



Australian Embassy

iZenPos & PORTAL

User's Reference

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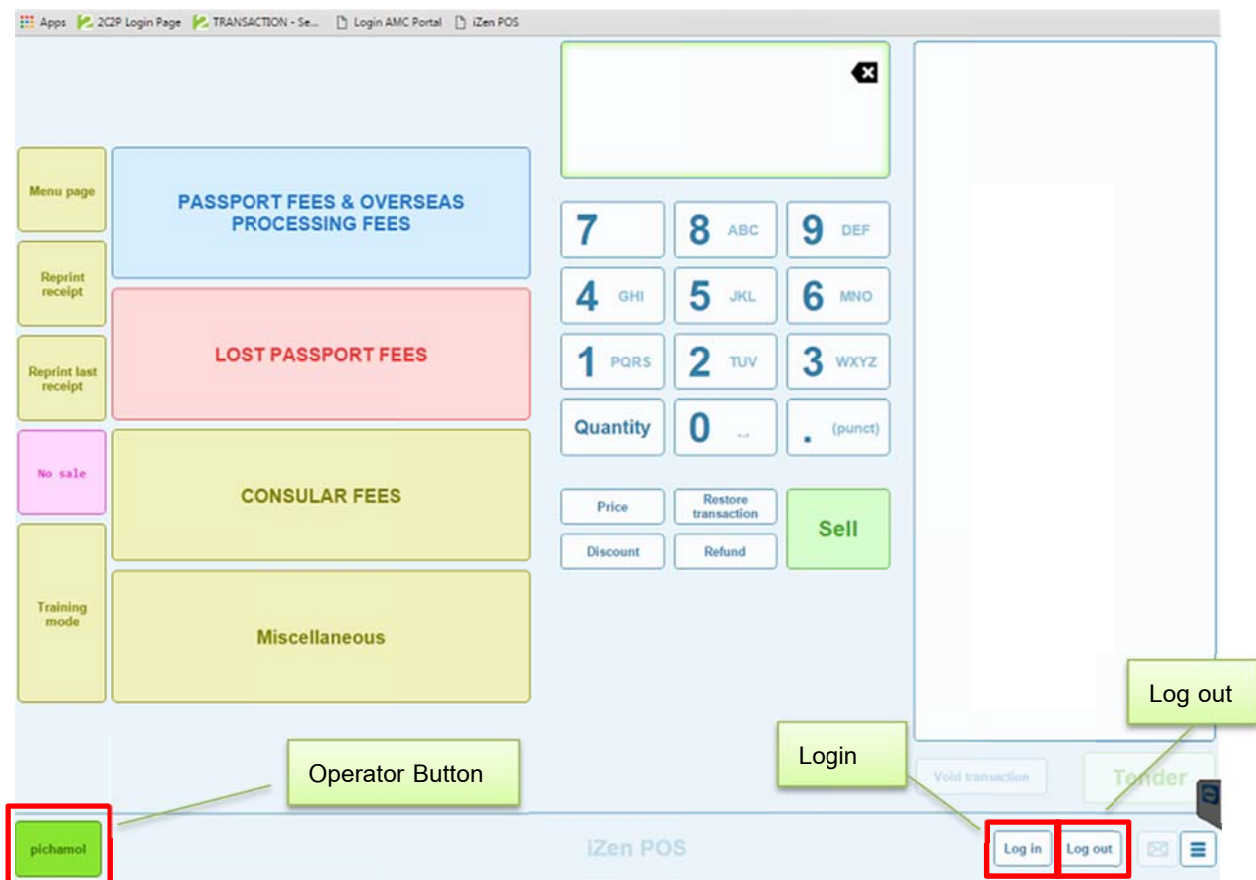
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iZenPOS

Login & Logout iZenPOS

1. Login iZenPOS

- Click on **Log in** button; enter Employee Username and Password to, then enter login to iZenPOS.



2. Log out iZenPOS

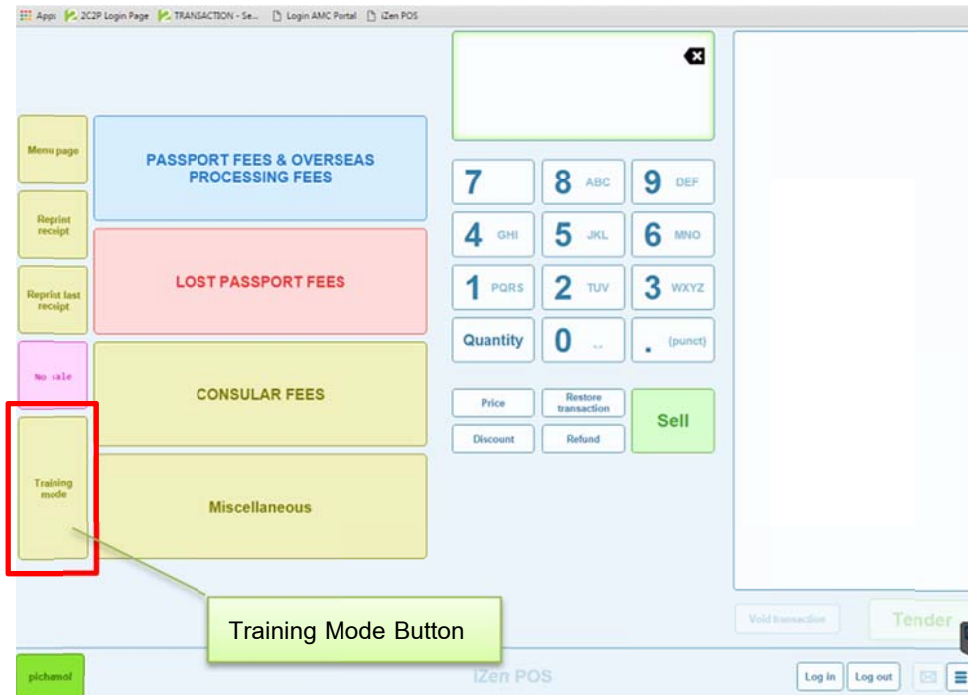
- Click on the **Operator button** & click **Log out** button.

Training Mode

Training Mode allows the operator to train the trainees, where all the training transactions are recorded but exclude from the actual Sales transactions.

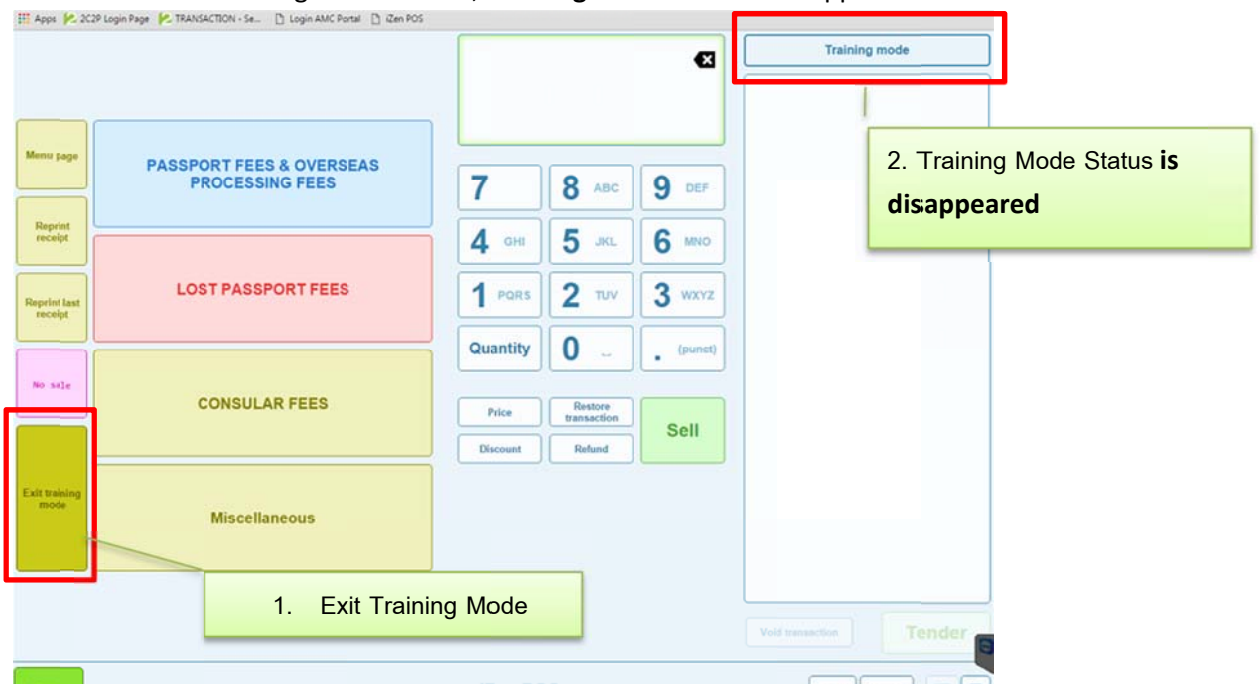
1. Enter Training Mode

- Click on Training Mode button, **Training Mode status** appears on the top-right of the screen.



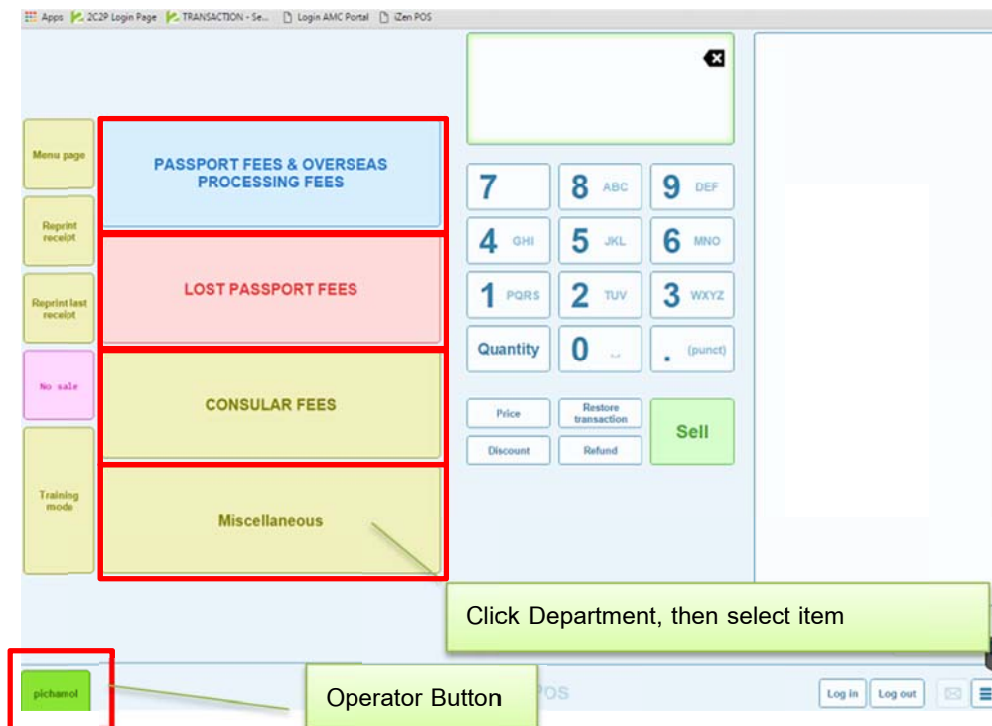
2. Exit Training Mode

- Click on Exit Training Mode button, **Training Mode status** is disappeared.

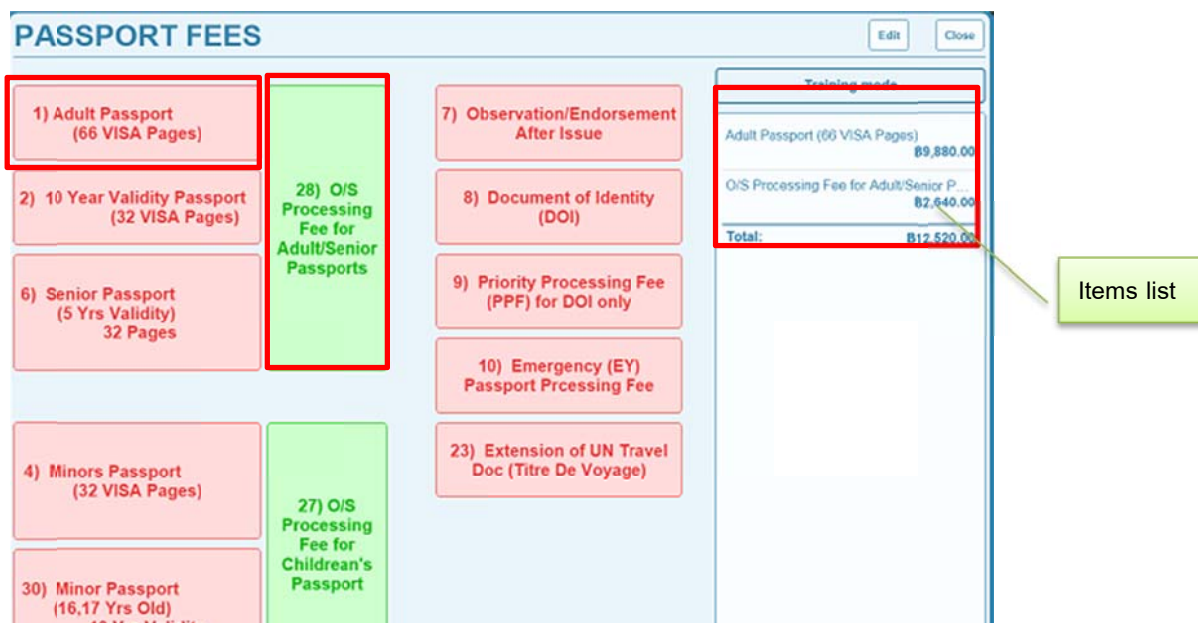


Sell Items

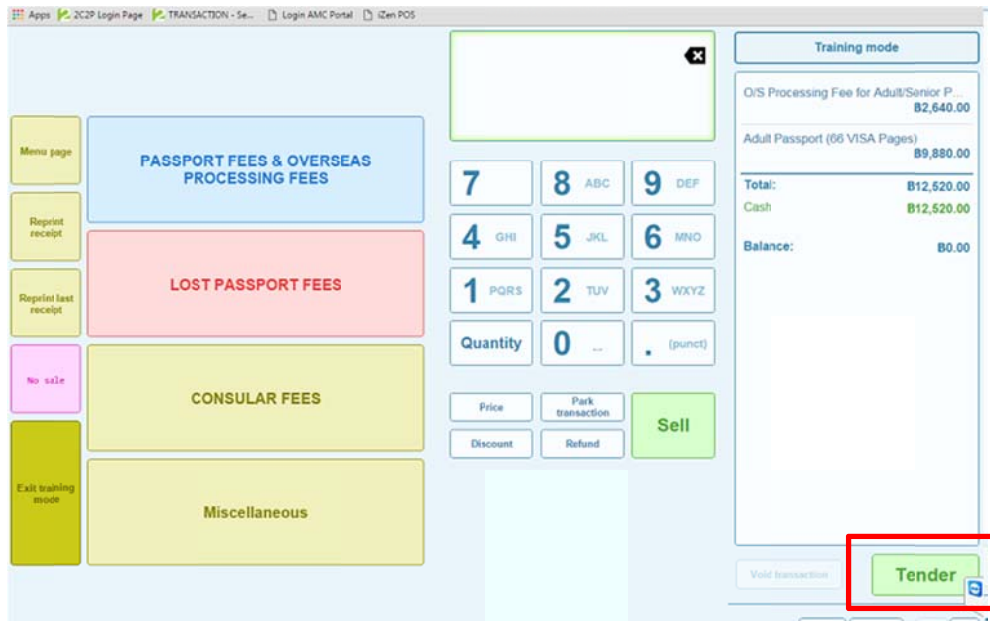
1. **Making sell & Tender** – Please make sure you are in the Live Mode, **NOT** in the Training Mode
 - 1.1. Click **Operator** button to start the active transaction.
 - 1.2. Click **item** to sell, items are classified under its Department/Category.



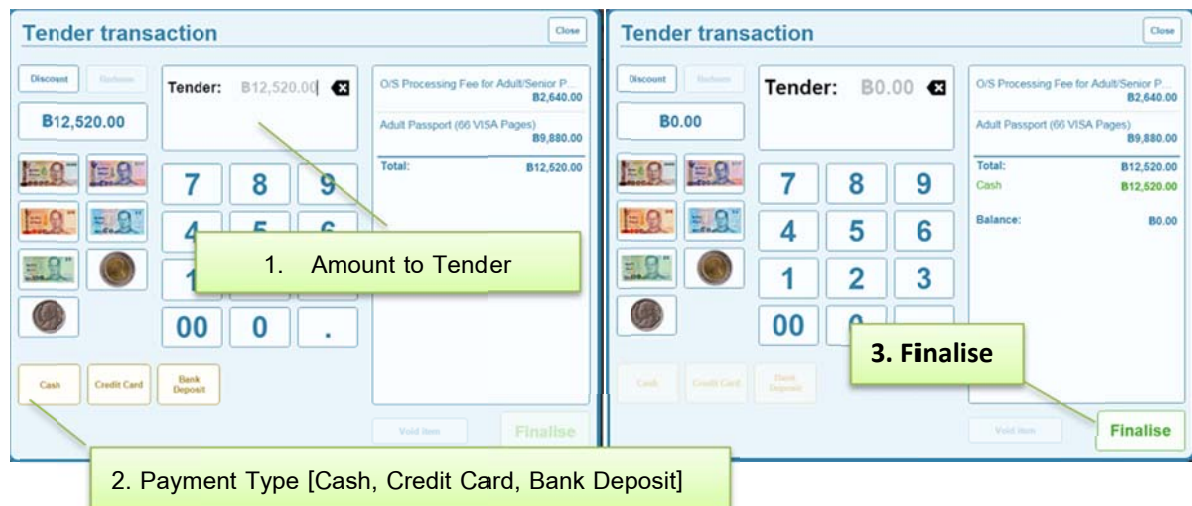
- 1.3. Click on **Item** to sell, repeat these steps to sell more items.



