



POS PORTAL  
Training Reference

### Main Screen



Username Signed On →

Menu →

Sign On /Off →

### Sign On

1. Hit the Sign On button on the main screen
2. Enter your Username and Password
3. Hit the Accept Button
4. You should then see your name on one of the user buttons

### Sign Off

1. Hit your Username
2. Hit the Sign Off button
3. Your name should not be seen on any user button

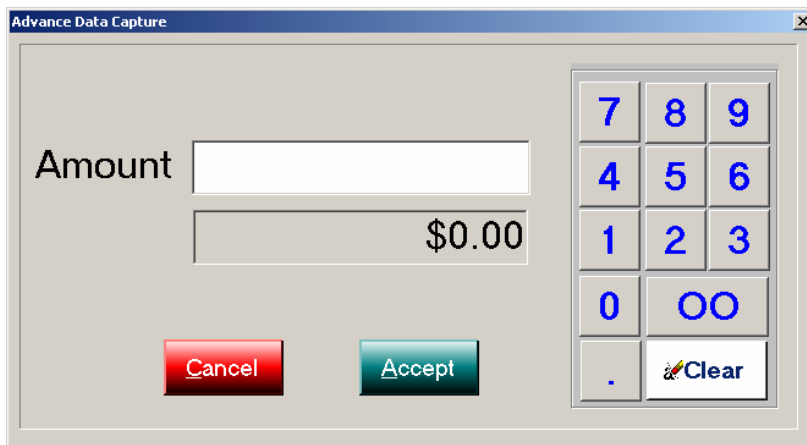


Handover / Advance buttons

### Advance

1. Hit on your Username (Main Screen)
2. Hit the Menu button (Main Screen)
3. Hit the Advance button
4. The Advance screen will then show

### Advance Screen

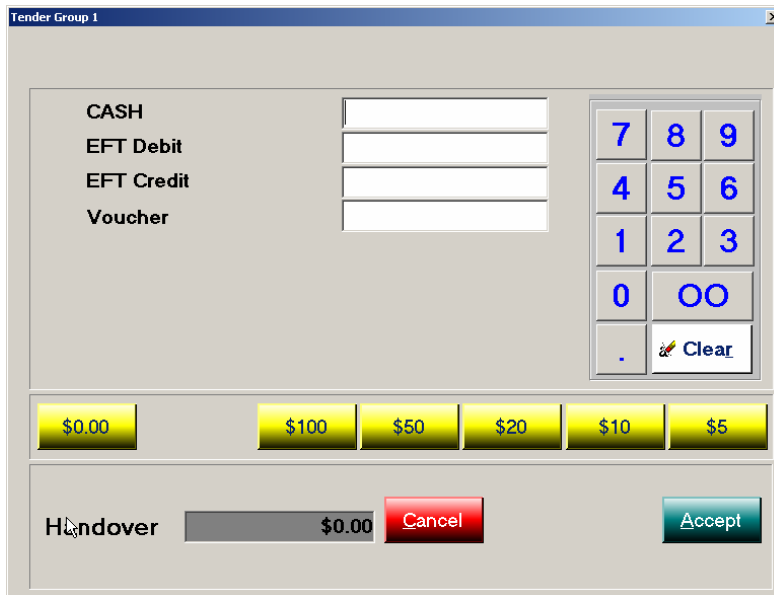


5. Enter the amount in the amount field
6. Hit Accept if its correct and you want to process the advance OR
7. Hit Cancel

## Handover

1. Hit on your Username (Main Screen)
2. Hit the Menu button (Main Screen)
3. Hit the Handover button
4. The Handover screen will then show

