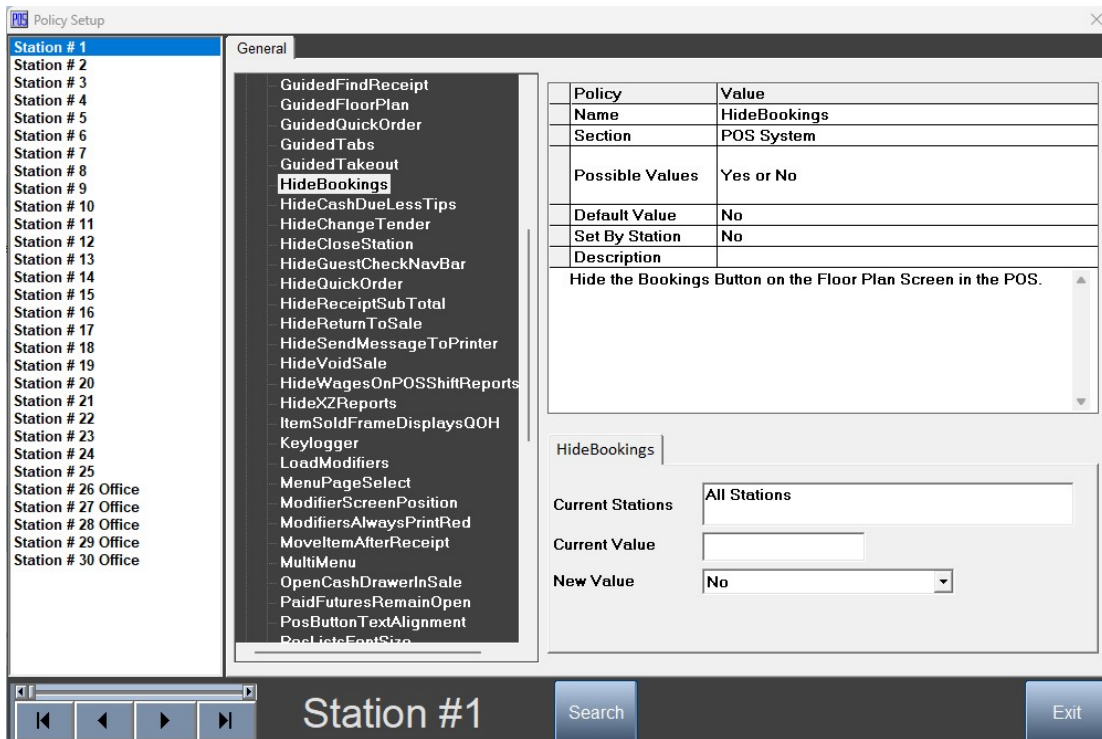
Select the font to use for the Guest Check Grid and the Modifier Screen Check at the point of sale.

Min. Line Height

Select the minimum height for each line on the Guest Check. The larger the number, the larger each line will physically be making it easier to select using the touch screen. Typically, 400 should be sufficient. Enter 0 to have the line size default to whatever is required determined by the font size.

Policy Setup

Policy Setup gives you the ability to modify many of the major options of UniversalPOS without having to leave the program and modify the "Settings.ini" file itself. Each option in Policy Setup has preset values and a description explaining what it does.



Policies are divided into several areas of the System with each area divided into individual features.

- Back Office
 - HideTableManagement
 - HidePhysicalPostMethod2
- Enterprise
 - AlwaysAddItems
 - DuplicateUpcRules
 - HideCloudRecover
 - MultiStoreStock
 - RegionalPricing
- Kiosk
- POS System
 - AddSeatUpdatesCover
 - AllowFractionalQuantities
 - AllowTableSectionPrinterOverride
 - AutoCloseSplitCheck
 - AutoClockOut
 - AutoSaveSales
 - AutoSendOnFinish
 - CreditCardSurcharge
 - DefaultMenuPage
 - Delivery
 - DeliveryViewer
 - EnhancedFloorPlanTables
 - EOD_Backup
 - EOD_Weather
 - FindReceipt
 - FloorPlanOnGuided Set By Station
 - HideBookings
 - HideCloseStation Set By Station
 - HideCashDueLessTips
 - HideGuestCheckNavBar
 - HideQuickOrder
 - HideReceiptSubTotal
 - HideReturnToSale
 - HideWagesOnPOSShiftReports Set By Station
 - HideChangeTender
 - HideQuickOrder
 - HideSendMessageToPrinter
 - HideVoidSale Set By Station
 - HideXZReports
 - KeyLogger Set By Station
 - MoveItemAfterReceipt
 - ModifiersAlwaysPrintRed

- MultiMenu Set By Station
- OpenCashDrawerInSale
- PaidFuturesRemainOpen
- PopUpScreenPosition Set By Station
- PriceOverrideAfterSend
- PrintTimeInterval
- PrintSaleStartPrompt
- PrintPaymentPrompt
- PrintDiscountPrompt
- PrintProductPrompt
- PromptCashOutReportDetailed
- QuickHold
- QuickOrderOnGuided
- QuantityOverrideAfterSent
- RetailPriceOnPosButton Set By Station
- SaleWeightLimit
- SeatBarLayout
- ShowCostInQuery
- SmartScanSellsItem Set By Station
- SplitCheckLayout Set By Station
- TakeoutOnGuided Set By Station
- UseFrequentBuyer
- VerifyStock
- ViewOrdersTileFontSize Set By Station
- ViewOrdersTilesAcross Set By Station
- ViewOrdersTilesDown Set By Station
- WarnIpPinPadConnection
- Reports
 - ShowCustomerStatsOnReports
 - ShowTipDistribution
 - ShowCashOutSummary
 - ShowCountsOnReports
 - ShowCashTipsOnShiftReports
 - ShowDirectVoids
 - ShowOtherinformationOnPosReports
 - TipPool
- System
 - AdmisTrack
 - AllowCostPlusPricing
 - AllowConditionalPrinting
 - CanFeature
 - DisableAutoReload
 - DisableOverrideProductTypeTaxes
 - ForceModsFromProductType
 - HideWineBrewClub
 - PriceSchedule

- SendWelcomeEmail
- StockAdjustmentDate
- StockTracker
- UseCounts
- UseMatrix
- UseStockSession
- ListViewer_Font
- ListViewer_Lines
- SearchLike_ShowCost
- UseStampReward
- WhiteLabel

Accounting Integration

The POS offers several methods to get General Ledger information into your accounting system.

- GL File Export
- Applications that create CSV files that can be uploaded

Accounting integration can be configured in System setup on the Accounting Tab.

The screenshot shows the 'System Setup' window with the 'Accounting' tab selected. The window has a menu bar at the top with various options like Printers, PATT, Quick Service, Receipts, Retail, Reports, Receipt Messages, Screen Saver, SMS, Winery/Brewery, Employee, Floats, Gift Card/Credit Note/Loyalty, Hospitality, Interfaces, Invoice/PO, Labels, More Features, Online/Future Orders, POS & System Screens, Accounting, API, Age Verification, Auto Sale Email, Company Profile, Customer, Documents, Email Invoice, Email Receipts, and Email Setup. The main area is divided into sections. The 'Accounting Program' section has a dropdown menu currently showing 'Simply Accounting', with a list of other options: 'Quickbooks Desktop Canada 2005~2007', 'Quickbooks Desktop Canada 2008~2014', 'Sage 50 Canadian Edition', 'CSV File', and 'Quickbooks Desktop Canada 2015~2020'. Below this, there are fields for 'Create Accounting Export', 'A/R Monthly Interest Rate', 'Dollar Mask', and 'Accounting Date Format' (set to 'MM/DD/YY'). The 'Misc. Accounting' section includes fields for 'Paid Out', 'Received On', 'Tips', 'Payment On Account', 'VAT Adjust', 'Shipping', 'Gift Card Sales', 'Gift Card Promo', and 'Penny Round'. At the bottom right, there is a 'Next Fiscal Period Start Date' field set to '01/01/3000' with a calendar icon. An 'Exit' button is located in the bottom right corner.

Accounting Program
Simply Accounting
Quickbooks Desktop Canada 2005~2007
Quickbooks Desktop Canada 2008~2014
Sage 50 Canadian Edition
CSV File
Quickbooks Desktop Canada 2015~2020

Create Accounting Export
A/R Monthly Interest Rate
Dollar Mask
Accounting Date Format MM/DD/YY

Misc. Accounting

Paid Out	
Received On	
Tips	
Payment On Account	
VAT Adjust	
Shipping	
Gift Card Sales	
Gift Card Promo	
Penny Round	

Next Fiscal Period Start Date 01/01/3000

Exit

POS General Ledger File Export

The POS can create General Ledger accounting export files, which can be used to import GL entries into Desktop Versions of QuickBooks, Sage and Simply Accounting.

To do this, the POS needs to know the general ledger accounting codes for the following accounts:

- Sales Departments → enter under Sales Department Setup
- Payment Methods → enter under Payment Method Setup
- Discounts → enter under Discount Setup
- Taxes → enter under Tax and Deposit Setup
- Bottle Deposits → enter under Tax and Deposit Setup
- Account Payments → enter under System Setup → Accounting Tab
- Account Charges → enter under Payment Method Setup
- Paid Outs → enter under System Setup → Accounting Tab
- Shipping → enter under System Setup → Accounting Tab
- Received In Advance → enter under System Setup → Accounting Tab
- Gratuities → enter under System Setup → Accounting Tab
- Misc. Accounts → enter under System Setup → Accounting Tab
- Quickbooks also requires you to enter the Tax Agency Name under System Setup → Accounting Tab

Ignore any accounts that you do not use in your accounting.

Under System Setup → Accounting Tab, select your accounting software and activate the accounting export. The actual accounting export files are created automatically when you *Close the Store* at the end of the business day.

See the POS User Guide for information on Closing the Store.

From the import menu in Simply Accounting or QuickBooks, you can locate and import these files daily to update your general ledger accounting. *See your accounting software manual for directions on General Ledger Importing.*

The accounting export files are normally stored in the accounting folder on the server (usually C:\POSEDGE\ACCOUNTING). You can override this default by setting the path for the accounting files in the POSEDGE.INI file located in the point of sale root folder. Accounting files can be stored on the local server or a web-based cloud drive for easier access.

For example, Accounting=F:\Accounting See *POSEDGE.INI* for additional information.

AccountingExport.exe application

AccountingExport.exe is an application which exports the previous day's sales to a CSV file by broken down by station. The file is saved to the accounting folder.

To run this application in stand-alone mode,

1. Locate the accountingexport.exe application in the POS root folder.
2. Open the application.
3. Select the date to report on and click Run.

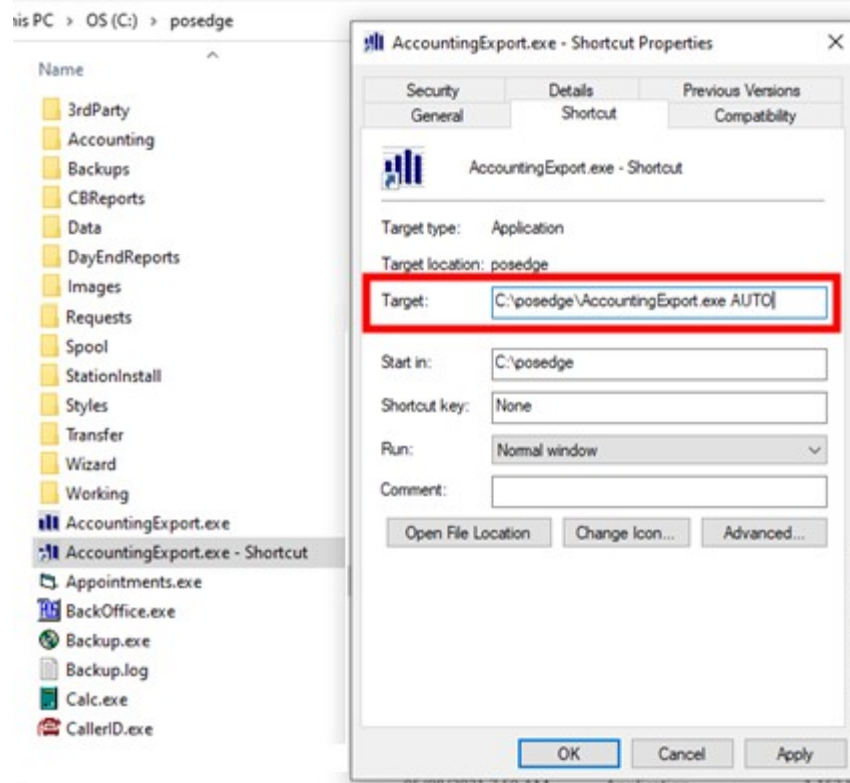


4. The application will export the selected days sales to the accounting folder.
5. Exit the application.

To run this application in Auto Mode,

1. Locate the accountingexport.exe application in the POS root folder.
2. Create a shortcut to the application.

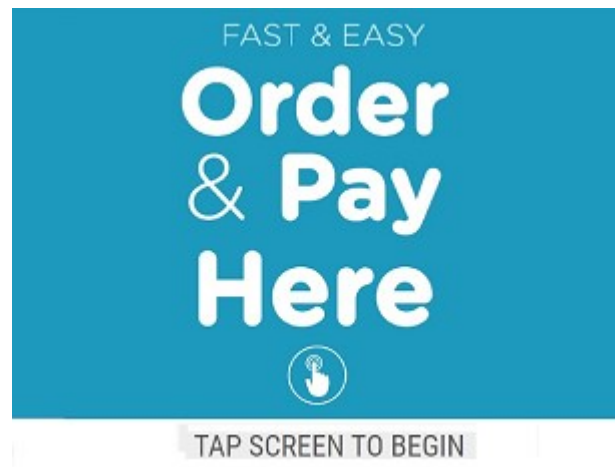
3. Right click on the shortcut and select properties. Add the work AUTO to the end of the target line and apply the changes.



4. Add this shortcut to the Windows Task Scheduler and set the properties of the scheduler to run the shortcut daily for the previous day.

Self Serve Kiosk

You can make any POS station a Self Serve Kiosk allowing customer the ability to place orders and close their transaction.

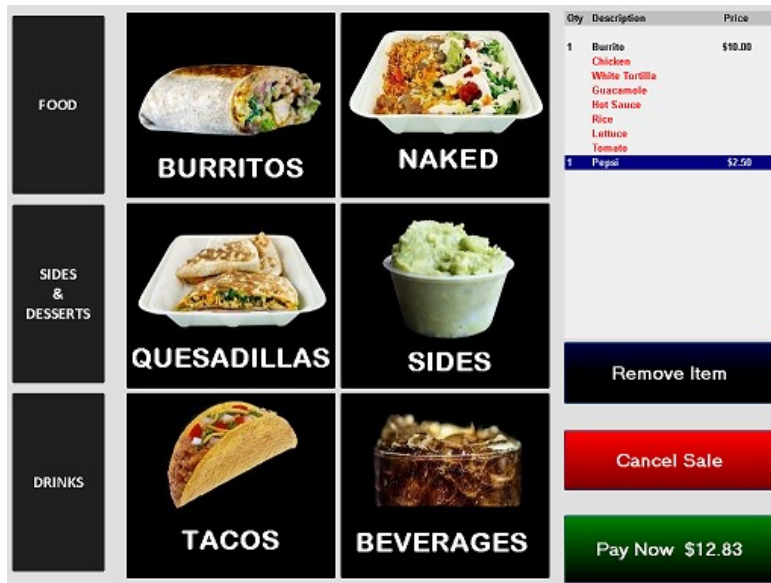


Touch the Top Left Corner of the Kiosk Screen to bring up a Security Windows to Exit the Kiosk back to Windows.

The kiosk screen should be designed with a simple clean flow so the customer

- can close transactions to debit or credit only.
- can easily navigate the order process.
- does not have access to any functions such as reporting or the system.

1. Create a screen layout for the Kiosk. Make sure you do not include functions that could allow customers the ability to bypass security. For example, do not include the Manager Function Button.

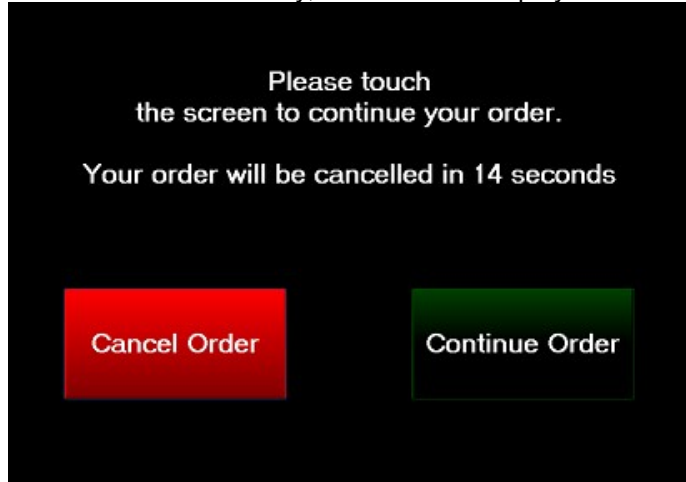


You should only add Kiosk Buttons under the POS Screen Designer. These buttons are designed to work in a Kiosk environment. These buttons include

- Kiosk Cancel Sale (on Order Screen Objects)
- Kiosk Pay Now (on Order Screen Objects)
- Kiosk Remove Item (on Order Screen Objects)
- Kiosk Return to Order (on Payment Screen Objects)

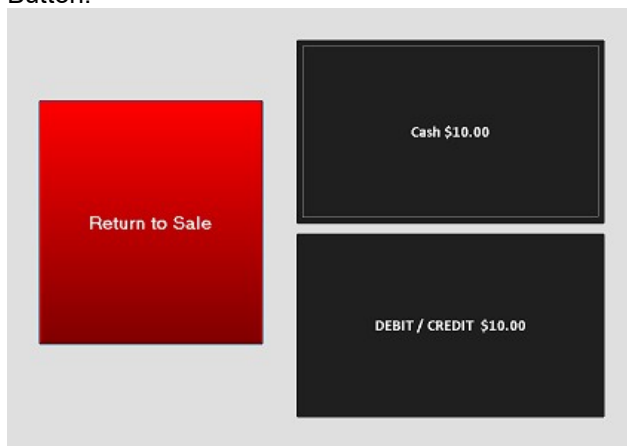
2. Create an employee called Kiosk or similar. This employee should be assigned a job position with minimal security. The Kiosk employee will automatically be used for all Kiosk Orders.
3. Under Station Setup,
 - a) set the Station Type to 5) Self Order Kiosk.
 - b) assign the Employee created in step 2 as the Kiosk Employee.
 - c) assign the Screen Layout created in Step 1.
 - d) set a In Sale Log Off Timer as you see fit. This will give the user the ability to easily cancel or continue an order after X seconds of inactivity.
 - e) finish Station Setup as normal.

4. ModifierScreenPosition under Policy Setup allows you to control the position of the modifier screen.
5. After X seconds of activity, the Kiosk will display the Cancel / Continue Order Screen.



Touching the Cancel Order Button will cancel any current transaction. Touching the screen anywhere else will return the Kiosk to the Order. This screen automatically cancels the order after 15 seconds if no action is taken by the user.

6. The Payment Screen should contain a Return to Order and a Debit / Credit Payment Button.



Our example displays a Cash Option. This is for demonstration purposes only and should not be included on an actual Kiosk.

7. Three messages can be programmed under Language Setup (Kiosk Language Section).
 - Your Order Has Been Cancelled
 - Please Proceed to Pickup Your Order.
 - Thank You

Tips & Tip Pooling (Gratuity)

Tips

Universal POS has several features to collect and allocate tips for servers in the hospitality industry. Gratuities can be added manually to bills from the Payment Screen by clicking the Gratuity Button, automatically added to bills by over tendering on a credit card payment or forced onto a bill based upon the table cover count. Gratuities collected will appear on all POS financial reports.

See Payment Method Setup

- To force over tendering on a payment method, such as visa, to count the over tendered amount as a gratuity.
- To allocate a percentage to be removed from a servers collected tips due to credit card fees.

In the POS Screen Designer, add the Gratuity Button to the Payment Screen to allow staff to manually add a gratuity to any bill. This manual entry can be a dollar amount or a percent value.

Under System Setup → Hospitality Tab,

- Enter a gratuity value to force a gratuity on any check that has a certain number of customers. You can also under Tax Setup, assign any taxes that need to be applied to a forced gratuity.
- Enter suggested gratuity values to print on the customer bill, such as 15% 18% 20% values.
- Enter a maximum gratuity value that can be manually added to any check. You can also adjust the Security Level, *Gratuity - Override Maximum Manual Entry* to control who can override this value.

Cash Tips

Cash Tips can be declared by servers. This option must be enabled under System Setup → More Features-> Cash Tips. If enabled, Cash Tips are declared in the POS from the Employee Screen. A Policy, ShowCashTipsOnShiftReports can disable Cash Tips from printing on Employee Sshift Reports.

Tip Pooling

Tip pooling allows a portion of a servers tips to be withheld, so they can be distributed to back of the house staff, such as cooks and bus staff.

To configure Tip Pooling

1. Under Sales Department Setup → enter the total percent to allocate to Tip Pooling for each department.
2. Under Job Positions, enter for each position, the percentage value of the Tip Pool to be allocated. For example, if the total tip pool is 5%, you could specify that Cooks get 60% and Bus Staff get 40%.

Tip pool values will appear on all front of the house financial reports.

Drive-thru

The POS can handle single and dual drive-thru windows as well as a multiple lane drive-thru.

- Each terminal that takes orders requires a *Save Order* button on the POS screen.
- Each terminal that completes the order requires a *Recall Order* button on the POS screen.
- All terminals can perform both the tasks of taking and completing orders.

1. From the POS Screen Designer, add *Save or (Drive Thru)* and *Recall Order (Drive Thru)* buttons to the appropriate POS Stations.
2. Create a Sales Type called Drive Thru.
3. Go to System Setup → Quick Order Tab
Select Drive Thru as the Default Drive Thru Sales Type.
4. Under Station Setup → Advanced Tab, set the Default Table Number for the Drive Thru Lane.

Terminals that are assigned to the same drive-thru lane need to be assigned to the same Drive-Thru table number. Terminals that are assigned different Drive-thru Table Numbers cannot see each other's traffic.

See Station Setup for additional information.

See Drive-thru in the POS User Guide.

Frequent Buyer Program

The Frequent Buyer Program is a specialized feature that tracks the purchases of products by customer. When a customer purchases so many of a particular product, the system issues them a free one. If you're a business where your customers should be in on a fairly regular basis to replenish their stock of an item, a program like this can sometimes ensure the customer will be back. Your supplier often implements programs like this, and they will credit your account or will replace the free product. The system will generate a report that lists the customer's personal information, what item they received for free, and details the receipt numbers, the transaction dates and what products were purchased to entitle the customer to a free item. This report can be given to your supplier if they are going to credit your account for the free item given.

Setting Up the Frequent Buyer Program

- 1) Activate Use Frequent Buyer Program under Policy Editor
- 2) Create or modify your Product Types. You need a unique Product Type for each group of products that are being tracked. In our example, we are tracking Kibbles and Bits Pet Food in 2kg and 5kg bags. Free bags are earned after purchasing 10 bags.

The screenshot shows the 'Product Type Setup' window with the 'General' tab selected. The 'Name' field is 'Kibbles and Bits 2kg Bag' and the 'Sales Department' is 'Dog Food'. The 'Commission Rate' is set to '10.'. The 'Loyalty Applies' checkbox is checked. The 'Prep Printers' section includes 'Local Receipt', 'Kitchen', 'Bar', and 'KDS'. The 'Taxes' section includes 'HST', 'HST 8% pop', 'HST 8% Food', and 'HST 13%'. The 'Price Schedule' button is visible at the bottom.

Field	Value
Name	Kibbles and Bits 2kg Bag
Sales Department	Dog Food
Loyalty Applies	☒
Is Drink	☐
Use Age Verification 1	☐
Use Age Verification 2	☐
Food Stamps Allowed	☐
Commission Rate	10.
Link To	
3rd Party Loyalty ID	
Deposit	0.00
Other Fee 1	0.00
Other Fee 2	0.00
Combo Tag	

Using the Frequent Buyer Program

The Frequent Buyer Program automatically keeps track of purchases for each transaction that has a customer attached. Each product purchased will be tracked by their product type. From the customer screen, click the *Frequent Buyer Tab* to view the customer's group totals and issue any free packages they are entitled to.

- 1) Click the *Customer Search* button in the point of sale and locate the customer.
- 2) Customers are automatically enrolled in any program automatically if they purchase any items that are associated with a Product Type that is part of a frequent buyer program.
- 3) Click the *Frequent Buyer Tab* on the Customer Screen to view programs and issue any free bags.

General Information	Last 5 Orders	Frequent Buyer program	Account Information
Jason Jackson 23 Smith Road Welland, Ontario Canada L0R 1T9 (905)123-4567 ext info@universalpos.ca Unknown Distance		Account Balance : \$0.00 Bonus Bucks : 0.00 Number Of Visits : 4 Customer Since : 09/29/2025 Last Purchase Date : 10/24/2025 Convenience Card : 0.00 Credit Note : 0.00	
		Notes	

Name	Quantity	#Required	#Free Available
Kibbles and Bits 2kg B	11	10	1

Issue free package if one is available

Make manual adjustments

View product tracker history for this customer

Issue Free

Print Current Frequent Buyer

Frequent Buyer Adjustments

Show Closed

Search
Customer Lookup

Like

Find Card #

Find Phone #

Find Email

Detailed Setup

Quick Setup

Transactions

Shipping Label

No Customer

Friday, October 24, 2025 1:26 PM Station 1 Supervisor Joe

4) Click Issue Free to give the customer their free package.

General InformationLast 5 OrdersFrequent Buyer programAccount Information

Jason Jackson
23 Smith Road

Welland, Ontario
Canada L0R 1T9
(905)123-4567
ext

info@universalpos.ca

Unknown Distance

Account Balance : \$0.00
Bonus Bucks : 0.00
Number Of Visits : 4
Customer Since : 09/29/2025
Last Purchase Date : 10/24/2025
Convenience Card : 0.00
Credit Note : 0.00

Notes

Issue 1 Free Package Now ?

Issue Free

Print Current
Frequent Buyer

Frequent Buyer
Adjustments

Show Closed

Search
Customer Lookup

Like

Find Card #

Find Phone #

Find Email

Detailed Setup

Quick Setup

Transactions

Shipping Label

No Customer

Friday, October 24, 2025 1:30 PM Station 1 Supervisor Joe

460

www.UniversalPointOfSale.com

Admission Tracker

The Admission Tracker is a special function that is designed for organizations that offer some form of membership such as a health club. When a customer enters the premises, their membership card would be scanned and the system would log their entry. Various reports can be generated to determine member's usage of the facility as well as the length of their visits.

Setting Up the Admission Tracker

- 1) Enable the Admission Tracker under Administration → Policy Setup → System → AdminTrack
- 2) Create Customer Types to assign to your customers such as:
 - *Premium Member* and check Use Admission Tracker
 - *Standard Member* and check Use Admission Tracker
 - *Non-Members* and don't check Use Admission Tracker

The screenshot shows the UniversalPOS software interface. The top menu bar includes: Customers, POS Setup, Table Management, Administration, Reports, and Help. The left sidebar has a tree view with the following items: Customer Setup, Customer Types (highlighted), Customer User Field 1, Customer User Field 2, City Maintenance, Sales Representatives, and Contacts. Below the sidebar, there is a section labeled 'Wholesale'. The main content area displays the 'Customer Types' configuration for 'Standard Member'. The 'Use Admission Tracker' checkbox is checked. Below it are fields for 'Bonus Buck % Rate' and 'Customer Auto'. A red rectangular box highlights a note at the bottom: 'Create your customer types and check "Use Admission Tracker" only for those types that require tracker'. The top status bar shows the date and time as 'Friday, Oct 24, 2025 1:34 PM' and the user as 'User: Supervisor Joe'.

3) Assign the appropriate customer type to your customers.

Customer Maintenance

General Family Information Advanced Statistics History Notes User Fields

3

Last Name **Brown** Salutation

First Name Kevin

Address 1 123 John Street

Address 2

City Welland

Province Ontario

Postal Code L2N2N2

Country Canada

Phone Number (905)123-4567 Toll Free () -

Fax Number () - Mobile () -

Email Address myemail@email.com

Web Address

Card Number

Customer Type **Standard Member** Account Expiry 01/01/3000

Contact Method By Email Terms

Contact Credit Limit \$0.00

Price Level Retail 1

Default Sales Type

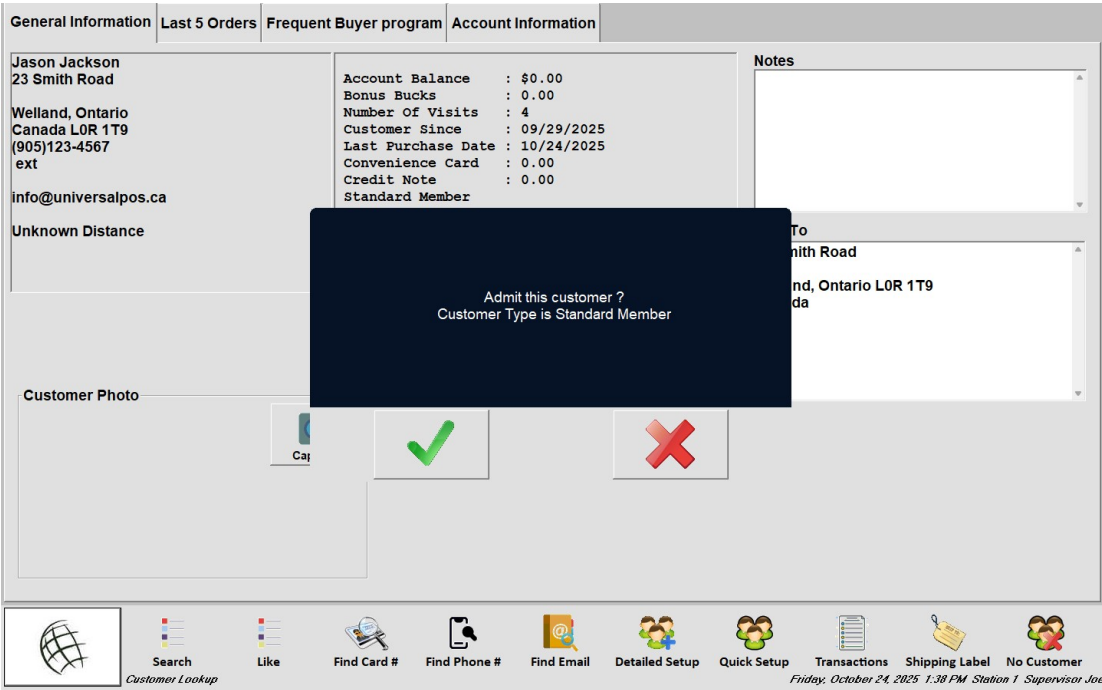
Licensee Number

Select the appropriate customer type for each customer

Find Code Phone# List Search Like Delete Copy Add New Refresh Exit

Using the Admission Tracker from the Point Of Sale

Attach the Customer to the Sale using any of the methods shown in the user’s manual.
If the customer is associated with a Customer Type that has Admission Tracking enabled, the system will prompt you to admit the Customer.