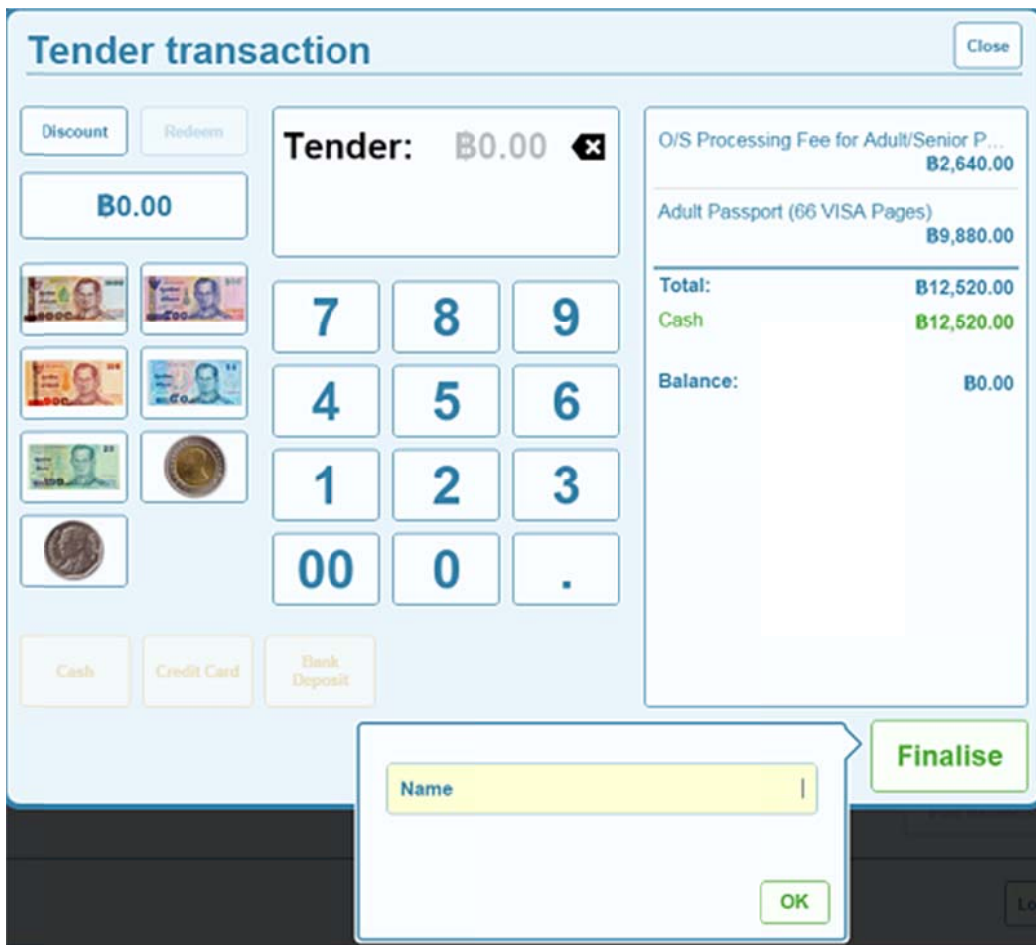
1.4. On Main POS screen, Click **Tender** button



1.5. Enter given **Tender amount**, then select the Tender type [**Cash, Credit Card or Bank Deposit**], then click **Finalise**.



1.6. Enter Customer name as reference, where the customer will be recorded in the Transaction Journal.



Tender transaction Close

Discount Redeem

Tender: B0.00 ✕

B0.00

7 8 9

4 5 6

1 2 3

00 0 .

Cash Credit Card Bank Deposit

O/S Processing Fee for Adult/Senior P... **B2,640.00**

Adult Passport (66 VISA Pages) **B9,880.00**

Total: B12,520.00

Cash **B12,520.00**

Balance: **B0.00**

Finalise

Name |

OK

Home Sales Products Company History Suggestions Site Balances Site Journals Jack amc

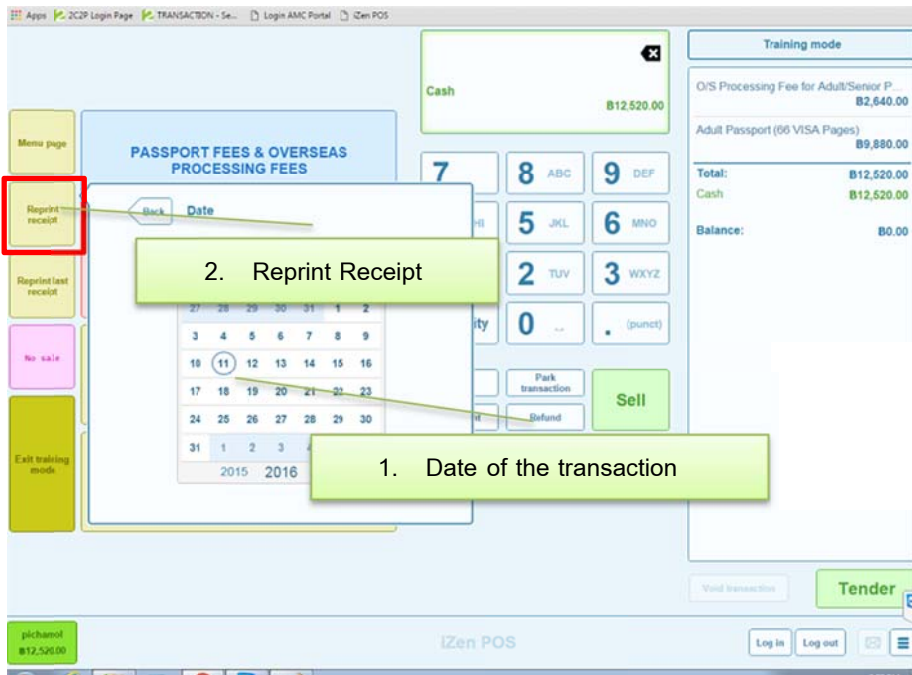
Terminal 4, Journal 24: Bangkok

Transaction Header		Terminal 4, Journal 24: Bangkok				
Reference	Information	Description	Sales	Quantity	Item Discount	Tender
Site	Bangkok	Witnessing Signature and/or seal	B520.00	1.000	B0.00	
Terminal	4	Cash				B520.00
Journal	24	Total:	B520.00	1.000	B0.00	B520.00
Shift	1					
Date	2016-01-06					
Time	09:03:18					
Duration	15 Seconds					
Clerk Name	nichamol					
Clerk Number	nichamol					
Customer	DIMITROV, SIMEON					

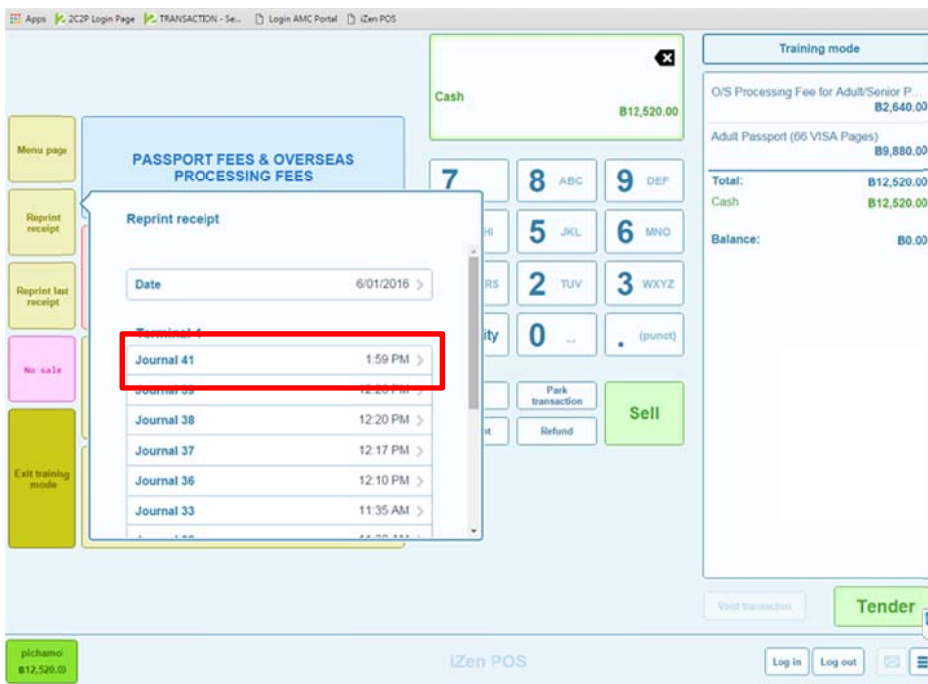
Reprint Receipt

Operate can reprint the customer receipt in the journals history. However, the re-printed receipt will have the word “**REPRINT**” display on the top of the re-printed receipt. The iZenPOS is not allowed to print multiple original copies.

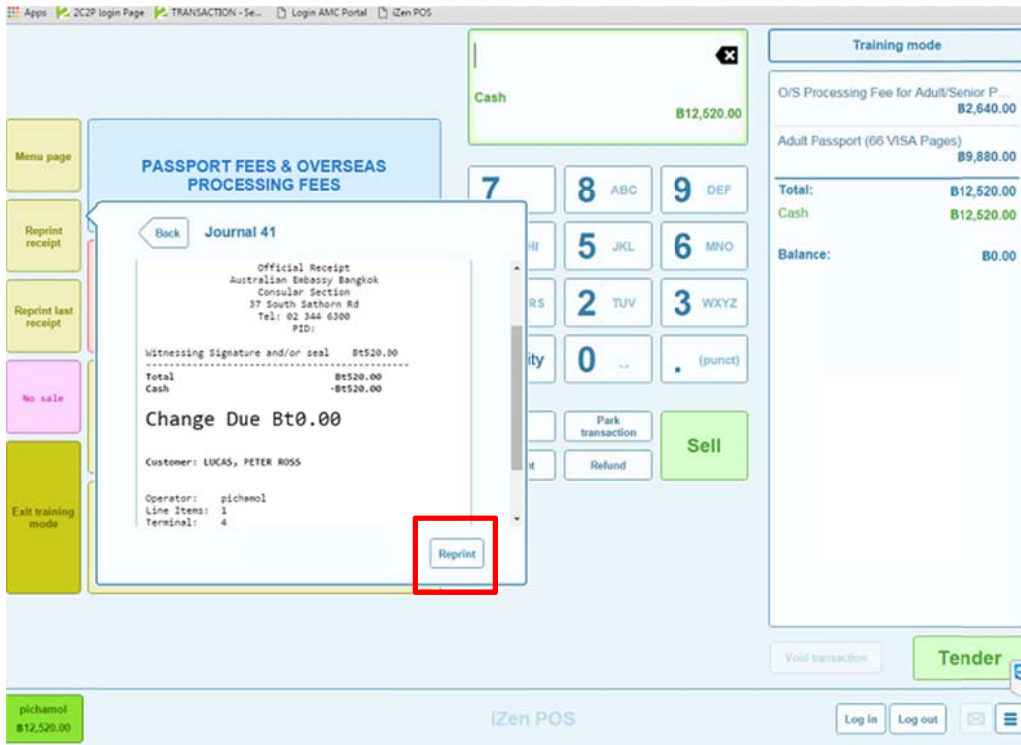
1. Click on “**Reprint Receipt**” function button.
2. Select date of the transaction for reprint



3. Select the Journal number to reprint.

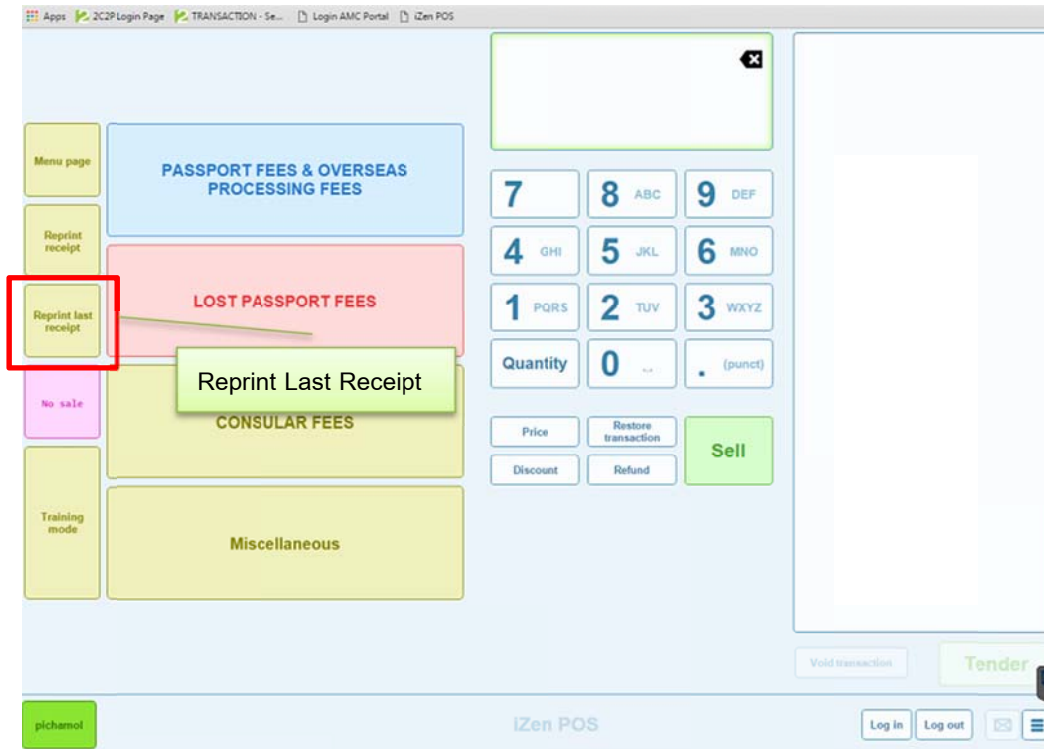


4. Click on Reprint button to reprint the receipt.



Reprint Last Receipt

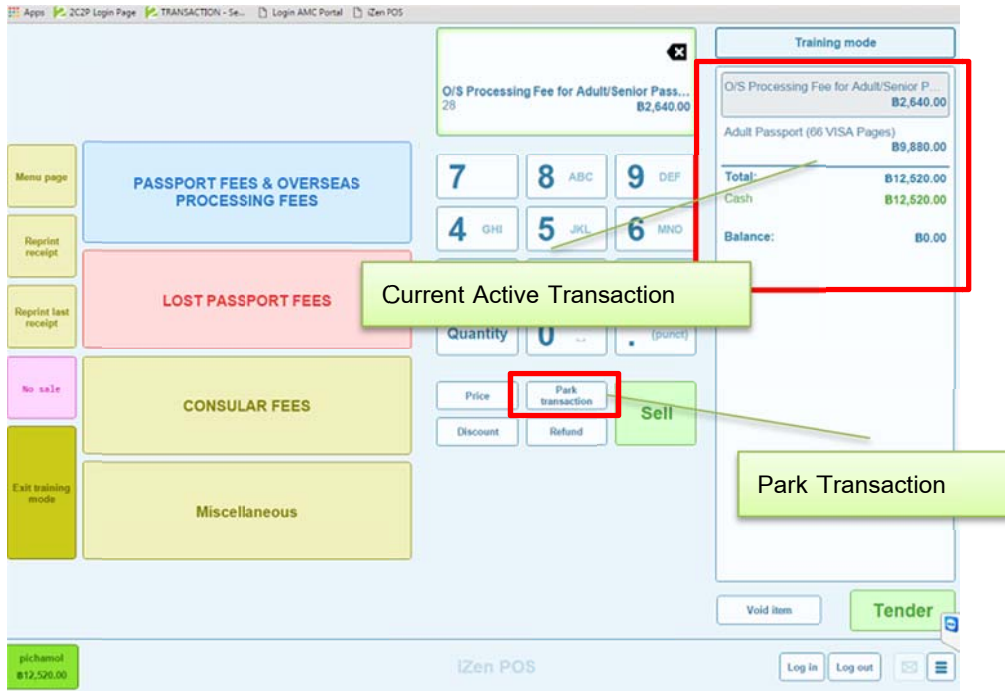
Operate can simply reprint last receipt, by click on the “Reprint Last Receipt” button. However, the re-printed receipt will have the word “REPRINT” display on the top of the re-printed receipt.