### Handover Screen

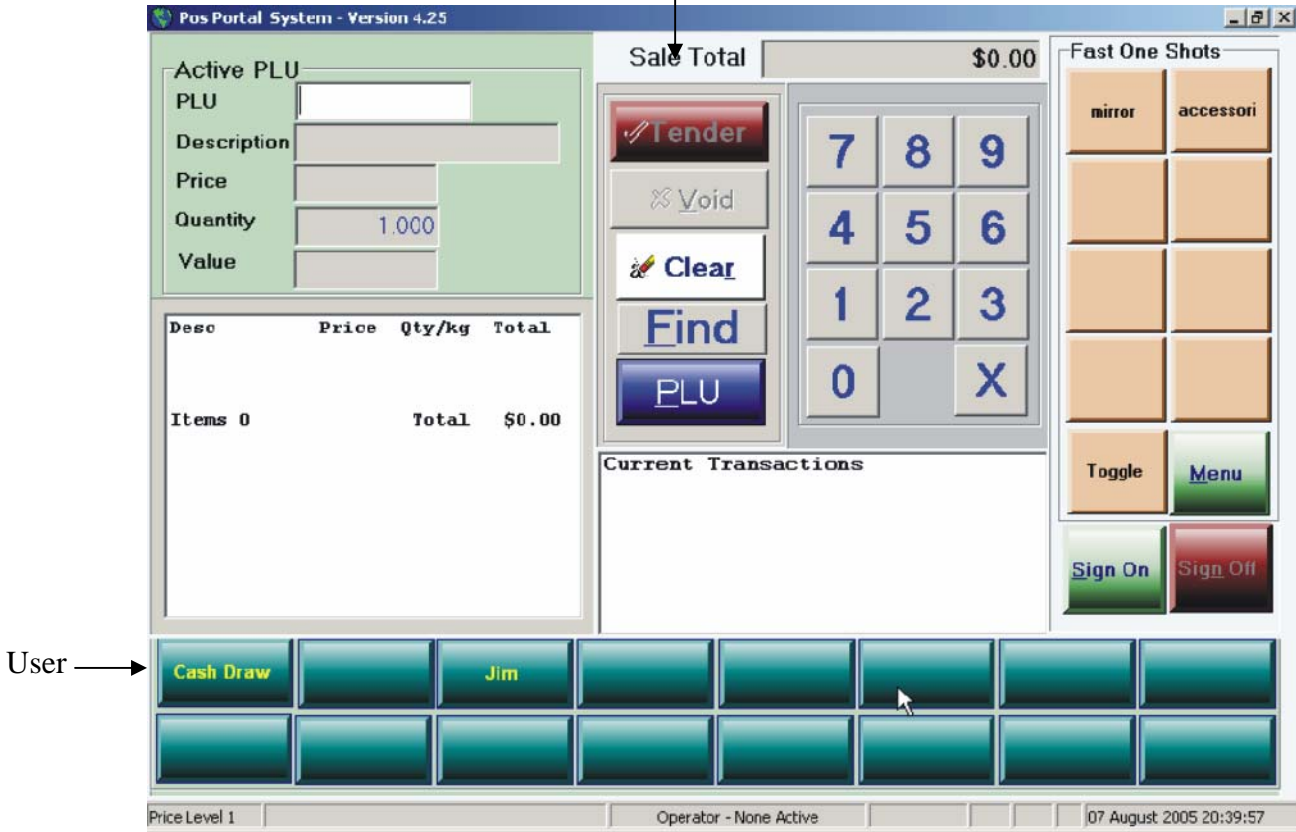


The screenshot shows a software window titled "Tender Group 1". On the left, there are four input fields labeled "CASH", "EFT Debit", "EFT Credit", and "Voucher". To the right of these fields is a numeric keypad with buttons for digits 0-9, a decimal point, and a "Clear" button. Below the keypad is a row of six yellow buttons labeled "\$0.00", "\$100", "\$50", "\$20", "\$10", and "\$5". At the bottom, there is a "Handover" label, a grey box containing "\$0.00", a red "Cancel" button, and a green "Accept" button.