Admission Ticket Printing

The POS can produce admission tickets. Tickets can be used for entrance to attractions, or in a winery environment can be used to show you have purchased wine tasting samples. You may be able to customize this feature to fit your particular business.

The system can produce individual tickets for each person or one ticket listing all the admissions.

INDIVIDUAL TICKETS	GROUP TICKETS						
Your Company 123 Main Street Your City, Country Phone Number # 890 - 4 ADMISSION TICKET VALID FOR ONE ADULT ADMISSION DO NOT LOOSE THIS TICKET Transaction 123456  March 9th, 2014 12:30 pm	Your Company 123 Main Street Your City, Country Phone Number ADMISSION TICKET <table><tbody><tr><td>2</td><td>ADULT ADMISSION</td></tr><tr><td>2</td><td>CHILD ADMISSION</td></tr><tr><td>1</td><td>SENIOR ADMISSION</td></tr></tbody></table> Transaction 123456  March 9th, 2014 12:30 pm	2	ADULT ADMISSION	2	CHILD ADMISSION	1	SENIOR ADMISSION
2	ADULT ADMISSION						
2	CHILD ADMISSION						
1	SENIOR ADMISSION						

Note: Individual tickets print to the local receipt printer. Group tickets print to the preselected ticket printer.

Individual tickets are sequentially numbered with a daily random security number to prevent forged tickets from being printed.

Setting Up Admission Tickets

1. Under Administration → System Setup → Printers Tab
Check *Print Individual Tickets on Ticket Printer* if you want individual chits to print for each ticket or leave unchecked for a group ticket.
2. Under Administration → System Setup → Receipt Messages 2 Tab
Format the layout of the ticket under Ticket Text.
Specialized Field Codes for Ticket Format

/HEADER/	Print Receipt Header
/FOOTER/	Print Receipt Footer
/NAME/	Product Name
/PRICE/	Product Price
/DATESTAMP/	Date and Time Stamp
/TRANSNO/	Transaction Number

You can format receipt text by using control codes.

^C	Center the text on the line
^B	Print the line in bold faced text
^D	Print the line in double width text
^R	Print the line in red text
^A	Print the receipt number as a barcode on the receipt
^L	Print the logo on the receipt
3. *For Group Tickets Only*
Under Administration → Station Setup → Printers and Cash Drawer Tab
Select for each station the printer to be used to print group tickets.
4. Under Products → Product Types
Select the product types that are required to produce tickets.
5. Under Products → Product Setup
Create the various products that are needed for admission tickets (i.e. Adult Admission and Child Admission) and assign them to the appropriate product type you created in step 4.

Caller-ID Integration

Caller-ID is a hardware device that connects between the point of sale and your phone line. It monitors incoming telephone calls and displays caller id information directly at the point of sale simplifying customer integration for sales transactions.

Once configured, the Caller ID window will automatically appear on the main point of sale screen when calls are available and no sales transaction is active.

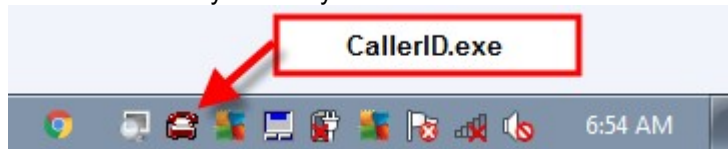
The system works with the following devices

- Whozz Calling Basic Ethernet
- Whozz Calling Deluxe Ethernet
- Whozz Calling VOIP Ethernet

Visit www.CallerID.com for additional information.

To install and use Caller-ID,

1. Follow the manufactures information for installing the Whozz Calling device.
2. On the main POS server, run the application CallerID.exe. This program will be located in the point of sale root folder. Once the program is running, it will be visible in the Windows system tray.



3. Right click on the CallerID application and left click Show.

4. Check Enabled, Port 3520, and enter the number of phone lines your Whozz Calling device supports and then click Hide Me.

Caller - ID

Line 1

Line #	I/O	Date	Time	Name	Phone Number

Line 2

Line #	I/O	Date	Time	Name	Phone Number

Line 3

Line #	I/O	Date	Time	Name	Phone Number

Line 4

Line #	I/O	Date	Time	Name	Phone Number

Enabled ☒

Listening on Port: 3520

Lines: 4

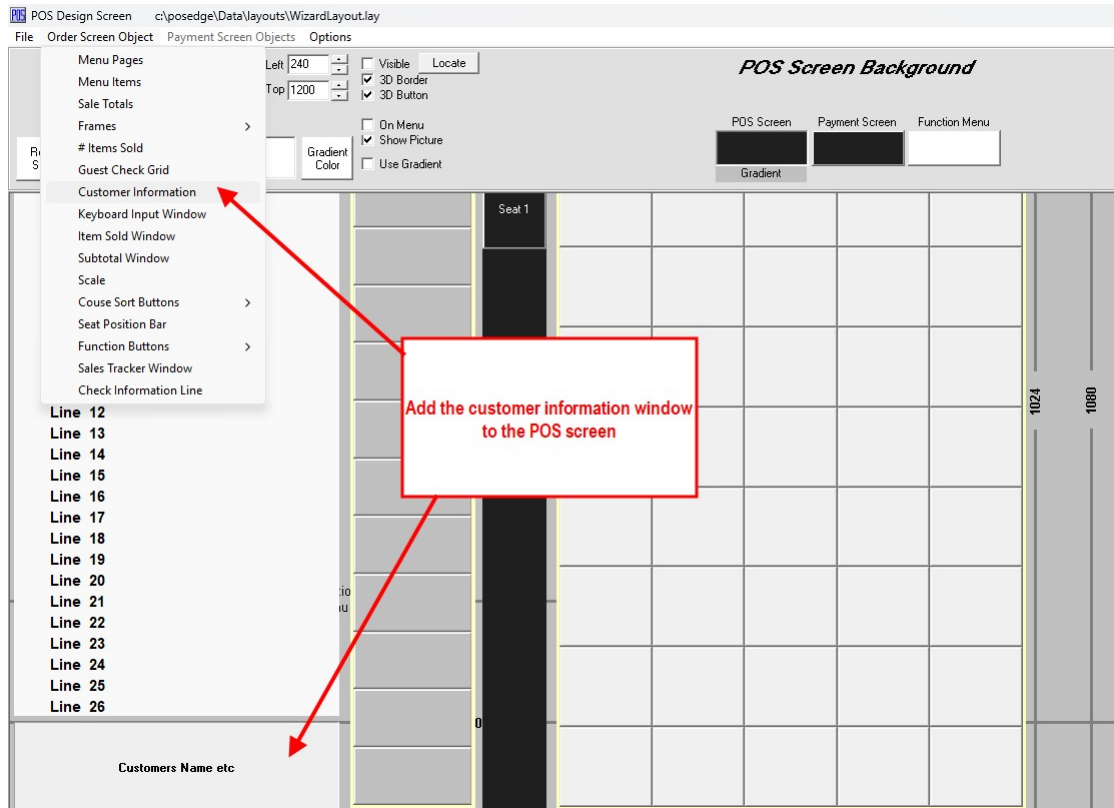
Check Enabled Port 3520

Hide Me

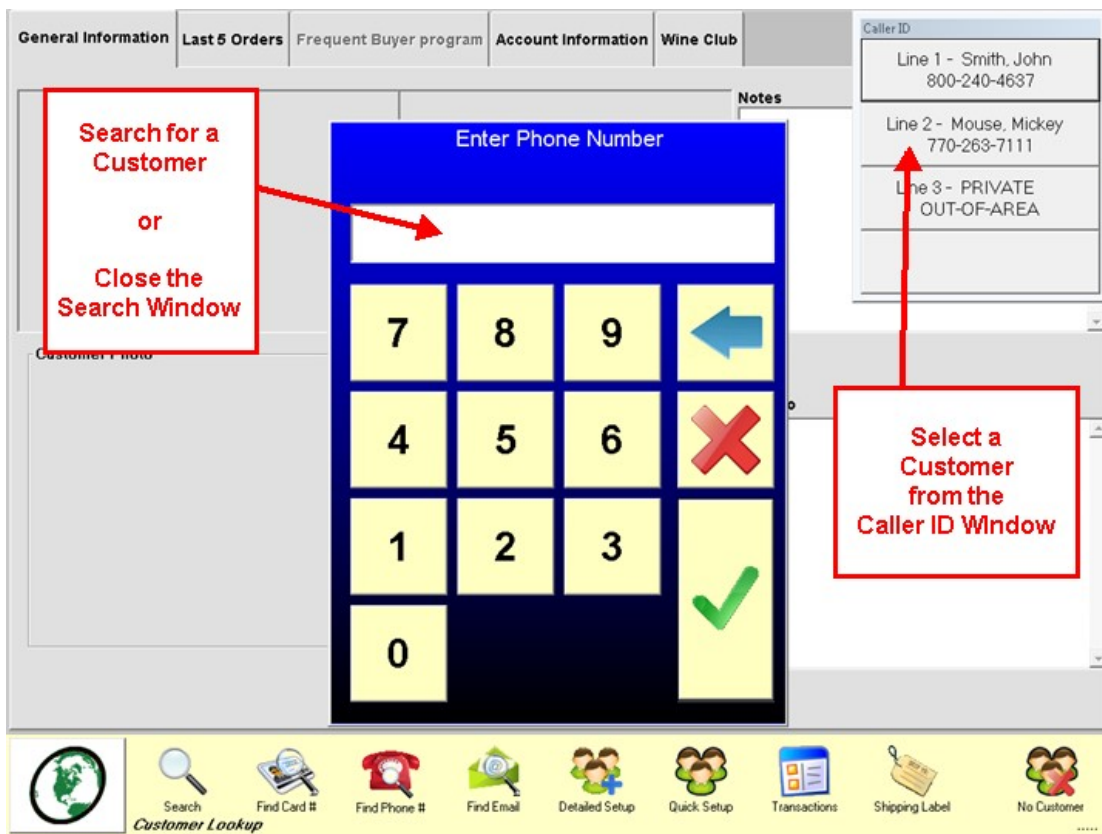
Close

Clear Log

5. Add the Customer Information Window to the point of sale screen. This is required to make the Caller ID operational in the point of sale.



In the Point of Sale, the Caller ID Window appears in the Customer Lookup Window.



General Information	Last 5 Orders	Frequent Buyer program	Account Information	Wine Club	Notes				
Atlanta, GA , Ontario Canada Phone 1 : (770)263-7111 Phone 2 : ext Fax : Email : Unknown Distance		Account Balance : \$0.00 Bonus Bucks : 0.00 Number Of Visits : 3 Customer Since : 12/29/2017 Last Purchase Date : 12/29/2017 Convenience Card : 0.00 Credit Note : 0.00		Caller ID Line 1 - Smith, John 800-240-4637 Line 2 - Mouse, Mickey 770-263-7111 Line 3 - PRIVATE OUT-OF-AREA					
<table border="1"> <thead> <tr> <th>Sale #1</th> <th>Sale #2</th> </tr> </thead> <tbody> <tr> <td> ----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Green Oli 0.00 1 * Onions 0.00 1 * Mushroom 0.00 1 20 Chicker 14.50 1 * Hot 0.00 1 Spicy 0.00 </td> <td> ----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Bacon 0.00 1 * Onions 0.00 </td> </tr> </tbody> </table>		Sale #1	Sale #2	----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Green Oli 0.00 1 * Onions 0.00 1 * Mushroom 0.00 1 20 Chicker 14.50 1 * Hot 0.00 1 Spicy 0.00	----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Bacon 0.00 1 * Onions 0.00	If the selected customer exists, the profile will be displayed or you will be prompted to create the new customer.			
Sale #1	Sale #2								
----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Green Oli 0.00 1 * Onions 0.00 1 * Mushroom 0.00 1 20 Chicker 14.50 1 * Hot 0.00 1 Spicy 0.00	----- Seat ----- 1 8 Slice Pizz 9.75 1 Cheese In 0.00 1 * Sausage 0.00 1 * Bacon 0.00 1 * Onions 0.00								

On-Line Ordering

The POS system can interface to several popular On-Line Ordering Systems. These interfaces allow customers to place orders through web browsers and mobile devices. Once the order is placed, it will populate in the POS system for sales tracking and reporting purposes.

On-Line Orders can

- Print to the appropriate Prep Printers in a hospitality environment.
- Be paid for on-line or be paid for on pickup or delivery.

NOTE: SMP is required for all On-Line Ordering Interfaces

Current On-Line Ordering Options

- Moduurn Mobility – Automatic Poll Method
- WooCommerce (Retail Only) – Manual/Automatic Poll Method
- Shopify (Retail Only) – Manual/Automatic Poll Method
- Cuboh – Automatic Poll Method

General Setup

1. Create a new product called Default Item. Set its classification to Product and assign this item to a product type that handles printing and taxes appropriately.
2. Create a new product called Default Modifier. Set its classification to Modifier and assign this modifier to a product type that handles printing and taxes appropriately.
3. Create a new employee called On-Line Employee.
4. Create a new payment type called On-Line Payment.
5. Create a new sales type called On-Line Pickup.
6. Create a new sales type called On-Line Delivery.

7. Go to On-Line Ordering Setup. This is found under Administration → System Setup → On Line Order Tab and select the On-Line Ordering System.
 - a) POS Listener
 - b) Moduurn
 - c) Select None if setting up WooCommerce, or Shopify

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Setup | Printers | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery | Employee | Floats | Gift Card/Credit Note/Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Features | Online/Future Orders | POS & System Screens

On-Line Order System: **None** ☐ Enable Cuboh
Select None for Shopify, WooCommerce and Cuboh

OLO Print Method: **Print at pickup time less lead time**
 Automatically Print Receipt: ☐
 Text Confirmation: **No**
 Default Item:
 Default Modifier:
 Default Employee: **Supervisor Joe**
 Default Payment Method:
 Default Void Reason: **Customer Complaint**
 Default OLO Sales Type Delivery: **Delivery**
 Default OLO Sales Type Pickup:
 Print Poll Time in Sec (0 to disable): **5** Required for Item Hold Timing and Future Order Timing
 Station Monitoring Print Jobs: **Station # 1**

Paid OLO Remain Active: ☐
 Default Tax Number: **1**
 Online Order Poll Time in: **15**

ANY CHANGES ON THIS SCREEN REQUIRE RELAUNCHING THE SPECIFIC ONLINE ORDER APP.

Exit

8. Select the appropriate defaults that were created in steps 1 through 6
9. On-Line Ordering Poll Time is how often the POS will check to see if any orders are waiting to be processed. Enter between 1 and 60 seconds. (Usually 15)
10. Enter the tax number, 1 to 7 that will be used to report the On-Line Ordering taxes.
11. Check Keep Paid In Full Orders Open.
12. Select the station that will poll for online print orders. (usually the same station that controls kitchen printers)
13. Print Poll Time: Enter how often (in seconds) the POS checks for orders that require printing to prep printers. Entering 0 will disable prep printing..

14. Under Administration → System Setup → Customer Tab, set as follows.

The screenshot shows the 'Customer' tab selected in the 'System Setup' menu. The 'Customer' tab is highlighted with a red box. The interface includes a 'SHOW CODES' button and three sections for configuring customer information:

- Customer Information On POS Screen:** A list box containing `/NAME/` and `/PHONE1/`.
- Customer Information On Receipt:** A list box containing `/NAME/`, `/PHONE1/`, and `/SHIPTO/`.
- Customer Information On Prep Printers:** A list box containing `/NAME/`, `/PHONE1/`, `/SHIPTO/`, and `/NOTES/`.

*Note: The format here is just a working suggestion.
/SHIPTO/ is needed for delivery information
/NOTES/ is needed for special instructions*

15. Under Administration → System Setup → Printers Tab, set as follows.

The screenshot shows the 'Printers' tab in the 'System Setup' window. The 'Prep Printer Header' section contains the following text: ^C^D^R/PICKUPNUMBER/, ^C^D^R/CHANNELNAME/, ^C^D/SALESTYPE/, ^C^D/TRANSNUM/, ^C/DATETIMESTAMP/, ^C^DServer /SERVER/, ^C^D#People /CUSTOMERCOUNT/, ^C^D/LABEL/, and ^C-----. The 'Prep Printer Footer (Default Mode)' section contains the following text: /CUSTOMERINFO/ and ^C^D*** END ORDER ***.

Prep Printer Header

```
^C^D^R/PICKUPNUMBER/  
^C^D^R/CHANNELNAME/  
^C^D/SALESTYPE/  
^C^D/TRANSNUM/  
^C/DATETIMESTAMP/  
^C^DServer /SERVER/  
^C^D#People /CUSTOMERCOUNT/  
^C^D/LABEL/  
^C-----
```

Prep Printer Footer (Default Mode)

```
/CUSTOMERINFO/  
^C^D*** END ORDER ***
```

Note: The format here is just a working suggestion.

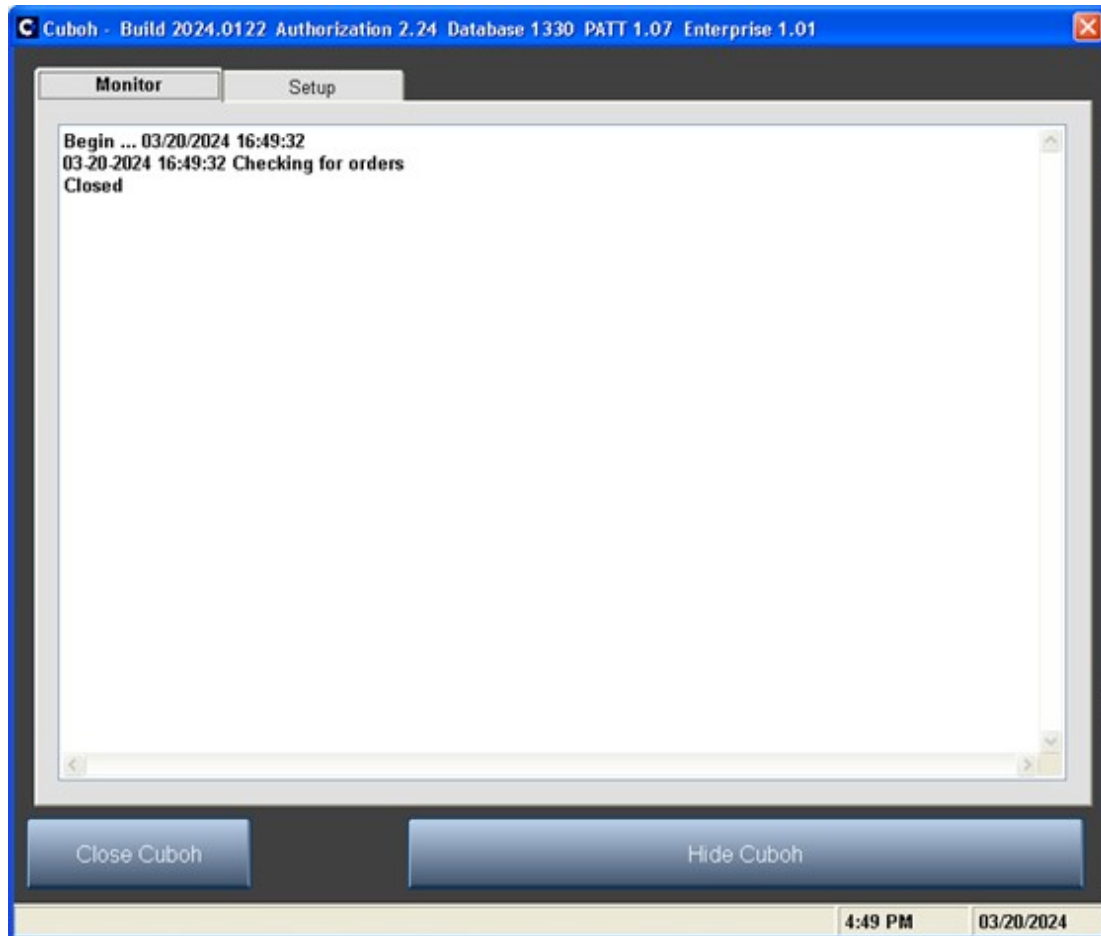
16. Save System Setup, Close and Exit the Back Office.

Cuboh Setup

The Cuboh App automatically polls Cuboh approximately once every 15 seconds to see if any orders are available. If any orders are found, they are downloaded and imported into the POS. The orders will print to the appropriate printers and will appear in the POS Transaction Viewer as a Delivery or Pickup Order.

Menu items in the POS are pushed to the UniversalPOS Google Server. Cuboh retrieves the menu from this Google Server.

Orders from Cuboh are pushed to the UniversalPOS Google Server. UniversalPOS retrieves orders from this Google Server.



- 1) In the Back Office of UniversalPOS, click Administration → System Setup → Online Order Tab. Complete the setup of this tab as described above under General Setup and check Enable Cuboh.

ees Customers POS Setup Table Management Administration Reports Help

System Setup

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email
inters | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS |
loyee | | Gift Card | Credit Note | Loyalty | Hospitality | Interfaces | Invoice/PO | Labels | More Feat

On-Line Order System **None** ☒ **Enable Cuboh**
Select None for Shopify, WooCommerce and Cuboh

- 2) Create a shortcut to Cuboh.exe and place this shortcut in your Windows Startup Folder on your POS Server.

3) Assign the items in UniversalPOS to include on the Cuboh Menu.

You can bulk assign the products you wish to include on the Cuboh menu from the Setup Tab in our Cuboh App. Check the various Product Types that you wish to include in Cuboh and click Set Products Available on Cuboh. This will go thru the product database and assign all the applicable products to Cuboh. Checking Set Online Modifiers will also automatically assign any required modifiers to Cuboh during this process.



or

You can also individually assign the items to include in Cuboh from Product Setup.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions

10 Chicken Wings

Web Name 10 Chicken Wings

Description 10 Chicken Seasoned Crispy Wings

Price \$7.50

Modifier Table

How Cook Wings

Include On Online Store ☒

On Shopify / WooCommerce ☐

Inventory ID

Cloud Menu

Picture

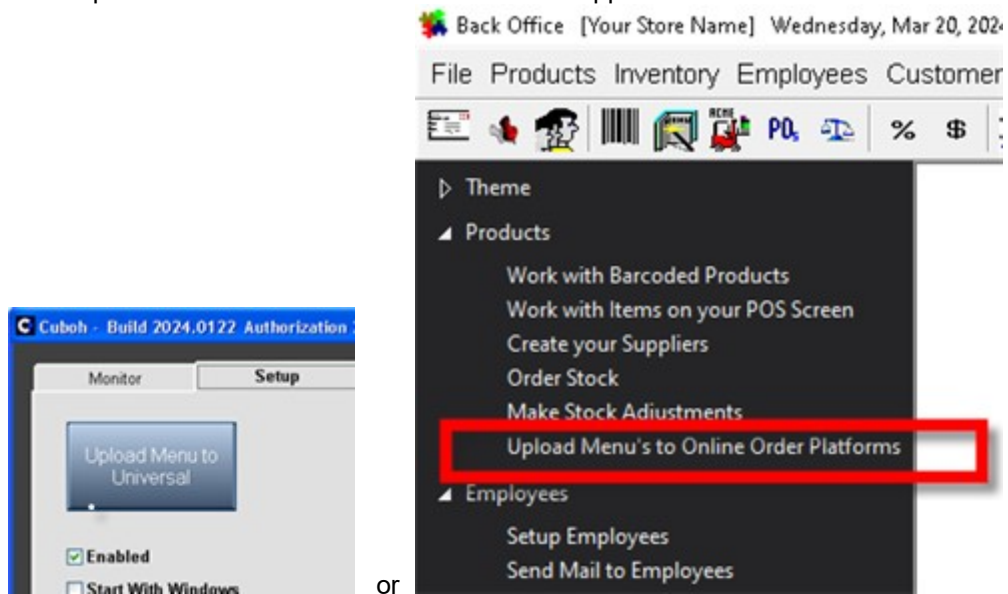


clr
get
cap

◀ ◁ ▷ ▶

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

- 4) Click Upload Menu to Universal from the Cuboh app or from the Back Office



This will push the Menu to our Google Server. The menu can now be retrieved from inside the Cuboh Dashboard.

Moduurn Setup

The Online Ordering App automatically polls Moduurn approximately once every 15 seconds to see if any orders are available. If any orders are found, they are downloaded and imported into the POS. The orders will print to the appropriate printers and will appear in the POS Transaction Viewer as a Delivery or Pickup Order.

The screenshot shows the 'System Setup' window with the 'On-Line Order System' tab selected. The configuration is for '2 - Moduurn'. The 'Get Order URL' is set to 'https://pos.globalfoodsoft.com/pos/order/pop' and the 'Port' is '80'. The 'OLO Print Method' is 'Print at pickup time less lead time'. The 'Text Confirmation' is 'No'. The 'Default Item' is empty. The 'Default Modifier' is empty. The 'Default Employee' is 'Supervisor Joe'. The 'Default Payment Method' is empty. The 'Default Void Reason' is 'Customer Complaint'. The 'Default OLO Sales Type Delivery' is 'Delivery'. The 'Default OLO Sales Type Pickup' is empty. The 'Print Poll Time in Sec (0 to disable)' is '5'. The 'Station Monitoring Print Jobs' is 'Station # 1'. The 'Paid OLO Remain Active' checkbox is unchecked. The 'Default Tax Number' is '1'. The 'Online Order Poll Time in' is '15'. A red warning message states: 'ANY CHANGES ON THIS SCREEN REQUIRE RELAUNCHING THE SPECIFIC ONLINE ORDER APP.' An 'Exit' button is in the bottom right corner.

Field	Value
On-Line Order System	2 - Moduurn
Get Order URL	https://pos.globalfoodsoft.com/pos/order/pop
Port	80
Parameters	
OLO Print Method	Print at pickup time less lead time
Automatically Print Receipt	☐
Text Confirmation	No
Default Item	
Default Modifier	
Default Employee	Supervisor Joe
Default Payment Method	
Default Void Reason	Customer Complaint
Default OLO Sales Type Delivery	Delivery
Default OLO Sales Type Pickup	
Print Poll Time in Sec (0 to disable)	5
Station Monitoring Print Jobs	Station # 1
Paid OLO Remain Active	☐
Default Tax Number	1
Online Order Poll Time in	15

ANY CHANGES ON THIS SCREEN REQUIRE RELAUNCHING THE SPECIFIC ONLINE ORDER APP.

Exit

Moduurn Setup

1. Fill out reseller's agreement with Moduurn Mobility.
2. Upgrade the POS to the latest version.
3. Create a copy of the posedge data folder and provide it to Moduurn Mobility once steps 1 and 2 above are completed. Because of email size restrictions, you may need to use dropbox.com.
4. Provide Moduurn Mobility with the POS version number found in the Back Office under Support so they can verify they are running the same version.
5. After Moduurn Mobility tests and configures their end, they may provide you with some items or settings you will have to enter into the POS system.
6. Be available to provide the required support for the client and Moduurn Mobility with regards to the online ordering system.
7. Complete the General Setup for On-Line Ordering at the beginning of this section.
8. Go to On-Line Ordering Setup. This is found under Administration → System Setup → On Line Order Tab
9. Select Moduurn as the On-Line Ordering Interface.
10. Enter the Order URL `api-v1.moduurn.com`
11. Enter the Port `443`
12. Parameters `/api/v1/orders/UPOSOrders?restaurantId=YOURKEY`
 where YOURKEY is the ID provided to you by Moduurn Mobility.
13. Under Administration → System Setup → Printers Tab
 Add the code fields to the Prep Printer Header or Footer
 `/CUSTOMERINFO/` to display customer information
 `/COMMENT/` to display any special comments
 `/SALESTYPE/` to display the Sales Type eg Delivery
14. On the Server PC, create a shortcut to Moduurn.exe and place this shortcut in your Windows Startup Folder.

Woo Commerce

The integration allows online orders to be automatically reflected in the POS and inventory values to be reflected in WooCommerce. Once orders are completed with the Woo Commerce Dashboard, the order is imported into the POS. Once a transaction is imported into the POS, it will appear in the Transaction Viewer as Paid Completed Transactions. Inventory values are pushed at a regular interval to WooCommerce.

It is the reseller's responsibility to setup and configure Woo Commerce. UniversalPOS does not support issues with the Woo Commerce Platform

All orders MUST be set to completed in Woo Commerce before they can be imported into UniversalPOS.

Inventory on hand can be pushed throughout the day to the Woo Commerce Platform.

Woo Commerce should be used in a retail environment only.