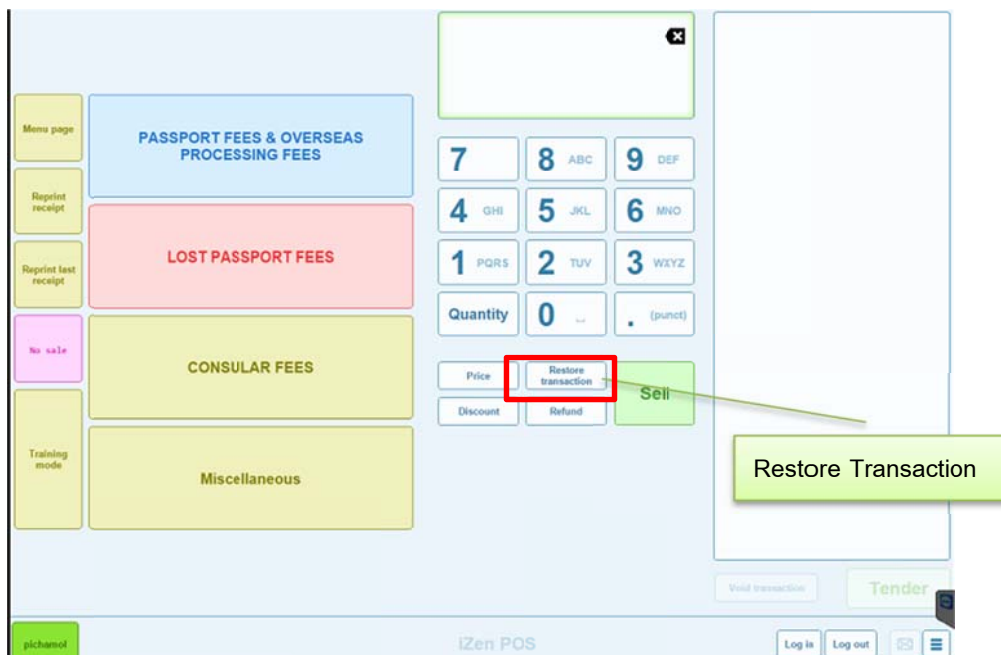
Park Sales Transaction & Restore Sales Transaction

Operators can Park current active transaction, if he/she need to serve another customer immediately.

1. **Park Transaction** – In the current active transaction, click on “**Park Transaction**” button.
2. Perform normal Sell, tender and finalise processes as required.

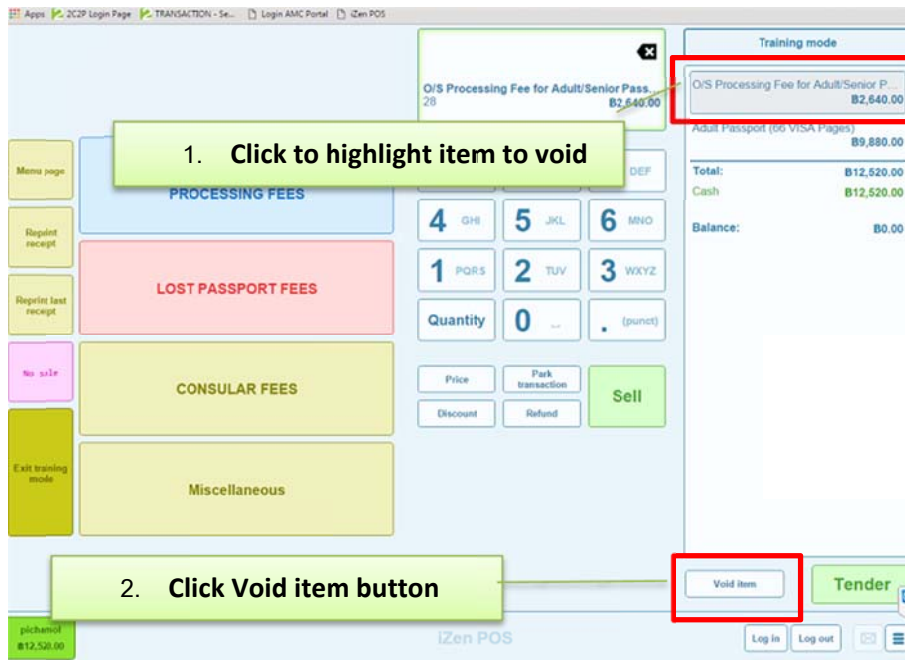


3. **Restore Transaction** – on the main POS screen click on “**Restore Transaction**” button.
4. Continue selling items, complete the Tender and Finalise processes.

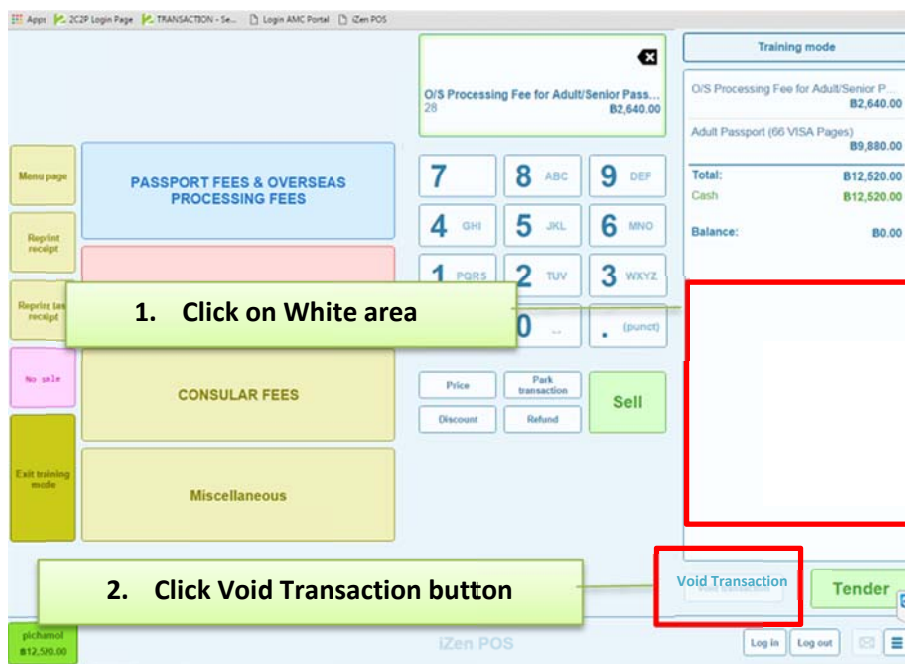


Void Item VS Void Transaction

1. **Void Item** – to delete an ITEM from the current active transaction.
 - 1.1. Click to **highlight on the item** that need to void.
 - 1.2. Click on “**Void Item**” button.



2. **Void Transaction** – delete the active transaction.
 - 2.1. Click in the white area of the POS screen, so that NOT to select a single item.
 - 2.2. Click on “**Void Transaction**” button.

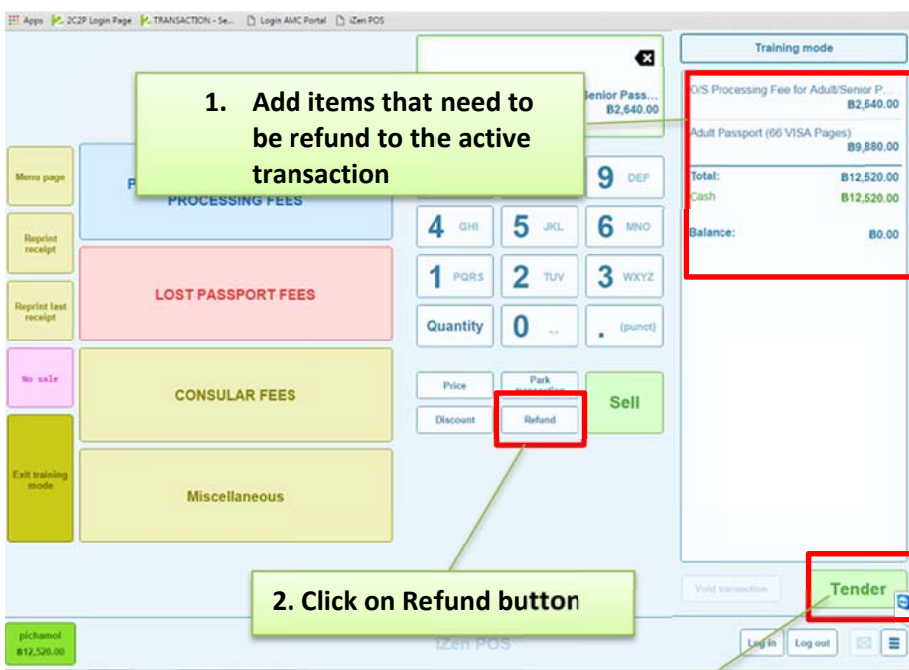


Refund Items

In some case, that needs to refund the payment to the customer. Refund only allows if the customer payment had previously been completely tendered.

This is similar to sell items processes, the different is that after you added the items to the active transaction and click refund. The tendering amount will be (-) negative.

1. Add the Items that need to be refund to the active transaction.
2. Click on “Refund” button.
3. Complete the normal Tendering processes and finalise.



1. Add items that need to be refund to the active transaction


2. Click on Refund button

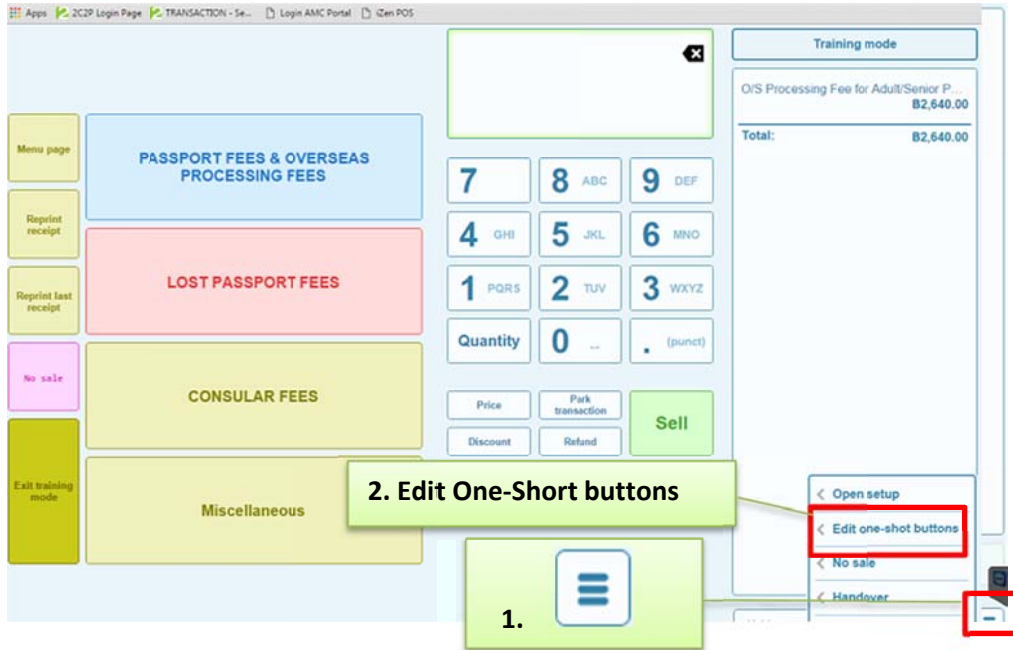
3. Tender and Finalise

Senior Pass...	B2,640.00
OS Processing Fee for Adult/Senior P...	B2,640.00
Adult Passport (66 VISA Pages)	B9,880.00
Total:	B12,520.00
Cash	B12,520.00
Balance:	B0.00

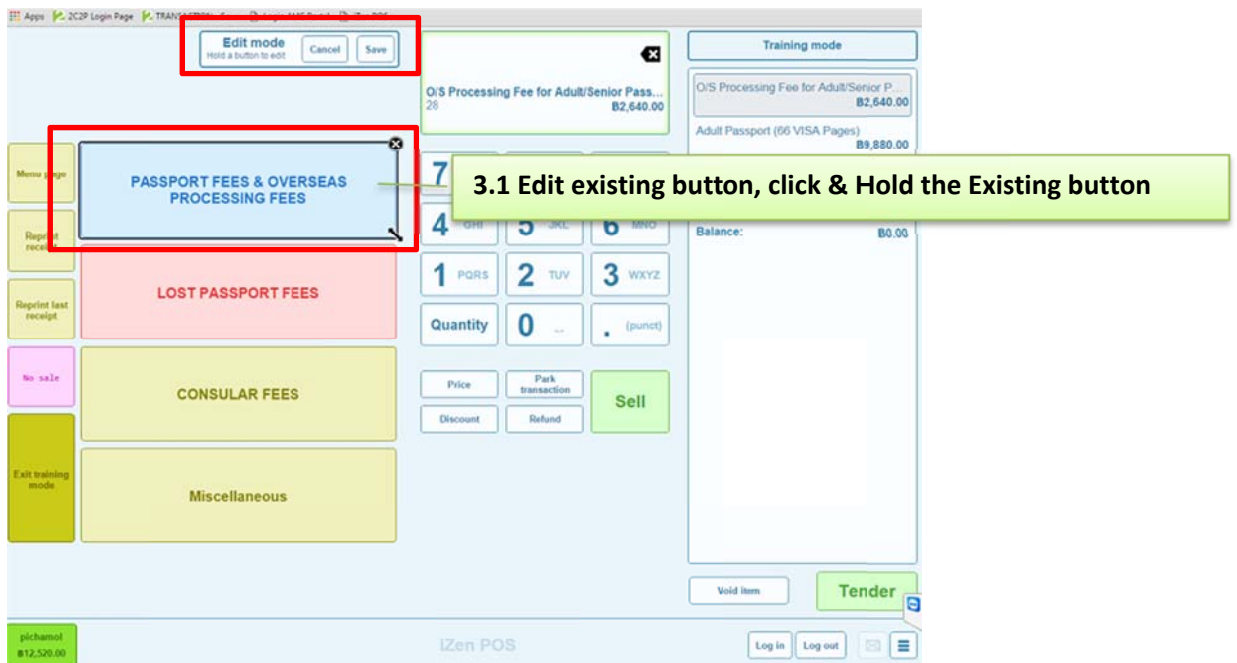
Edit One-Shot button


iZenPOS allows the operator to edit the POS screen buttons and sub-menu items buttons.


1. Click on the  at the bottom-right corner of the POS screen.
2. Click on "Edit One-Shot buttons"

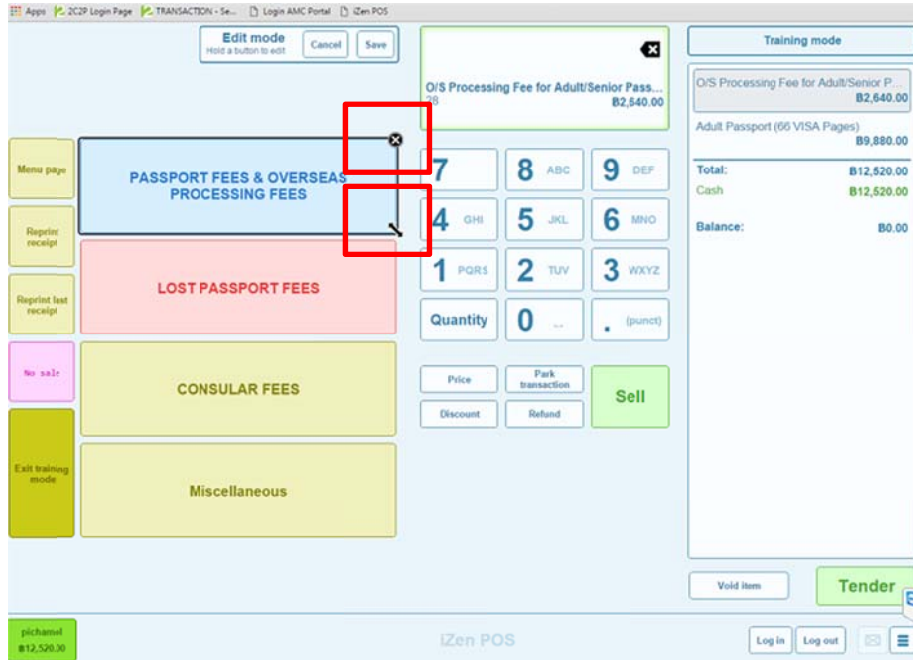


3. The screen is entered to the **EDIT MODE**, after have made any changes always click **SAVE**.
 - 3.1 To **edit existing button**, click and Hold on the existing button.