5. Enter the amount in the correct tender field
6. Hit Accept if its correct and you want to process the handover OR
7. Hit Cancel

### Sale Process

Tender



1. Select User
2. Scan Item/s
3. Hit Tender – The tender screen will then be displayed

### Tender Screen



4. Select payment option
5. Enter money given
6. Hit Accept
7. Give customer change if any

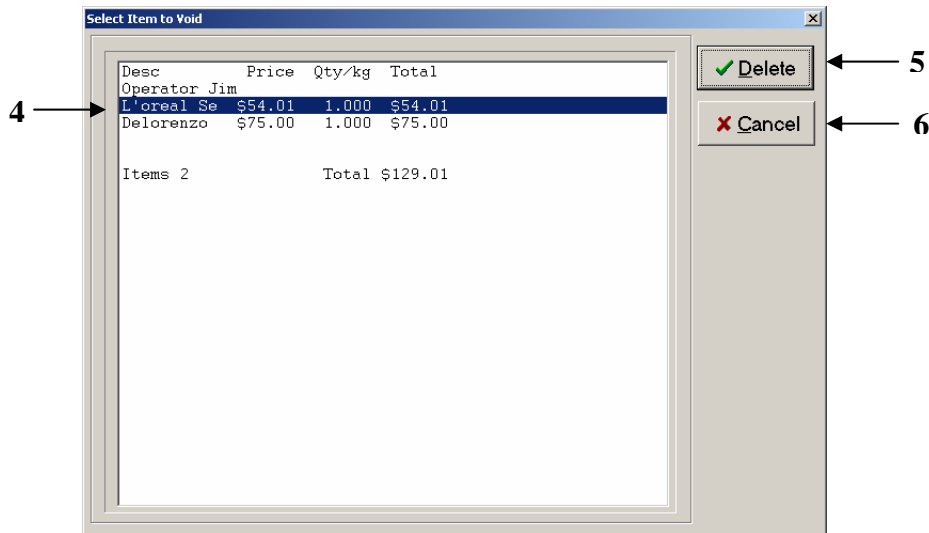
### Void Sale



1. Hit the Void button
2. There should now be no items listed



2. Hit the Delete button
3. The Void an item screen will then be displayed

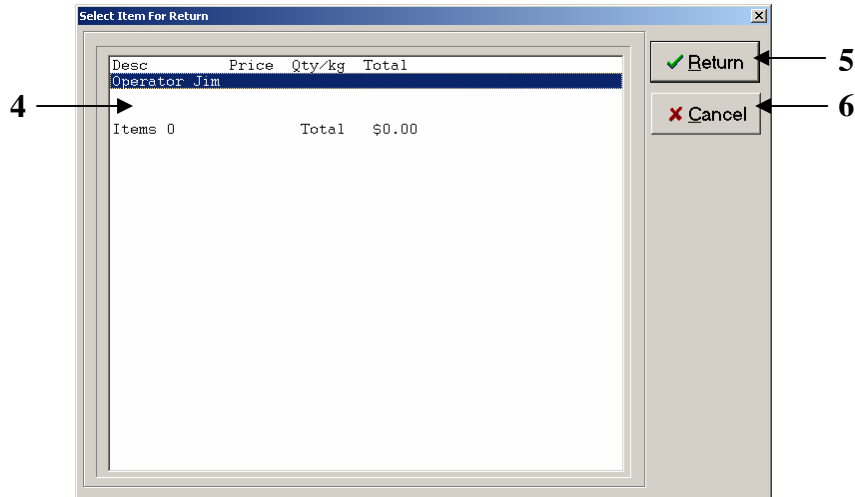


4. Select the item you want to Delete
5. Hit the Delete button OR
6. Hit Cancel to close the screen

The item should now be removed from the transaction

## Return an Item/s

1. Scan Item/s
2. Hit the Menu button (Main Screen)
3. Hit the Return button on the Menu Screen
4. The return screen will then be displayed