Woo Commerce Setup

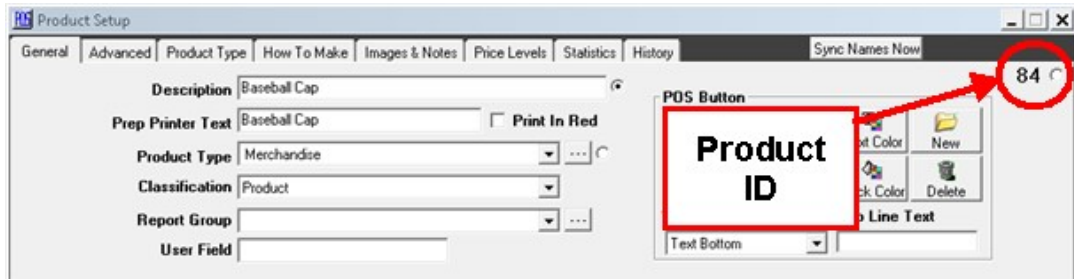
1. From the Woo Commerce Dashboard, generate your consumer and secret keys and enable the API.
2. Upgrade the POS to the latest version.
3. Complete the General Setup for On-Line Ordering at the beginning of this section.
4. Launch the WooCommerce App located in the POSEGE root folder and click on the Setup tab.
5. Enter the Order URL. This is normally your web site. eg yourwebsite.com or www.yourwebsite.com
6. Enter your Secret Key. You can get this from the Woo Commerce Dashboard.
7. Enter your Consumer Key. You can get this from the Woo Commerce Dashboard.
8. Enter the Port 443
9. Enter the Parameters (usually) /wp-json/wc/v3/orders

The screenshot shows the 'Setup' tab of the WooCommerce application. The title bar reads 'WooCommerce - Build 2025.035 Authorization 2.36 Database 1409 PATT 1.08 Enterprise 1.03'. The 'Monitor' tab is also visible. The 'Setup' tab contains the following fields and options:

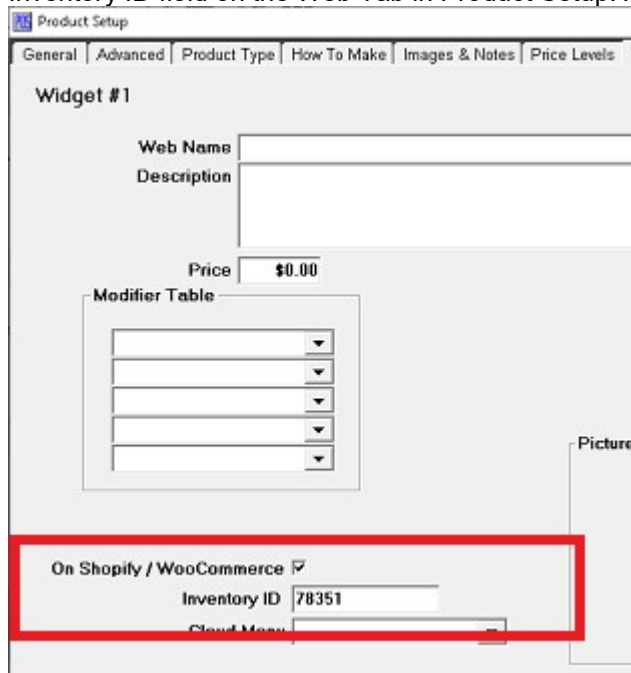
- Order URL: yourstorename.com
- Port: 443
- Parameters: /wp-json/wc/v3/orders
- Secret Key: cs_f742bb784b23737e2c6d32762dc89
- Consumer Key: ck_e908f3c26c35853aa0eb016cdb2f29d4
- Return How Many Per Request: 100
- Request Idle Timer in Milliseconds: 30000
- ☒ Auto Receive Orders
- ☒ Auto Update Inventory
- ☐ Start With Windows
- ☐ Prompt for Page
- ☐ Prompt for Date
- Inventory Update Interval Minutes: 15
- Inventory Warehouse: 1 from POS (1 to 15)
-
-
-

At the bottom, a status bar shows 'Next Inventory Update in 16 minutes', '8:08 AM', and '04/03/2025'.

10. Save your changes and close Woo Commerce.
11. Create a shortcut to WooCommerce.exe and place this shortcut on your Windows Desktop.
12. Map the items on your Woo Commerce site to the items in the POS by adding the Unique Product ID number to the SKU field for each item on the Woo Commerce Site.

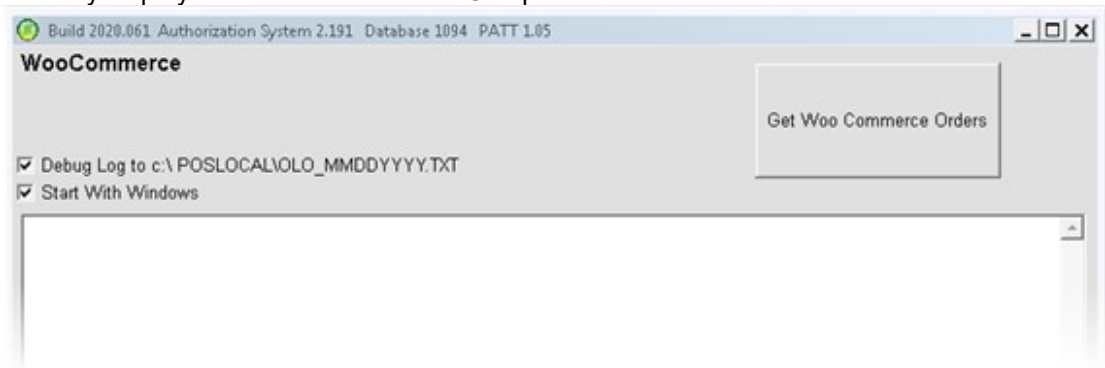


13. If you want to have POS inventory values synced to Woo Commerce, locate the Product ID for each item on the Woo Commerce site and enter this value in the Inventory ID field on the Web Tab in Product Setup. Also Check On Woo Commerce.

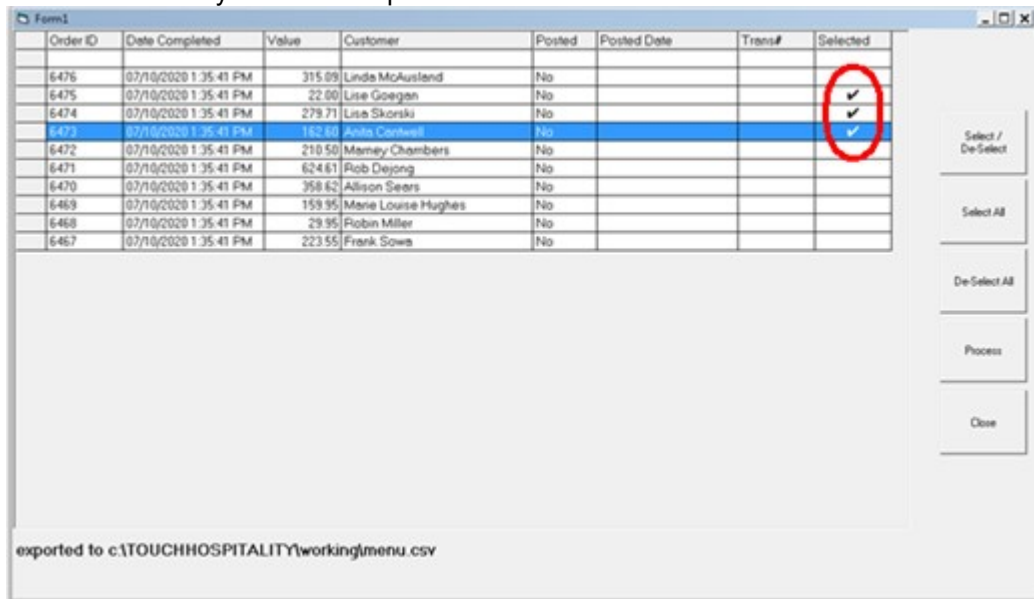


To Process Woo Commerce Orders Manually,

1. Double Click the OnLineOrder.exe Shortcut you placed on your desktop.
 2. Click Get Woo Commerce Orders.
- We only display orders with a status of Completed.

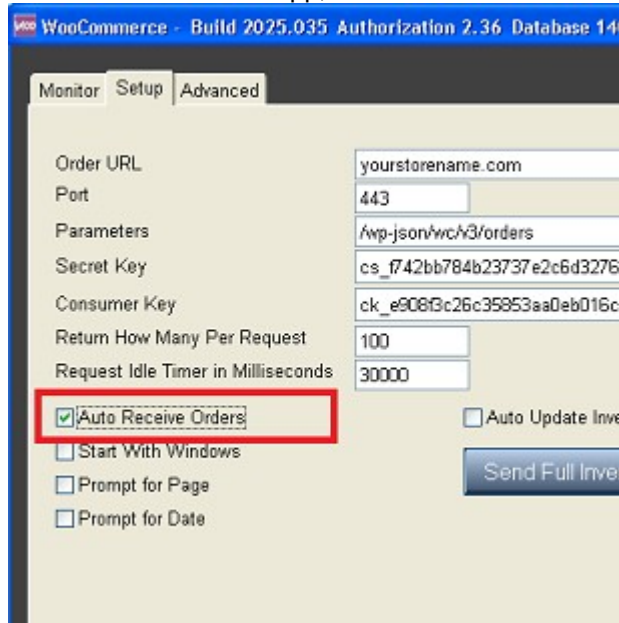


3. Select the orders you want to import and click Process.



To Process Woo Commerce Orders Automatically,

1. Make sure the WooCommerce.exe app is set to start with Windows on a PC.
2. In the WooCommerce app, check Auto Receive Orders.



Synchronize Inventory Automatically to WooCommerce,

1. Check Auto Update Inventory in WooCommerce
2. Set the Update Interval in minutes. 15 is recommended.

WooCommerce - Build 2025.035 Authorization 2.36 Database 1409 PATT 1.08 Enterprise 1.0

Monitor Setup Advanced

Order URL yourstorename.com

Port 443

Parameters /wp-json/wc/v3/orders

Secret Key cs_f742bb784b23737e2c6d32762dc89

Consumer Key ck_e908f3c26c35853aa0eb016cdb2f29d4

Return How Many Per Request 100

Request Idle Timer in Milliseconds 30000

☐ Auto Receive Orders

☐ Start With Windows

☐ Prompt for Page

☐ Prompt for Date

☒ Auto Update Inventory

Send Full Inventory Now

Inventory Update Interval Minutes 15

Inventory Warehouse 1 from POS (1 to 15)

3. Initially, you will need to click 'Send Full Inventory Now'. This may take some time but this is required to get all current inventory values into your online store. Moving forward, the app will push changes in inventory only.

Shopify

The Shopify integration can operate in a manual or automated model. Once orders are completed with the Shopify Dashboard, they can be imported into the POS. Once a transaction is imported into the POS, it will appear in the Transaction Viewer as Paid Completed Transactions.

It is the reseller's responsibility to setup and configure Shopify. UniversalPOS does not support issues with the Shopify Platform

Inventory on hand can be pushed throughout the day to the Shopify Platform.

You can run multiple instances of the Shopify App if you have more than one Shopify Store.

Shopify should be used in a retail environment only.

Build 2021.073 Authorization System 2.191 Database 1172 PATT 1.06

Shopify

Monitor Setup

☒ Auto Receive Orders
☒ Start With Windows

URL: gallery.myshopify.com
Port: 443
Order Parameters: /admin/api/2020-07/orders.json?financial_status=any
API Key: 4bee6481eabe67c19fd342c4
Secret Key: shppa_572a8d512231c1cbef3173a3
Inventory Parameters: /admin/api/2020-07/inventory_levels/set.json
Location ID: 531517761173

Dont Save Setup Save Setup

Unload Shopify Monitor Retrieve Orders Force Stock Update

Next Inventory Update in 15 minutes 11:47 PM 09/16/2021

Shopify Setup

The screenshot shows the Shopify Admin API settings page. The left sidebar contains a menu with options: Store details, Plan, Billing, Users and permissions, Payments, Checkout, Shipping and delivery, Taxes and duties, Locations, and Gift cards. The main content area is titled 'App development > universal POS API' and has tabs for Overview, Configuration, API credentials (selected), and App settings. Under 'API credentials', there is a section for 'Admin API access token' with a 'New' button. A warning message states: 'To protect your data, you'll only be able to reveal your Admin API token once. Copy and save your Admin API access token in a secure place.' Below this, the token is displayed as 'shpat_7bb79570dfcfd2303[redacted]e86d' and is labeled 'Created Sept 30, 2022 at 12:43 UTC'. A red arrow points from the text 'Secret Key' to this token. Below the token, there is a section for 'API key and secret key'. It contains two fields: 'API key' with the value '616a115687566901d26f16ecbafc8dfa' and 'API secret key' which is masked with dots. A red arrow points from the text 'API Key' to the API key field. Both sections are labeled 'Created Sept 30, 2022 at 12:39 UTC'.

Shopify Admin API settings page showing API credentials and keys.

Secret Key (points to Admin API access token)

API Key (points to API key)

Shopify

YourCompanyWebName

InventoryLevel

yourcompanyname

Search

Home

Orders

Products

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online Store

Point of Sale

Settings

← Universal API

8

App details

These details can help you keep track of your private apps and stay informed about changes that affect your app.

Admin API

You should only choose the permissions your private apps need to work. Don't use API access in ways that violate the Shopify API License and Terms of Use.

[Learn more about Shopify's APIs.](#)

Private app name

universal POS API

Emergency developer email

developers email here

The email address used for developer communications about your app, like API updates. [Learn more about getting technical updates.](#)

Private apps are subject to the [Shopify API License and Terms of Use](#).

Keep these credentials secure. They provide open API access to your store.

API key

tv32732tts276e3242tr3f

API KEY

Password

.....

Show

Example URL

https://tv32732tts276e3242tr3f:shppa_63g3tdgetwgsfw763

Private applications authenticate with Shopify through basic HTTP authentication, using the URL format `https://(apikey):(password)@(hostname)/admin/api/(version)/(resource).json`

Shared Secret

shpps_y35t3tusj38373hs733i339sjs3837363

Secrets are used to validate the integrity of webhooks.

ADMIN API PERMISSIONS

ACTIVE PERMISSIONS FOR THIS APP

Customers

View or manage customers, customer addresses, order history, and customer groups

Access scopes: read_customers and write_customers

The Customer API provides access to customer names, emails, phone numbers, and addresses.

Inventory

View or manage inventory across multiple locations

Access scopes: read_inventory and write_inventory

The Inventory API provides access to inventory levels, locations, and variants.

Orders

View or manage orders, transactions, fulfillments, and abandoned checkouts

Access scopes: read_orders and write_orders

The Orders API provides access to customer names, emails, phone numbers, addresses, geolocations, IP addresses, and user agents.

Set Read Write Permissions for Inventory

Inventory

View or manage inventory across multiple locations

Access scopes: read_inventory and write_inventory

Read and write

Set Read Write Permissions for Orders

Orders

View or manage orders, transactions, fulfillments, and abandoned checkouts

Access scopes: read_orders and write_orders

Read and write

UniversalPOS

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1. From the Shopify Dashboard (see example above),
 - a. Make a Private App called Universal
 - i. Log in to your store as the store owner
 - ii. From your Shopify admin, go to Apps
 - iii. Click Manage private apps
 - iv. Click Enable private apps
 - v. Read and check the terms, and then click Enable private app development
 - b. Generate Credentials
 - i. From your Shopify admin, go to Apps
 - ii. Click Manage private apps
 - iii. Click Create private app
 - iv. In the App details section, enter a name for your private app and a contact email address
 - v. In the Admin API section, select the areas of your store that you want the app to be able to access
 - c. Allow Developers to access the App
 - d. Set Read/Write Permissions on Orders and Products
 - e. Record the API Secret Key and API Key
 - f. Generate a Inventory Location ID
2. Upgrade the POS to the latest version.
3. Complete the General Setup for On-Line Ordering at the beginning of this section.
4. Launch the Shopify App located in the POSEGE root folder and click on the Setup tab.
5. Enter the URL e.g. mycompany.shopify.com
6. Enter your API Key and Secret Key
7. Enter the Port 443
8. Enter for Order Parameter

/admin/api/2024-01/orders.json?financial_status=paid&status=any

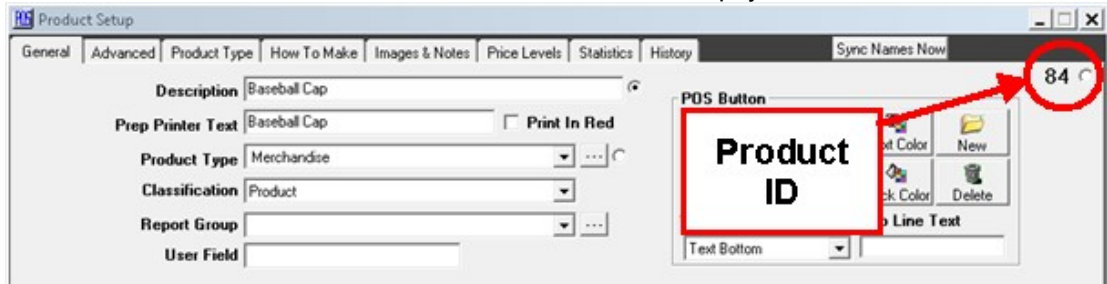
status options: open, closed, cancelled, any
financial_status options authorized, pending, paid, refunded, voided, unpaid, any
created_at_min=<###> where ### is the number of days prior to today 1 to 999
limit=### where ### is a number 50 to 250

NOTE: Make sure the API Date and Version match your actual Shopify sites Date and Version. Our example is using the API from 2024-01

9. Enter the Inventory Location ID.
10. Enter the Inventory Parameters
/admin/api/2020-10/inventory_levels/set.json

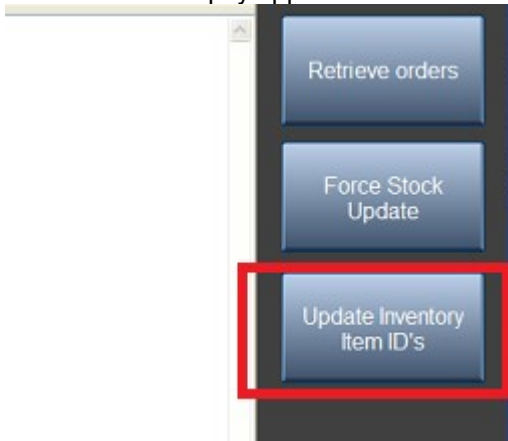
NOTE: Make sure the API Date and Version match your actual Shopify sites Date and Version. Our example is using the API from 2020-10

11. Create a shortcut to Shopify.exe and place this shortcut on your Windows Desktop. If you have more than one Shopify account that you want to access, then add a command line to your shortcut. For example, the shortcut target could be c:\posedge\shopify.exe STORENAME where STORENAME is any name other than Shopify.
12. Map the items on your Shopify site to the items in the POS by adding the Unique Product ID number to the SKU field for each item on the Shopify Site.



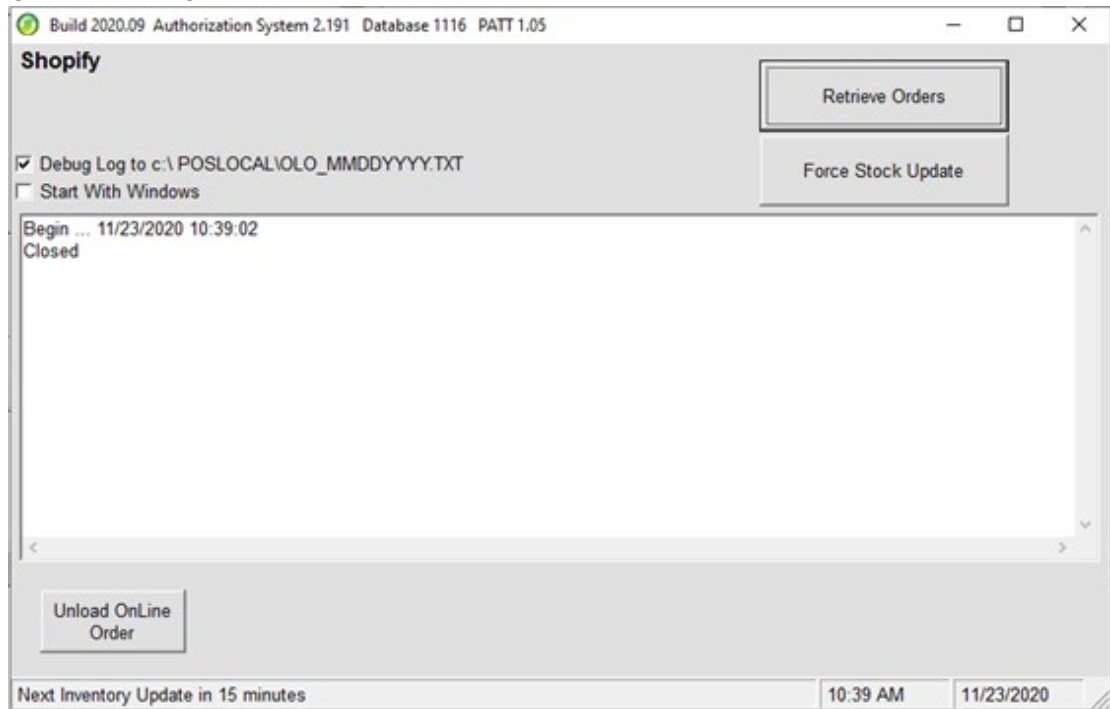
13. Optionally, if you want inventory levels pushed to Shopify, add each item's unique Shopify **inventory_item_id** to the **Inventory ID** field on the Web tab in Product Setup. Also, check Include On Web Store.

You can also populate the **Inventory ID** field by clicking the Update Inventory Item ID button in our Shopify app.



To Process Shopify Orders in Manual Mode,

1. Double Click the Shopify.exe Shortcut you placed on your desktop.
2. Click Retrieve Orders.



3. Select the orders you want to import and click Process.

Form1

Order ID	Date Completed	Value	Customer	Posted	Posted Date	Trans#	Selected
6476	07/10/2020 1:35:41 PM	315.89	Linda McAusland	No			
6475	07/10/2020 1:35:41 PM	22.00	Lise Goegen	No			
6474	07/10/2020 1:35:41 PM	279.71	Lise Skorski	No			
6473	07/10/2020 1:35:41 PM	162.60	Anita Cartwell	No			☒
6472	07/10/2020 1:35:41 PM	210.50	Mamey Chambers	No			☒
6471	07/10/2020 1:35:41 PM	624.61	Rob Dejong	No			
6470	07/10/2020 1:35:41 PM	358.62	Allison Sears	No			
6469	07/10/2020 1:35:41 PM	159.95	Marie Louise Hughes	No			
6468	07/10/2020 1:35:41 PM	29.95	Robin Miller	No			
6467	07/10/2020 1:35:41 PM	223.55	Frank Sows	No			

exported to c:\TOUCHHOSPITALITY\working\menu.csv

Select / De-Select
Select All
De-Select All
Process
Close

Typical line item example for Shopify

```
"line_items": [  
  {  
    "id": 9761106723014,  
    "admin_graphql_api_id": "gid://shopify/LineItem/976723014",  
    "grams": 113,  
    "name": "Sample Item",  
    "price": "2.99",  
    "price_set": {  
      "shop_money": {  
        "amount": "2.99",  
        "currency_code": "CAD"  
      },  
      "presentment_money": {  
        "amount": "2.99",  
        "currency_code": "CAD"  
      }  
    },  
    "product_exists": true,  
    "product_id": 6603150393542,  
    "properties": [],  
    "quantity": 1,  
    "deposit": "0",  
    "requires_shipping": true,  
    "sku": "1636",  
    "taxable": true,  
    "title": "Sample Item",  
    "total_discount": "0.00",  
    "total_discount_set": {  
      "shop_money": {  
        "amount": "0.00",  
        "currency_code": "CAD"  
      },  
      "presentment_money": {  
        "amount": "0.00",  
        "currency_code": "CAD"  
      }  
    },  
    "tax_lines": [  
      {  
        "price": "0.31",  
        "price_set": {  
          "shop_money": {  
            "amount": "0.31",  
            "currency_code": "CAD"  
          },  
          "presentment_money": {  
            "amount": "0.31",  
            "currency_code": "CAD"  
          }  
        },  
        "rate": 0.13,  
      },  
    ],  
  },  
]
```

```

      "title": "HST"
    }
  ],
  "duties": [],
  "discount_allocations": [
    {
      "amount": "0.60",
      "amount_set": {
        "shop_money": {
          "amount": "0.60",
          "currency_code": "CAD"
        },
        "presentment_money": {
          "amount": "0.60",
          "currency_code": "CAD"
        }
      }
    },
    {
      "discount_application_index": 0
    }
  ]
},
{
  "id": 9761106755782,
  "admin_graphql_api_id": "gid://shopify/LineItem/9761106755782",
  "fulfilla

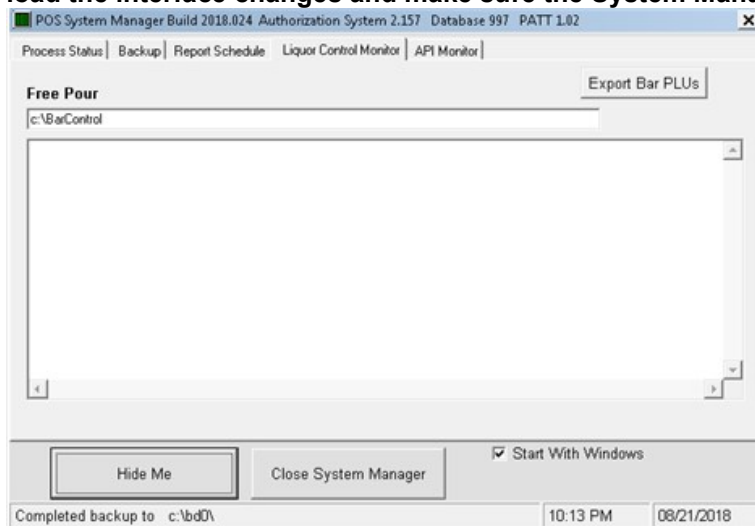
```

Liquor Control Interface

The POS system can interface to several popular liquor control system. These interfaces allow for detailed tracking of your bar inventory.

- Manual Mode – This works the same as the Berg & Control Plus without the actual control unit. Bartenders will see the orders and can clear the orders but pouring does not interact with the POS. This can eliminate the need for a Bar Chit Printer.
- Berg Interface – Liquor is dispensed in a controlled environment. The Berg interface will only allow pouring when the item has been rung into the POS.
- Control Plus Octopus Interface – Liquor is dispensed in a controlled environment. The Control Plus interface will only allow pouring when the item has been rung into the POS.
- Free Pour Interface – Bar sales are exported in real time. All reporting is performed through the Free Pour system.
- Bev Check Interface – Bar sales are exported in real time. All reporting is performed through the Bev Check system.
- Sprint Liquor Control – Liquor Pour information is given to the POS system in real time. All reporting is performed through the POS system. Two major reports are provided under Misc. Reports.
 - Liquor Counts List
 - Liquor Counts Sales Summary

The System Manager controls All Liquor Interfaces. Restart the System Manager to load the interface changes and make sure the System Manager is running at all times.



Setup for Berg and Control Plus

BERG ECU must be set for Generic, Ack Enabled.

Configure the Berg in Universal under Station Setup > Interfaces Tab

CONTROL PLUS ECU must be set for Generic with a 4 digit PLU, Ack Enabled.

Configure the unit in Universal under Station Setup > Interfaces Tab

The screenshot shows the 'Station Setup' window with the 'Interfaces' tab selected. On the left, a list of stations from #1 to #16 is visible. The main area is divided into two sections: 'DVR' and 'Liquor Control'. In the 'DVR' section, 'DVR Type' is set to 'IP - Line Detail' and 'Parameters' is '123.123.123.123:12345'. In the 'Liquor Control' section, 'Type' is set to 'Berg - with No Warnings' and 'Berg String' is '4:2400,n,8,1'.

Select the appropriate ECU in Universal under System Setup > Interfaces Tab

The screenshot shows the 'System Setup' window with the 'Interfaces' tab selected. The 'Liquor Control' section is expanded, showing a 'System' dropdown set to 'Berg / Control Plus'. Below this is a list titled 'Select all Bar Product Types' with checkboxes for 'Appetizers', 'Baked', 'Bar Modifiers', 'Beer', 'Beverages', 'Cocktails', and 'Desserts'. 'Bar Modifiers', 'Beer', and 'Cocktails' are checked. To the right of the list are 'Select All' and 'De-Select All' buttons.

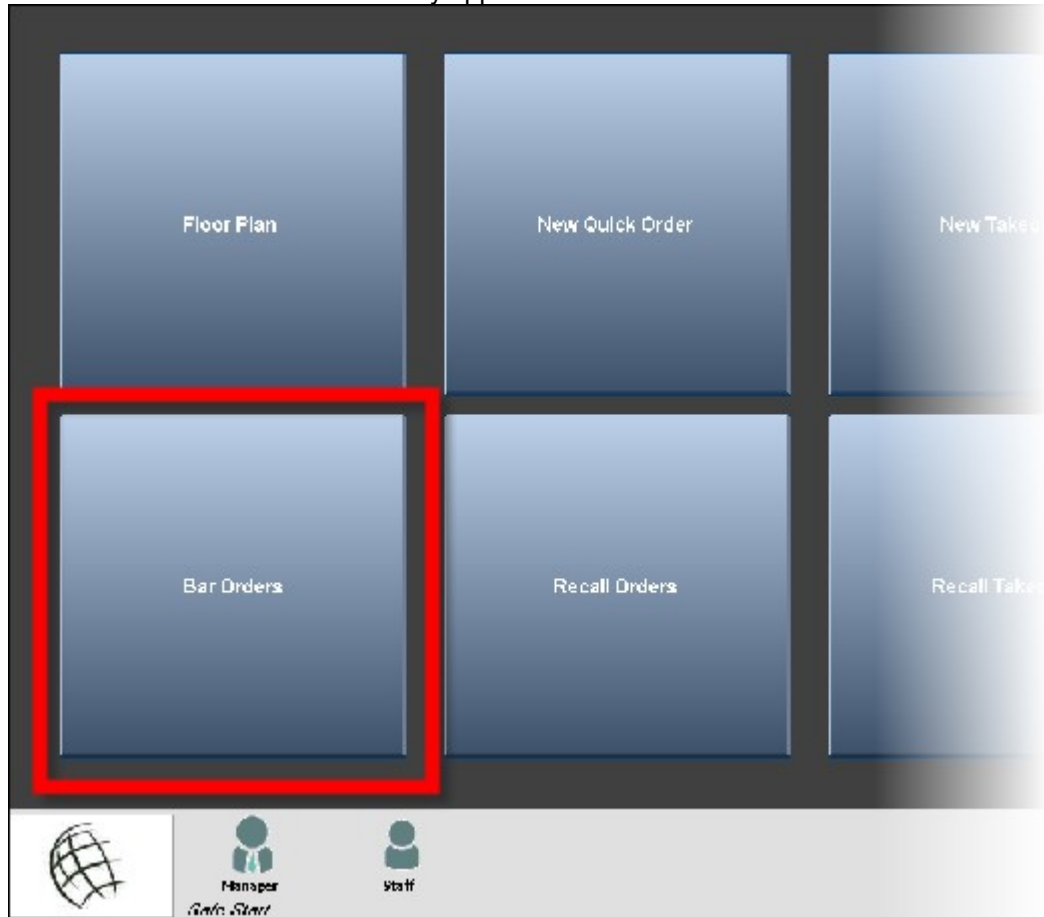
You must select all the Product Types that will need to go to the Bar Orders Screen. Only Products associated the Bar Product Types will display on the Bar Orders Screen.