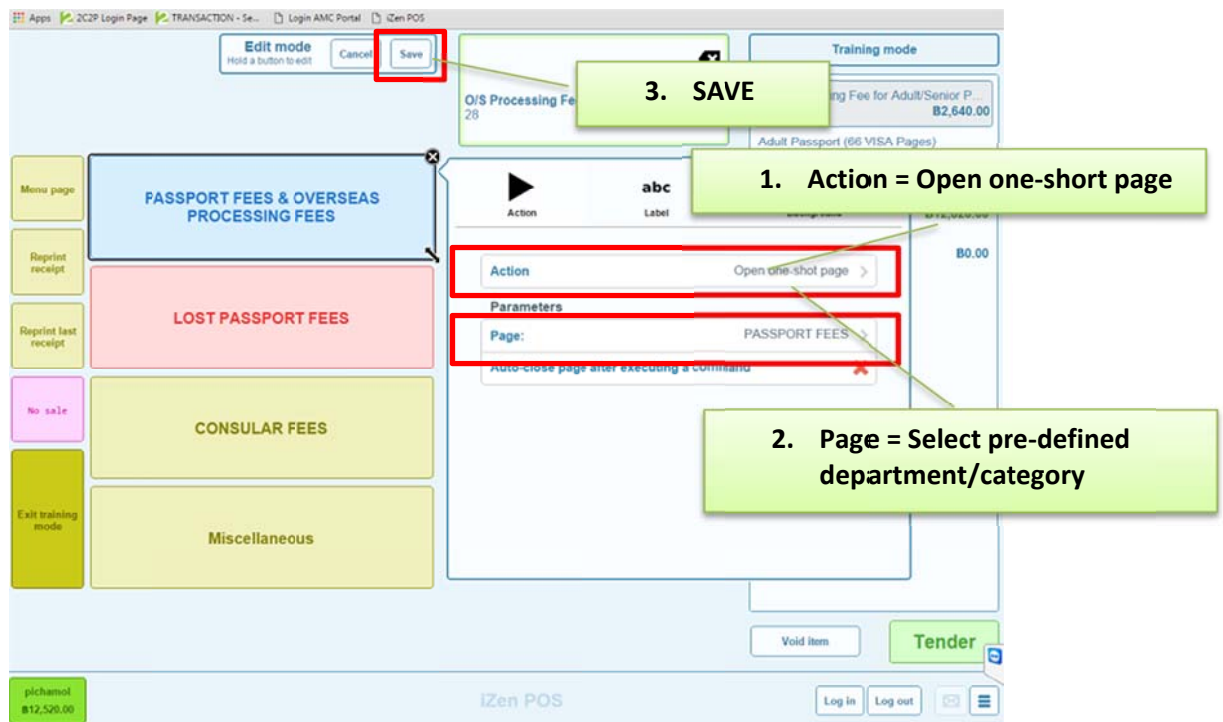
3.2 **Delete button** – Click on the cross symbol  of the button to delete.

3.3 **Resize button** – Click & Hold the arrow symbol  of the button and move to resize.

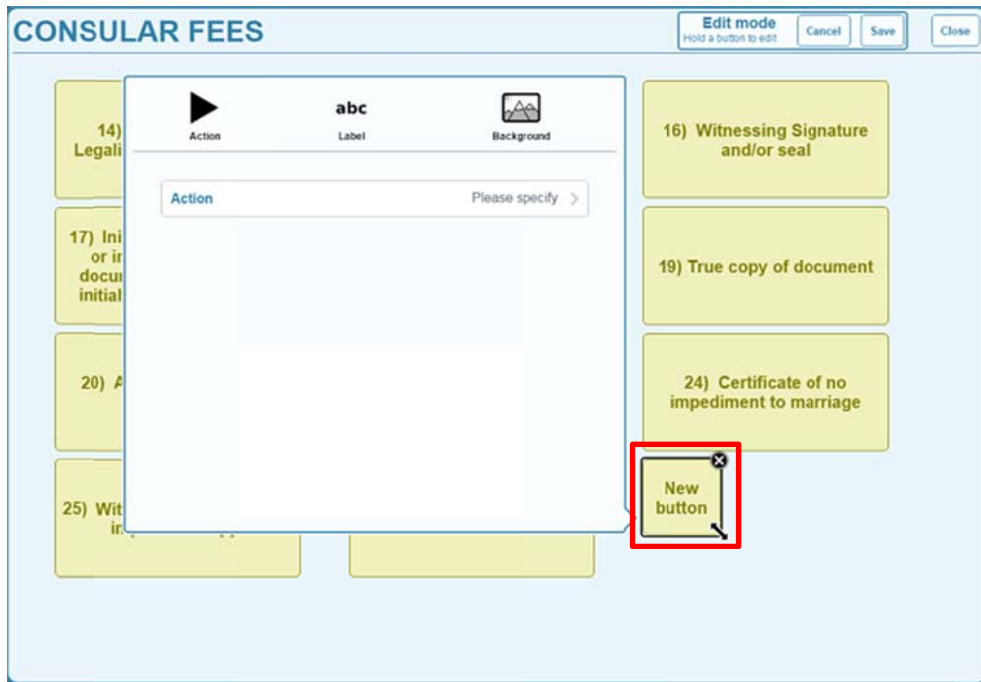


4. Assign a button in the main POS screen to sub-menu by department/category.

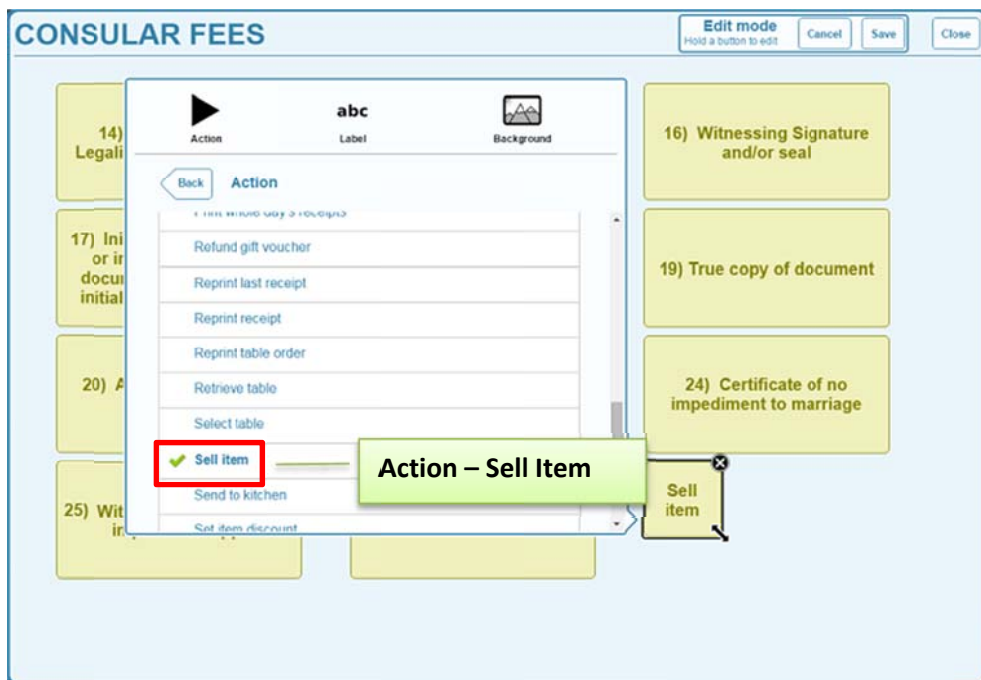
4.1 Click and hold the button, until you see an “Action” tab. Set as following:



5. **Create new button** - [Item data must have already been created on the Portal Inventory maintenance prior assign the button for it. Refer to "Create New Item" on the Portal]
 - 5.1. Click **Edit**, to enter the **Edit Mode**
 - 5.2. Click and Hold on the available area on the sub- menu to create new button.



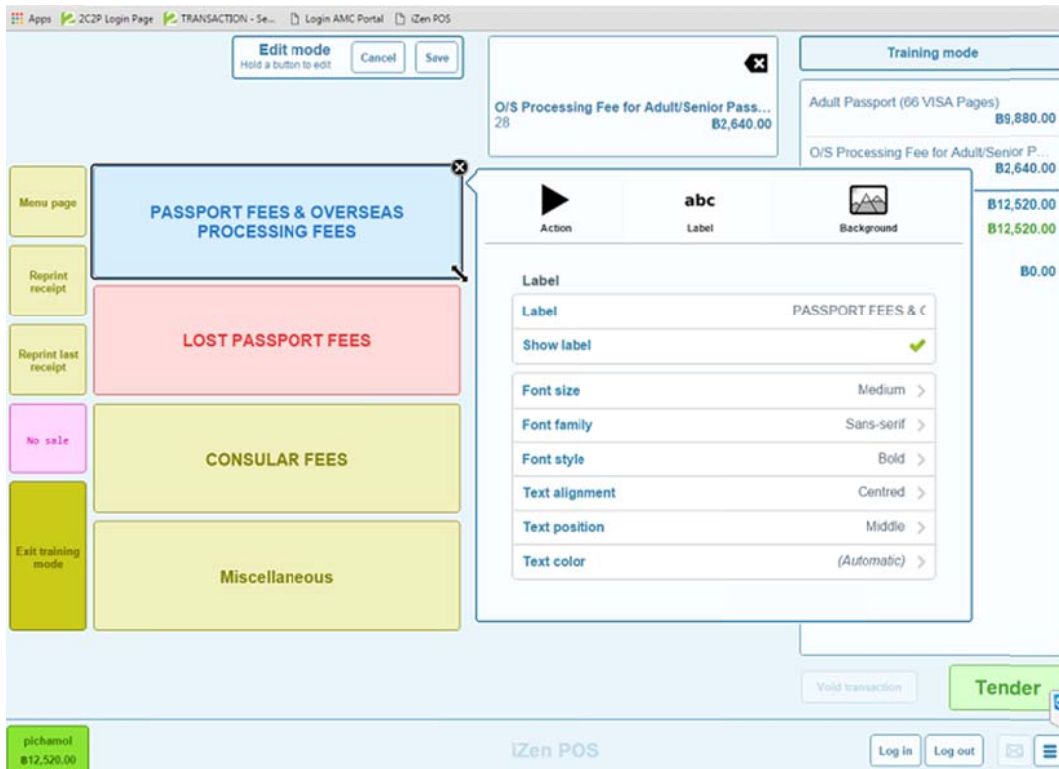
- 5.3. Select Action = **Sell Item**



5.4. Select **Item** to assign to a new create button, then click **SAVE**.



5.5. To change the Label description, click on **Label** symbol. This setting allows you to change the button label description, font colour, font style and size etc., then click **SAVE**.



Portal

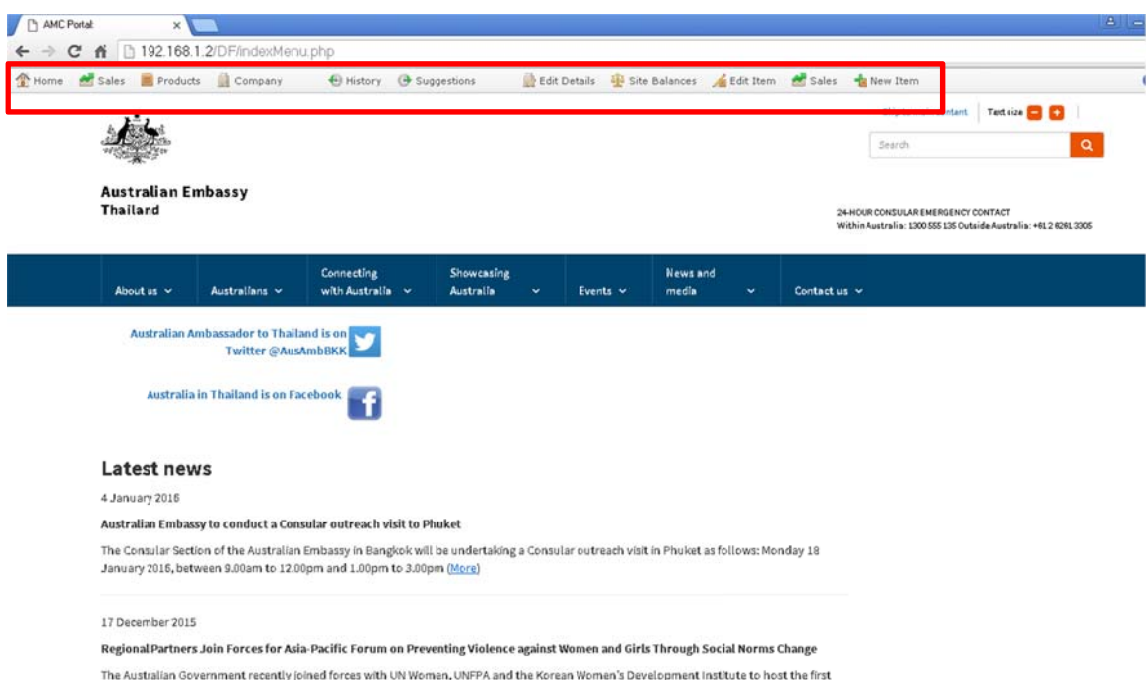
Login & Logout the Portal / Change Password / Adjust menu size

1. Login to the Portal

- 1.1. In Chrome browser = <http://thai.zenglobal.net/DF/Login.php?company=1>
- 1.2. Enter in Portal Username & Password, and click OK




- 1.3. After Login successfully, Top MENU bar appears on the screen.



2. Logout from the Portal

Click on Portal user name on the TOP-RIGHT corner of the Portal screen, click **Logout**



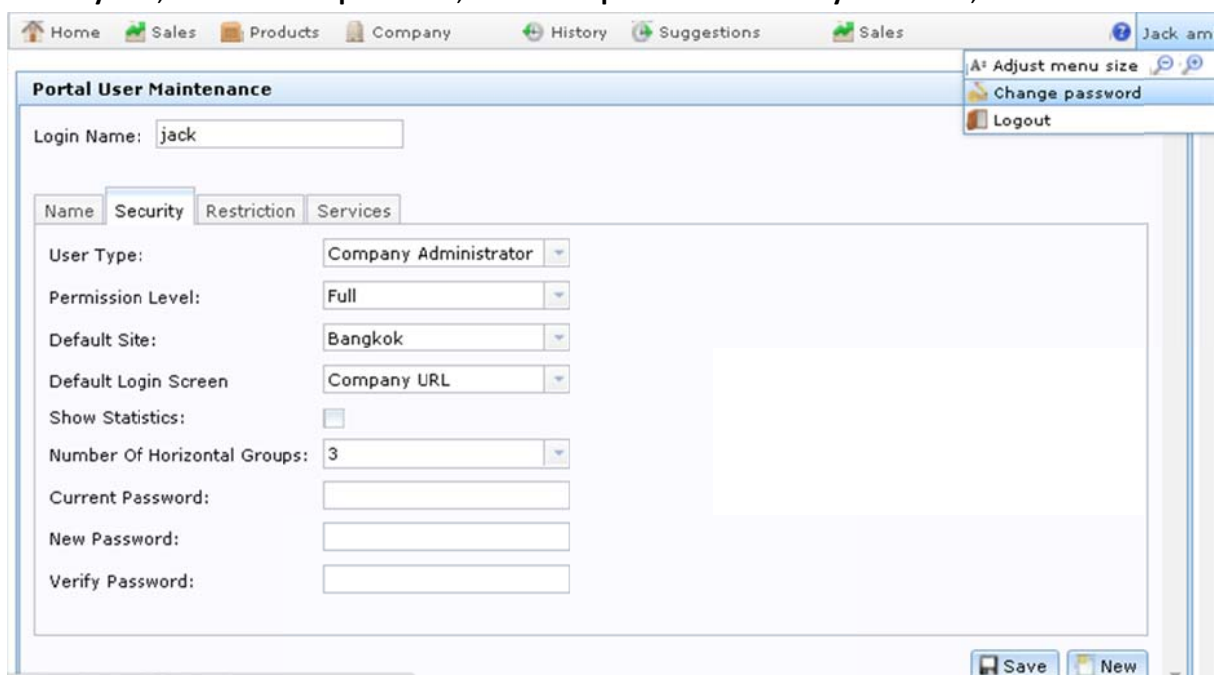
The screenshot shows a web portal with a navigation bar at the top containing 'Home', 'Sales', 'Products', 'Company', 'History', 'Suggestions', and 'Sales'. The user name 'Jack amc' is displayed in the top right corner. A dropdown menu is open, showing options: 'Adjust menu size', 'Change password', and 'Logout'. The main content area displays a table titled 'Sales Inc By Department (NET of Discounts)'.

Department	Sunday 10-Jan-2016	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Total
Passport Fees		฿24,320.00	฿9,880.00					฿34,200.00
O/S Processing Fees		฿6,600.00	฿2,640.00					฿9,240.00
Consular Fees		฿11,700.00	฿9,100.00					฿20,800.00
Total:		฿42,620.00	฿21,620.00					฿64,240.00

3. Change Portal User Password

3.1. Click on Portal user name on the TOP-RIGHT corner of the Portal screen, click **Change password**

3.2. **Security Tab**, enter **current password**, enter **new password** and **verify Password**, then click **Save**



The screenshot shows the 'Portal User Maintenance' form. The 'Login Name' field contains 'jack'. The 'Security' tab is selected. The form includes the following fields:

- User Type: Company Administrator
- Permission Level: Full
- Default Site: Bangkok
- Default Login Screen: Company URL
- Show Statistics:
- Number Of Horizontal Groups: 3
- Current Password:
- New Password:
- Verify Password:

Buttons for 'Save' and 'New' are visible at the bottom right of the form.