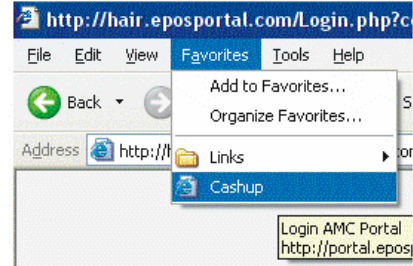


5. Select the item to be returned
6. Hit the Return button OR
7. Hit the Cancel button to close the screen



## Cash Up

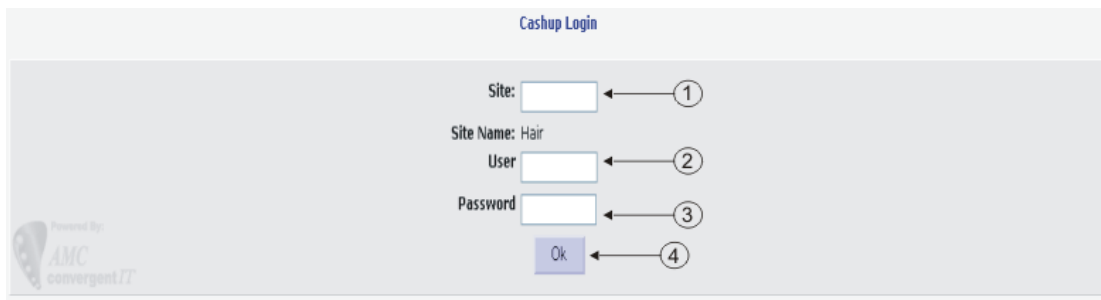
- Open Internet Explorer
- Go to Favorites at the top of the page and select Cashup



or type <http://wrappings.eposportal.com/PosCashupLogin.php?site=> here place **your site code number** in the address bar

Note: This process cashes up a cash drawer. Each cash drawer is configured as a USER with a USER ID & a PASSWORD. Ask your supervisor for details. DO NOT use your operator id and operator password.

Once you have done that the login screen seen below should load.



Cashup Login

Site:  ← ①

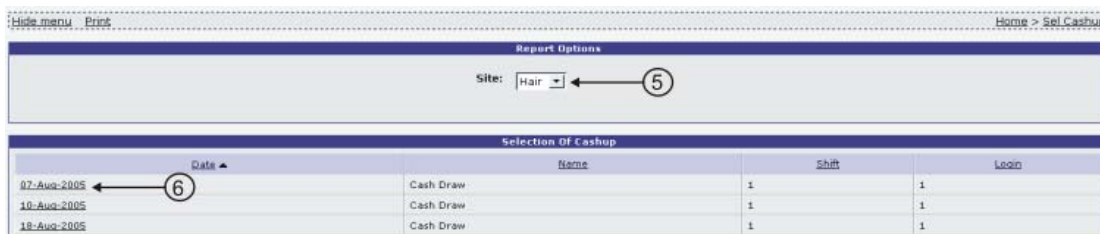
Site Name: Hair

User:  ← ②

Password:  ← ③

Ok ← ④

1. Enter your site code in the site field if it is blank or incorrect
2. Enter the CASH DRAWER number you are cashing up as your User.
3. Enter the password associated with this CASH DRAWER user.
4. If all the details are correct press the Ok button to proceed