Item Configuration for Berg & Control Plus

1. Go to the POS Screen Designer and add the Bar Order Button to the POS Screen.



A Bar Order Button will automatically appear on the Guided POS Screen.



2. The button will only be visible on the POS Terminals that have a Liquor ECU physically connected. The Bar Order Button allows bartenders to display a list of drinks that need to be poured. As servers add beverages to their orders, they will be displayed here.

Order #30		Order #31	
1	Manhattan	1	Bar Scotch
	>> Crown Royal		Soda
	>> Dry Vermouth		
	>> Sweet Vermouth		
1	Bar Scotch		
	Soda		

Bar Orders

Clear Selected ItemMark Selected Item as PouredRefresh

As drinks are poured, they will be highlighted in Red and when the entire beverage dispensed, the item will be removed from the screen.

- Under Product Setup, products that need to be dispensed or products that have ingredients that need to be dispensed must have the Classification set to Bar Products under the Classification.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels

Description: Manhattan

Prep Printer Text: Manhattan ☐ Print In Red

Product Type: Liquor

Classification: Bar Product

Report Group:

User Field:

- On the Advanced Tab, add the appropriate PLU number for the product that needs to be dispensed. In Our Manhattan example, we have left the PLU number blank because the Manhattan itself is not dispensed.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions

Manhattan

UPC Code: 200265

Alternate UPC 1: 1

Alternate UPC 2: 1

Bottle Size (millilitres):

Basic Selling Price:

Supplier: Supplier Part Number:

kg: 0

Cubic Meters: 0

Other Fee 1: \$0.00

Security Level Required:

Prompt:

Link To UPC:

POS Keyboard Shortcut:

PLU Number:

2nd Party Loyalty ID:

We created Ingredients for the Manhattan and these are what need to be dispensed. The PLU numbers are attached to the Ingredients

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online

Manhattan

Recipe

Description	Quantity	Units
Crown Royal	1	oz
Dry Vermouth	1	oz
Sweet Vermouth	1	oz

Create Ingredients under Ingredient Setup.

Ingredient

Blue
Crown Royal
Dry Vermouth
Eggs
Sweet Vermouth

Information

Description: Crown Royal

Product Type: Liquor

Report Group:

Ingredient Unit: oz

Container Unit: bottle

Shipping Package: case

oz/bottle: 40

bottle/case: 1

Cost per case: 55.00

Cost per oz: 1.3750

Supplier: Amce

Supplier Item Number:

Min. Stock Level: 0 bottle

Reorder Quantity: 0 bottle

PLU#: 123

Quantity On Hand: -1 oz or -0.025 bottle

Stock Adjust by oz

Stock Adjust by bottle

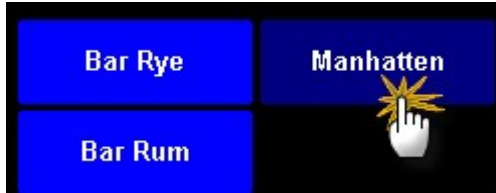
Stats

History

- Manual Keyboard Bar Commands can also be created. Set these up as Manual Comment (Print Follows Product Type) or Manual Comment (Print Follows Item). *It is important that Manual Comments DO NOT have a PLU#. Leave this field Blank.*

Berg & Control Plus POS Operations

- Servers add items to their checks as normal. In our example for the Manhattan, the server clicks the Manhattan Button.



Bartenders will see and dispense the ingredients to make the Manhattan from the Bar Orders Screen.



- Bartenders can dispense drinks using the same method as servers or simply by opening a Check and pouring the liquor.

Setup for All Other Liquor Systems

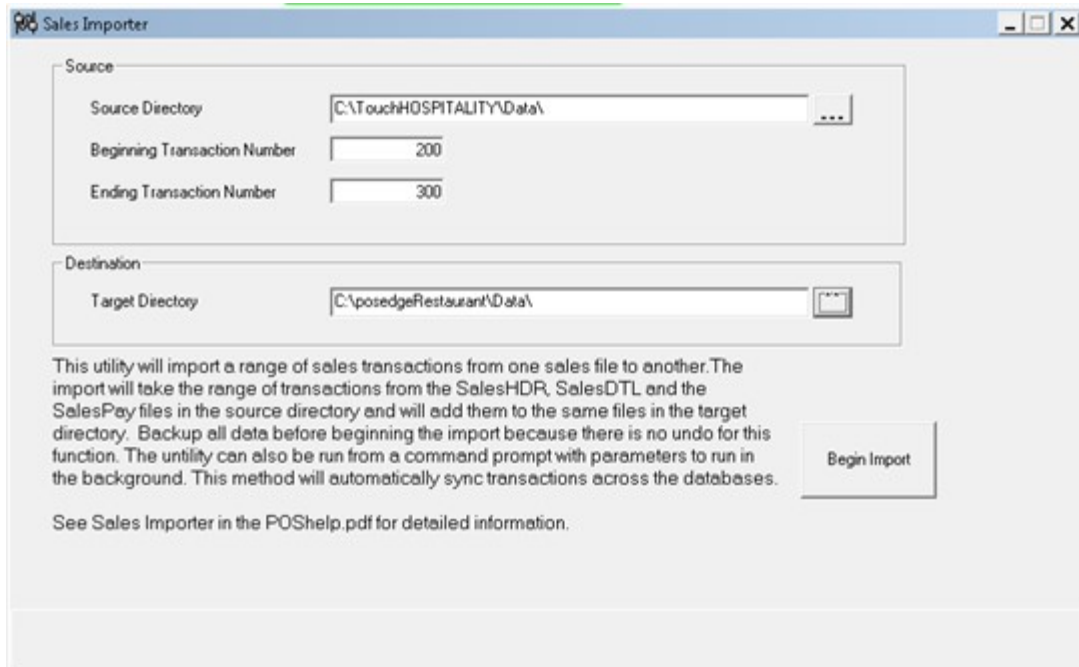
From System Setup → Interface Tab

The screenshot shows the 'System Setup' window with the 'Interface' tab selected. The 'Liquor Control' section is highlighted with a red rectangle. It includes a 'System' dropdown menu currently set to 'Free Pour', a 'Drop Folder' text box containing 'C:\BARCONTROL' with a browse button to its right, and a 'Select all Bar Product Types' list. This list has checkboxes for 'Appetizers', 'Bar Modifiers', 'Beer', 'Beverages', 'Cocktails', 'Desserts', and 'Draft'. 'Bar Modifiers', 'Beer', 'Cocktails', and 'Draft' are checked. To the right of the list are 'Select All' and 'De-Select All' buttons. The 'Property Management' section on the right has a 'Systems' dropdown set to 'None or Folio Printer' and a 'Property Management Printer' dropdown set to 'No Printer'.

1. Select from the dropdown, the appropriate Liquor Control System.
2. Enter the appropriate interface information.
 - a. Free Pour - Enter the file drop location.
 - b. Bev Check – Enter the file drop location
 - c. Sprint – Enter the serial communication protocol eg 1:9600,n,8,1
format CommPort:BaudRate,Parity, DataBits, StopBits
The Sprint System must be connected to the computer running the POS System Manager.
3. Select all the appropriate Bar Report Categories.
4. For the Sprint Interface Only, Under Product Setup → Advanced Tab, Add the PLU number assigned to each liquor in the Sprint system to each liquor in product setup.

Sales Importer Utility

The Sales Importer (ImportSales.exe) utility allows sales information to be synchronized between multiple databases. This utility can be run silently in the background or run as a desktop application.



As a desktop application, you can easily move sales information from one database to another. As a background, the utility can push sales information from a stand-alone POS terminal to a main server.

To run the utility as a desktop application,

1. Start the ImportSales.exe application.
2. Enter the Source Directory. This is the path to the data you want to import.
3. Enter the Transaction Number of the first transaction you wish to import.
4. Enter the Transaction Number for the last transaction you wish to import.

5. Enter the Target Directory. This is the path to the data file where you want the transactions imported.
6. Click Begin Import to start importing.

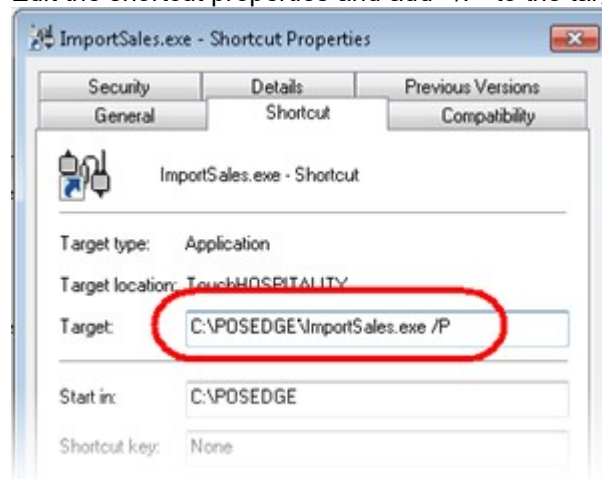
To run the utility in the background,

1. Setup your main POS system as normal.
2. Install the POS on a second terminal that is to operate in Stand-Alone mode.
 - a. In the POSEDGE root folder, edit the POSEDGE.INI file and add the following lines,

```
[ImportSales]
ServerDatabase = Pathname
```

where **Pathname** is the path to the main POS data folder.
eg \\POSSERVER\POSEDGE\DATA\

- b. Create a shortcut to ImportSales.exe
 - c. Edit the shortcut properties and add /P to the target line.



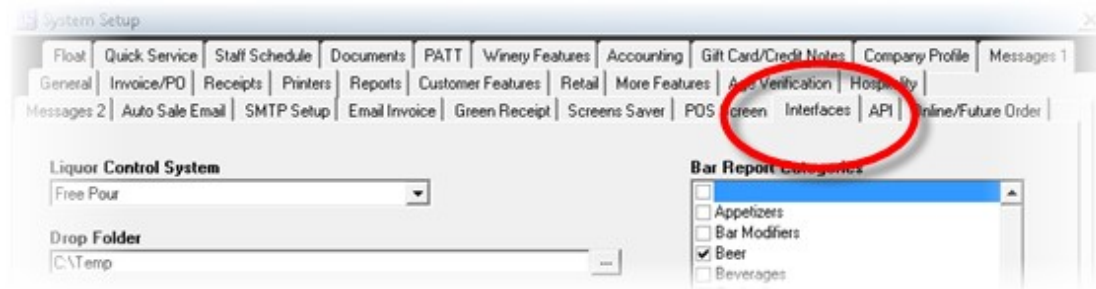
You can also add /S to the target line to have the utility run without any user prompts

3. Running the ImportSales Shortcut will synchronize sales from the stand-alone POS system to the main POS system. The shortcut can also be set up to run automatically using the Windows Scheduler allowing synchronization to happen automatically.

Property Management

The POS system can interface to your hotels property management system or a Folio Chit can print allowing the hotels front desk to manually post the room charges.

From System Setup → Interface Tab



See *Authorization Methods* under *Payment Methods*.

No interface or the Folio Printer Method

1. Select the Property Management Printer where you want the Folio Chit to print.
2. Create a Payment Method called Room Charge and set the Authorization Method to Front Desk (Print On Ticket).



When a Room Charge is processed, the POS will pre-authorize a transaction in the Authorization Manager. Once the gratuity is added and the pre-authorization is completed, a folio chit will print to the property management printer.

Usage Procedure for Folio Printer

1. Sell the items to the customer.
2. Print the receipt for the customer.
3. Close the transaction to Room Charge.



4. Enter the Folio Room Number

Please enter the room number

225

*	\$	#	/	-	+	,	?	.CA	.COM	←	Clear	
Q	W	E	R	T	Y	U	I	O	P	7	8	9
A	S	D	F	G	H	J	K	L		4	5	6
Z	X	C	V	B	N	M	.	@		1	2	3
Shift	Space									0	✓	

nothing will print to the Folio Printer at this point

5. Open the Authorization Manager under Manager or Employee Functions - Charges.



6. Add the Gratuity to the Pre-Authorization,

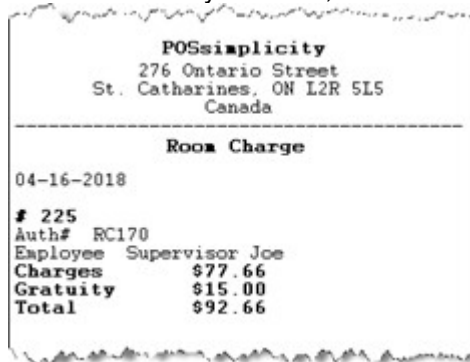
The screenshot shows a POS system interface with a list of transactions. A red box highlights the 'Pre-Authorization Complete' button. A red arrow points from the box to the button. The interface includes a table with columns: Business Date, Transactional, PreAuth, Status, Card Number, Expiry, Authorization, Reference, Amount, Employee, Sequence#, and Customer Chit. The table lists transactions from April 14, 2018, to April 14, 2018, with various amounts and employee names. The 'Pre-Authorization Complete' button is located on the right side of the interface.

Business Date	Transactional	PreAuth	Status	Card Number	Expiry	Authorization	Reference	Amount	Employee	Sequence#	Customer Chit
Apr 14, 2018	134		Approved	XXXXXXXXXX	XX/XX	306641	6	\$1.00	Supervisor Joe	0010010060	"C"SalePurchase Ref# 5
Apr 14, 2018	134		Approved	XXXXXXXXXX	XX/XX	306641	6	\$1.00	Supervisor Joe	0010010060	"C"SalePurchase Ref# 6
Apr 14, 2018	134		Approved	XXXXXXXXXX	XX/XX	306641	6	\$1.00	Supervisor Joe	0010010060	"C"SalePurchase Ref# 7
Apr 14, 2018	132		Approved	XXXXXXXXXX	XX/XX	888627	7	\$1.00	Supervisor Joe	0010010070	"C"SalePurchase Ref# 7
Apr 14, 2018	138		Approved	XXXXXXXXXX	XX/XX	372637	9	\$1.00	Supervisor Joe	0010010080	"C"SalePurchase Ref# 9
Apr 14, 2018	139		Approved	XXXXXXXXXX	XX/XX	148735	10	\$1.00	Supervisor Joe	0010010090	"C"SalePurchase Ref# 1
Apr 14, 2018	140		Approved	XXXXXXXXXX	XX/XX	901140	11	\$1.00	Supervisor Joe	0010010100	"C"SalePurchase Ref# 1
Apr 14, 2018	142		Approved	XXXXXXXXXX	XX/XX	389786	15	\$1.00	Supervisor Joe	0010010150	"C"SalePurchase Ref# 1
Apr 14, 2018	143		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010160	"C"SalePurchase Ref# 1
Apr 14, 2018	144		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010170	"C"SalePurchase Ref# 1
Apr 14, 2018	145		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010180	"C"SalePurchase Ref# 1
Apr 14, 2018	146		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010190	"C"SalePurchase Ref# 1
Apr 14, 2018	147		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010200	"C"SalePurchase Ref# 1
Apr 14, 2018	148		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010210	"C"SalePurchase Ref# 1
Apr 14, 2018	149		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010220	"C"SalePurchase Ref# 2
Apr 14, 2018	150		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010230	"C"SalePurchase Ref# 2
Apr 14, 2018	152		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010250	"C"SalePurchase Ref# 2
Apr 14, 2018	154		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010270	"C"SalePurchase Ref# 2
Apr 14, 2018	155		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010290	"C"SalePurchase Ref# 2
Apr 14, 2018	156		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010300	"C"SalePurchase Ref# 2
Apr 14, 2018	157		Approved	XXXXXXXXXX	XX/XX				Supervisor Joe	0010010310	"C"SalePurchase Ref# 2
Apr 14, 2018	158		Approved	XXXXXXXXXX	XX/XX	246771	32	\$1.00	Supervisor Joe	0010010320	"C"SalePurchase Ref# 3
Apr 14, 2018	159		Approved	XXXXXXXXXX	XX/XX	333654	33	\$1.00	Supervisor Joe	0010010330	"C"SalePurchase Ref# 3
Apr 14, 2018	160		Approved	XXXXXXXXXX	XX/XX	886377	34	\$1.00	Supervisor Joe	0010010340	"C"SalePurchase Ref# 3
Apr 14, 2018	161		Approved	XXXXXXXXXX	XX/XX	390223	35	\$1.00	Supervisor Joe	0010010350	"C"SalePurchase Ref# 3
Apr 14, 2018	162		Approved	XXXXXXXXXX	XX/XX	224678	36	\$1.00	Supervisor Joe	0010010360	"C"SalePurchase Ref# 3
Apr 14, 2018	164	Yes	Room Charged - Pre Appr	XXXX		RC164	RC164	\$2.00	Supervisor Joe		
Apr 14, 2018	165	Yes	Room Charged - Pre Appr	XXXX		RC165	RC165	\$2.00	Supervisor Joe		
Apr 14, 2018	166	Yes	Room Charged - Pre Appr	XXXX		RC166	RC166	\$2.00	Supervisor Joe		
Apr 14, 2018	167	Yes	Room Charged - Pre Appr	XXXX		RC167	RC167	\$2.00	Supervisor Joe		
Apr 14, 2018	169	Yes	Room Charged - Pre Appr	XXXX		RC169	RC169	\$2.00	Supervisor Joe		
Apr 14, 2018	171	Yes	Room Charged - Pre Appr	XXXX		RC171	RC171	\$77.66	Supervisor Joe		
Apr 14, 2018	136		9999 Unknown	XXXX				\$100.00	Supervisor Joe		
Apr 14, 2018	135		9999 Unknown	XXXX				\$100.00	Supervisor Joe		
Apr 14, 2018	132		9999 Unknown	XXXX		888627	7	\$1.00	Supervisor Joe	0010010070	"C"SalePurchase Ref# 7
Apr 14, 2018	137		9999 Unknown	XXXX		435856	8	\$1.00	Supervisor Joe	0010010080	"C"SalePurchase Ref# 8

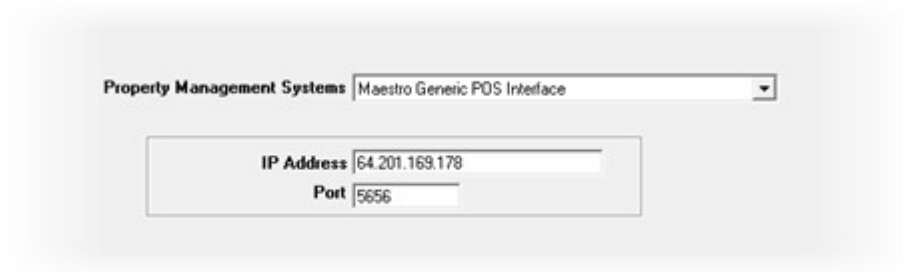
Buttons on the right: Pre-Authorize Complete, Void Authorization, Print Customer Copy, Print Merchant Copy.

Bottom bar: Receipt Manager, Date (9), Employee, Find Receipt, Monday, April 16, 2018 6:33 PM Station 1 Supervisor Joe

7. Once the Gratuity is added, the chit will print to the Folio Printer.



Maestro POS Interface

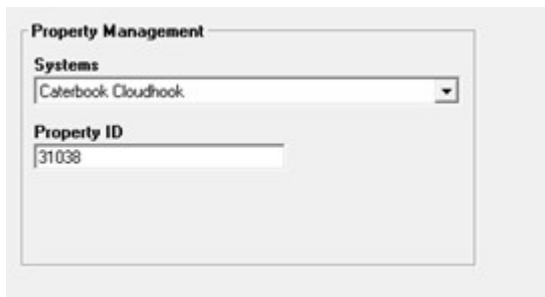


1. Set the IP Address and the Port for the Maestro PMS Server.
2. Create a Payment Method called Room Charge and set the Authorization Method to Front Desk (Authorize Folio).

Usage Procedure for Maestro

1. Sell the items to the customer.
2. Print the receipt for the customer.
3. Close the transaction to Room Charge.
4. Enter the Folio Room Number

Caterbook with Cloudhook



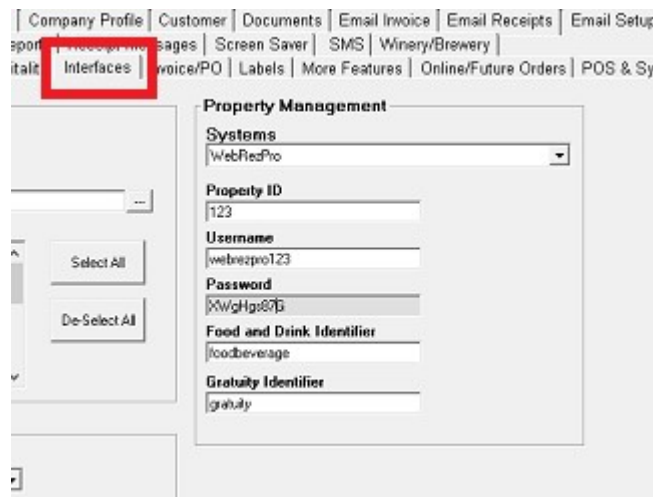
The screenshot shows a 'Property Management' window. Inside, there is a 'Systems' dropdown menu currently displaying 'Caterbook Cloudhook'. Below this, there is a 'Property ID' label followed by a text input field containing the number '31038'.

1. Set the Property ID provided by Caterbook.
2. Create a Payment Method called Room Charge and set the Authorization Method to Front Desk (Authorize Folio).

Usage Procedure for Caterbook

1. Sell the items to the customer.
2. Print the receipt for the customer.
3. Close the transaction to Room Charge.
4. Enter the Folio Room Number

WebRezPro



1. Set the Property ID, Username and Password provided by WebRezPro.
2. Set the Food & Beverage and Gratuity IDs. These must contain no spaces or special characters. Recommend **foodbeverage** and **gratuity**
3. Create a Payment Method called Room Charge and set the Authorization Method to Front Desk (Authorize Folio).

Usage Procedure for WebRezPro

1. Sell the items to the customer.
2. Press Room Charge and select Print Receipt.
3. Once client completes the Chit with Name and Room Number, recall the check and again, press Room Charge and select Post Charges.
4. Enter the Room Number and follow the on screen prompts.
5. Once the transaction is posted, you can optionally add a gratuity using Employee → Charges.

Setting Up Your POS Keyboard

The POS can be operated using a standard computer keyboard or a Point Of Sale style keyboard. You can assign various POS functions and products to keyboards. Most of the keyboard assignment functions are setup in Station Setup under the Keyboard tab.

Station Setup

General | **Keyboard** | Devices | Printers / Drawers | Advanced | Interfaces | Credit / Loyalty | Floor Plan | POS Screens

Use POS: Shift Alt Ctrl with A~Z F1~F12

1 - Click the appropriate key code

Payment Method	KeyCode
Cash	F1
Debit	F2
Visa	F3
Gift Card	F4

	KeyCode
Item List	
Customer List	F7
@/for	F5
Clear	
Paid Out	
Discount List	F9
Refund List	
Sales Tracker List	
Tax Exempt	
Subtotal	
Inquire Mode	
Employee Settings	
Price Override	
Refund Item	
Receipt	
Payment On	
Repeat	
Park Sale	
Sale Refund	

2 - Press the appropriate key on your keyboard

Station #1

Exit

In addition to various POS functions, you can set up direct products to be accessed by pressing a key on your keyboard. You program the specific item in Product Setup under the Advanced tab by clicking the Scan Code box and pressing the appropriate key on your POS keyboard.



Your POS keyboard requires programming prior to setting it up within the POS. You can program your keyboard using any of the following macros.

- F1 thru F12
- Shift F1 thru Shift F12
- Alt F1 thru Alt F12
- Ctrl F1 thru Ctrl F12
- *

Refer to the manual that accompanied your POS keyboard for instructions on programming your keyboard.

Standard computer keyboards do not require any additional programming.

Operating with your Keyboard

The function keys and direct products you set up on your keyboard will only function from the main order entry screen in the point of sale. They will not function under the Finished or Payment Screen, Manager Tasks, Employee Tasks, etc.

Under the Order Entry Screen, the keyboard functions will operate the same as the touch screen alternative.

Setting up Your Weight Scale

You can connect a weight scale to any station within the system. This will allow you to create products that can be sold by weight. For example, you can create a deli product called sliced ham, set its retail price to 2.99 per pound, set the packaged ham on the scale, and sell the product. The system will calculate the selling price for the ham by multiplying the retail price by the weight of the product.

Current Tested Devices

- Avery Berkel 6700 Series RS232 Type 4 Interface Scale
- Datalogic Magellon Scale/Scanner Series Dual Cable RS232
- CAS PD-1 & PD2 RS232 Interface Scale
- KiloTech KPOS 1530 RS232 Interface Scale
- Most RS232 Scales that support ECR Protocols Type 2 or Type 4.
- T-Scale EHB-600 and DL Series RS232 Interface Scale
- Brecknell 67XX lb / kg Scale

- 1) In System Setup → Retail Tab, set the Scale Unit of Measure to LB or KG.
- 2) In System Setup → Receipt Tab, uncheck the Short Receipt.
- 3) In Station Setup under the Devices Tab, select the appropriate scale type and enter the serial port parameters for the scale.

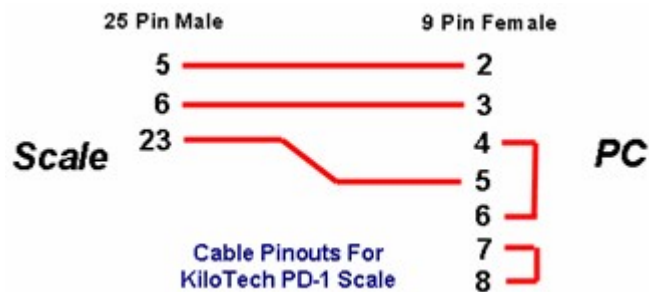
i.e. 1:9600,e,7,1 for COM1 or DEMOMODE
- 4) In POS Screen Design, add a Scale Window to your POS Desktop.
In DEMOMODE, click the Scale Window to change the weight.
- 5) In Product Setup under the Advanced tab, Check the items that require the scale and enter the retail price of the product per your scales unit of measure (LB or KG).
- 6) The next sections describe in more detail specifics for different models of scales.

*For Additional Information see
Product Setup
Using a Scale*

CAS PD-1 & PD-2 Scale (Type Mode 2)

To configure the system for the CAS PD-1 or PD2 scale,

- 1) Set the scale to Type Mode 2.
Refer to your CAS manual for more information.
- 2) Set the Port Settings for the serial port in the Windows Device Manager to,
 - Baud Rate 9600
 - Parity Even
 - Data Bits 7
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String e.g., PORT:9600,e,7,1
where PORT is the serial port the scale is connected to.
- 4) Make or purchase the appropriate cable.



KiloTech KPOS 1530 Scale (Type Mode 3)

To configure the system for the KiloTech KPOS1530 scale:

- 1) Set the following parameters on the scale under the CAL mode

- Type Mode 3
- Communication Port RS232
- Baud Rate 9600
- Parameters N, 8, 1

Refer to your KiloTech Service Manual for more information.

- 2) Set the Port Settings for the serial port in the Windows Device Manager to

- Baud Rate 9600
- Parity None
- Data Bits 8
- Stop Bits 1

- 3) Under Station Setup → Devices Tab

- Select the appropriate scale type
- Set the Scale String i.e. PORT:9600,n,8,1
where PORT is the serial port the scale is connected to.

Datalogic Magellan Dual Cable Scale/Scanner

To configure the system for the Scale:

- 1) Use the default setting on the scale.
- 2) Set the Scale Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity Even
 - Data Bits 7
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String i.e. PORT:9600,e,7,1
where PORT is the serial port the scale is connected to.

To configure Scale/Scanner for Dual Cable Serial, scan the following codes.

Scan Set / End

Scan IF = RS232

Finish with scan Set / End

Set / End



IF = RS232



Set / End



To configure the system for the Magellan 8200 scanner,

- 1) Disable the barcode Label-ID on the scanner and Enable Beep Not On File.
See the Magellan manuals for additional information.



- 2) Set the Scanner Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity None
 - Data Bits 8
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scanner type
 - Set the Scanner String i.e. PORT:9600,n,8,1

ECR Interface (Type Mode 4)

To configure the system for the ECR Type Mode 4 scale:

- 1) Set the scale to Type Mode 4.
Refer to your scale manual for more information.
- 2) Set the Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity Even
 - Data Bits 7
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String i.e. PORT:9600,e,7,1
where PORT is the serial port the scale is connected to.

T-Scale EHB-600

- 4) Set the scale to P-CONF.
Refer to your scale manual for more information.
- 5) Set the Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity None
 - Data Bits 8
 - Stop Bits 1
- 6) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String i.e. PORT:9600,n,8,1
where PORT is the serial port the scale is connected to.

T-Scale DL Series

- 1) Set the scale to PORT > CAS > ACTIVE PROTOCOL Mode
Refer to your scale manual for more information.
- 2) Set the Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity None
 - Data Bits 8
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String i.e. PORT:9600,n,8,1
where PORT is the serial port the scale is connected to.
- 4) This scale offers a pole display that displays the unit price of the item and the total price. This feature can be disabled by adding the following to the POSEDGE.INI file in the POSLOCAL folder.

```
[Scale]  
ScaleDisplayOff=True
```

Brecknell 67XX lb / kg Scale

To configure the system for the Brecknell scale:

- 1) Set the scale to the following
 - a) Baud Rate: 9600 Parity: none Data Bits: 8 Stop Bits: 1
 - b) Parameter 8213-SCP03: Set the USER-COM-LYOUT parameter to SCP03.
- 2) Set the Scale Port Settings for the serial port in the Windows Device Manager to
 - Baud Rate 9600
 - Parity None
 - Data Bits 8
 - Stop Bits 1
- 3) Under Station Setup → Devices Tab
 - Select the appropriate scale type
 - Set the Scale String i.e. PORT:9600,n,8,1
where PORT is the serial port the scale is connected to.

Scale Tares

A Scale Tare is used to adjust the weight on the scale to account for the container the merchandise is packaged in. Tares can be preprogrammed to account for your own containers or tares can be open so you can enter the tare value at the point of sale.