4. **Adjust menu size** - Click on Portal user name on the TOP-RIGHT corner of the Portal screen, click Adjust menu size + or -



This screenshot is similar to the previous one, showing the 'Portal User Maintenance' form. The dropdown menu for the user name 'Jack amc' is open, showing the 'Adjust menu size' option selected, along with 'Change password' and 'Logout'.

Getting to know Report Sorting and Report filter facilities

1. Report Sorting:

After report is generated, click on each of the column header to sort in alphabetical order (A-Z) or numeric order (Low-High). Click again to reverse the sorting (Z-A) or (High-low).

Sales Inc By Department (NET of Discounts)

Department	Sunday 10-Jan-2016	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Total
Passport Fees		฿24,320.00	฿9,880.00					฿34,200.00
O/S Processing Fees		฿6,600.00	฿2,640.00					฿9,240.00
Consular Fees		฿11,700.00	฿9,100.00					฿20,800.00
Total:		฿42,620.00	฿21,620.00					฿64,240.00

2. Report Filters

Where there is a symbol, click to active or hide the report filter.

Report Filters – click to active / Hide

Sales Inc By Department (NET of Discounts)

Department	Sunday 10-Jan-2016	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Total
Passport Fees		฿24,320.00	฿9,880.00					฿34,200.00
Consular Fees		฿11,700.00	฿9,100.00					฿20,800.00
O/S Processing Fees		฿6,600.00	฿2,640.00					฿9,240.00
Total:		฿42,620.00	฿21,620.00					฿64,240.00

States
All >

Site
All >

By
Day >

Date
12/01/2016

Display As
Table >

Type
Sales Inc >

Portal Reports

1. Balance Report:

1.1. Site Balance Report

Click on: Sales -> Balance Reports -> Site Balance

- This is the daily 'Site Tender Report' sales figure for each site.
- Place your mouse on the daily 'sales figure', it will appear an underline, then click on it to see the full Balance Report details.

Sites Tenders Report Summary

Site	Sunday 03-Jan-2016	Monday 04-Jan-2016	Tuesday 05-Jan-2016	Wednesday 06-Jan-2016	Thursday 07-Jan-2016	Friday 08-Jan-2016	Saturday 09-Jan-2016	Total:
Bangkok		฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,730.00		฿105,880.00
Total:		฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,730.00		฿105,880.00

Callout: Daily Sales Figure

- Full Balance Report details:

Balance Report for the 08-Jan-2016: Bangkok

Departments Sales

Tender Types: [Cash, Credit Card, Bank Deposit]

Reference	Customers	Discount	Net Sales	Debit Total
Passport Fees	5		฿29,560.00	
O/S Processing Fees	5		฿10,560.00	
Consular Fees	10		฿10,140.00	฿50,260.00

Average spend per customer

Reference	Customers	Amount
Store Customers	15	
Purchase per Customer		฿3,350.67
Returns		

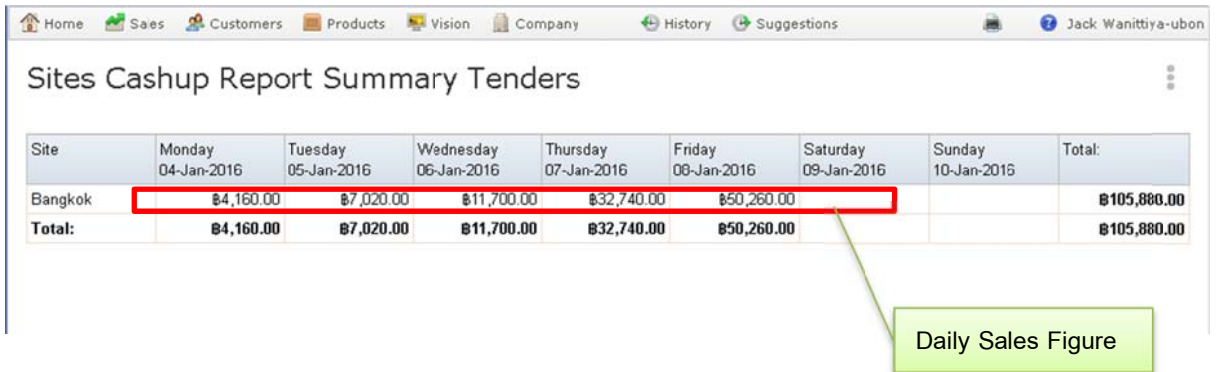
Taking Information

Takings	Amount	Sub Total	Total Credit
Cash	฿50,260.00	฿50,260.00	
Rounding	฿0.00	฿0.00	฿50,260.00

Reference	Sub Total	Total
Money Banked		฿0.00
Declared Tender Amounts		
Cash	฿50,260.00	฿50,260.00
Item / Department Sales		฿50,260.00
Net Sales (Sales + Rounding)		฿50,260.00
Net Takings (Net Sales + Surplus)		฿50,260.00
Rounding		฿0.00

1.2. **Cashup Report** – Click on: Sales -> Balance Reports -> Site Cashups

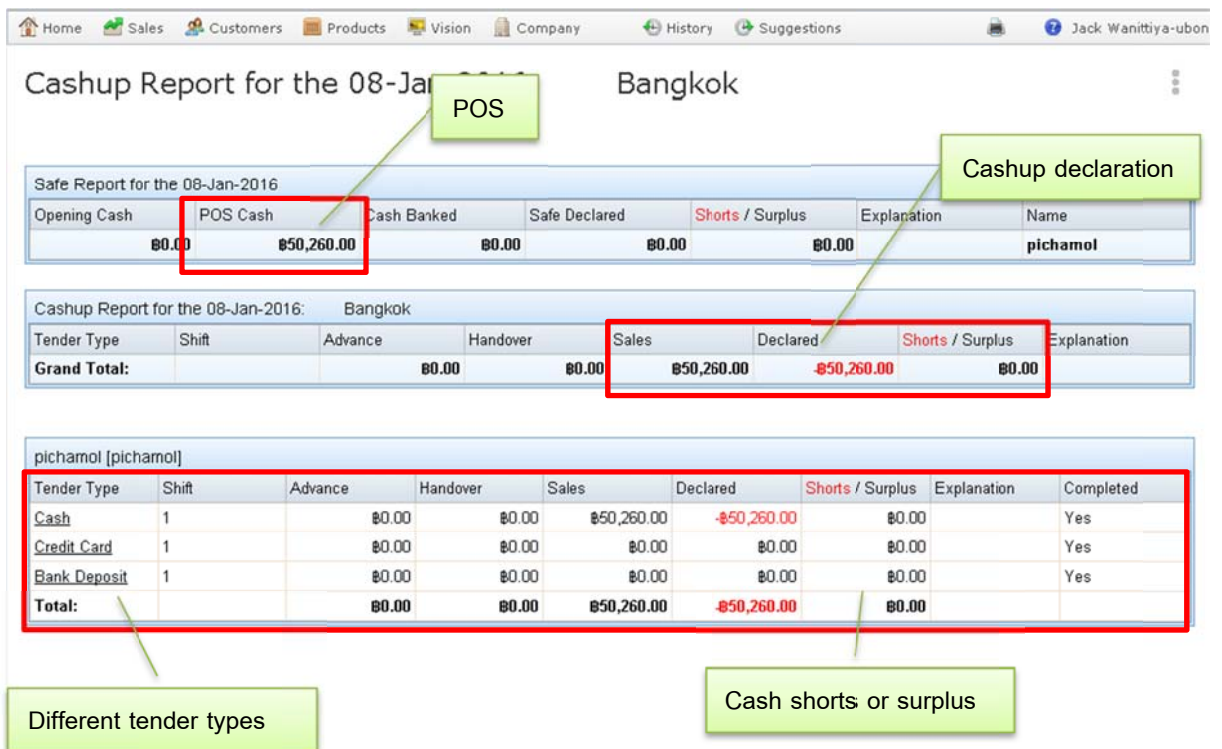
- This is the daily 'Site Cashup Report' figure for each site.
- Place your mouse on the daily 'sales figure', it will appear an underline, then click on it to see the full Site Cashup Report details.



Site	Monday 04-Jan-2016	Tuesday 05-Jan-2016	Wednesday 06-Jan-2016	Thursday 07-Jan-2016	Friday 08-Jan-2016	Saturday 09-Jan-2016	Sunday 10-Jan-2016	Total:
Bangkok	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00
Total:	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00

Daily Sales Figure

- Full Balance Report details:



Cashup Report for the 08-Jan-2016 Bangkok

Safe Report for the 08-Jan-2016						
Opening Cash	POS Cash	Cash Banked	Safe Declared	Shorts / Surplus	Explanation	Name
฿0.00	฿50,260.00	฿0.00	฿0.00	฿0.00		pichamol

Cashup Report for the 08-Jan-2016: Bangkok							
Tender Type	Shift	Advance	Handover	Sales	Declared	Shorts / Surplus	Explanation
Grand Total:			฿0.00	฿0.00	฿50,260.00	-฿50,260.00	฿0.00

pichamol [pichamol]								
Tender Type	Shift	Advance	Handover	Sales	Declared	Shorts / Surplus	Explanation	Completed
Cash	1	฿0.00	฿0.00	฿50,260.00	-฿50,260.00	฿0.00		Yes
Credit Card	1	฿0.00	฿0.00	฿0.00	฿0.00	฿0.00		Yes
Bank Deposit	1	฿0.00	฿0.00	฿0.00	฿0.00	฿0.00		Yes
Total:		฿0.00	฿0.00	฿50,260.00	-฿50,260.00	฿0.00		

POS

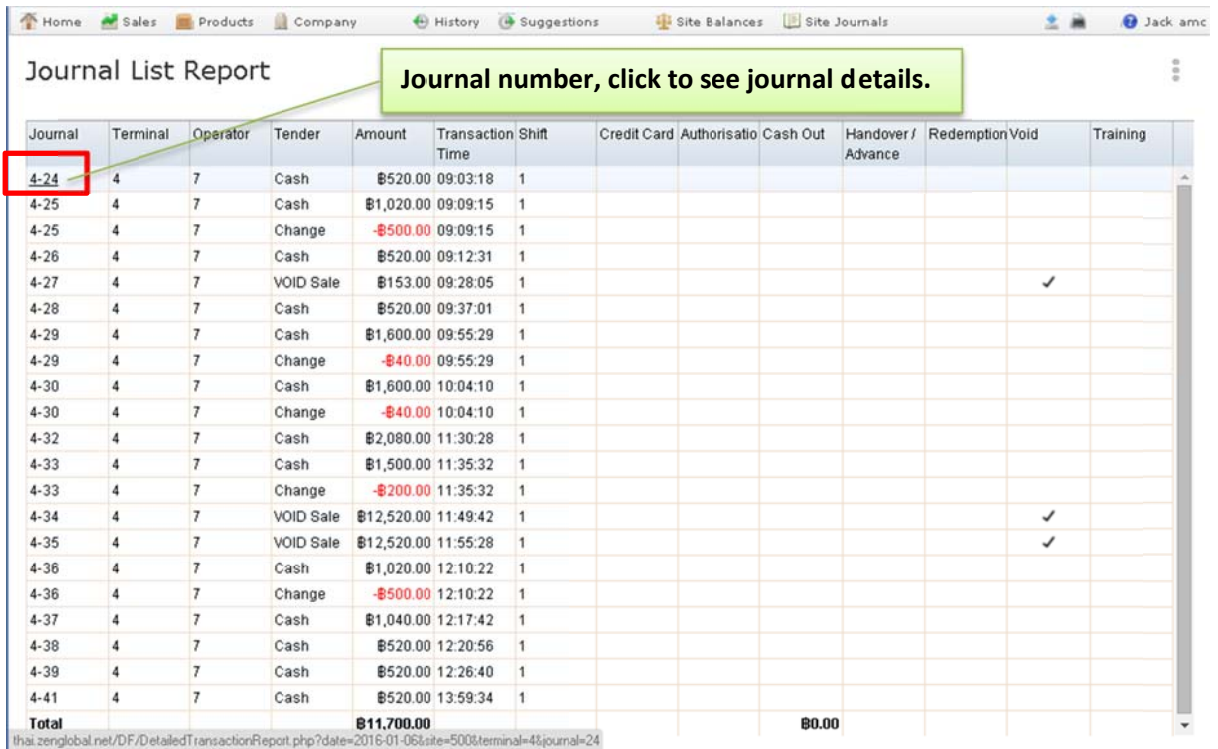
Cashup declaration

Different tender types

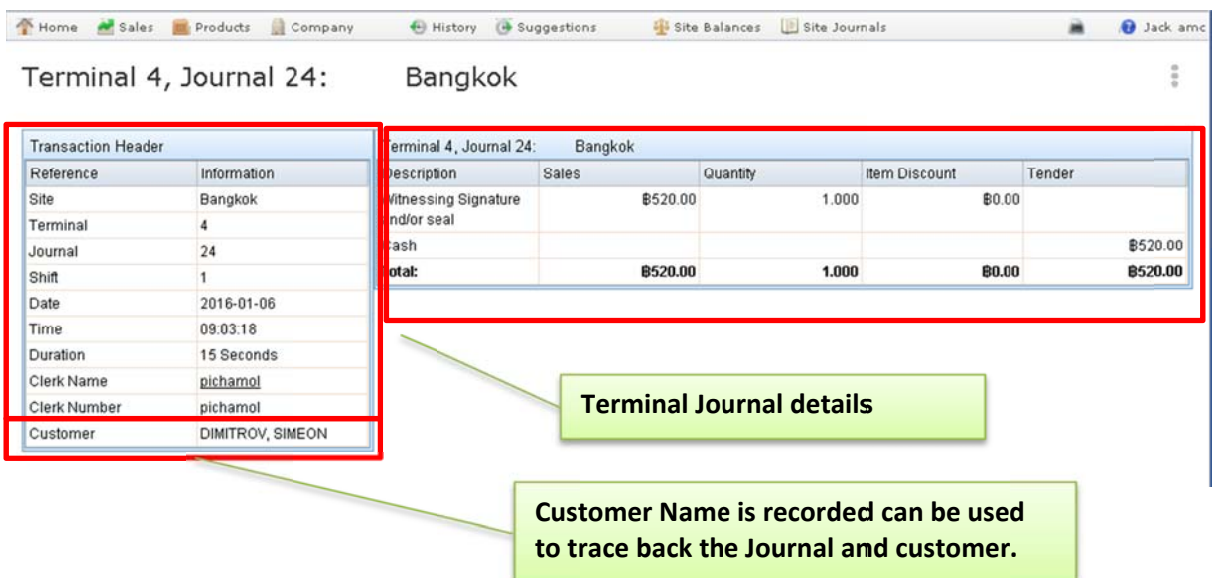
Cash shorts or surplus

1.3. Site Journals Report – Click on: Sales -> Balance Reports -> Site Journals

- This is the Site Journals Report that record all the transactions perform on the iZenPos terminals.



Journal	Terminal	Operator	Tender	Amount	Transaction Time	Shift	Credit Card	Authorisation	Cash Out	Handover / Advance	Redemption Void	Training
4-24	4	7	Cash	B520.00	09:03:18	1						
4-25	4	7	Cash	B1,020.00	09:09:15	1						
4-25	4	7	Change	-B500.00	09:09:15	1						
4-26	4	7	Cash	B520.00	09:12:31	1						
4-27	4	7	VOID Sale	B153.00	09:28:05	1					✓	
4-28	4	7	Cash	B520.00	09:37:01	1						
4-29	4	7	Cash	B1,600.00	09:55:29	1						
4-29	4	7	Change	-B40.00	09:55:29	1						
4-30	4	7	Cash	B1,600.00	10:04:10	1						
4-30	4	7	Change	-B40.00	10:04:10	1						
4-32	4	7	Cash	B2,080.00	11:30:28	1						
4-33	4	7	Cash	B1,500.00	11:35:32	1						
4-33	4	7	Change	-B200.00	11:35:32	1						
4-34	4	7	VOID Sale	B12,520.00	11:49:42	1					✓	
4-35	4	7	VOID Sale	B12,520.00	11:55:28	1					✓	
4-36	4	7	Cash	B1,020.00	12:10:22	1						
4-36	4	7	Change	-B500.00	12:10:22	1						
4-37	4	7	Cash	B1,040.00	12:17:42	1						
4-38	4	7	Cash	B520.00	12:20:56	1						
4-39	4	7	Cash	B520.00	12:26:40	1						
4-41	4	7	Cash	B520.00	13:59:34	1						
Total				B11,700.00					B0.00			



Transaction Header	
Reference	Information
Site	Bangkok
Terminal	4
Journal	24
Shift	1
Date	2016-01-06
Time	09:03:18
Duration	15 Seconds
Clerk Name	pichamol
Clerk Number	pichamol
Customer	DIMITROV, SIMEON

Terminal 4, Journal 24: Bangkok				
Description	Sales	Quantity	Item Discount	Tender
Witnessing Signature and/or seal	B520.00	1.000		B0.00
Cash				B520.00
Total:	B520.00	1.000	B0.00	B520.00

2. Sales Reports

2.1. Site Sales Report

Click on: Sales -> Sales Reports -> Sales

- This is the daily 'Site Sales Report' for each site.
- Place your mouse on 'Site name', it will appear an underline, then click on it to see the Department Sales Report, and Items Sales Report.