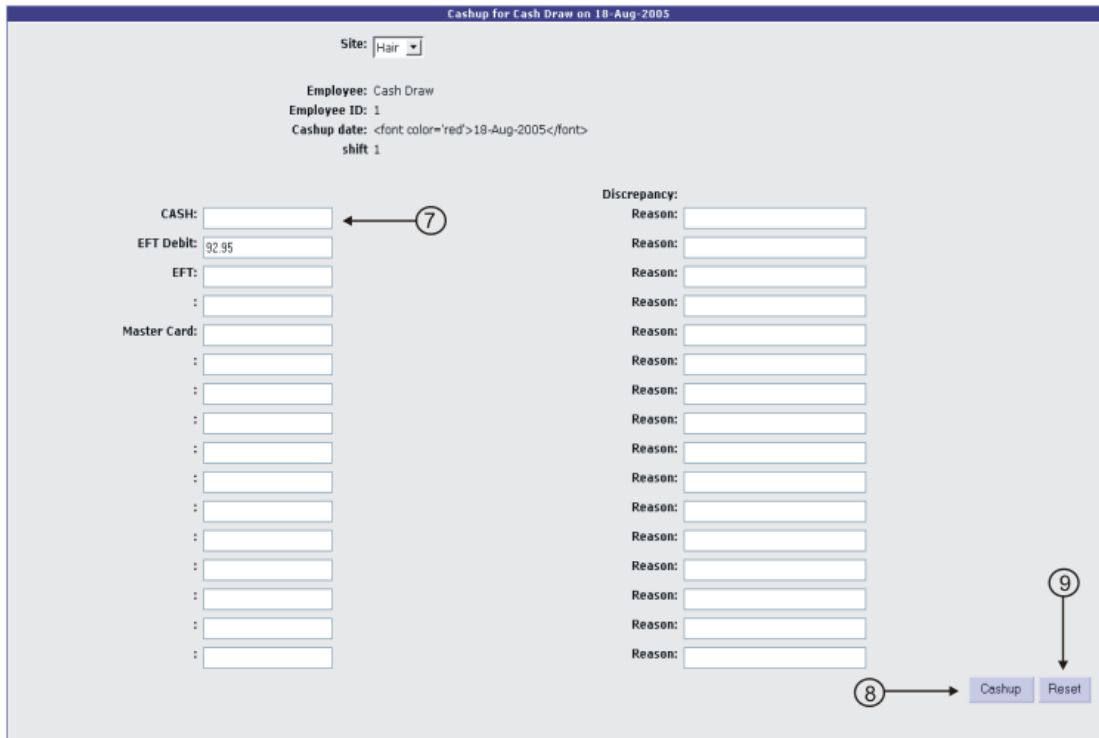
Report Options

Site: Hair ← ⑤

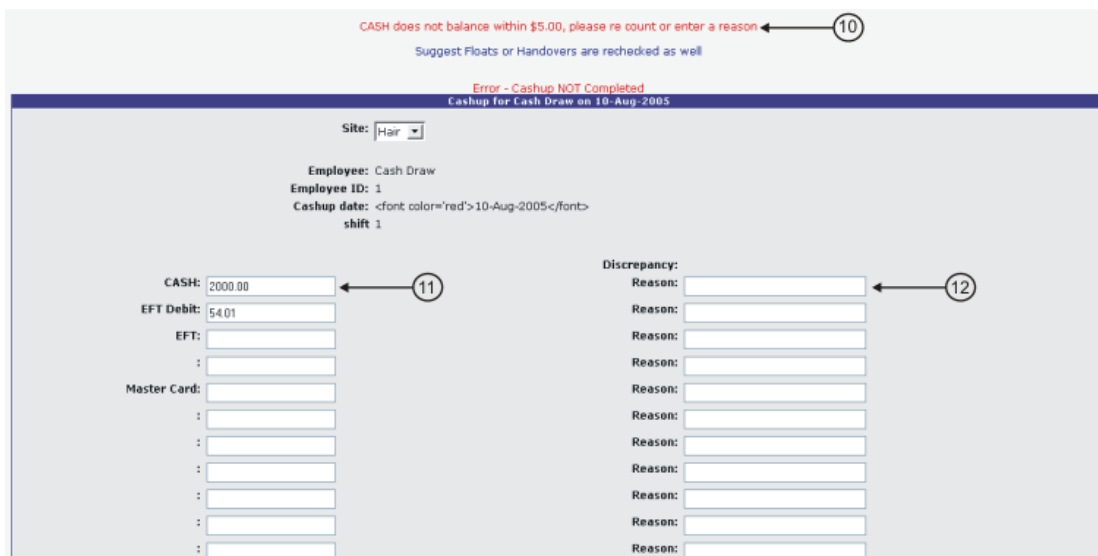
Selection Of Cashup

Date	Name	Shift	Login
07-Aug-2005 ← ⑥	Cash Draw	1	1
10-Aug-2005	Cash Draw	1	1
18-Aug-2005	Cash Draw	1	1

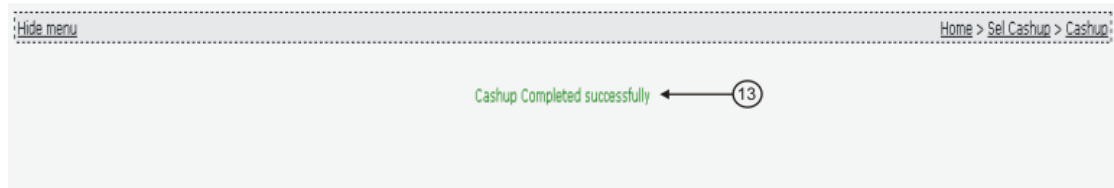
5. Check that your are on the correct site
6. Select the date you wish to cashup