To set up Tares,

1. Go to Administration → System Setup → Retail Tab → Click Tare Setup and create the various tares that are required.

Open Tare example with weight set to zero



The screenshot shows the 'Tare Setup' window with the 'General' tab selected. On the left, a list of tares includes '* Open Tare', 'Large Salad Container', and 'Small Salad Container'. The right pane shows the configuration for the selected '* Open Tare'. The 'Name' field contains '* Open Tare' and the 'Weight' field contains '0'. A small number '4' is visible in the top right corner of the right pane.

Container Tare example with weight set to container weight



The screenshot shows the 'Tare Setup' window with the 'General' tab selected. On the left, a list of tares includes '* Open Tare', 'Large Salad Container', and 'Small Salad Container'. The right pane shows the configuration for the selected 'Large Salad Container'. The 'Name' field contains 'Large Salad Container' and the 'Weight' field contains '0.075'. A small number '3' is visible in the top right corner of the right pane.

2. To add container tares to products, Go to Product Setup → Advanced Tab and Check Use Scale and Select the appropriate Tare. In our example, our product is a Large Salad so the Tare is Large Salad Container.

Product Setup

General | **Advanced** | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History | Promotions

Greek Salad

UPC Code C lbs 0

Alternate UPC 1 1 Cubic Feet 0

Alternate UPC 2 1 Other Fee 1 \$0.00

Bottle Size (millilitres) C Security Level Required

Basic Selling Price C Prompt

Supplier Part Number

Link To UPC

POS Keyboard

PLU Number

3rd Party Loyalty ID

Quantity On Hand

Minimum Stock

Re-Order Quantity

Label Type No Label

Package Size

Ask For Quantity ☐

Open Price ☐

Inactive ☐

Scale Tare Small Salad Container

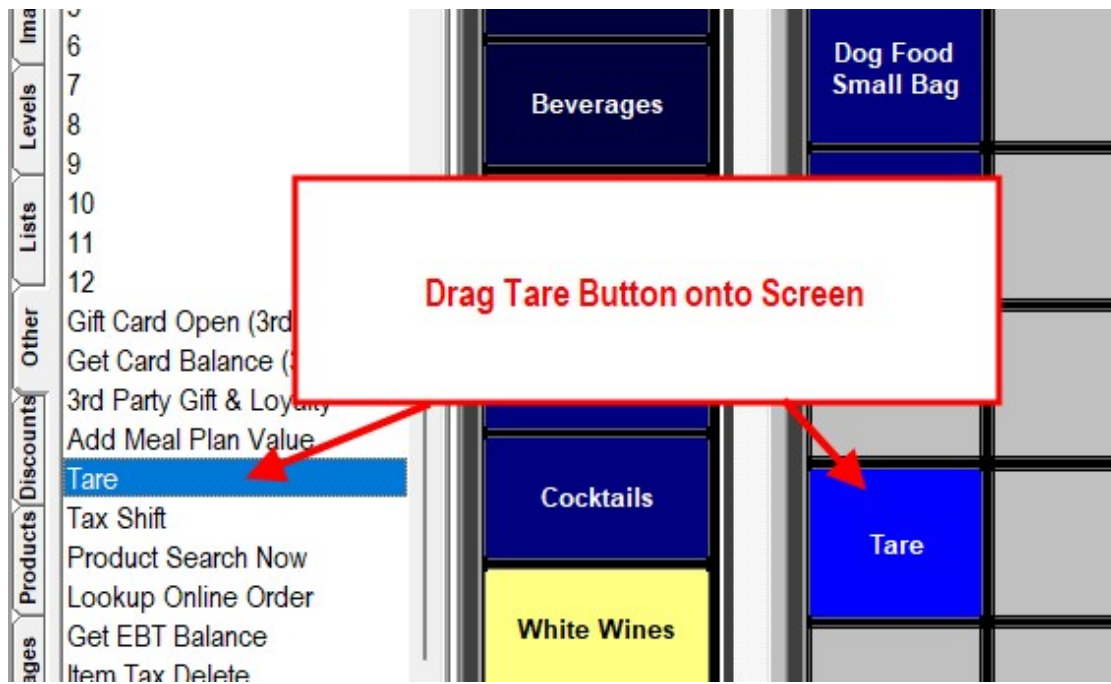
Use Scale ☒

Print Shelf Tag Print Product Tag Quick Stock

List Find UPC Find Part# Find Image Delete Copy Add New Refresh Exit

For a product that requires a tare, click Use Tare and select the appropriate tare

3. To add the Tare list to the screen or to use Open Tares, Go to the Menu Designer and drag the Tare button onto the screen.



Using Tares

Container tares at the point of sale take care of themselves.

In our example above, the Large Salad Container Tare would be automatically applied when the salad is sold.

The Tare List and Open Tares are accessed at the point of sale by pressing the TARE Button, selecting the appropriate tare, and then selling the product. If the selected tare is open, the system will prompt for the container weight when the item is sold.

Setting Up Your Winery / Brewery System

The POS has several features that have been specifically designed for wineries and micro breweries.

- 1) Under System Setup → Winery /Brewery Tab, select the Winery Brewery Location. Choose Basic if your location is not listed.

Accounting | API | Age Verification | Auto Sale Email | Company Profile | Customer | Documents | Email Invoice | Email Receipts | Email Reports | PATT | Quick Service | Receipts | Retail | Reports | Receipt Messages | Screen Saver | SMS | Winery/Brewery |

Winery/Brewery Location Basic

Do Not Allow Manual Adjustments Of Key Price ☒

Percentage Cost Of Retail For Wines 58.00

Default Sale Type For Wine Club

Email Reports (seperate addresses by a comma)

Warehouse Number

- 2) Create Sales Types as needed, such as called Retail Sale, Licensee Sale, Wine Club and Sampling. Delete unneeded Sales Types.
- 3) Create a Discount called Sampling and set it for a Percent Sale Discount with a rate of 100%. Under the Advanced Tab, uncheck all the Tax Boxes.

4) Under Tax and Deposit Setup, setup your taxes and deposits as required.

Tax and Deposits Setup

General Winery

Tax Number	Name	Rate	Limit	VAT	Accounting Code	Quantity Limit For Tax Exempt	Group #
1	H.S.T.	13.0000	0.01				1
2		0.0000	0.00				2
3	HST Included	13.0000	0.00	☒			3
4		0.0000	0.00	☐			4
5		0.0000	0.00	☐			5
6		0.0000	0.00			0	6
7		0.0000	0.00			0	7

Deposit

Deposit

Other Fee 1

Other Fee 2

Combine VAT 4 and 5 ☐

Print VAT on Receipt ☒

Print Exempt on Receipt ☒

Tax To Charge On Shipping H.S.T.

Tax To Charge On Purchases H.S.T.

Tax On Auto & Manual % Gratuity

Tax Type Standard (Round Off)

General Tax Name Tax

Tax On Tax None

Group 1 Name H.S.T.

Group 2 Name

Group 3 Name HST Included

Group 4 Name

Group 5 Name

Group 6 Name

Group 7 Name

- 5) On the Winery Tab, assign the taxes and deposits to apply to

 Tax and Deposits Setup

General
Winery

	Apply Deposit	H.S.T.		HST Included		
Retail Price	☒	☒	☐	☐	☐	☐
Licensee Price	☒	☐	☐	☒	☐	☐
Duty Free Price	☐	☐	☐	☒	☐	☐
LCBO Price	☐	☐	☐	☒	☐	☐
Export Price	☐	☐	☐	☒	☐	☐
Other Price	☐	☐	☐	☒	☐	☐

- 6) Create your Sales Departments as needed. For example, Red Wine, White Wine, Rose, Merchandise.

- 7) Create your Product Types as needed.
Under Product Type Setup, check Invoice Module Gets Taxes from Wine/Brewery Price for any Retail Wine/Brewery Product Type. Enter the Bottle Deposit Value for the item.

Product Type Setup

General | Advanced | Auto Coupon | Modifier Table

Name: Retail Wine 750ml

Sales Department: Merchandise

Loyalty Applies: ☒

Is Drink: ☐

Use Age Verification 1: ☐

Use Age Verification 2: ☐

Food Stamps Allowed: ☐

Commission Rate: 0.

Link To:

3rd Party Loyalty ID:

Deposit: 0.20

Other Fee 1: 0.00

Other Fee 2: 0.00

Combo Tag:

Prep Printers

☐ Local Receipt

☐ Kitchen

☐ Bar

☐ Ticket Printer

Taxes

☐ H.S.T.

☒ HST Included

Invoice Module Gets Taxes From Wine/Brewery Prices: ☒

17

Appetizers
Bar Modifiers
Beer
Beverages
Cocktails
Desserts
Draft
Entrees
Food Modifiers
Liquor
Merchandise
Pizza
Retail Wine 750ml
Salads
Toppings
Wine

Navigation: [Previous] [Next] [First] [Last]

Buttons: Delete Add New Exit

- 8) Create your Products. When setting up your Winery/Brewery Products, set the products Classification to Wine / Beer / Cider Sales by Bottle. Enter other standard setup as required.

Product Setup

General | Advanced | Product Type | How To Make | Images & Notes | Price Levels | Web / Online | Statistics | History

Description: Bottle Cabernet

Prep Printer Text: Bottle Cabernet ☐ Print In Red

Product Type: Wine

Classification: Wine / Beer / Cider Sales By Bottle

Report Group:

VQA #:

Wine Beer Cider Price

Sync Prices

Cost/Qty	\$0.00	1	
Retail Price	\$19.95	1	
Licensee Price	\$0.00	1	
Duty Free Price	\$0.00	1	
LCBO Price	\$0.00	1	
Export Price	\$0.00	0	
Other Price	\$0.00	0	
Modifier Price	\$0.00		

POS Button

Bottle Cabernet

Center Middle

Modifier Table

Ask All

Course Sorting

☐ Appetizer

☐ Entree

☐ Dessert

☐ 4th Course

☒ No Course

Click the Wine Beer Cider Price Button to enter Retail Pricing.

Wine Pricer

Retail Price	19.95
Licensee Price	17.00
Duty Free Price	15.00
LCBO Price	15.00
Export Price	12.00
Other Price	0.00
Cost Price	8.00
Bottle Size (millilitres)	750
Basic Selling Price	19.9500

Post Prices To Product

9) When you create your customers, enter the required general information and set their Price Level and Default Sales Type. This will make it simple for the invoicing app to charge the appropriate prices when a customer is selected.

Making Sales In Your Winery

- All Retail Store Sales are made using the point of sale system.
See Point Of Sale User Guide for additional information.
- All other sales channels using the invoicing system.
See Invoicing User Guide for additional information.

For all sales, always verify,

- ✓ the Price Level
- ✓ the Sales Type

Sampling

- 1) Sell the bottle that you are sampling.
- 2) Perform a Sampling discount.
- 3) Finish the sale by pressing the Cash Button.

Setting Up Gift Baskets For Wineries

There are several ways you could set up and sell gift baskets using the POS, but the following is the preferred method because it will allow the system to accommodate all the various tax and bottle deposit structures that could exist in the basket. For example, your basket might contain Wine, Cheese, Cork Screw, and Glasses. This means the basket must charge wine taxes, deposits, and merchandise taxes.

Sell Gift Baskets just as you would any other product.

Note: You cannot sell gift baskets using the Invoicing Module.

Note: See Sales Departments, Product Types, Products, Modifiers, Combos and Menu Design for additional information.

The following steps will demonstrate how to create a Gift Basket.

- 1) Click *Administration* → *System Setup* → *Hospitality Tab* and enable the feature *Force Voiding Of Master Item*.
- 2) Click *Products* → *Sales Department* and if it doesn't already exist create a Sales Department called Gift Baskets.
- 3) Click *Products* → *Product Types* and if it doesn't already exist create a new Product Type called Gift Baskets. Verify that this product type is charging no taxes, no deposits, and is being applied to the Sales Department Gift Baskets.
- 4) Click *Products* → *Product Setup* and verify or create each product that will go into the Gift Basket.

Bottle Size	750
Basic Selling Price	17.0512
Report Group	
Price Table	
Cost/Qty	\$5.50 1
Retail Price	\$19.95 262.7
Licensee Price	\$16.26 195.6
Duty Free Price	\$10.31 87.5%
LCBO Price	\$9.83 78.7%
Export Price	\$10.31 87.5%
Modifier Price	\$19.95 262.7

Wine Price

Enter the Price the Item Will Sell For In The Gift Basket.

Find Part# Find UPC List Find

For each product, enter the price that is sells for within the gift basket. Enter this price in the Modifier Price field.

Note: Do not associate any of the products you create here to the Gift Basket product type that you just created in step 3.

- 5) Click *Products* → *Modifiers* to create the list of items that will go into the Gift Basket.

Modifier Table Setup

Table Name: Gift Basket #1

Minimum Choices: 5 Maximum Choices: 5

Auto Accept Selection: ☒

Allow How Many Splits: 0

Roll Up Price: ☐

Number Free Choices: 0

Compact Screen: ☐

Max. Price For Free Choice: \$0.00

Is Combo: ☒

Modifier List

- Chardonnay 2006
- Cabernet Merlot 2005
- Cork Screw
- Wine Glass
- Wine Glass

Product List

- Blue Rane
- Bottle Cabernet
- Bottle Chardonnay
- Budweiser
- Cabernet Merlot 2005
- Caesar Salad
- Chardonnay 2006
- Cheesecake
- Chicken Swiss
- Chicken Wings 12
- Clamato Juice
- Clams Casino
- Coffee
- Coke
- Comment
- Coors Light
- Cork Screw
- Corona
- Crab Cakes

Buttons: Add Item, Remove Item, Add New Product, Edit Product

Product Filter: [Dropdown]

Items In Your Gift Basket

Bottom Bar: Add New Record (Yellow button), Save (Floppy disk icon)

- Under Table Name, enter a unique name for your gift basket.
- Under the Product List, locate the items that are in your gift basket. Click the Add Item button to move them into the basket.
- The Minimum Choices and the Maximum Choices both must equal the number of items in the gift basket. In our example, we have five items in our gift basket. We have set both the Minimum and Maximum Choices to five.
- Check the Auto Accept Selection feature.
- Check the Is Combo feature.
- Uncheck all other features.

- 6) Click *Products* → *Menu Design* to create the Gift Basket button on your point of sale screen. Right click on any blank button to create a new product.

2 Click Advanced

1 Create the Gift Basket product. Assign it to the Product Type Gift Basket and Charge No Price.

Product Setup
Information | **Advanced** | How To Make | Images & Notes | Statistics | History

Description: Gift Basket

Product Type: Gift Basket
Classification: Product
UPC Code:
Alternate UPC Code:
Bottle Size:
Basic Selling Price:
Report Group:
Price Table:

Cost/Qty: \$0.00 | 1
Retail Price: \$0.00
Licensee Price: \$0.00
Duty Free Price: \$0.00
LCBO Price: \$0.00
Export Price: \$0.00
Modifier Price: \$0.00

Wine Price

POS Button
Gift Basket
Text Color
New Image
Back Color
Delete Image

Supplier
Supplier Part Number

Re-Order Quantity: 0
Label Type: No Label
Package Size:

Print Shelf Tag | Print Product Tag | Quick Receive Stock

Add New Record Refresh Save

Assign the modifier table you created in step 5

Product Setup
Information | Advanced | **How To Make** | Images & Notes | Statistics

Gift Basket

Modifier Table
Gift Basket 1

* First Course

Wine / Brew Clubs

Under Construction

Fast Food Takeout & Delivery

There are only a few steps in setting up for takeout and delivery.

- 1) Create 2 Sales Types called Delivery and Takeout.

Sale Type Setup

General | Advanced

Sale Type Name ☒ **Print In Red**

Print Winery Reports ☐

Next Invoice Number

Delivery Fee

Price Level

- 2) In System Setup under the *Quick Service* tab, select the Sales Type you just created as your Default Sales Type for Deliveries and Takeouts. Optionally, set your default delivery fee.

System Setup

General | Invoice/PO | Receipts | Printers | Reports | Customer Features | Retail | More Features | Age Verification | Hospitality | Float

Email Setup | Email Invoice | Email Receipt | Screens Saver | POS Screen | Interfaces | API | Online/Future Order | SMS

Quick Service | Employee | Documents | PATT | Winery/Brewery | Accounting | Gift Card/Credit Notes | Company Profile | Messages 1 | Messages 2 | Auto Sale Email

Customer Receipt Prints On Kitchen Printer 2 For Deliveries ☐

Force a Receipt for Delivery and Takeout ☒

Default Sales Type for Deliveries

Default Sales Type for Drive Thru

Default Sales Type for Pick Up

☐ **Use Google Maps API**

My Postal / Zip Code

API Key

Default Delivery Fee

Delivery Zones

- 3) Optionally, under Station Setup, set the Station Type to Pizza Delivery or Retail/Quick Service for all applicable stations.
- 4) In POS Screen Design, make sure you add the following buttons to your POS screen:
 - Delivery to suspend and recall transactions for delivery
 - Pickup to suspend and recall transactions for takeout
- 5) Optionally, create your delivery drivers as employees and Check Is Delivery Driver

The screenshot shows the 'Employee Maintenance' window with the 'General' tab selected. On the left, a list of employees includes 'Delivery Driver 1' (highlighted), 'Delivery Driver 2', 'Duck Donald', 'Mouse Mickey', 'On Line', and 'Supervisor Joe'. The main form area contains the following fields and sections:

- Last Name:** Delivery Driver 1
- First Name:** (empty)
- POS Name:** Driver 1
- POS Access Number:** 99
- Alternate POS Access Number:** (empty)
- Pinpad Access Number:** (empty)
- Job Position:** A table with two columns: 'Job Position' and 'Pay Rate'. It contains one row with 'Driver' and '\$0.00'. To the right of the table are '+' and '-' buttons.
- Employee Reference Number:** (empty)
- Pager Number Required:** A checkbox (unchecked) followed by an empty text field.
- Is Delivery Driver:** A checkbox (checked).

- 6) Create your menu as needed using Products, Super Buttons, Modifiers and Price Tables.

The System Manager

The System Manager is a program that is included with the POS system. This program must be running on *one computer only*, usually the point of sale server computer.

To view the System Manager, simply right click on the icon and left click *View System Manager*.



The System Manager is a utility that runs hidden in the background. It provides many functions, but its main purpose is to back up your data and update your stock levels. When you receive stock or sell a product, the information is sent to the System Manager and it will update the stock changes. If for any reason the System Manager is not running, then your stock will not be accurate. This is not as big a problem as it sounds. As soon as the System Manager is running again, it will gather all the information that is waiting to be processed and update your stock levels.

To disable the System Manager, right click on the icon and left click *Exit System Manager*.

*For Additional Information see
Backing Up Your Data
Rebuilding Your Data Files*

POSEDGE.INI

Some system information that the POS needs to operate correctly is stored in configuration setting files. Generally, the information within these files is created and maintained automatically by the POS and should not require any user intervention.

The POS maintains two configuration files; Global and Local. The global file stores information that is required by all POS stations while the local file stores information that is specific to each individual station.

Only qualified administrators should make manual adjustments to these files.

Global POSEDGE.INI

(Located in the root POS folder on the server computer)

[Database]

DBName2004

Location POS data files For example, DBNAME2004=\\posserver\posedge\data\

PGName2004

Location POS root directory For example, PGName2004=\\posserver\posedge\

SPName2004

Location POS spool directory. By default, this entry is not present and the receipt data is automatically spooled to the *PGName2004\spool* directory. You may want to have a dedicated printer server, in which case you can specify the spool directory.

For example, SPName2004=\\posserver\posedge\spool\

DBNameLocal

Local location POS data files. For example, DBNAMELocal=c:\posedge\data\

PGNameLocal

Local location POS root directory. For example, PGNameLocal=C:\posedge\

SPNameLocal

Local location POS spool directory. By default, this entry is not present and the receipt data is automatically spooled to the *PGNameLocal\spool* directory. You may want to have a dedicated printer server, in which case you can specify the spool directory.

For example, SPNameLocal=c:\posedge\spool\

Accounting

Location of POS accounting files. By default, accounting export files are saved to the accounting folder located within the point of sale root folder. Any entry here will override this default. You may want your accounting files saved to another location.

[Reports]

SystemDSN=System DSN Name

Enter the System DSN. (usually \\posserver\posedge\data)

MyDSN=System DSN Name

Enter the DSN to use when creating reports (usually POSReports)

Path=pathname

Enter the path name to the report data files (usually c:\temp)

SyncData=True/False

[Backup]

Interval

The number of minutes between backups

Source

The pathname to backup

Destination1

The first destination for the backup

Destination2

The second destination for the backup

Destination3

The third destination for the backup

Destination4

The fourth destination for the backup

[PortableDataCollector]

CollectorIniLocal=True/False

DataFormat=UMQ or UQ

DataCollectorFiles=pathname i.e. c:\posedge\3rdparty\

JobPath=path & filename i.e. c:\posedge\3rdparty\doPT630.bat

[PortableDataCollector]

[SystemManager]

SystemManagerStation=## where ## is the station that runs the System Manager

StartWithWindows=0/1 (where 0=False and 1=True)

[Invoice]

NumberRows=### where ### is the number of rows of detail allowed per invoice. If this entry does not exist, NumberRows defaults to 99.

[Options]

3rdPartyAppCustIDL=# where # is the Customer_IDL to assign for the 3rdPartyApp button

Local POSEGE.INI

(Located in the c:\poslocal folder on each computer)

[Database]

IsLocal=True/False

Set to True if the database and the POS programs are physically located on this computer. The default setting is False.

SoftwareKeyName

Use this entry to override the name of the software.key file if you need to have multiple software keys in one location.

Eg. SoftwareKeyName=Software1.Key

[PortableDataCollector]

AutoCreate=True/False

DataFormat=UMQ or UQ

DataCollectorFiles=pathname i.e. c:\posedge\3rdparty\

JobPath=path & filename i.e. c:\posedge\3rdparty\doPT630.bat

[Reports]

SystemDSN=System DSN Name

Enter the System DSN. (usually \\posserver\posedge\data)

MyDSN=System DSN Name

Enter the DSN to use when creating reports (usually POSReports)

Path=pathname

Enter the path name to the report data files (usually c:\temp)

[Launcher]

POSPath=\\{SERVER COMPUTER NAME}\{POS Folder}\

Enter the path to the POS root folder on the server. Example, \\POSSERVER\POSEDGE\

StationNumber=#

Enter the station number for this POS terminal.

StartAutomatically=True or False

Enter TRUE to have the terminal start the Point Of Sale as soon as the POS Launcher is started or FALSE to require the user to confirm.

SyncTime=Net Time \\{COMPUTER NAME} /SET /YES

Enter the command line sync the time for this computer.

AllowStandAlone=True or False

BackUpPOSPPath=C:\POSLOCAL\

3rd Party Integrations



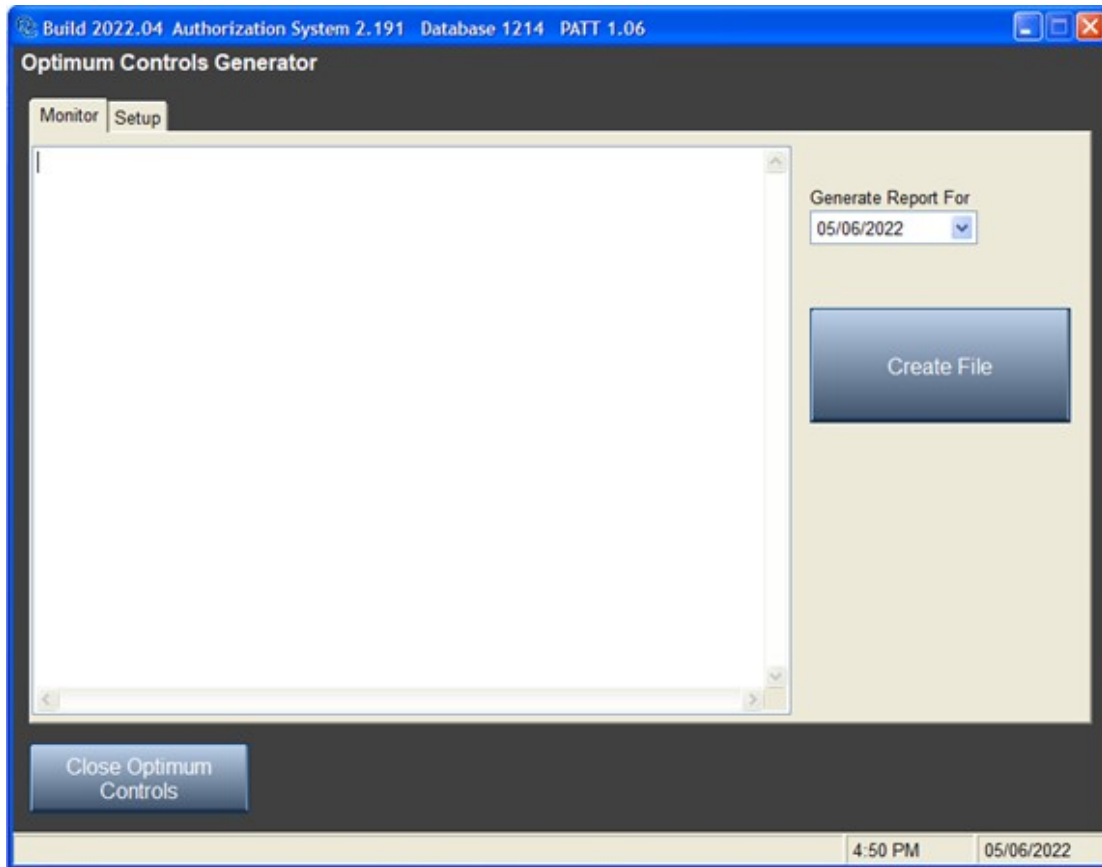
3rd Party Applications

See Gift Cards (Ackroo Processed)

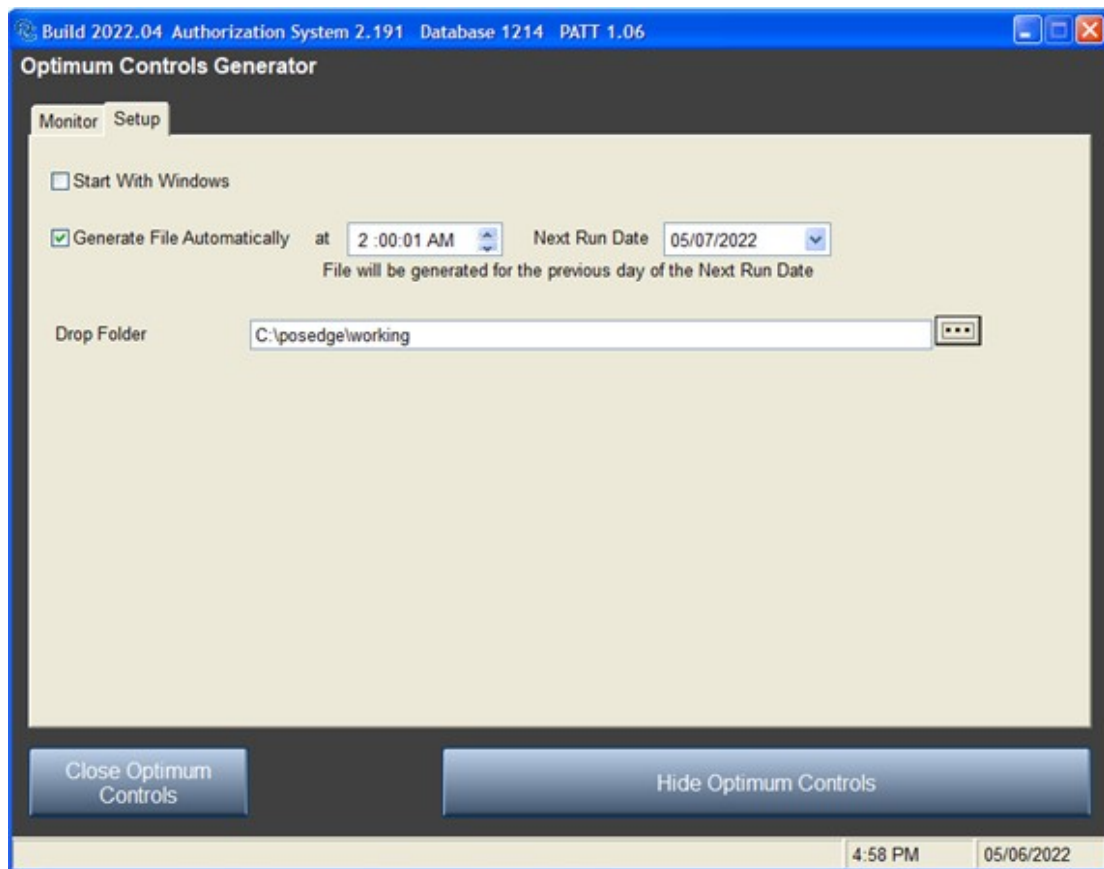
See Customer Rewards (Ackroo Processed)

Optimum Controls

Optimum Controls provides a suite of easy to use management tools for your restaurant. The Optimum Controls Generator provides information from the point of sale to Optimum Controls. The generator can run in an auto mode, so the file is automatically generated daily or in a manual mode where you select the date and manually generate the report.