Sites : Sales Inc (NET of Discounts)

Site	Monday 04-Jan-2016	Tuesday 05-Jan-2016	Wednesday 06-Jan-2016	Thursday 07-Jan-2016	Friday 08-Jan-2016	Saturday 09-Jan-2016	Sunday 10-Jan-2016	Total
Bangkok	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00
Total	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00

Sites : Sales Inc (NET of Discounts)

Site	Monday 04-Jan-2016	Tuesday 05-Jan-2016	Wednesday 06-Jan-2016	Thursday 07-Jan-2016	Friday 08-Jan-2016	Saturday 09-Jan-2016	Sunday 10-Jan-2016	Total
Bangkok	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00
Total	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00

Department Sales Report

Sales Inc By Department Bangkok (NET of Discounts)

Department	Monday 04-Jan-2016	Tuesday 05-Jan-2016	Wednesday 06-Jan-2016	Thursday 07-Jan-2016	Friday 08-Jan-2016	Saturday 09-Jan-2016	Sunday 10-Jan-2016	Total
Passport Fees				฿17,080.00	฿29,560.00			฿46,640.00
Consular Fees	฿4,160.00	฿7,020.00	฿11,700.00	฿11,700.00	฿10,140.00			฿44,720.00
O/S Processing Fees				฿3,960.00	฿10,560.00			฿14,520.00
Total:	฿4,160.00	฿7,020.00	฿11,700.00	฿32,740.00	฿50,260.00			฿105,880.00

2.2. Department Sales Report

Click on: Sales -> Sales Reports -> Department Sales

- This is the daily 'Department Sales Report' for each site.

2.3. Items Sales Report

Click on: Sales -> Sales Reports -> Items Sales

- This is the daily 'Items Sales Report' for each site.

2.4. Associated Item Report

Click on: Sales -> Sales Reports -> Associated Items

- This is the report that shows what other associate items are purchased when customer purchase this item.

3. Control Reports

3.1. Customer Report Click on: Sales -> Control Reports -> Statistics -> Customer

- Demonstrates number of customers that use the service at each site. There are filter options that allow the report to be viewed with different information [Customer Purchase, Average Customer Purchase] etc.

Site	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total
Bangkok		16	8	5	5	6		40
Phuket						4		4
Total Customers:		16	8	5	5	10		44

3.2. Transactions per Hour by Day Report Click on: Sales -> Control report -> Statistics -> Time Hour

- Demonstrates number of customers that use the service at site in different time of the day. There are filter options that allow user to see [Quantity, Sales, Average Sales, and Average Quantity] etc.

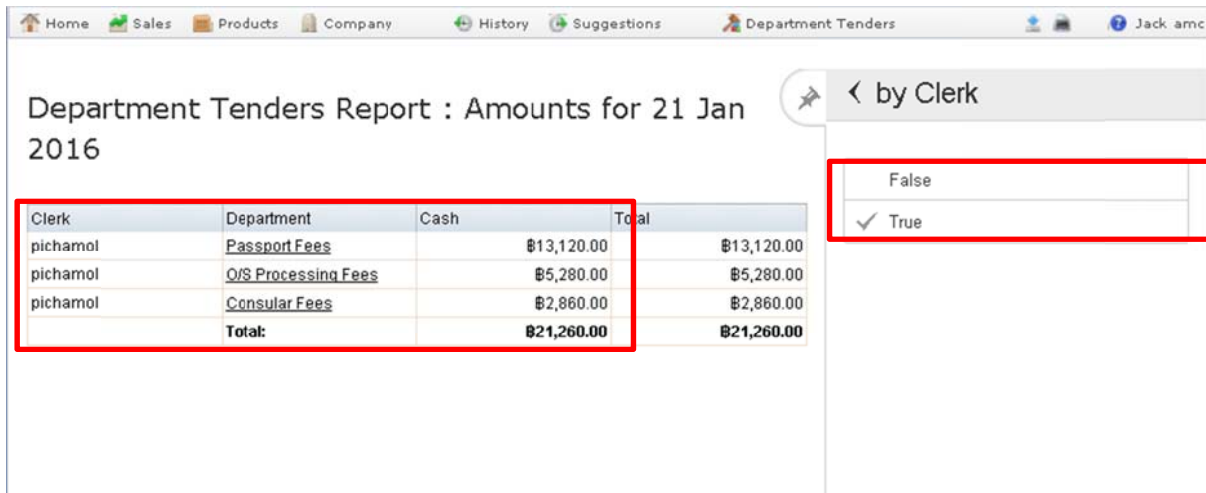
Time	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total:
8:00 - 8:59		2				1		3
9:00 - 9:59		4	4	1	2	1		12
10:00 - 10:59		5	1	1	1	3		11
11:00 - 11:59			2	3	2	1		8
12:00 - 12:59		2	1					3
13:00 - 13:59		3						3
Total:		16	8	5	5	6		40

Time	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total:
8:00 - 8:59		2				1		3
9:00 - 9:59		4	4	1	2	1		12
10:00 - 10:59		5	1	1	1	3		11
11:00 - 11:59			2	3	2	1		8
12:00 - 12:59		2	1					3
13:00 - 13:59		3						3
Total:		16	8	5	5	6		40

3.3. Department Tender Report (Clerk Sales report, by DEPARTMENT, by TENDER TYPE)

- Click on: Sales -> Control report -> Statistics -> Department Tender
- Click **By Clerk** = True

There will be additional tender type column “**Credit Card**” and “**Bank Deposit**”, only if there is an actual transaction on the iZenPOS.

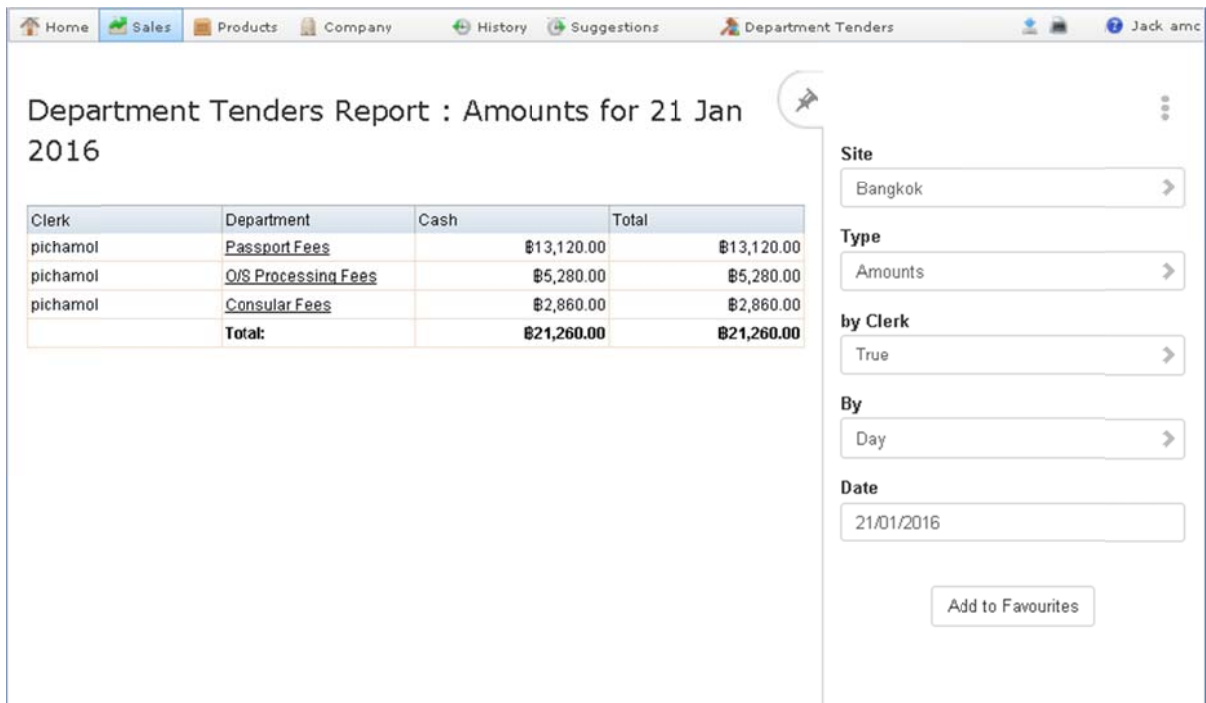


Department Tenders Report : Amounts for 21 Jan 2016

by Clerk

False
 True

Clerk	Department	Cash	Total
pichamol	Passport Fees	฿13,120.00	฿13,120.00
pichamol	O/S Processing Fees	฿5,280.00	฿5,280.00
pichamol	Consular Fees	฿2,860.00	฿2,860.00
	Total:	฿21,260.00	฿21,260.00



Department Tenders Report : Amounts for 21 Jan 2016

Site: Bangkok

Type: Amounts

by Clerk: True

By: Day

Date: 21/01/2016

Add to Favourites

Clerk	Department	Cash	Total
pichamol	Passport Fees	฿13,120.00	฿13,120.00
pichamol	O/S Processing Fees	฿5,280.00	฿5,280.00
pichamol	Consular Fees	฿2,860.00	฿2,860.00
	Total:	฿21,260.00	฿21,260.00

3.4. Clerk Transaction Report

- Click on: Sales -> Control Reports -> POS Reports-> Clerk Transaction.
- Click operator and select to view "Clerk Transaction Report" or "Clerk Item Report".

Sites Clerk Report Summary - Transactions

Clerk	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total
pichamol	16	8	5	5	6			40
Total	16	8	5	5	6			40

States: THA
Site: Bangkok
Type: Transactions

Transactions for pichamol: Bangkok [Sales]

Terminal	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total
4	฿1,560.00 91	฿520.00 111	฿2,330.00 122	฿3,390.00 131	฿520.00 143			฿106,310.00
	฿790.00 92	฿1,300.00 112	฿520.00 124	฿790.00 132	฿790.00 144			
	฿4,600.00 93	฿780.00 113	฿520.00 126	฿4,600.00 133	฿4,600.00 146			
	฿2,080.00 94	฿2,080.00 115	฿9,200.00 127	฿520.00 134	฿4,600.00 148			
	฿520.00 95	฿1,560.00 117	฿9,200.00 129	฿520.00 136	฿4,600.00 149			
	฿1,300.00 96	฿520.00 118			฿4,600.00 151			
	฿4,600.00 97	฿12,520.00 119						
	฿780.00 98	฿2,340.00 120						
	฿2,080.00 99							
	฿520.00 100							
	฿1,560.00 101							
	฿4,600.00 103							
	฿3,960.00 104							
	฿9,200.00 105							
	฿3,960.00 106							
	฿520.00 107							
Total	฿42,620.00	฿21,620.00	฿21,770.00	฿9,800.00	฿10,500.00			

Site: Bangkok
Clerk: pichamol
By: Sales
Date: 15/01/2016
Loyalty Filter: No Filter
Discount Filter: No Filter
Debtor Filter: No Filter
Department: All
Cash Filter: No Filter

3.5. Clerk Transaction Report

Sites Clerk Report Summary - Transactions

Clerk	Monday 11-Jan-2016	Tuesday 12-Jan-2016	Wednesday 13-Jan-2016	Thursday 14-Jan-2016	Friday 15-Jan-2016	Saturday 16-Jan-2016	Sunday 17-Jan-2016	Total
pichamol	16	8	5	5	6			40
Total	16	8	5	5	6			40

States: THA
Site: Bangkok
Type:

Clerk Items Report : Department - All : Clerk - pichamol : From 10 Jan 2016 To 2016-01-17

Description	Item	Quantity	Cost	Sales Ex	Sales Inc	Profit	Scan Rate
Minors Passport (32 VISA Pages + 5	4	6	฿0.00	฿19,680.00	฿19,680.00	100.00%	0.00%
Adult Passport (34 VISA Pages)	2	3	฿0.00	฿19,680.00	฿19,680.00	100.00%	0.00%
True copy of document	19	22	฿0.00	฿17,160.00	฿17,160.00	100.00%	0.00%
O/S Processing Fee for Adult/Senior	28	4	฿0.00	฿10,560.00	฿10,560.00	100.00%	0.00%
Adult Passport (66 VISA Pages)	1	1	฿0.00	฿9,980.00	฿9,980.00	100.00%	0.00%
Witnessing Signature and/or seal	16	16	฿0.00	฿8,320.00	฿8,320.00	100.00%	0.00%
Emergency Passport Overseas	10	2	฿0.00	฿7,920.00	฿7,920.00	100.00%	0.00%
O/S Processing Fee for Children's P	27	6	฿0.00	฿7,920.00	฿7,920.00	100.00%	0.00%
Certificate of no impediment to mar	24	1	฿0.00	฿2,330.00	฿2,330.00	100.00%	0.00%
Apostille	26	1	฿0.00	฿1,560.00	฿1,560.00	100.00%	0.00%
AUS License (฿20-	22	1	฿0.00	฿1,300.00	฿1,300.00	100.00%	0.00%

Department Filter: All, Consular Fees, Department, Lost Passport Fees, Miscellaneous, O/S Processing Fees, Passport Fees, Undefined

- 3.6. **Clerk Sales Report** Click on: Sales -> Control Reports -> POS Report -> Clerk Sales
- There are filter options that allow user to see [Sales By Clerk, Sales By Department, Sales By Item].

Sales For Bangkok Between 11 Jan 2016 and 17 Jan 2016 Inclusive

Clerk	Transactions	Quantity	Discount	Net Sales	Average	Sales %
pichamol	52	63.00	฿0.00	฿106,310.00	฿2,044.42	100.00%
Total:	52	63.00	฿0.00	฿106,310.00	฿2,044.42	

Sales For Bangkok Between 2016-01-11 and 2016-01-17 Inclusive

Clerk	Division	Department	Transactions	Quantity	Discount	Net Sales	Average	Sales %
pichamol		Passport Fees	14	12.00	฿0.00	฿57,160.00	฿4,082.86	53.77%
pichamol		Consular Fees	26	41.00	฿0.00	฿30,670.00	฿1,179.62	28.85%
pichamol		O/S Processing Fees	12	10.00	฿0.00	฿18,480.00	฿1,540.00	17.38%
Total:			52	63.00	฿0.00	฿106,310.00	฿2,044.42	

3.7. **Clerk Sales Report By Tender Type [Cash, Credit Card, Bank Deposit]**

- Click on: Sales -> Control Reports -> POS Report -> Clerk Sales
- Click on operator name & click Sales By Tender.

Sales For Bangkok Between 11 Jan 2016 and 17 Jan 2016 Inclusive

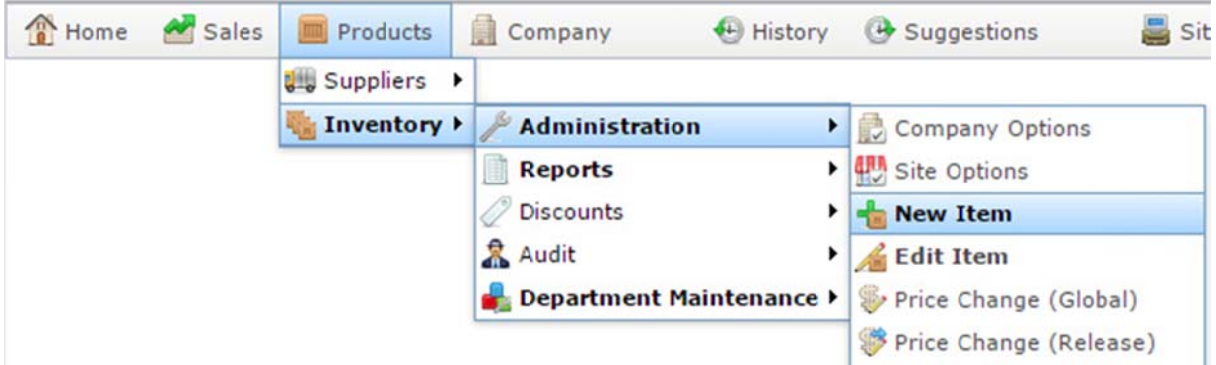
Clerk	Transactions	Quantity	Discount	Net Sales	Average	Sales %
pichamol	52	63.00	฿0.00	฿106,310.00	฿2,044.42	100.00%
Total:	52	63.00	฿0.00	฿106,310.00	฿2,044.42	

pichamol: Sales By Tender [Bangkok] Between 2016-01-11 and 2016-01-11 Inclusive

Clerk	Transactions	Item Count	Sales Discount	Item Discount	Rounding	Net Sales	New Cards	Cash	Credit Card	Bank Deposit
pichamol	16	25.00	฿0.00	฿0.00	฿0.00	฿42,620.00	0	฿42,620.00		
Total:	16	25.00	฿0.00	฿0.00	฿0.00	฿42,620.00	0	฿42,620.00	฿0.00	฿0.00

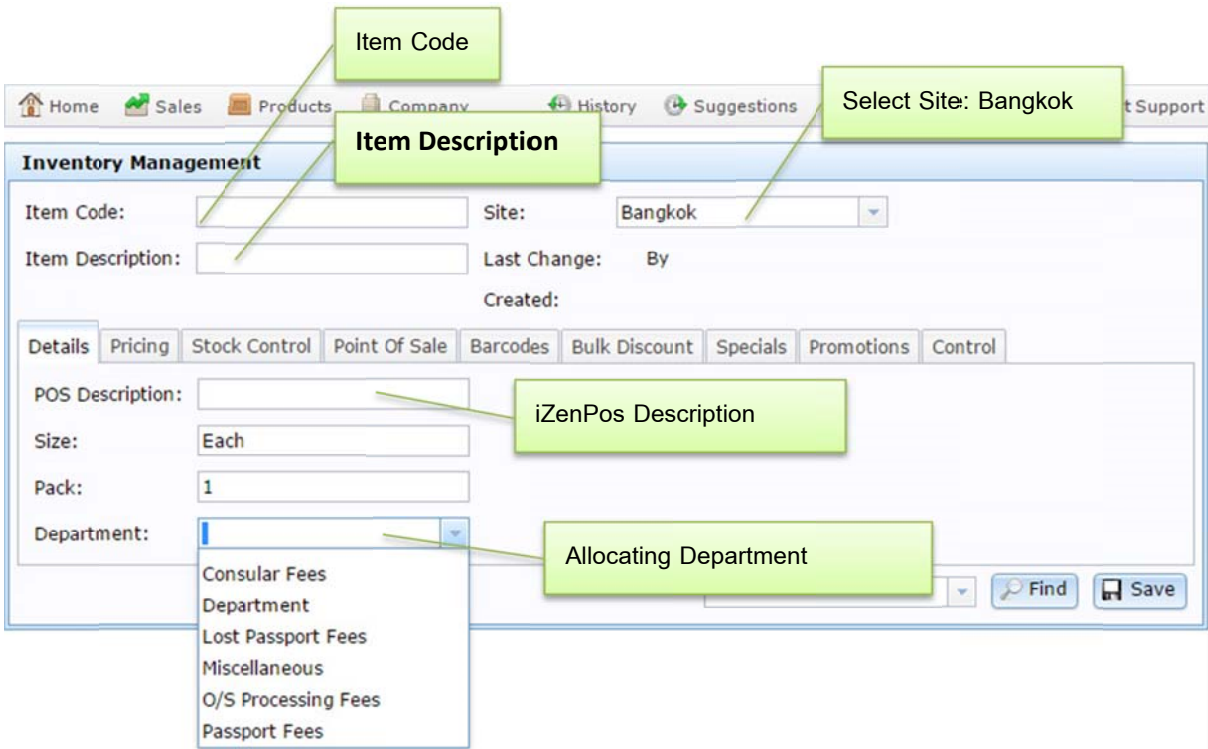
Create New Item

1. Click on: Products -> Inventory -> Administration -> New Item

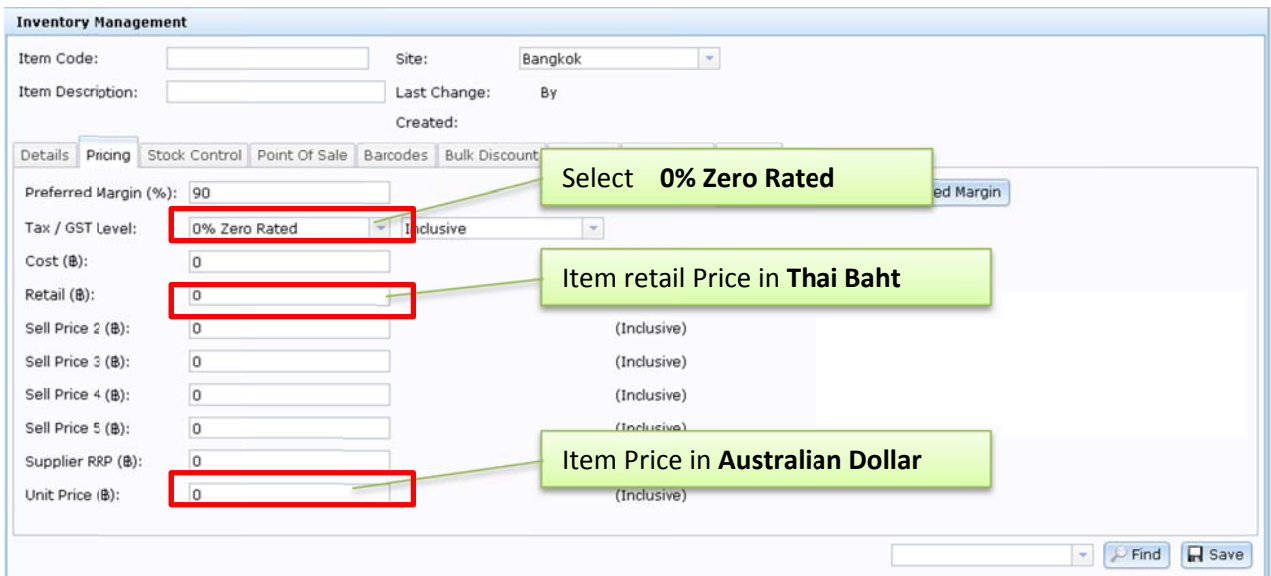


2. On the Inventory Management Screen – enter Item details as following:

2.1 Details Tab:



2.2 Pricing Tab:



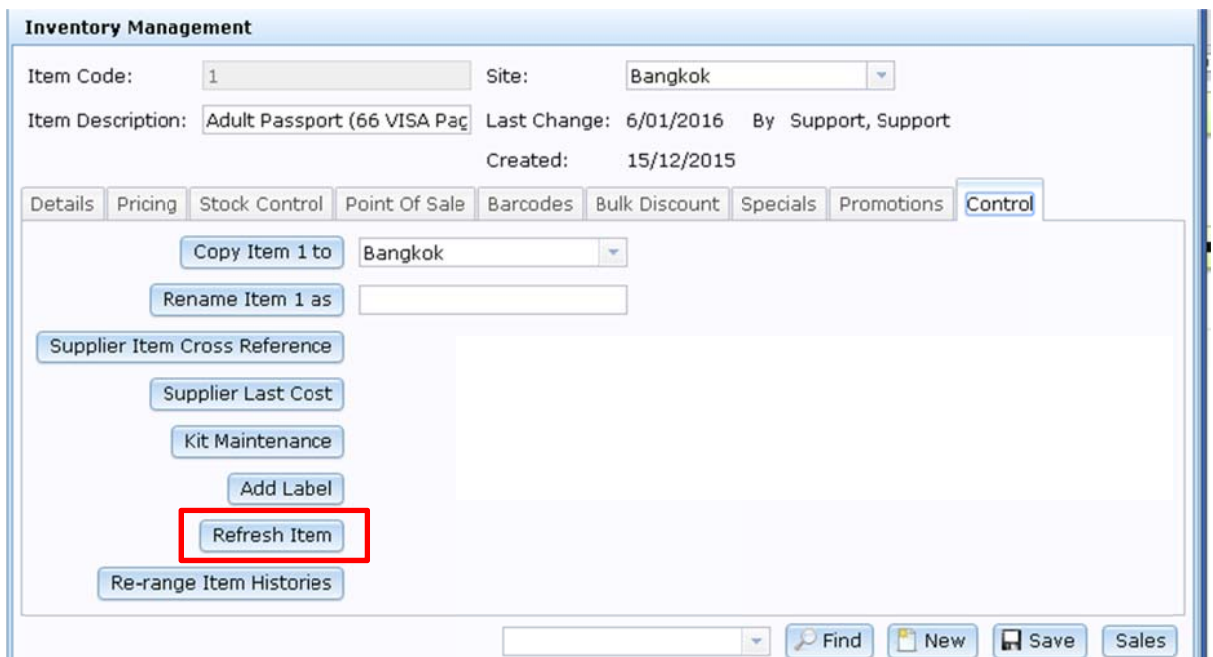
The screenshot shows the 'Pricing' tab in the 'Inventory Management' system. The 'Tax / GST Level' dropdown is set to '0% Zero Rated'. The 'Retail (฿)' and 'Unit Price (฿)' fields are both set to '0'. Callout boxes highlight these fields with the following text:

- Select **0% Zero Rated**
- Item retail Price in **Thai Baht**
- Item Price in **Australian Dollar**

- After completing the item details, Click **Save**

2.3 Control tab:

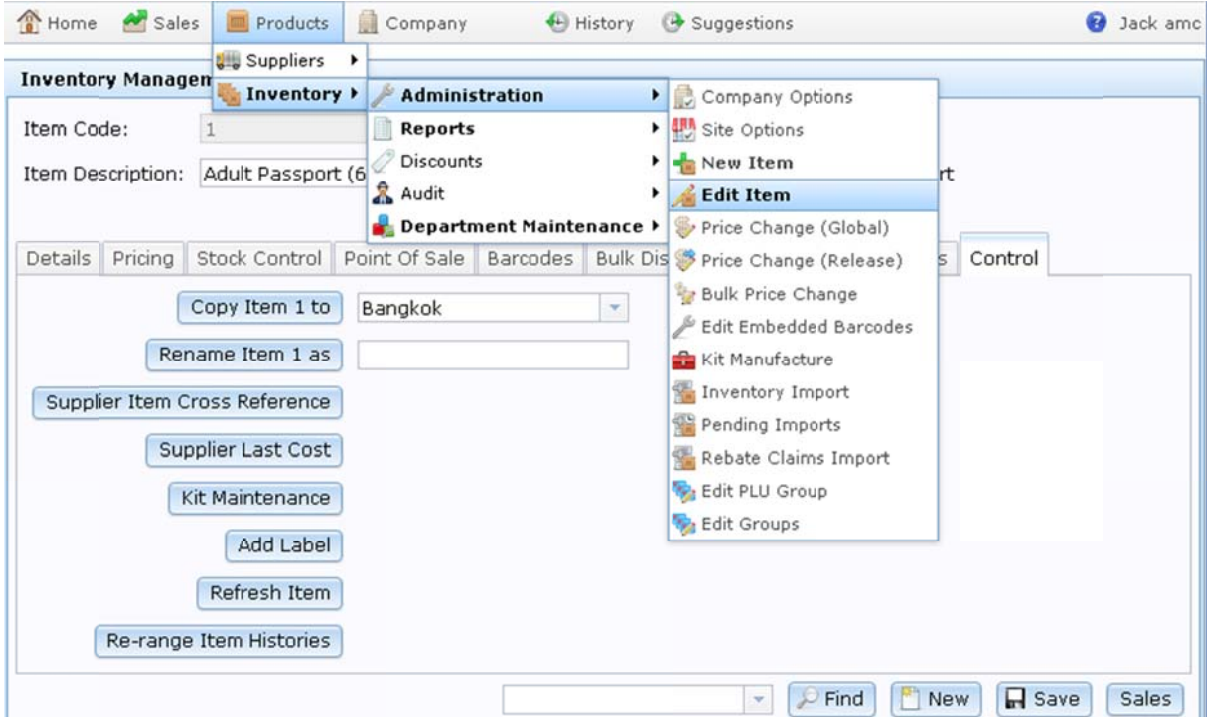
- Go to **Control** tab, click on **Refresh Item**, to immediately send created item information to all of the iZenPos terminals.
- On the iZenPos screen, need to create a POS button and assigned to link with created item on the Portal.



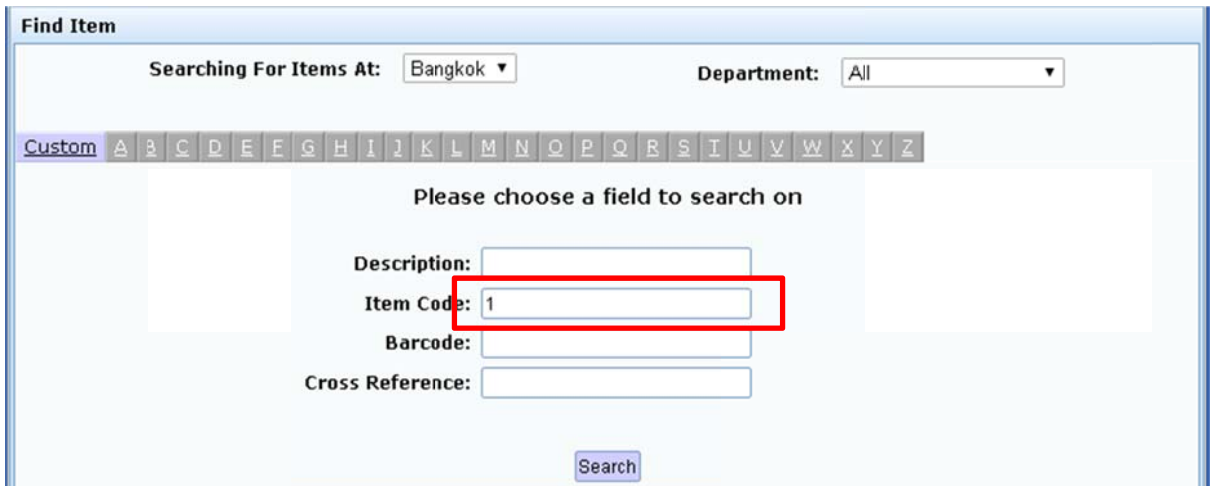
The screenshot shows the 'Control' tab in the 'Inventory Management' system. The 'Item Code' is '1' and the 'Item Description' is 'Adult Passport (66 VISA Paq'. The 'Refresh Item' button is highlighted with a red box. Other buttons visible include 'Copy Item 1 to', 'Rename Item 1 as', 'Supplier Item Cross Reference', 'Supplier Last Cost', 'Kit Maintenance', 'Add Label', and 'Re-range Item Histories'.

Edit Item

1. Click on: Products -> Inventory -> Administration -> Edit Item

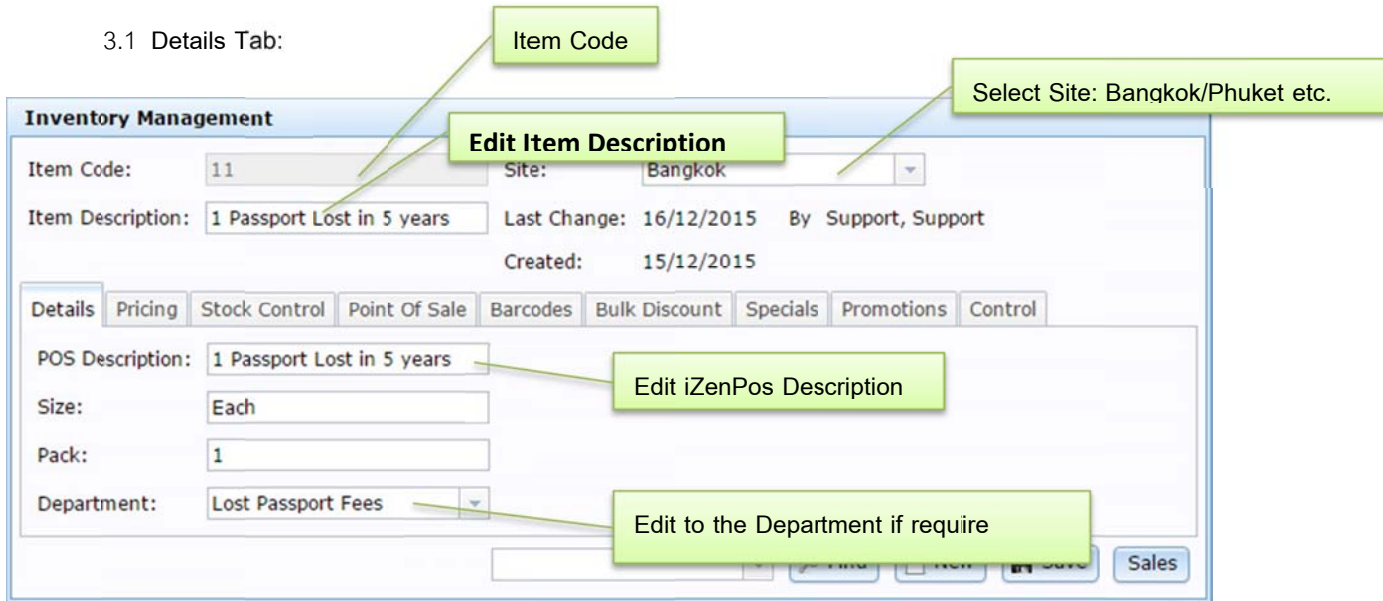


2. Enter the Item description or Item code for Editing, click Search.



3. On the Inventory Management Screen – EDIT ITEM DETAILS AS REQUIRE:

3.1 Details Tab:



Inventory Management

Item Code: 11 Site: Bangkok

Item Description: 1 Passport Lost in 5 years Last Change: 16/12/2015 By Support, Support
Created: 15/12/2015

Details Pricing Stock Control Point Of Sale Barcodes Bulk Discount Specials Promotions Control