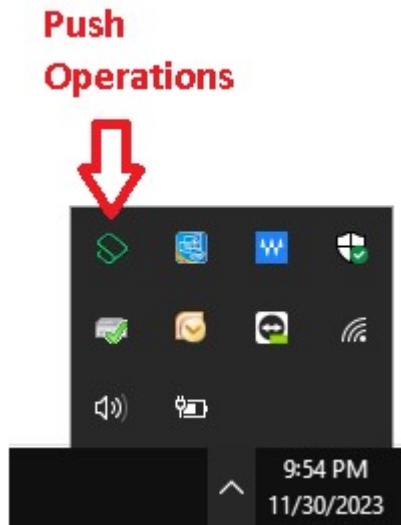
Setup



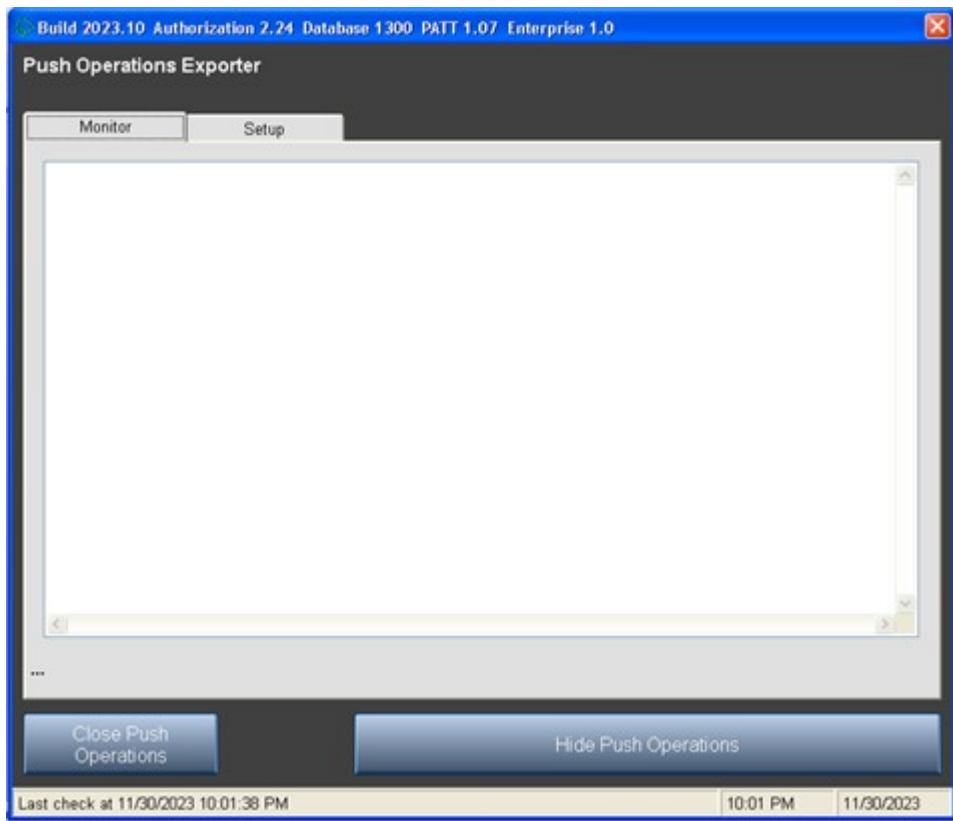
1. Check to Start with Windows or add the application to your Windows Startup Folder.
2. If you want to have the reports automatically generated, check Generate File Automatically and enter the time of day to generate the report and also the first date to begin. If you leave this unchecked, you can manually generate the report from the Monitor Tab.
3. Select the Drop Folder. This is where the generated report will be stored. File names for the generated reports are OC_DD-MM-YYYY.csv

Push Operations

Push Operations provides analytical tools for your business. The Push Operations Exporter provides information from the point of sale to Push Operations. The generator can run in an auto mode, so the file is automatically generated daily or in a manual mode where you select the date and manually generate the report.



Right Click the Icon and Click View to Open



Setup

Build 2023.10 Authorization 2.24 Database 1300 PATT 1.07 Enterprise 1.0

Push Operations Exporter

Monitor Setup

☐ Start With Windows ☐ Enabled

Temp Folder C:\Temp\

Next Date To Run 12/01/2023 Time To Run 12:00:00 AM

Data is always exported for the previous date selected above

Company Name Acme Supply

Store Location Toronto Canada

File Version 1.0

Close Push Operations Hide Push Operations

Last check at 11/30/2023 10:06:18 PM 10:06 PM 11/30/2023

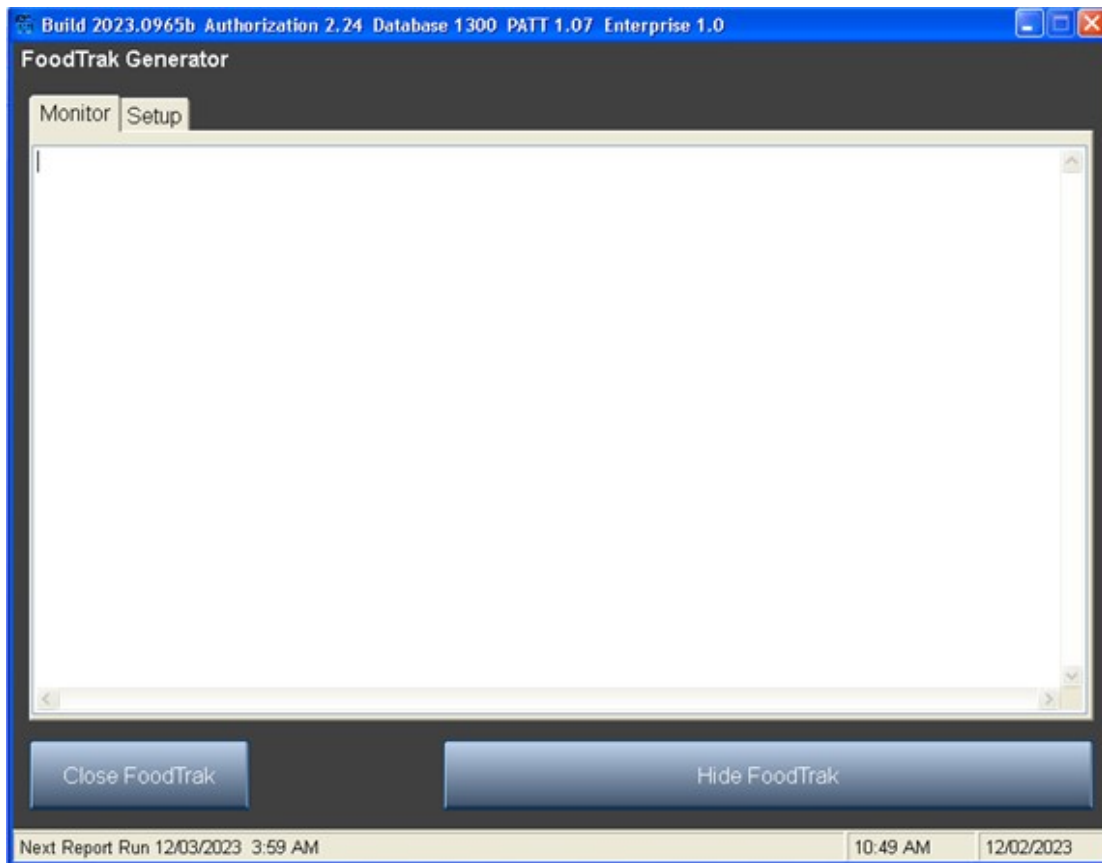
1. Enter the Temp Folder where Universal will place any temporary files generated. (usually c:\temp)
2. Check to Start with Windows or add the application to your Windows Startup Folder.
3. Enter your Company Name, Store Location and 1.0 for the File Version. Provide this information to Push Operations.
4. Select the next date and time to run. Information is always exported for the previous day.
5. Check Enabled.
6. Click Hide Push Operations.

FoodTrak

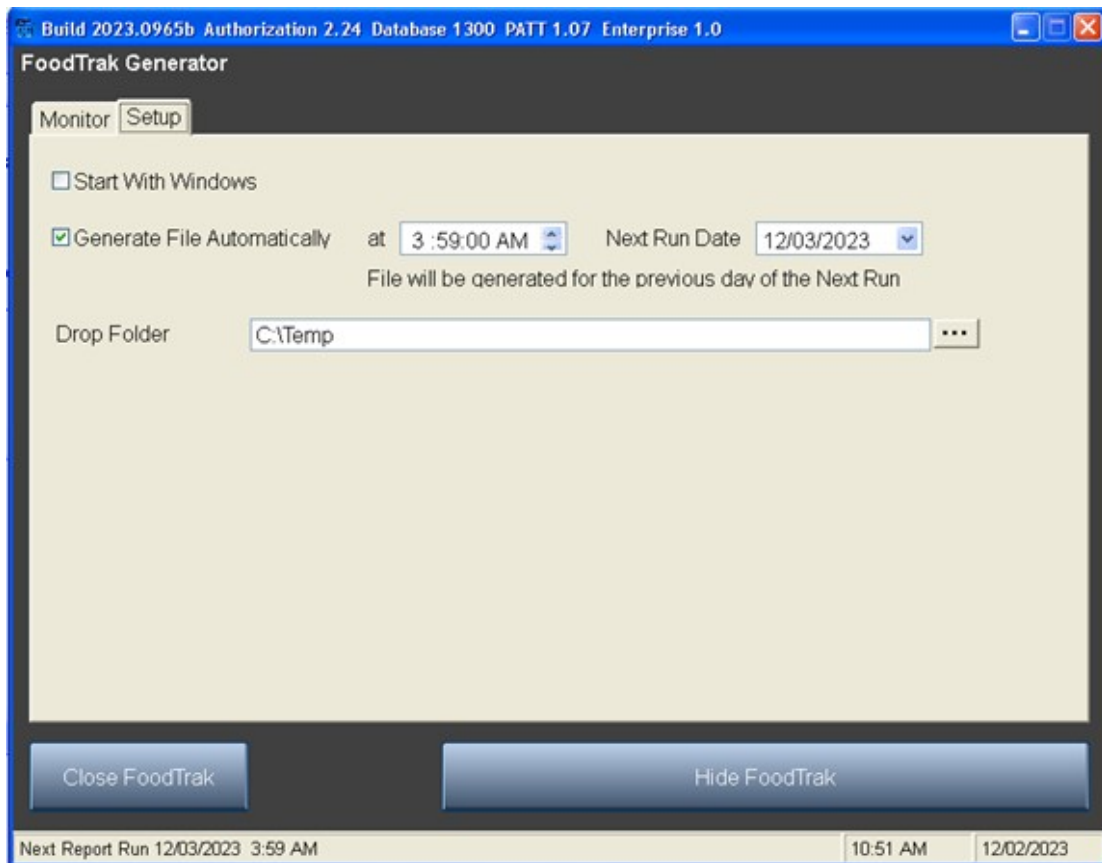
Food Trak provides analytical tools for your business. The Food Trak Generator exports sales information from the point of sale to Food Trak. The generator can run in an auto mode, so the file is automatically generated daily or in a manual mode where you select the date range and manually generate the export file.



Right Click the Icon and Click View to Open



Setup



1. Enter the Drop Folder where Universal will place the Food Trak file generated.
2. Check to Start with Windows or add the application to your Windows Startup Folder.
3. Select the next date and time to run. Information is always exported for the previous day.
4. Check Generate File Automatically.
5. Click Hide FoodTrak.

Enterprise Setup Guide



Enterprise Management

Universal POS offers many functions to allow multi store operations to easily communicate information between all locations.

All Enterprise Features require SMP and all Head Office Fees to be current for all locations or the feature will be automatically disabled.

- Centralized Reporting
(See Universal Remote for additional information)
- Centralized Gift Cards
(See POS Multi Store Gift Cards for additional information)
- Centralized Product and Price Maintenance. The following steps show the process to centralize product and price maintenance.
- Stock Query Requests
 - a) Complete Store Setup
 - b) Under Policy Setup → Enterprise
Set the Enterprise Options to suit your needs.
 - AlwaysAddItems
 - DuplicateUpcRules
 - c) Select the Products and Product Types that apply to each store.
 - d) Generate Poll Files when new products are added or Prices Change.
 - e) Configure Polling at remote stores so each store is looking for any changes.

Store Setup

Store Setup lets you create a profile for each store in your chain. These stores can be accessed for reporting and stock management. This process only needs to be completed at the Head Office location.

Store Setup can be found in the Back Office under Administration → Store Setup.

The screenshot shows the 'Store Setup' application window. On the left, a list of stores is displayed: Tampa, Toronto, UniversalPOS (highlighted), Vancouver, and Winnipeg. The main area is divided into two tabs: 'General' and 'Enterprise'. The 'General' tab is active, showing the following fields:

Store Name	UniversalPOS
Number	001
POS Serial Number	8813319632
IP Address	99.249.27.34
Port	5657

At the bottom of the window, there are four buttons: 'Generate Poll Files', 'Delete', 'Add New', and 'Exit'. A small number '4' is visible in the top right corner of the main area.

Store Name

Enter the name for the store.

Number

Enter the 1 to 7 digit store number.

IP Address

Enter the External Static IP Address or URL for the store. This is only required for direct stock requests from remote stores.

Port

Enter the local port the remote store monitors. This is only required for direct stock requests from remote stores.

POS Serial Number

Enter the POS Serial Number for the remote store. Each store can locate its serial number from Back Office → Support → Software Key → Upgrade Your Software Key

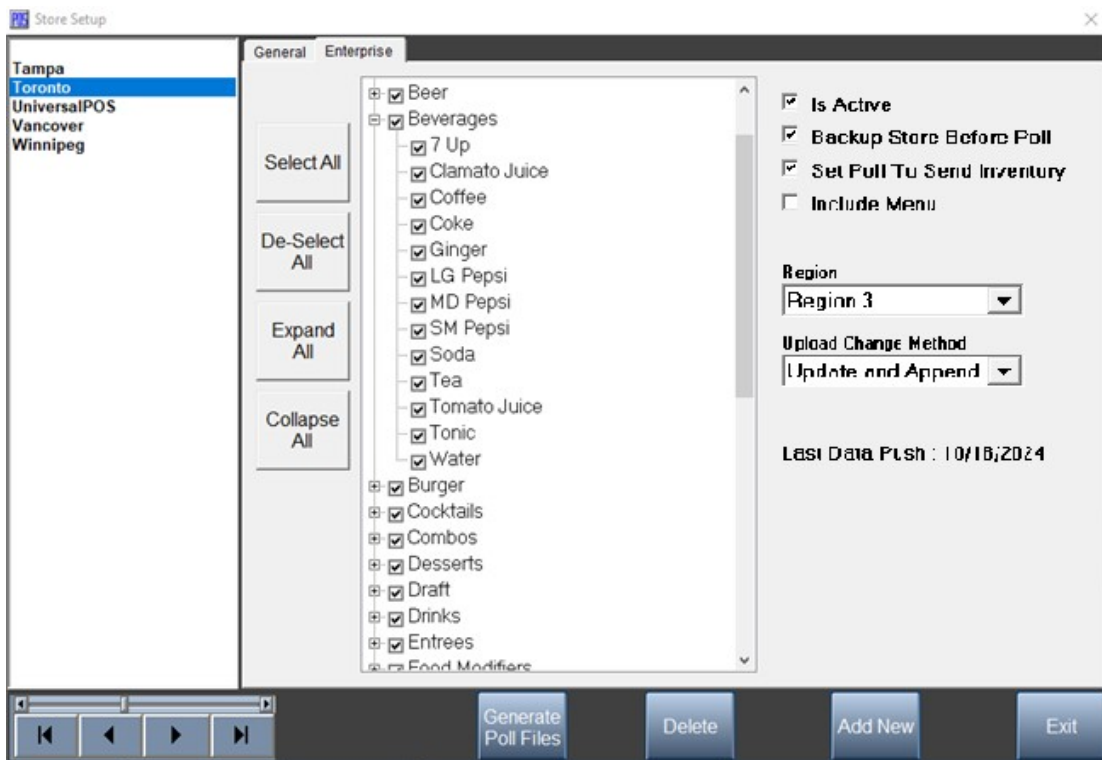
Enterprise Tab under Store Setup

The Enterprise Tab allows a head office to

- Create and maintain a remote stores products and product types
- Make price changes at the head office and have those changes sent to the remote stores.
- Poll updates can take place during normal business hours.

The Enterprise tab is only available on systems configured as the head office. This is controlled by your Software.Key file.

This process only needs to be completed at the Head Office location.



Item Selection

Select the Items and Product types that are available at each location.

Is Active

Select whether the location is Active or not. A location must be active to be included when poll files are created.

Set to Poll Inventory

This will tell the remote store to Send Inventory Stock Changes to the Head Office PC on a regular basis allowing the head office to know how much stock each store currently has.

Backup Store Before Poll Update

This will force the remote store to automatically backup its database prior to the poll update making any changes. The poll backups are located in the POSEDGE\BACKUP folder labeled as DataBackupPriorToPoll_YYYYMMDDHHNN.zip

Regional Pricing

This option will allow each Product and each Price Table to maintain up to 6 different prices allowing remote stores to have their own pricing structure.

Once the feature is enabled on a Head Office terminal, Retail 1 thru 6 in Product Setup represents the 6 different regional pricing. In Price Table Setup, you can easily create the Regional Pricing by clicking the Create Regional Pricing on the appropriate record.

This feature must be enabled under Policy Setup to be visible.

Upload Change Method

The Upload Change Method determines the type of update performed at the remote location.

- Overwrite will delete all existing products and product types at the remote location and then create the new items based on what the head office has sent. Generally, the Overwrite is only performed on the initial first time download to the remote store,
- Update and Append will modify existing head office products and product types at the remote location and create any new items that are needed.

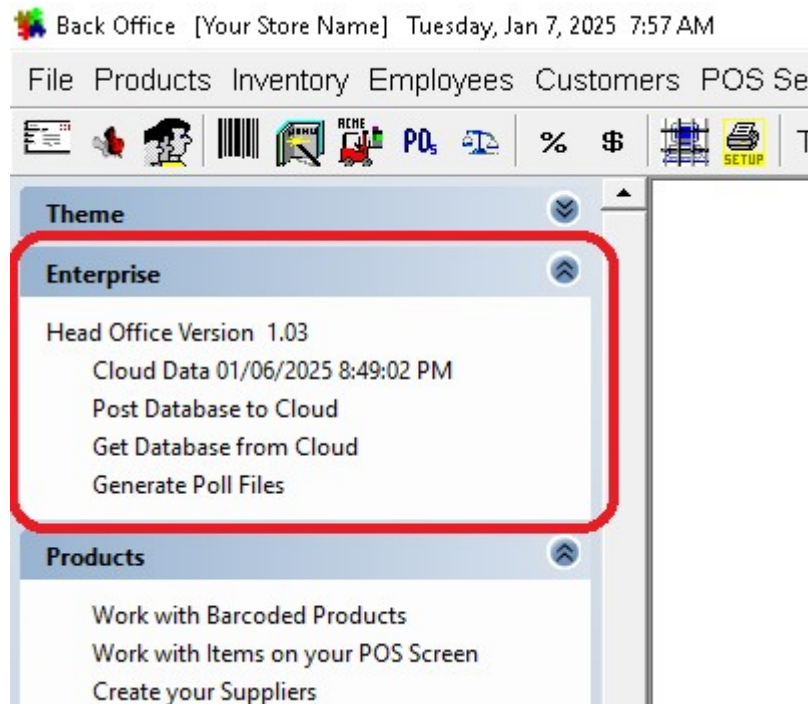
Syncing Head Office Data to Cloud

You can sync your Head Office Data to the Cloud allowing the data to be recovered by a different PC giving you the freedom to be somewhat mobile with configuring your POS.

For example, today I am working out of my head office changing pricing. After I am finished work, I can quickly save the data to the cloud. Once I get home, I can recover the data on my home PC and continue working.

It is important to remember is that valid data is only ever at one location at any given time. You cannot have multiple users working the data at several locations at any given time. Also, it is the user's responsibility to ensure the data is stored to the cloud once they are finished.

Note: Set BackOffice.exe and Backup.exe to always Run As Administrator under their Windows Properties.



Cloud Data Date Stamp

The Cloud Data Date Stamp lets you know the data and time the Head Office data was stored in the Cloud. Clicking this field will refresh the stamp.

Post Database to Cloud

Post Database to Cloud backups up your data to the Cloud.

Get Database from Cloud

Get Database from restores the Cloud Data to your local PC. Once this process is completed, you must restart your computer.

Generate Poll Files

Generate Poll Files creates your Poll Files. This is the same as going to Administration → Store Setup → Generate Poll Files.

Generate Poll Files

This feature requires Universal Enterprise and current SMP at each location.

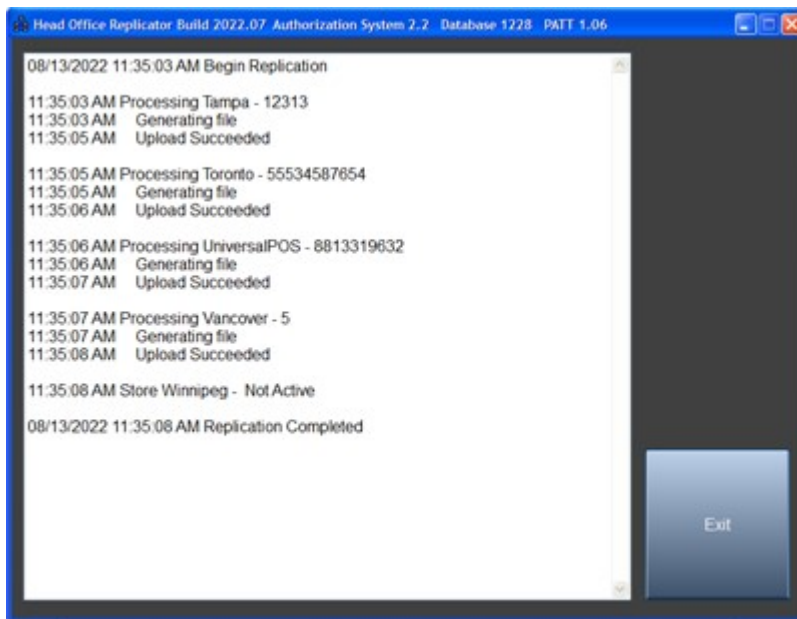
The Generate Poll Files app creates the files needed to update each remote store. Poll files can be created by clicking the Generate Poll Files button under Store Setup or by running the GeneratePollFiles app located in the POSEDGE root folder.

Each remote store needs to have the Poll.exe app running to monitor for the updates.

This process only needs to be completed at the Head Office location.



Press the Begin Replication button to create the files.



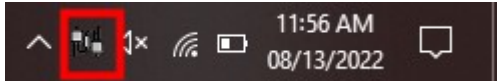
The generator will go thru each active remote store and create the appropriate poll files for each store. These files are stores in the cloud on the UniversalPOS Server.

Poll App (Remote Store Poll Update)

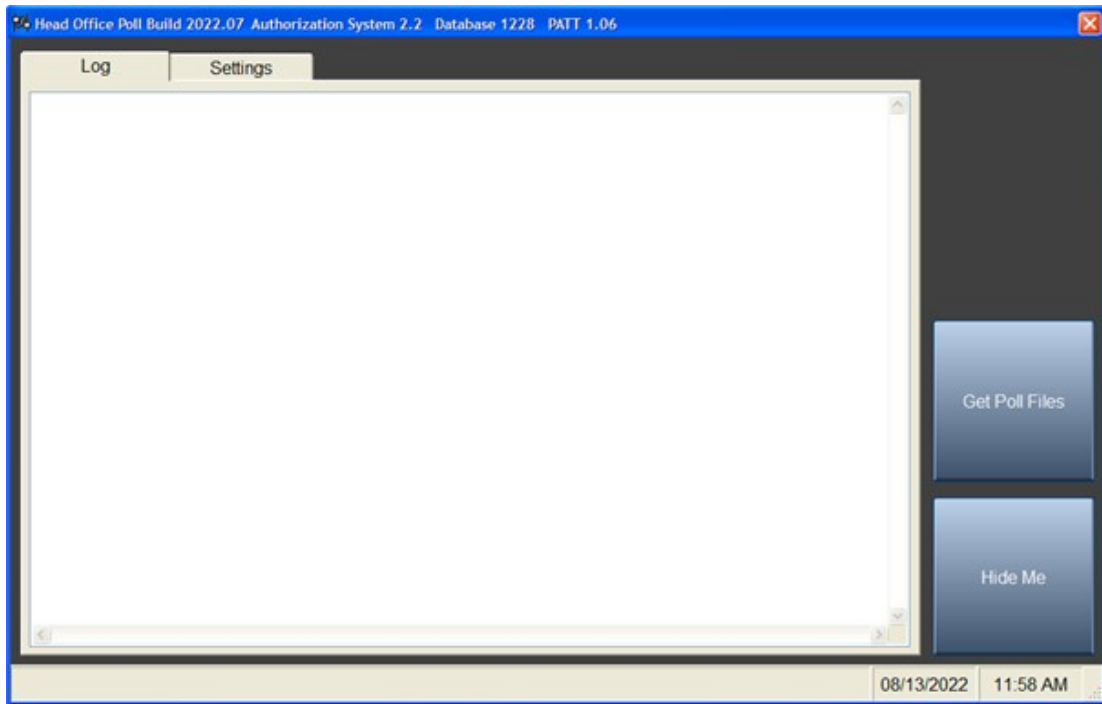
This feature requires Universal Enterprise and current SMP at each location.

The GeneratePollFiles.exe application creates the files needed to update each remote store. The Poll.exe application runs at each remote store waiting for the files created by the GeneratePollFiles app. The Poll application is located in the POSEDGE root folder. This application can be run manually or run in the background in the Windows System Tray. Its generally recommended to initially run the application manually so you can monitor what is happening and make sure changes are coming thru correctly. Once you are comfortable with the process, add the Poll.exe to your Windows Startup and let the application run automatically in the background.

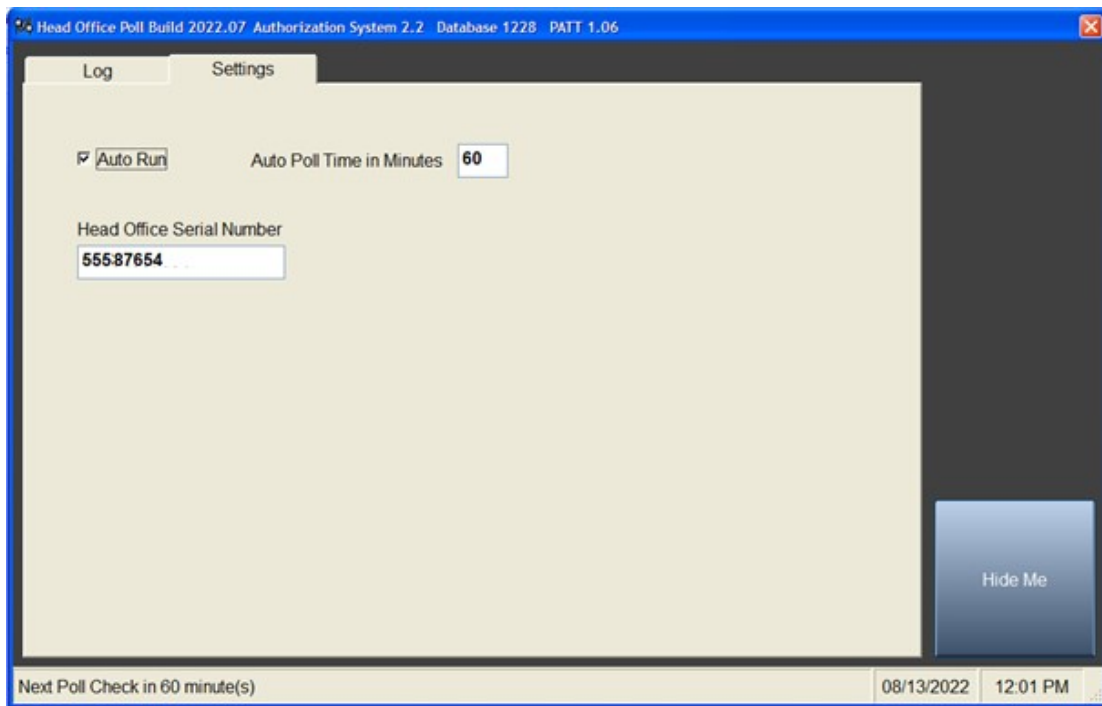
This process only needs to be completed at the Remote Store locations.



If the application is running in auto mode, you can right click on the Poll icon to open the application



The Get Poll Files button is only visible in Manual Mode.

**Auto Run**

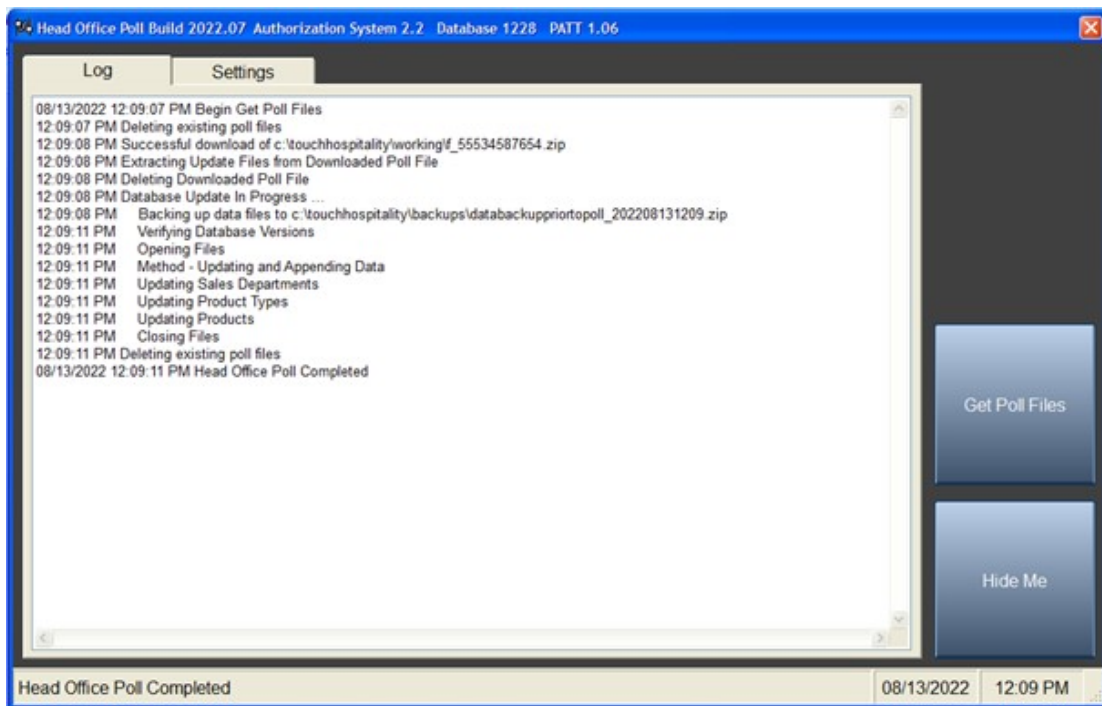
If selected, the Poll Monitor will check regularly for any poll files generated by the head office and perform the updates if needed. The Get Poll Files button is not visible if Auto Run is selected.

Auto Poll Time in Minutes

Enter how often (in minutes) the Poll application should check for updates. The minimum time is 10 minutes.

Head Office Serial Number

Enter the POS serial number for the Head Office location. This can be found at the head office in the Back Office by clicking About at the bottom of the screen.



A log will display the process of the poll update.

Suggested Initial Setup of Head Office

There are many methods that can be utilized to initially create the Head Office files.