POS Description: 1 Passport Lost in 5 years

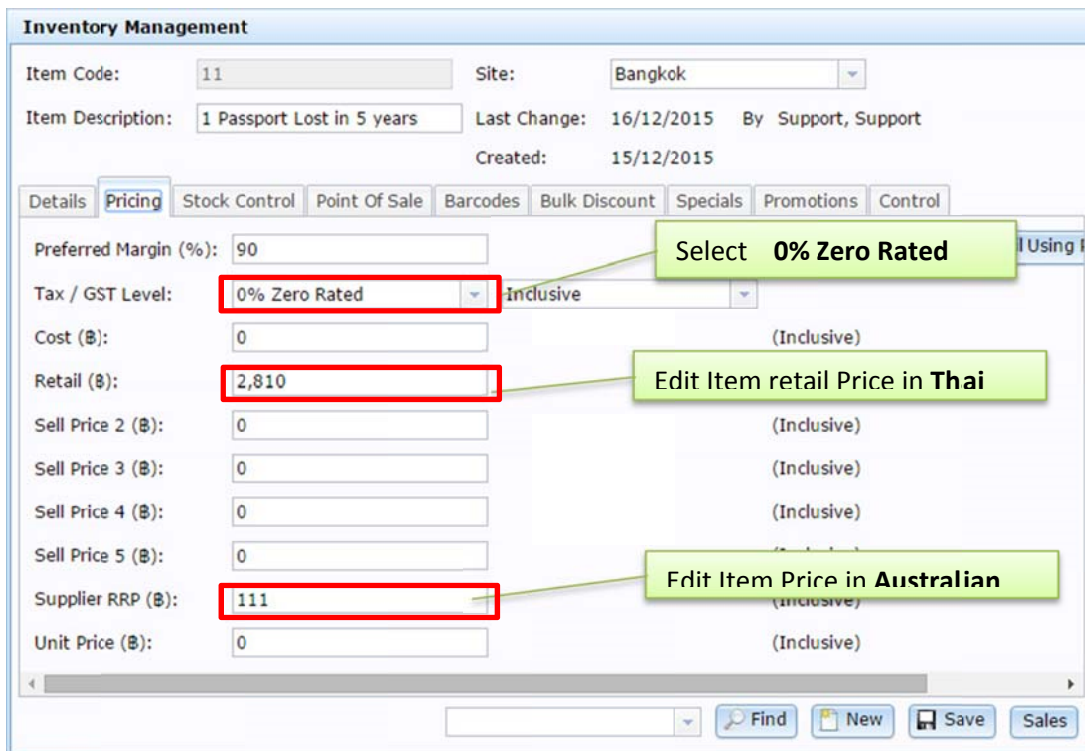
Size: Each

Pack: 1

Department: Lost Passport Fees

Buttons: Find, New, Save, Sales

3.2 Pricing Tab:



Inventory Management

Item Code: 11 Site: Bangkok

Item Description: 1 Passport Lost in 5 years Last Change: 16/12/2015 By Support, Support
Created: 15/12/2015

Details Pricing Stock Control Point Of Sale Barcodes Bulk Discount Specials Promotions Control

Preferred Margin (%): 90

Tax / GST Level: 0% Zero Rated Inclusive

Cost (฿): 0 (Inclusive)

Retail (฿): 2,810

Sell Price 2 (฿): 0 (Inclusive)

Sell Price 3 (฿): 0 (Inclusive)

Sell Price 4 (฿): 0 (Inclusive)

Sell Price 5 (฿): 0 (Inclusive)

Supplier RRP (฿): 111 (Inclusive)

Unit Price (฿): 0 (Inclusive)

Buttons: Find, New, Save, Sales

- After completing the item details, Click **Save**

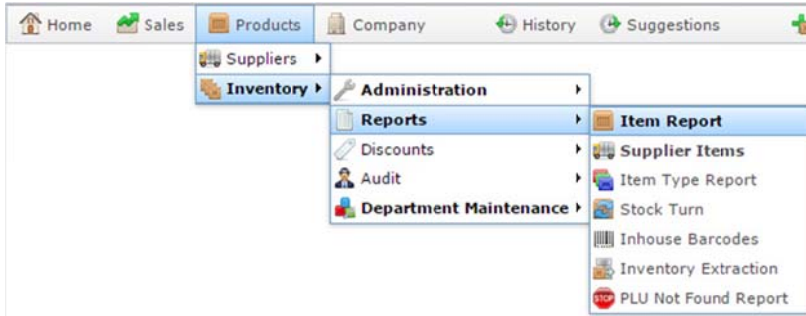
3.3 Control tab:

- Go to **Control** tab, click on **Refresh Item**, to immediately send edited item information to all of the iZenPos terminals.

Item Report

To see the list of all items in the inventory:

1. Click on: Products -> Inventory -> Reports -> Item Report



2. Click on required site [Bangkok or Phuket] as underline, and click **Show Items**

Site	Cost (Ex)	Cost (Inc)	Retail	SOH	Profit	Profit (Ex)	On Order	Kits	Manufac Kit Item	Referred Items	Small Item	Item Count
Bangkok							0					28
Total												28

3. If require, click on item description to edit Item details. However, with in the Item report you can see Item Cost, Retail Price and Stock On Hand etc.

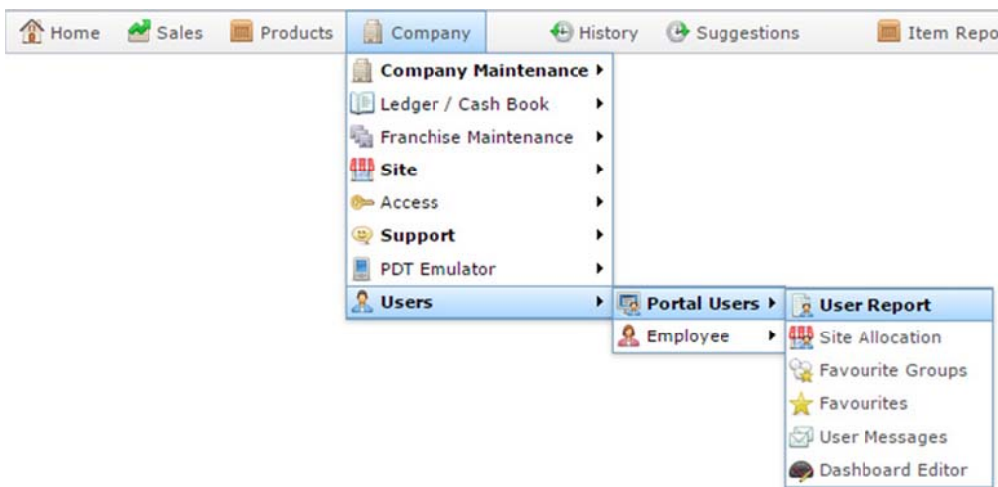
Description	Size	Item Number	Cost (Ex)	Cost (Inc)	Retail	SOH	Profit %	Margin %	Profit	Profit (Ex)	On Order	Kit	Manufac Kit Item	Referred	POS	Small Item	Date Last Sale
Preparing a declaration or other document or taking down in waiting an oral declaration made before the consul or vice consul	Each	18	฿0.00	฿0.00	฿780.00	0	100.00%	0.00%	฿780.00	฿780.00	0				✓		
<u>1 Passport Lost in 5 years</u>	Each	11	฿0.00	฿0.00	฿2,810.00	-1	100.00%	0.00%	฿2,810.00	฿2,810.00	0				✓		30 DEC 2015
2 Passports Lost in 5 years	Each	12	฿0.00	฿0.00	฿6,320.00	0	100.00%	0.00%	฿6,320.00	฿6,320.00	0				✓		
True copy of document	Each	19	฿0.00	฿0.00	฿780.00	-23	100.00%	0.00%	฿780.00	฿780.00	0				✓		30 DEC 2015

Employee (iZenPos) VS Portal user access

There are 2 separate types of user access, iZenPos access and Portal access. On the iZenPos, we call an “employee” user access, and for the Portal we call a “Portal” user access.

1. Create / Edit / Delete - Portal user

1.1 Click on: Company -> Company Maintenance -> User -> Portal Users -> User Report



1.2 To create a new Porta user click on **Create New Portal User**, or click on an existing Login name to edit an existing Portal user details.

Portal User Report - Thailand

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
Support	Support	Support		Company Admin	Full	✓	15/12/2011 12:20:39	15/12/2011 15:53:56	4/01/2016 15:53:56
account	Account	Staff		Supervisor	Full	✓	17/12/2011 14:11:12	17/12/2011 14:21:15	17/12/2011 14:21:15
admin	Admin	Sta					2/2011 23:39	16/12/2011 16:24:00	16/12/2011 16:24:00

An Existing Portal user Login

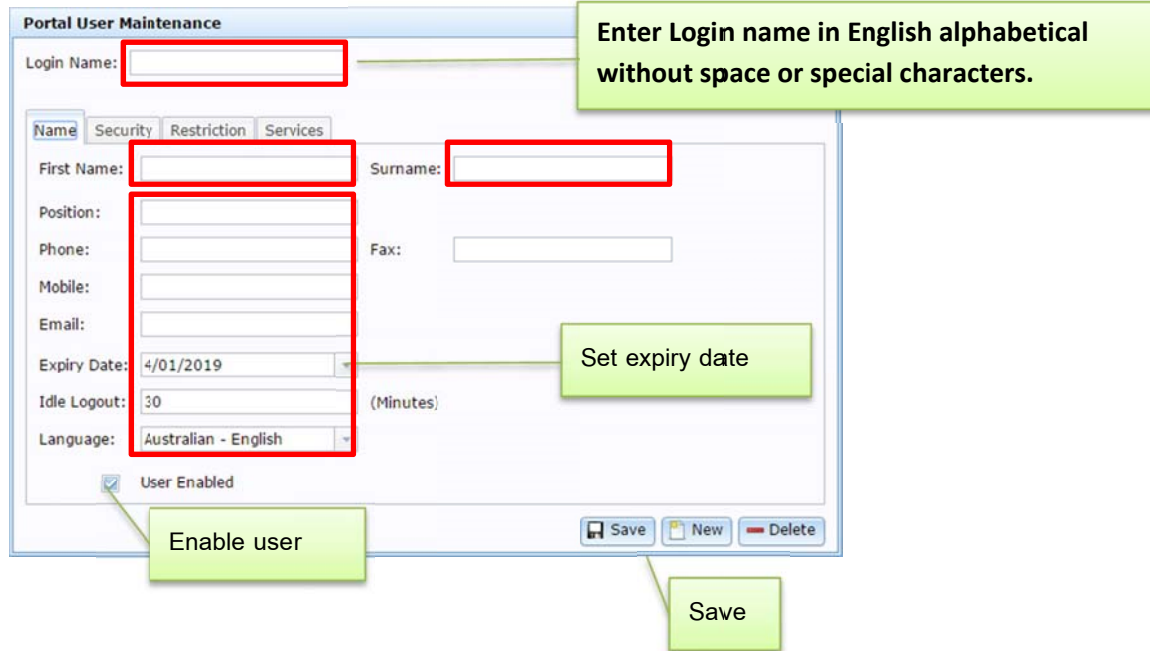
Add to Favourites

Create New Portal User

Create New Portal User

1.3 Enter/Edit Portal user Login information in **the required fields** as require and then click on **Save**:

1.3.1 **Name Tab:**



Enter Login name in English alphabetical without space or special characters.

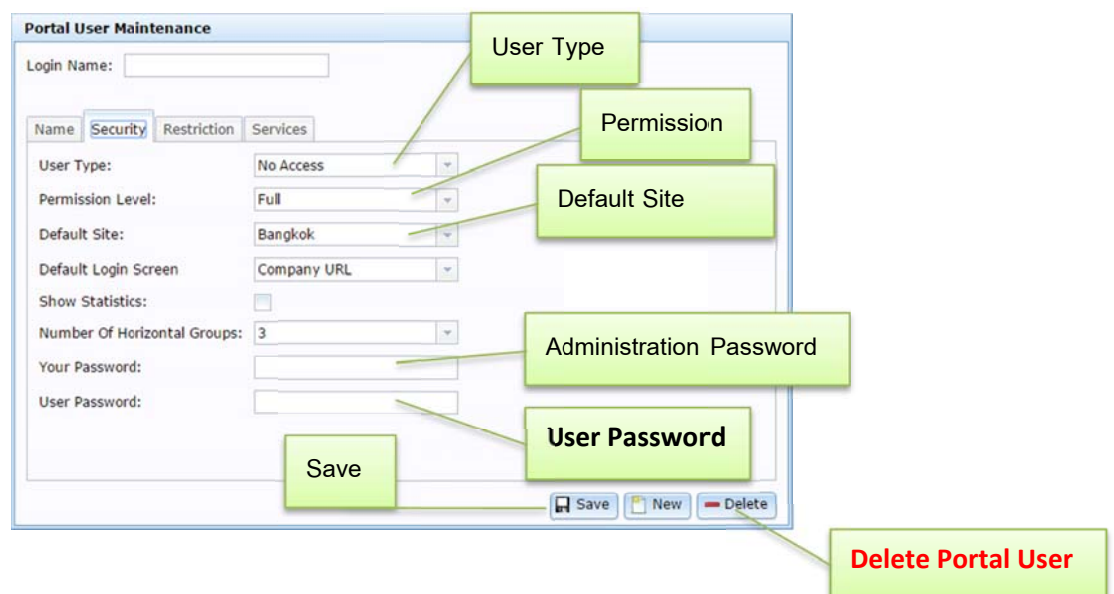
Set expiry date

Enable user

Save

1.3.2 **Security Tab:**

- Select user type: [Company Administrator, Company user, Site Administrator, Supervisor or User]
- Give the permission level just necessary for the role of each of the Portal user
- Default Site: Bangkok or Phuket etc.
- Your Password = the password of the person giving the authorization.
- User Password = user create new password.



User Type

Permission

Default Site

Administration Password

User Password

Save

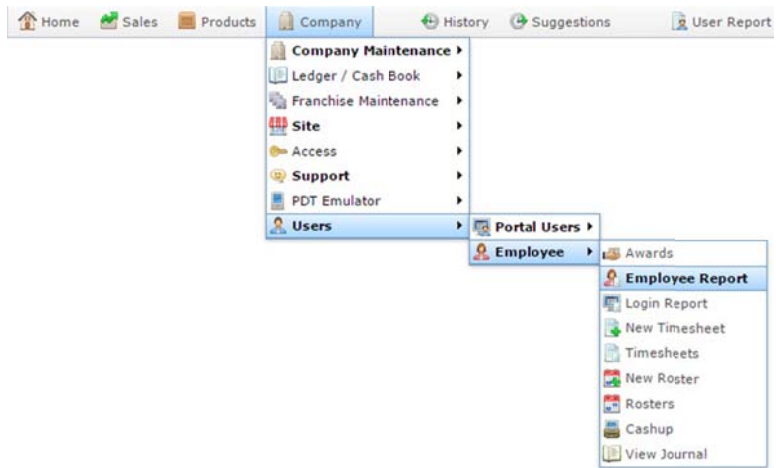
Delete Portal User

1.3.3 **Delete Portal User:** Select an existing user to be deleted, click delete button.

2. **Create / Edit Employee user :**

This is a user access that requires for login the iZenPos application for selling items on the POS terminal. This access must be granted by the Company Administrator.

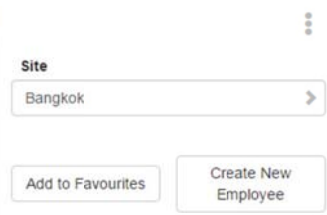
2.1 Click on: Company -> Company Maintenance -> User -> Employee -> Employee Report



2.2 To create a new iZenPos user click on **Create New Employee**, or click on an existing Login name to edit an existing Employee/iZenPos user details.

Point of Sale User Report

Login	Name	Passw #	System User Level	Superv	Price Edit	Susper	Status	Acct Expr	Pwd Expr	Award	Salary	Positio	Schedt Positio	Schedt Enable
1	POS	1111	1	Cashur				Will Not Expire	15-Jun-2016	Hourly Rate	0	1		
2	User2	2222	5	Cashur				Will Not Expire	15-Jun-2016	Hourly Rate	0	2		
3	User3	3333	6	Cashur	✓	✓		Will Not Expire	15-Jun-2016	Hourly Rate	0	3		



An Existing Employee Login

Create new Employee login for iZenPos

2.3 Enter/Edit Employee user Login information in **the required fields** as require and then click on **Save**:

2.3.1 **Name Tab:** Enter Login name in English alphabetical without space or special characters. (ie.)

- Login Name : Peter
- POS Name : Peter
- Portal Name : Peter

Employee Maintenance for Bangkok

Name Passwords Security Account Salary Leave Dates

System Number: 9

Login Name:

POS Name:

Portal Name:

Save

Find New Delete Save Reset

iZenPos Login name

Employee name that appears on the iZenPos login button

Employee name that appear on the Portal reports

2.3.2 Passwords Tab:

Employee Maintenance for Bangkok

Name Passwords Security Account Salary Leave Dates

Password:

Password Required:

Allow Change Password:

Force Change Password:

Force Unique Password:

Password Life Span:

Limit Grace Logins:

Grace Login Number:

Remaining Grace Login:

Password Expiry:

Save

Find New Delete Save Reset

Enter new Employer Password

2.3.3 Security Tab:

Employee Maintenance for Bangkok

Name Passwords Security Account Salary Leave Dates

User Security Level:

Schedule User:

Schedule User Position:

POS Price Edit:

POS Supervisor:

Access to POS Setup:

Save

Find New Delete Save Reset

Cashup

Set all = True

Delete Employee User

2.3.4 Delete Employee User: Select an existing user to be deleted, click delete button.