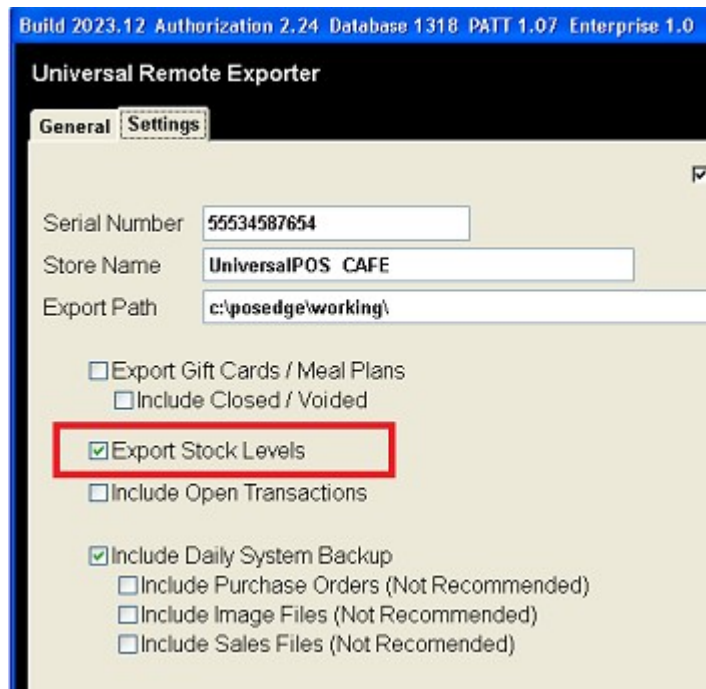
1. Order a Head Office license from UniversalPOS.
2. Install UniversalPOS on the Head Office Computer as normal.
3. To get the initial data for the head office, we recommend selecting one existing store which currently has the most accurate and up to date information. We will call this location *Store One*. Copy this data and install it as the data files for the head office. Perform any data files upgrades as required. Once the upgrade is completed, run a Clear All Sales on the Head Office. Copy in the Head Office software.key.
4. Open the Back Office for the Head Office, click About and record the Software Serial Number.
5. At the Head Office, open the Back Office, click Administration → Store Setup
 - a) Add the Store information for *Store One*, giving it a descriptive name and also that stores UniversalPOS Serial Number. This can be found at each location by opening the Back Office and clicking About at the bottom of the screen.
 - b) Click the Enterprise Tab and select the products and product types that apply to each store. Generally, Select All is recommended.
 - c) Check Is Active
 - d) Check Perform Backup Before Poll
 - e) Set Upload Change Method to Update and Append
 - f) Once the store, *Store One* has been save, Click Generate Poll Files → Create Poll Files to begin replication.
6. At *Store One*, run the following commands using the DBEDITOR.
 - a) update saledpt set ho_idl=dept_idl
 - b) update prodtype set ho_idl=prtype_idl
 - c) update products set ho_idl=prod_idl
 - d) update modifier set ho_idl=mod_idl
 - e) update pricetbl set ho_idl=ptable_idl

7. At *Store One*,
 - a) locate the Poll.exe application in the POSEDGE folder. Right click on this and select Copy. Open the Windows Run command and type Shell:Startup. Right click the window that opens and click Paste Shortcut.
 - b) Double Click the Shortcut to launch the Poll application. This will run in the Windows System Tray.
 - c) Right Click on the Poll.exe application in the System Tray and left click View.
 - d) On the Setup Tab, enter the Head Office Serial Number that was recorded in step 4.
 - e) Save the Changes and click Poll.
8. Run some tests.
 - a) At the Head Office, create a product, change a price, create a department.
 - b) Generate the Poll Files under Store Setup.
 - c) At *Store One*, click Get Poll Files. Once the Poll has successfully completed, open the Back Office and look for the changes you made.
 - d) If everything was successful, in the Poll.exe application, check Autorun and we recommend an interval of 60 minutes.
9. If any technical issues arise when generating poll files or getting poll files, contact Universal POS for trouble shooting.

Stock Request Query

The Stock Request Query allows a simple method for multi store operations to quickly determine another store has stock availability. This feature requires Universal Enterprise and current SMP at each location.

1. Stock values are uploaded at preset intervals using the SalesExporter utility.



Enable Export Stock Levels.

2. Complete Store Setup. For each store location, provide a Name, Store Number and the Universal POS Software serial number for that location.
3. Enable Enterprise > MultiStoreStock under Policy Setup.

The Stock Query Button will appear in the POS on the Products Page and in the Back Office under Product Setup.



API Monitor

The API Monitor gives multistore operations and web sites the ability to communicate to the point of sale database to gather information or create records. API requests can be entered through any web browser or integrated into 3rd party applications or web sites.

Several API calls are available.

- Request Quantity of Stock On Hand for a product
Note: If enabled, this request can be performed from product setup on the statistics tab.
- Adjust Stock Levels for a product
Note: If enabled, this request can be performed from product setup on the statistics tab.
- Request Yesterdays Sales for a product
- Request Customer Information
- Create a Customer
- Create a Sales Transaction
- Get Gift Card Balance
- Adjust Gift Card Balance

Detailed specifications for API calls can be found in the API Developers Kit.

Note: This process will only function if the calling store is external from the local area network.

Configuration of APImonitor

1. Exit the APImonitor by right clicking it in the Windows system tray and left clicking exit.
2. Start POSsetup → Click Administration → System Setup → API.
 - Check Enable API.
 - Enter the Local IP Address of the computer that runs the APImonitor.
We recommend that this IP is the static physical IP assigned to the computer.
eg 192.168.0.50 The standard loopback is not recommended.
 - Enter the Local Port the computer will monitor for incoming requests.

The screenshot shows the 'System Setup' window with the 'API' tab selected. The 'Enable API' checkbox is checked. The 'IP Address Of PC Running the APImonitor' is set to '127.0.0.1'. The 'Port Monitored By the APImonitor' is set to '5656'. The 'API Token' is a long alphanumeric string, and there is a 'Generate' button next to it. The 'Your POS Serial Number' is '55534587654', with a 'Copy to Clipboard' button next to it. Below these fields is a box labeled 'API Authorized Users'. An 'Exit' button is located in the bottom right corner of the window.

Field	Value
Enable API	☒
IP Address Of PC Running the APImonitor	127.0.0.1
Port Monitored By the APImonitor	5656
API Token	9972A4680D29D13CD2292652BF29D26D952035E6A0337D8E591372DDDA72F544
Your POS Serial Number	55534587654

- Save the information.

3. Configure Port Forwarding on your Router so incoming communications on the port are forwarded to the IP selected in step 2.

4. Go to the POSEGE folder on your C:\ Drive and start the APImonitor.exe application. Click Allow to create an exception if prompted by your Windows Firewall.



If you open the API Monitor, you can verify it is monitoring the correct IP and Port.

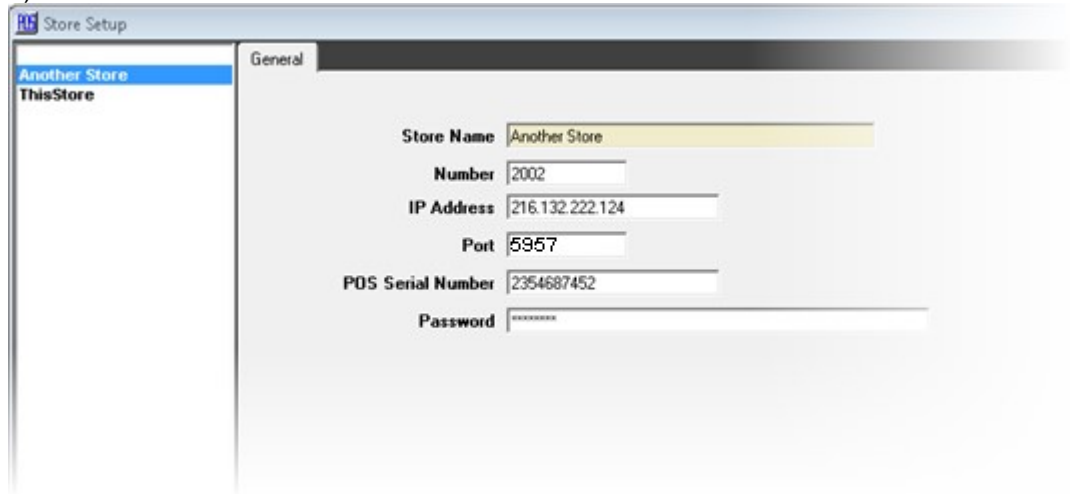
Remote Request Quantity on Hand & Transfer Stock from Product Setup

Requesting the quantity of stock on hand and transferring stock from another store are the only API calls that are built into the POS software. This ability is built into Product Setup but web and applications developers can easily use our API to create their own interface. Several things need to be set up in order for this process to take place.

- Each store needs the APImonitor to be waiting for stock requests from other stores.
- Each store needs to know the IP Address, Port, Password, and Serial Number of all the other stores so stock levels can be requested from each store.
- Each store needs a static IP address, an open port in its firewall, and port forwarding configured.
- Every store in the chain requires the same UPC codes to identify products.

Configuration of Store Setup for Access via Product Setup

1. Start POSsetup → Administration → Store Setup and create each store in your chain.
 - a) Enter the store name and number for identification purposes.
 - b) Enter the IP and Port for that store.
 - c) Enter the POS Serial Number for that store. Each store can find their serial number from POSsetup → Support → Software Key → Upgrade Your Software Key.
 - d) Enter the Store Password.



The screenshot shows a software window titled "Store Setup" with a "General" tab selected. On the left, there is a list of stores with "Another Store" highlighted in blue and "ThisStore" below it. The main area contains several input fields:

Field	Value
Store Name	Another Store
Number	2002
IP Address	216.132.222.124
Port	5957
POS Serial Number	2354687452
Password	*****

- e) Save the Setup for each store in your chain.

Product Setup

General Advanced Product Type How To Make Images & Notes Price Levels Statistics History

JAM (250 Gram) Raspberry

Monthly Statistics

Current Year Sales Previous Year Sales Stock Received

January
February
March
April
May
June
July
August
September
October
November
December

Click to Request QOH and to Transfer Stock to a Remote Store

Quantity On Hand

Item	Quantity
Main Store	0
Warehouse A	0
Warehouse B	0
Warehouse C	0
Warehouse D	0
Warehouse E	0
Warehouse F	0
Warehouse G	0
Warehouse H	0
Warehouse I	0
Warehouse J	0
Warehouse K	0
Warehouse L	0
Warehouse M	0
Warehouse N	0
Warehouse O	0
Warehouse P	0
Warehouse Q	0
Warehouse R	0
Warehouse S	0
Warehouse T	0
Warehouse U	0
Warehouse V	0
Warehouse W	0
Warehouse X	0
Warehouse Y	0
Warehouse Z	0

Last Date Sold:

Last Date Purchased: Created: 05/16/2007

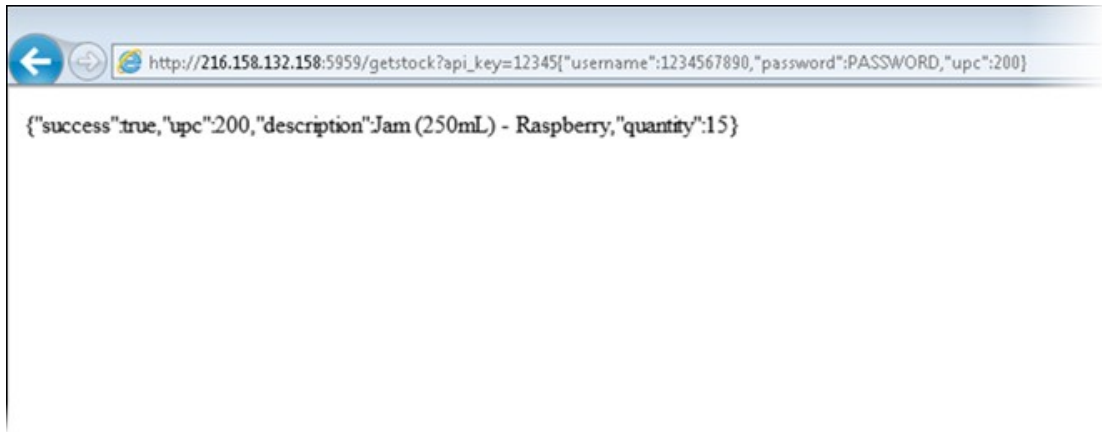
Check Stock At Another Store Check Stock At Another Store

On Order:

Find Part Find UPC List Find Image Refresh Copy Add New Delete Print



Usage of Remote Stock API from Internet Explorer



Reporting



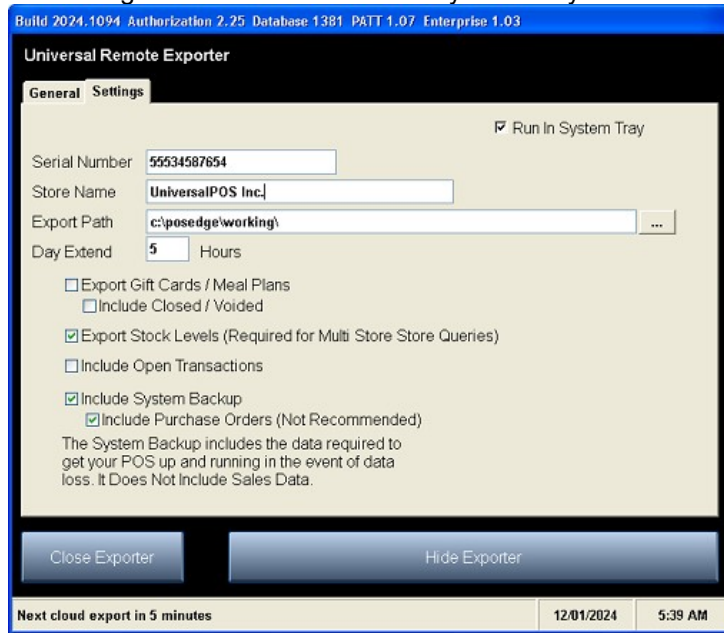
Universal Remote / Sales Exporter

Universal Remote is a live On-Line Reporting and Analytic Tool that allows customers to view sales information through any Internet browser. To setup Universal Remote,

Universal Remote also provides a simple method to run Daily Cloud Backups. See *Backups for additional information*.

NOTE: Universal Remote is a tool only to view Sales Information that has been uploaded to the cloud. Many factors can affect the accuracy of this information such as making changes to sales that occurred in a previous day or having the sales exporter not running for a period. Always use the POS to gather financial information for tax purposes.

1. Using the Windows File Explorer, navigate to the POSEDGE root folder.
2. Locate the program SalesExport.exe
3. Right Click on this file and Left Click Copy
4. Left Click the Windows Button  and in the Search Bar type SHELL:STARTUP and press the Enter key on your keyboard.
5. In the Windows that opens, Right Click and Left Click Paste Shortcut.
6. Double Left Click the Icon that's created to open the Sales Export program.
7. The SalesExporter will launch on the Windows Task Bar. Click on the program; go to the Settings Tab and Check Run In System Tray.



Build 2024.1094 Authorization 2.25 Database 1381 PATT 1.07 Enterprise 1.03

Universal Remote Exporter

General Settings

Run In System Tray ☒

Serial Number

Store Name

Export Path ...

Day Extend Hours

☐ Export Gift Cards / Meal Plans

☐ Include Closed / Voided

☒ Export Stock Levels (Required for Multi Store Store Queries)

☐ Include Open Transactions

☒ Include System Backup

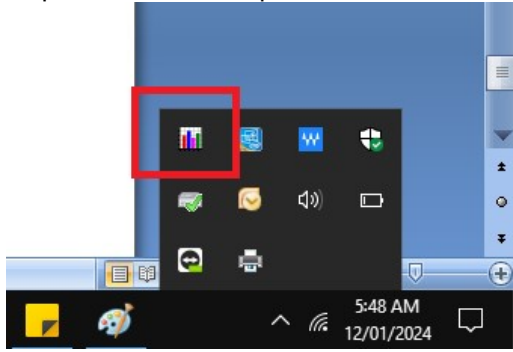
☒ Include Purchase Orders (Not Recommended)

The System Backup includes the data required to get your POS up and running in the event of data loss. It Does Not Include Sales Data.

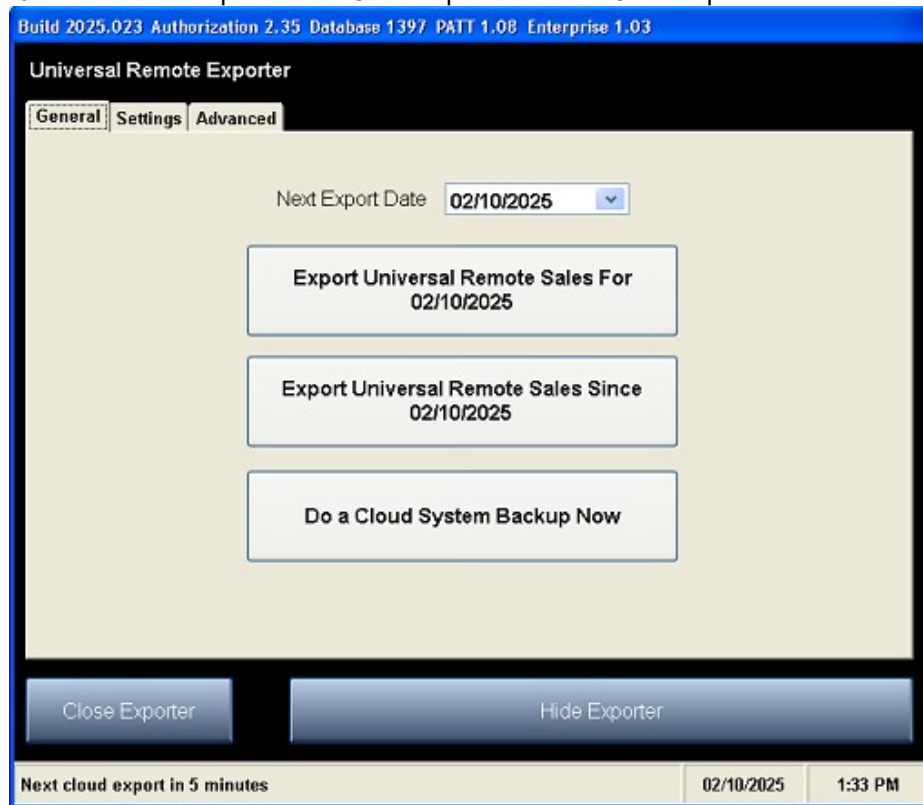
Close Exporter Hide Exporter

Next cloud export in 5 minutes 12/01/2024 5:39 AM

8. Close the Sales Exporter and then re-launch once more from the Window opened in step 4. The Sales Exporter will now launch in the Windows System Tray.



9. The Sales Exporter can be launched by Left Clicking the Icon and Right Clicking View Sales Exporter.
10. Launch the Exporter and Click Export and then Click Exporter.



11. To access Universal Remote, go to www.universalpos.net and enter your login credentials.

Universal POS, Technology Drive: x +

← → ↻ Not secure | universalpos.net/customer.asp

UNIVERSAL REMOTE

UNIVERSALPOS INC.
SERIAL NUMBER 55534587654
LAST UPDATED 8/16/2021 7:47:03 AM

SIGN OFF UNIVERSAL REMOTE

CLICK FOR DATE RANGE REPORTS

Select Report Date:

08/11/2021
08/12/2021
08/13/2021
08/14/2021
08/15/2021
08/16/2021

Click here to view reports based on a date range. For example April 1st to April

Select a Single Day

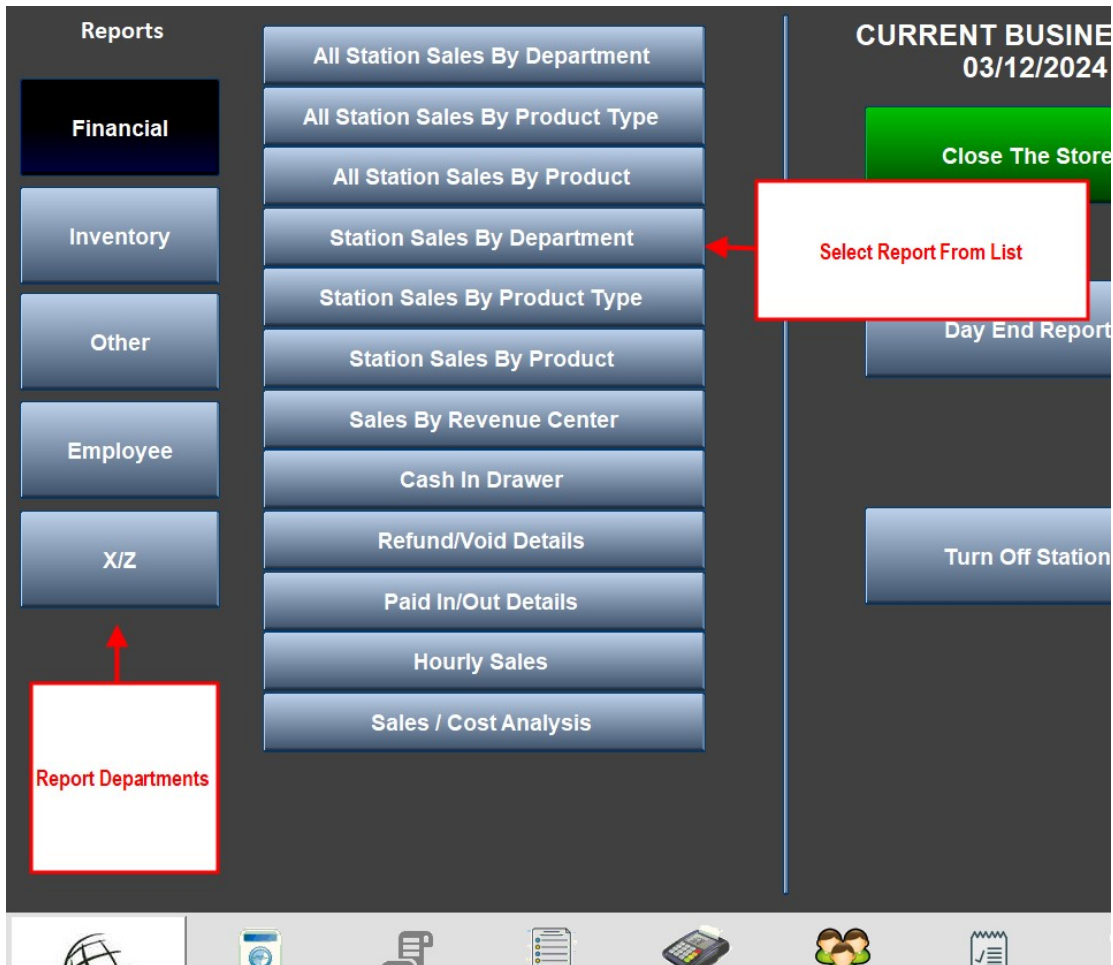
Select one of the last 7 days

Snapshot for 8/16/2021	Value
Total Sales	91.30
Total Discounts	0.00
Total Sales Less Discounts	91.30
Cost Of Sales	0.00
Profit From Sales	91.30
Cost Percent	0.0%

POS Reports

POS Reports are simple and informative reports that generally print on your local receipt printer. These reports can provide quick information on all aspects of your business and the main advantage is that they are very quick to create. You can provide a date range for most POS Reports, so you can get your sales by the day, week, month, and year, or whatever period you want. These reports can be displayed on the screen or printed directly to your local receipt printer. On Screen Reports can optionally be printed to your Windows default printer.

POS Reports are located in the Point of Sale under Manager Tasks.



- 1) Select the appropriate report from the list.

- 2) Select the starting and ending date for the report.

Please Select Date Range

Today

March 2024

March

2024

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

March 2024

March

2024

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

- 3) Direct the reports output to the screen or your receipt printer.

Send the report to the receipt printer or
display on screen

'All Station Sales By Department '

Output Report To



Receipt



Screen



POS Simplicity
 276 Ontario Street
 St. Catharines, Ontario L2R 5L5
 Phone (905)682-2666

FULL REPORT

 for ALL Stations

04:40 PM 02/21/2007
 Station 1 Cashier Supervisor

**Sample
 Day End Report**

	Quantity	Retail	
SALES			
Food	43	\$441.25	
Merchandise	2	\$15.90	
Modifiers	2	\$0.00	
Total Sales	47	\$457.15	← Sales By Department
Discounts			
Open Item % Discount	2	-\$4.29	
Staff Discount	1	-\$8.48	
Total Discounts	3	-\$12.77	← Discounts Given
Net 1 Total		\$444.38	← Net1 = Total Sales - Total Discounts
Taxes			
G.S.T.		\$25.69	
P.S.T.		\$32.12	
P.S.T. Exempt		\$2.15	
Net 2 Total		\$502.19	← Net2 = Net1 + Taxes Collected
Total Tips Collected		\$13.38	
Received On Account	1	\$10.00	
Paid Out	1	-\$25.00	← Misc. Adjustments

Net 3 Total \$500.57

← Net3= Net2 + Misc. Adjustments

Media

Cash		
Float In	\$100.00	
In Drawer	\$351.85	
# of Transactions	13	
Visa		
In Drawer	\$34.08	
# of Transactions	1	
Master Card		
In Drawer	\$110.00	
# of Transactions	1	
Tips In Total	\$13.38	
On Account		
In Drawer	\$38.64	
# of Transactions	1	
U.S. Cash		
Float In	\$50.00	
In Drawer Foreign	110.00	
In Drawer Domestic	\$116.00	
# of Transactions	1	
Avg. Exchange Rate	1.10000	

← Net3 - All In Drawer Totals (Domestic)
Should = Zero

Non Balancing Data

Customer Count	15	
Transaction Counter	17	
Open Transactions	1	
Sale Voids	1	
Item Voids	1	\$16.95
Refunds	-1	-\$16.95

Sales Type Stats

In Store Purchase	14	\$411.68
Delivery Sales	1	\$42.70

← Statistics for
Informational Purposes Only

Customer Stats

Craig Smith	
Payments	\$0.00
Charges	\$38.64

----- end report -----

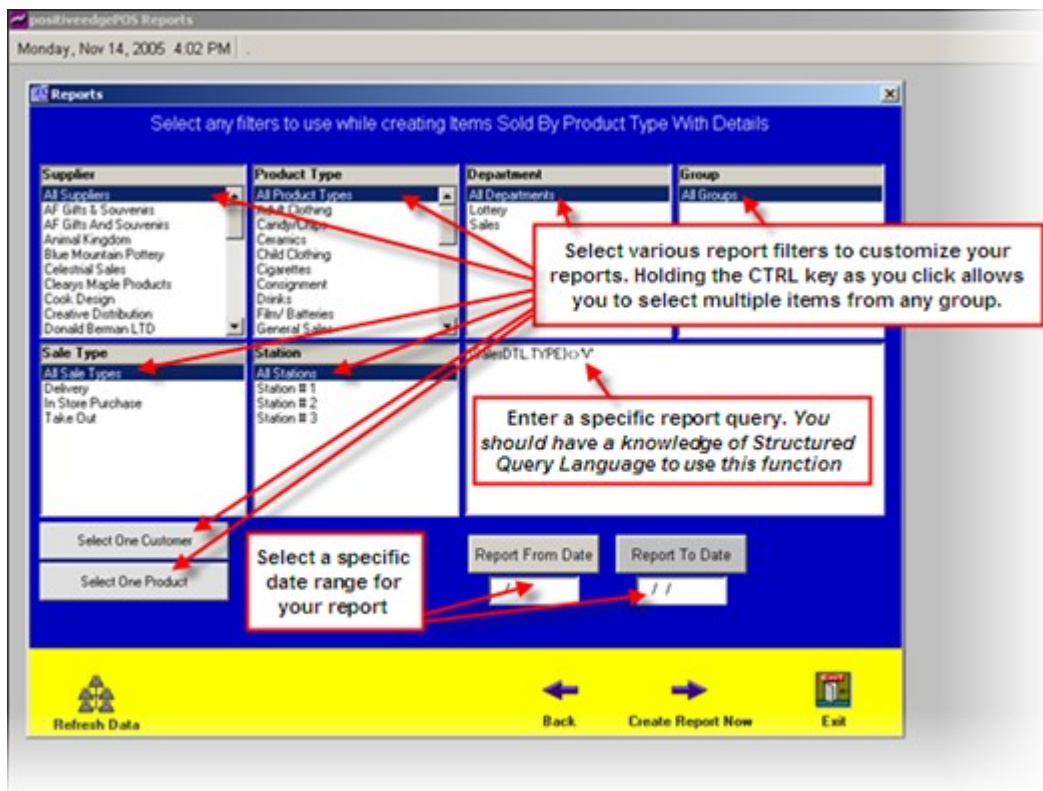
Analysis Reports

Analysis Reports are used to create detailed reports on all aspects of your business. The POS uses Crystal Reports XI for its report generator.

Like POS Reports, you can specify Start and End Date Ranges for Analysis Reports. Along with the date ranges, you can also filter the reports to customize the reports to show more specific information. For example, you might want a detailed sales report from January 1st to December 31st, but you only want to include on the report, products from a specific supplier. The filters you can select from will vary between the different reports. For example, the filters for a customer-based report will be different than the filters for an inventory report.

All Analysis Reports will print to your Windows default printer. These reports will not print on a receipt printer.

Analysis Reports can be time consuming to create, so be patient.



Report Filters

Depending on the report selected, you may have the option of selecting from various report filters. These filters allow you to customize the report to only include relevant information. You can select one or many filters.

SQL (Structured Query Language)

When you are creating your reports, you can customize the reports by entering a direct query for the report. For example, you can customize a basic sales report, by telling the report to only include items that were sold that have 'cola' somewhere in the name, or create a list of customers, but only include those that have 'L2R' somewhere in the Postal Code.

Examples

{Product.Name} like '*cola*'

The report will only include Products that have cola in the name

Uppercase({Customer.City}) like '*CATH*'

Include all customers with CATH somewhere in City

{Customer.CustSince} > Date (2006, 01, 01)

Include all customers that were created after January 1st, 2006

Uppercase({Customer.City}) like '*CATH*' and {Customer.CustSince} > Date(2006,01,01)

Include all customers that were created after January 1st, 2006 with CATH somewhere in the city name

Uppercase({Customer.FirstName}) like 'JA*'

Or

Uppercase({Customer.FirstName}) startswith 'JA'

Include all customers whose first name begins with JA

Not Uppercase({Customer.City}) like '*CATH*'

Include all customers whose city does not contain CATH

Uppercase({Customer.Postal}) like 'L?N*'

Include all customers whose Postal Code has an L in the first position, any character in the second position, an N is the third position and contains any number of additional characters after that.

{Customer.Name} in 'Adams' to 'Dawson'

Include all customers whose name is between Atterbury and Dawson

{Products.PriceA} in [1.00, 1.25, 1.50]

Include all products whose retail Price is \$1.00, \$1.25 or \$1.50

Most reports already create a basic SQL for you. You can modify the existing query or create one of your own.

Saving Your Report Queries

Once you've viewed a report, you can save the query that was used to create it. This is useful if a report is going to be run over and over again and is a complicated report using many filters and perhaps has your own query built in. Once a report is viewed on the screen and exited, you can press the **Save Query** button to save the filters the system used to create the report.



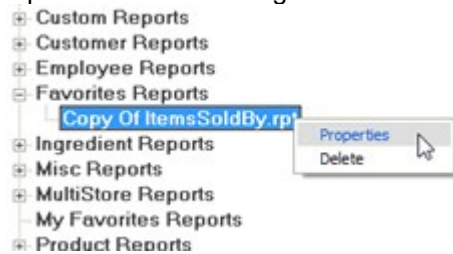
Scheduling Reports

All back office reports can be scheduled to run automatically.

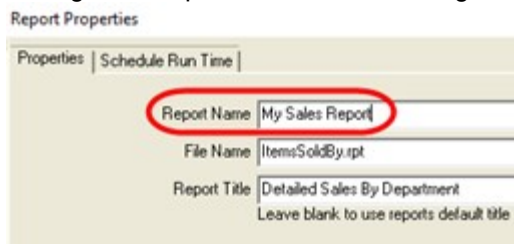
1. Login to Reports.
2. Find the report you wish to run on a schedule. Right click on it and add it to favorites.



3. Open Favorites and Right Click on the report that was just added.



4. Change the Report Name to something that you will understand,



and then click the Schedule Run Time Tab.

5. Select the Report Period, where to Send the Report and then Click Copy to Clipboard or send the information directly to appropriate Windows Batch File. Click Save and Exit Reports.

Report Properties

Properties: Schedule Run Time

Period

- ☐ Current Day
- ☐ Current Month
- ☐ Current Year
- ☒ Previous Day
- ☐ Previous Month
- ☐ Previous Year
- ☐ Previous Week (Last Day Of Week Is Yesterday)
- ☐ Next X Days (First Day Of Period Is Tomorrow)
- ☐ Last X Days (Last Day Of Period is Yesterday)
- ☐ Specific Period
- ☐ Not Required

Send To

- ☐ Send To Disk File
- ☒ Send To Email

Output Format

- ☒ PDF
- ☐ Excel

info@myemail.com

Scheduler Path

c:\TOUCHHOSPITALITY\ACBReports\sys/R1

Copy To Clipboard Send to Daily.Bat Send to Weekly.Bat Send to Monthly.Bat Test Run

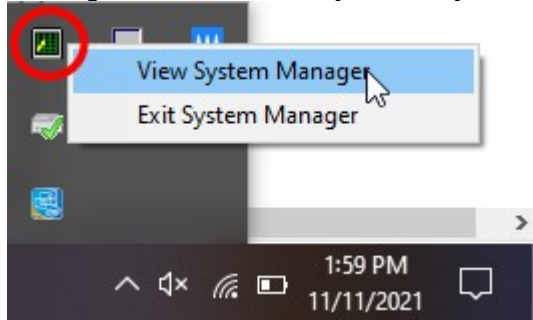
Save

6. If you clicked Copy to Clipboard, you can then manually paste the information into a Windows Batch File of your choosing or directly into any Scheduler such as Windows Task Scheduler.

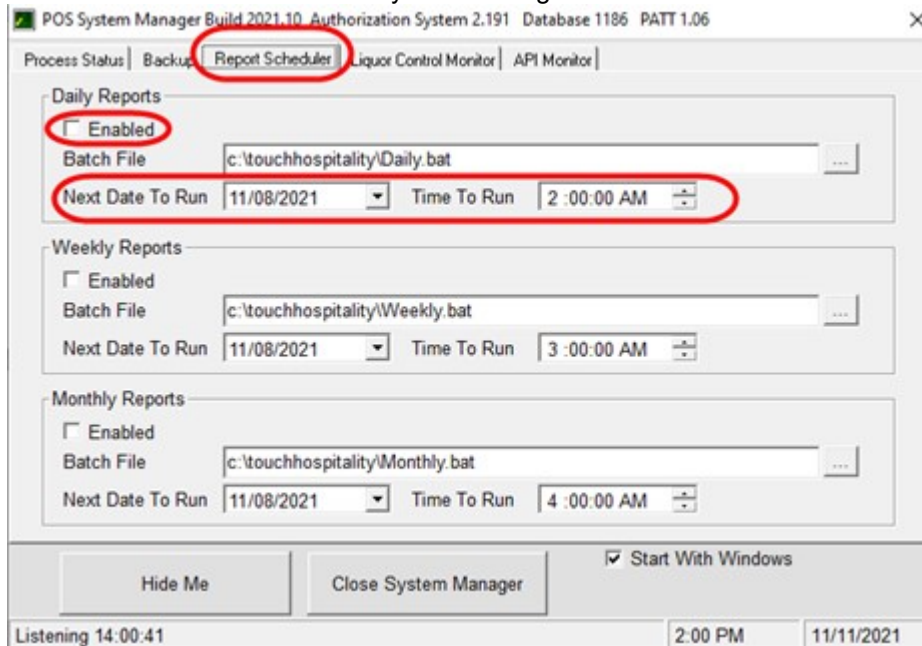
OR

We recommend you send the information directly to the Daily, Weekly or the Monthly Batch File and use the System Managers Report Scheduler.

7. To use the System Manager Report Scheduler, open the System Manager by Right Clicking it in the Windows System Tray and Left Click View.



8. Click the Report Scheduler Tab. Enable the Reports you wish to run and the date and time to run the next. Set the Date to Run. Once set, it will automatically change to the next appropriate date after it runs. Set the Time to Run. Its best to have the reports after business hours. Do not change the batch file path and name unless you are not using our standard names. Hide the System Manager.



Trouble Shooting & Tweaks

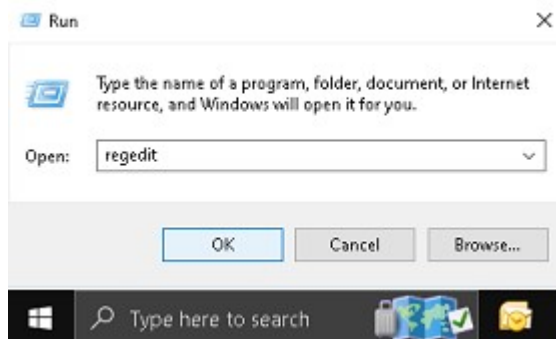


Tweaks

Increasing Scroll Bar Size

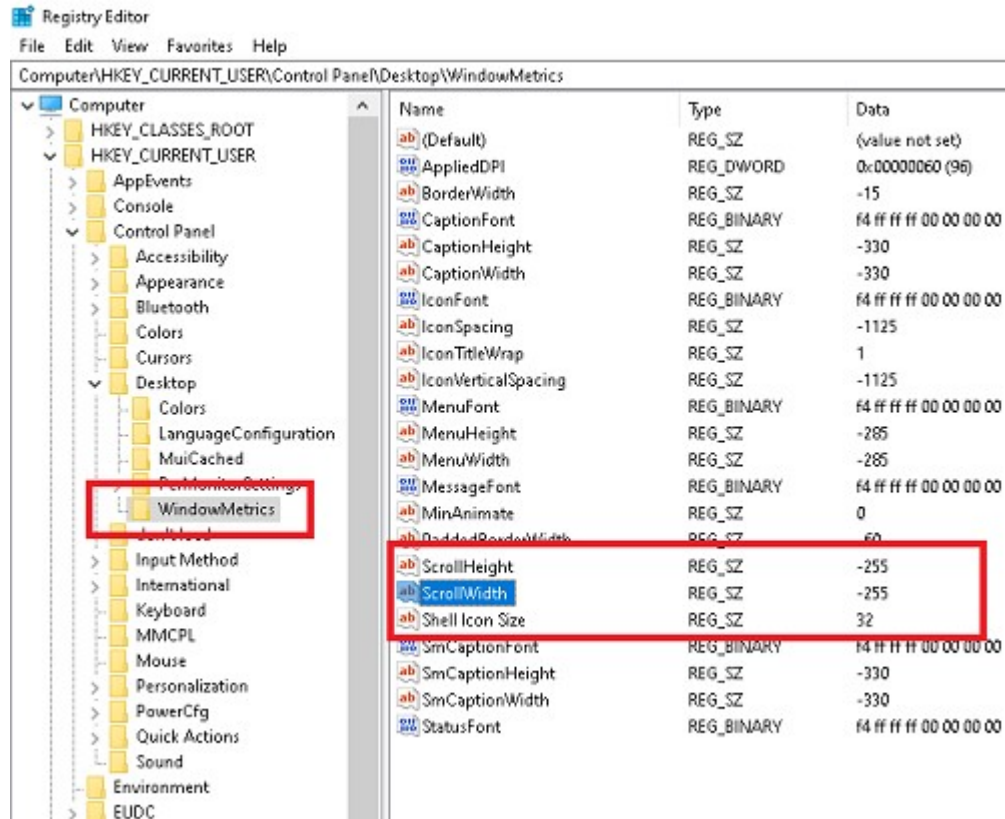
The size of the scroll bars in the POS is controlled by Windows. Changes to size of the scroll bars will affect the scroll bar size throughout Windows. To adjust the scroll bar size,

1. Exit all programs on the computer.
2. Open the Run command on the computer and type regedit and click OK.

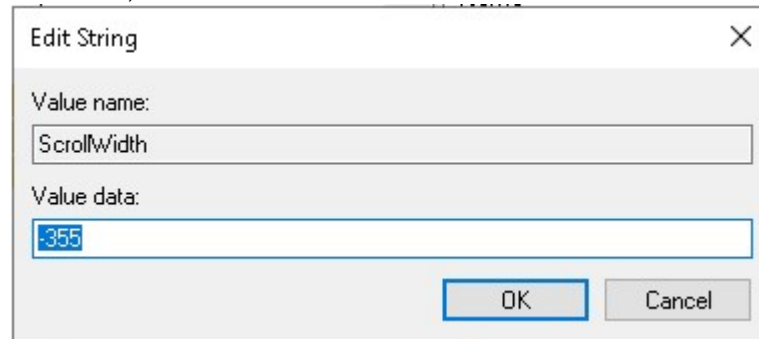


3. When the Windows Registry opens, navigate to ***Computer\HKEY_CURRENT_USER\Control Panel\Desktop\WindowMetrics***

4. Modify the ScrollWidth setting. Generally the default is -255. Start with small increments. Try -355 to start or any value you choose.



5. To do this, double click on ScrollWidth and enter a new value of -355



6. Close the Windows Registry Editor. Log out of Windows and log back in. Open the POS to see your results. Run the process again if you don't like the new size selected.

Port Forwarding

Some parts of the POS require communication thru the web and will require Port Forwarding on your router.

This procedure will vary depending on the model of your router.

1. Log into your router through your web browser. Open your web browser and enter your IP4 Gateway into the address bar. Enter your Username and Password when Prompted.



2. Navigate to Port Forwarding on your Router and forward the port you want opened to your Servers IP address. In my example, we are forwarding port 5959 to 192.168.1.107. This address is the Server IP Address that we are forwarding information to. Save your Changes and Close your browser.

LINKSYS
A Division of Cisco Systems, Inc.

Applications & Gaming

Setup | Wireless | Security | Access Restrictions | Applications & Gaming

Single Port Forwarding | Port Range Forwarding | Port Range Triggering | DDNS

Single Port Forwarding

Application Name: HTTP, FTP, None, None, None, EVO, API, HTTPS

Application Name	External Port	Internal Port	Protocol	To IP Address	Enabled
HTTP	---	---	---	192.168.1.103	☒
FTP	---	---	---	192.168.1.103	☐
None	---	---	---	192.168.1.0	☐
None	---	---	---	192.168.1.0	☐
None	---	---	---	192.168.1.0	☐
EVO	5656	5656	TCP	192.168.1.107	☒
	5500	445	Both	192.168.1.103	☐
API	5959	5959	Both	192.168.1.107	☒
HTTPS	443	443	Both	192.168.1.103	☐
	0	0	Both	192.168.1.0	☐
	0	0	Both	192.168.1.0	☐
	0	0	Both	192.168.1.0	☐
	0	0	Both	192.168.1.0	☐
	0	0	Both	192.168.1.0	☐
	0	0	Both	192.168.1.0	☐

Save Settings | Cancel Changes

System Problems

If a printer is not printing

- Look to see if the printer is on-line. There should a light on the front or top of the printer to indicate this.
- Turn the printer off and on.
- Check the power cable to ensure that it is properly plugged in at both ends.
- Check the network cable or serial cable to ensure that is properly connected. Ensure it is properly connected at both ends.
- Check to see if the printer is out of paper.
- Feed paper through the printer to ensure nothing is blocking its path.
- Make sure the printer ribbon is secure and moves freely.
- Go to Manager → Print Manager to see if the printer has been redirected.
Note: See Print Manager for additional information.
- Run a self-test on the printer.
 1. Turn it off.
 2. Hold down the printer buttons.
 3. Turn it on while holding the buttons.
 4. Turn it off to discontinue.
- All printers are controlled by one or more computer terminals. Verify that all computer terminals are up and running.
- Lastly, redirect printing to another printer and contact your installing dealer.

If cash drawer is not opening

- Create a new printer using the Generic/Text Only driver.
- Verify that a Windows test page will print. If a Windows test page will not print, the printer requires troubleshooting first.
- Right-click the **Generic/Text Only** printer in the **Printers and Faxes** window, then click the **Print Commands** tab. Type <1B>p055 in the **End Print Job** field.
- Click Start, point to All Programs, point to Accessories, then click Notepad. Type **test**. Click **File** and then click **Print**. Assure that **Generic/Text Only** is selected in the list of printers, then click **Print**.
- Your cash drawer should now open, assuming it is correctly connected and functional. If you hear a clicking noise, but the drawer does not open, be certain the drawer is unlocked.

If a station is not starting up

- Check that the station has power and is turned on.
- If you have a UPS, make sure it is on.
- Make sure the monitor is on.
- Make sure all cables are connected properly.
- Try plugging the station into another power source.
- Lastly, contact your installing dealer.

If a station is not responding

- Attach a keyboard to the station that is not responding.
- Press then NumLock a few times to ensure the system is reading the keyboard.

If the NumLock Light turns off press [Ctrl] [Alt] [Delete] all at the same time → select Shut Down → after Windows shuts down, power off the station → wait several seconds, then turn it back on.

If the NumLock Light does not turn off and on, turn off the computer using its power button or if that fails, disconnect the power → wait several seconds and then restart the computer.

If inventory is not updating

- Verify that the System Manager is running on the POS Server.
- Restart all POS terminals.

Rebuild Data Files

Use the function to compact and rebuild system index files.

Before rebuilding your files,

- 1) Back up your data
- 2) Turn Off all stations
- 3) Turn On the station running the System Manager
- 4) Exit the Point Of Sale if it starts automatically
- 5) Open the System Manager
- 6) Click the File Repair tab
- 7) Click Rebuild Files

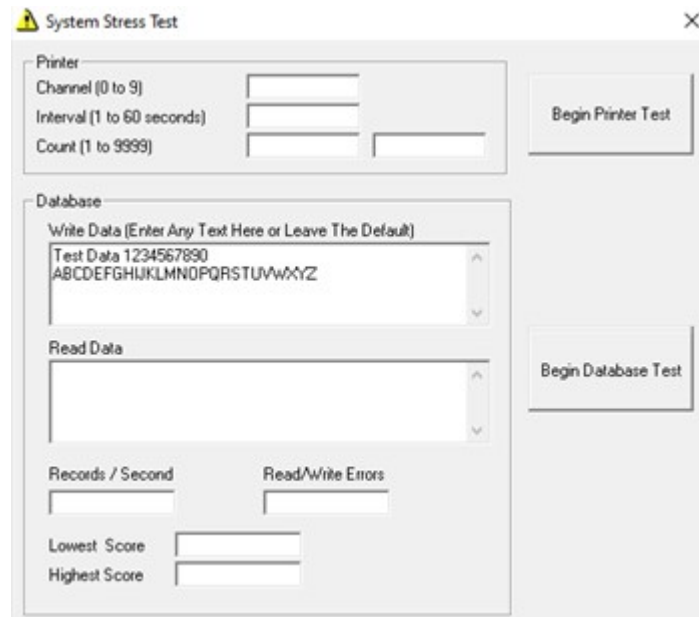
When complete, restart the computer.

For Additional Information see System Manager.

Stress Test

The Stress Test allows you to test database connectivity as well as printer performance.

From the POS Login Screen, press CTRL S



The image shows a 'System Stress Test' dialog box with a yellow warning icon and a close button (X) in the top right corner. The dialog is divided into two main sections: 'Printer' and 'Database'. The 'Printer' section contains three input fields: 'Channel (0 to 9)', 'Interval (1 to 60 seconds)', and 'Count (1 to 9999)'. To the right of these fields is a button labeled 'Begin Printer Test'. The 'Database' section contains two text areas: 'Write Data (Enter Any Text Here or Leave The Default)' and 'Read Data'. The 'Write Data' area contains the text 'Test Data 1234567890' and 'ABCDEFGHIJKLMNOPQRSTUVWXYZ'. To the right of the 'Read Data' area is a button labeled 'Begin Database Test'. At the bottom of the dialog, there are four input fields: 'Records / Second', 'Read/Write Errors', 'Lowest Score', and 'Highest Score'.

Click Begin Database Test to check database performance.

and / or

Enter a Printer Channel on this station, the interval between test prints and the number of test prints to run and then Click Begin Printer Test

Be Prepared

Backup

Backups are your only protection against losing all your sales, and all your systems programming. Back up your database often and keep at least one copy off-site. On Site backups are useful but do not protect you against fire or theft.

The POS offers many backup options.

- The Sales Exporter with Universal Remote can do a Daily System Cloud Backups. This Backup does not include sales data.
See Universal Remote for additional information.
- The POS can prompt for a backup each day when you close the store.
- Manual Backups can be accessed from the Back Office.
- Every POS Terminal can create a local database backup when the POS starts each day. This is configured under Station Setup.
- The System Manager can run backups automatically in the background throughout the day.

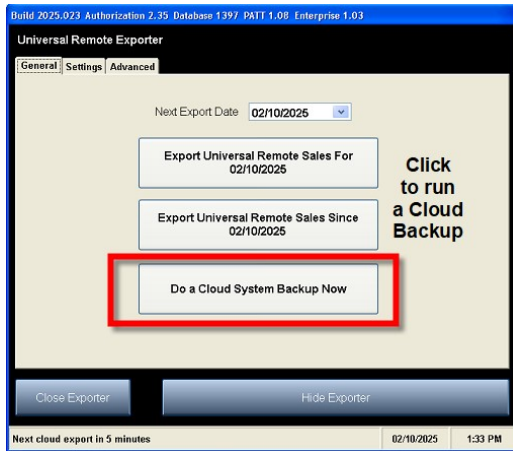
Have several backup USB sticks, one for each day of the week. Label them Monday, Tuesday etc. Each day, backup your system to the appropriate USB Stick

Backing Up Your Data

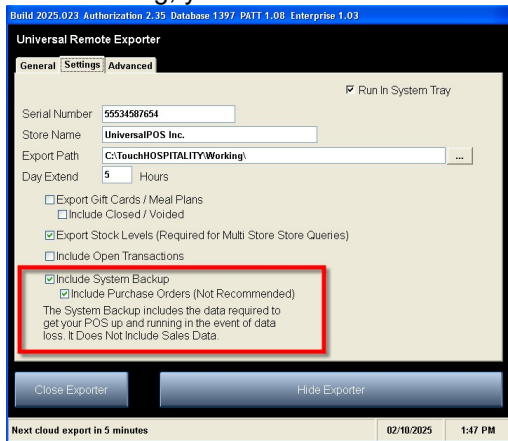
The importance of data backups cannot be stressed enough. Data can be lost for a variety of reasons; hardware failures, equipment theft, and power failures.

Sales Exporter Cloud Backup

The Sales Exporter provides a simple method to run a Daily System Cloud Backups. See *Universal Remote / Sales Exporter for additional information*. This Backup includes System Data required to get a POS system up and running in the event of a Hard Drive Failure but it does not include Sales Data.

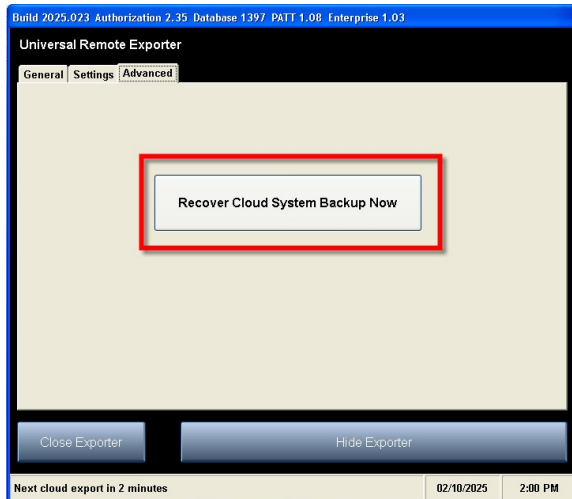


Under Setting, you can check to have the backup Run Automated Daily



Sales Exporter Cloud Restore

Recover Cloud will download the Sales Exporter Cloud Backup to the c:\posedge\working folder.



To restore your data after replacing the hard drive,

1. Do a Fresh POS install.
2. Copy in the clients Software.key.
3. Launch the Sales Exporter and Run a Cloud Restore.
4. Unzip the downloaded folder into the c:\posedge\data folder, overwriting existing files.
5. Launch the System Manager and run an upgrade if required.

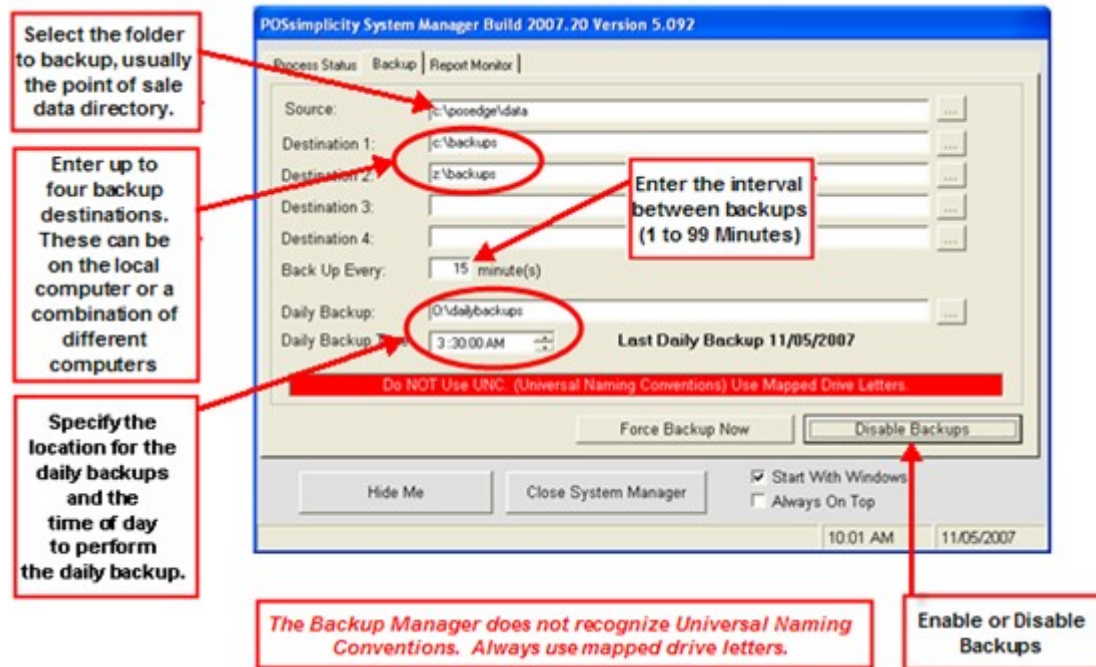
System Manager Backups

The POS System Manager provides for simple real time backups of your data.

The POS provides two automated backups.

- **Daily Backups** are performed once each day and stored in a folder by calendar date.
- **Real-time Backups** are performed many times during each business day. The POS can back up your data to up to four different locations every 1 to 99 minutes.

To set up the backup process, open the System Manager and click on the Backup tab.



*Note: For the Backup Source and Destinations,
DO NOT USE UNC (Universal Naming Conventions)
Instead, map the network drive in Windows and use the mapped drive letter for the
appropriate path.*

Source

This is the data directory that you want backed up. This would normally be the POS data directory. The system will back up all sub directories of the Source. To use the backup process, you must have a valid source directory.

Destination 1 to 4

This is the data directory where you want the source information saved to for real-time backups. This can be any local or shared computer directory. To use the backup process, you must have a valid directory entered under Destination 1. You can select up to four different backup locations.

Backup Up Every

Enter the frequency for real-time backups. This can be anywhere from 1 to 99 minutes.

Daily Backup

Enter the folder to use for daily backups. The POS will create sub directories within this folder to store the daily backups. The sub directories will have the format MMDDYYYY.

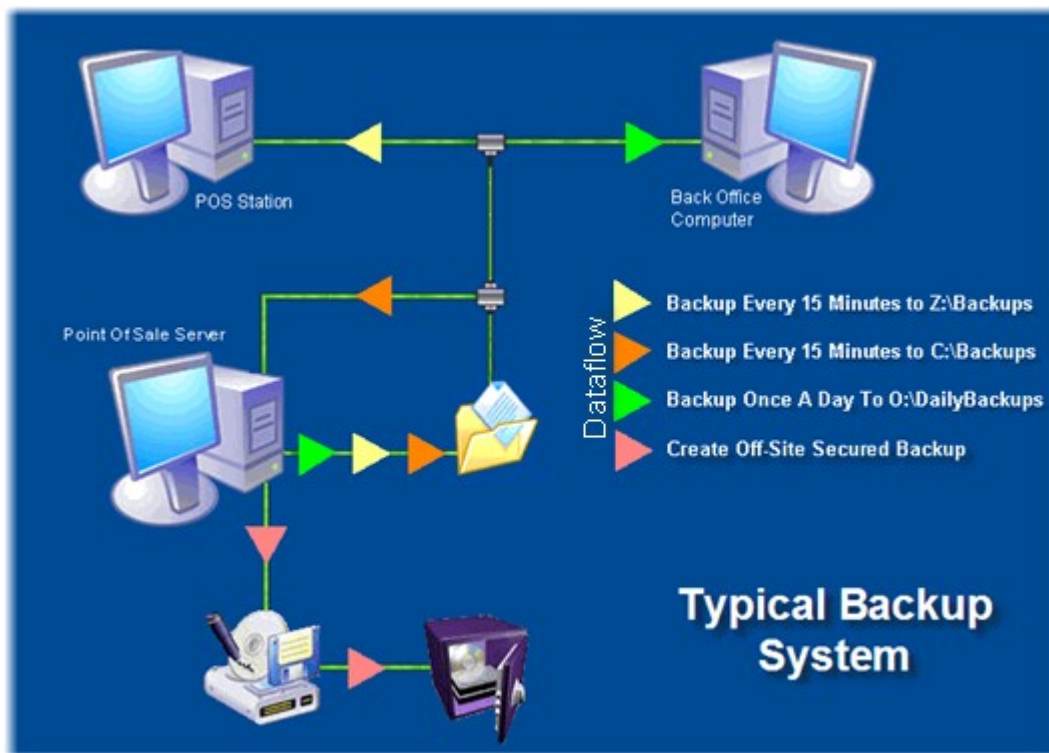
Daily Backup Time

Enter the time of day to perform the daily backup.

Activate or De-Activate Backups

Click to start or end the backup process.

Note: Backing up your data is extremely important. You should always make sure you have backups that are not stored on premises. If all your backups are stored on your computers and your computers are stolen, then you have no backups!



For Additional Information see System Manager & posedge.ini

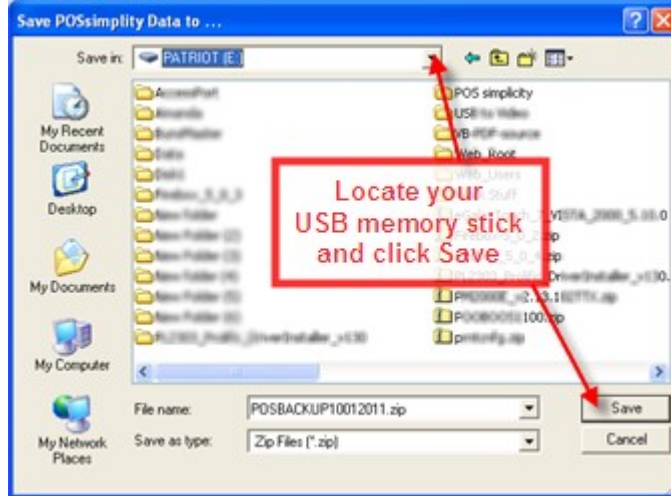
Manual Backups

In POSsetup, you can manually backup your data anytime to another computer on your network or a USB memory stick.

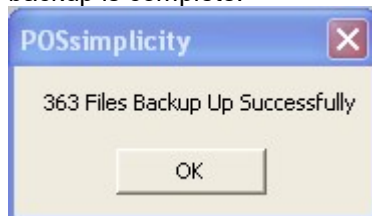
1. Log in to POSsetup.
2. Insert your USB memory stick into an available USB port on the computer.
3. Click the Backup button at the bottom of the screen.



4. A typical Windows dialog box similar to the one shown below will appear. Navigate the dialog box to locate your USB memory stick.



5. You can enter your own file name or use the default name provided.
6. Click the Save button.
7. When the confirmation window appears, you can remove your USB stick and your backup is complete.



Who Do You Call

In the event of trouble, make sure you know who to call for support.

Contingency Plan

Have a Contingency Plan. If your POS system does fail, what do you do?

Power failures, critical hardware malfunctions are all a real possibility. Have a plan ready to run you business old school.

- Note pads & pencils
- Calculator
- Credit card swipe unit and instructions on how to process credit cards.
- Written instructions on how to take and process orders using this manual system

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