7. Enter the amount you are declaring in each tender e.g. Cash, EFT
8. If the amounts are correct press the Cashup button
9. If you would like to reset all the fields on the page to blank press the Reset button



10. If the amount/s you entered were incorrect by  $\pm 5$  you will receive an error at the top of the page for each tender that is incorrect
11. You can change the amount in the tender field if you wish AND OR
12. Type a reason next to the incorrect tender field and press the Cashup button



13. If the tender amounts were correct within  $\pm 5$  (*configurable*) or you left a reason next to the incorrect tender/s you should see the above screen with message  
**“Cashup completed successfully”**

INTENTIONALLY BLANK



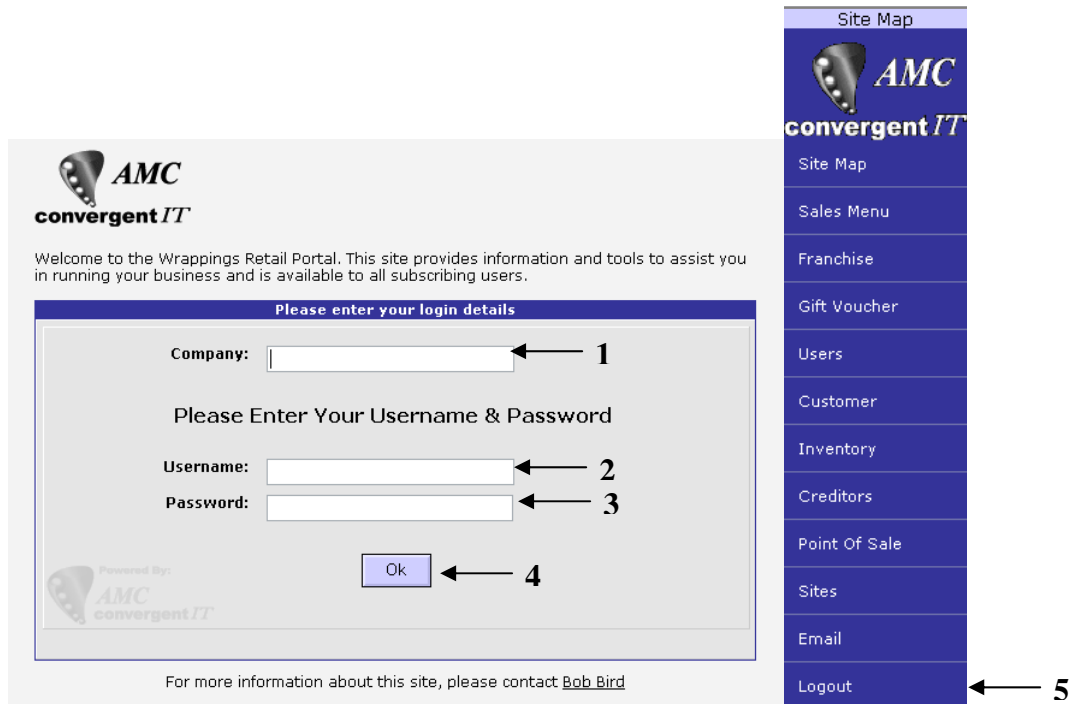
# PORTAL ASP

## QUICK REFERENCE MANUAL

## Login / Logout

Portal URL address: <http://wrappings.eposportal.com/Login.php?company=> \_\_\_\_\_

Write your company number



The screenshot displays the AMC convergent IT login portal. The main content area features a login form with the following elements:

- Company:** A text input field with an arrow pointing to it labeled '1'.
- Please Enter Your Username & Password:** A heading above two input fields.
- Username:** A text input field with an arrow pointing to it labeled '2'.
- Password:** A text input field with an arrow pointing to it labeled '3'.
- Ok:** A button with an arrow pointing to it labeled '4'.

Below the form, it says "Powered By: AMC convergent IT" and "For more information about this site, please contact [Bob Bird](#)".

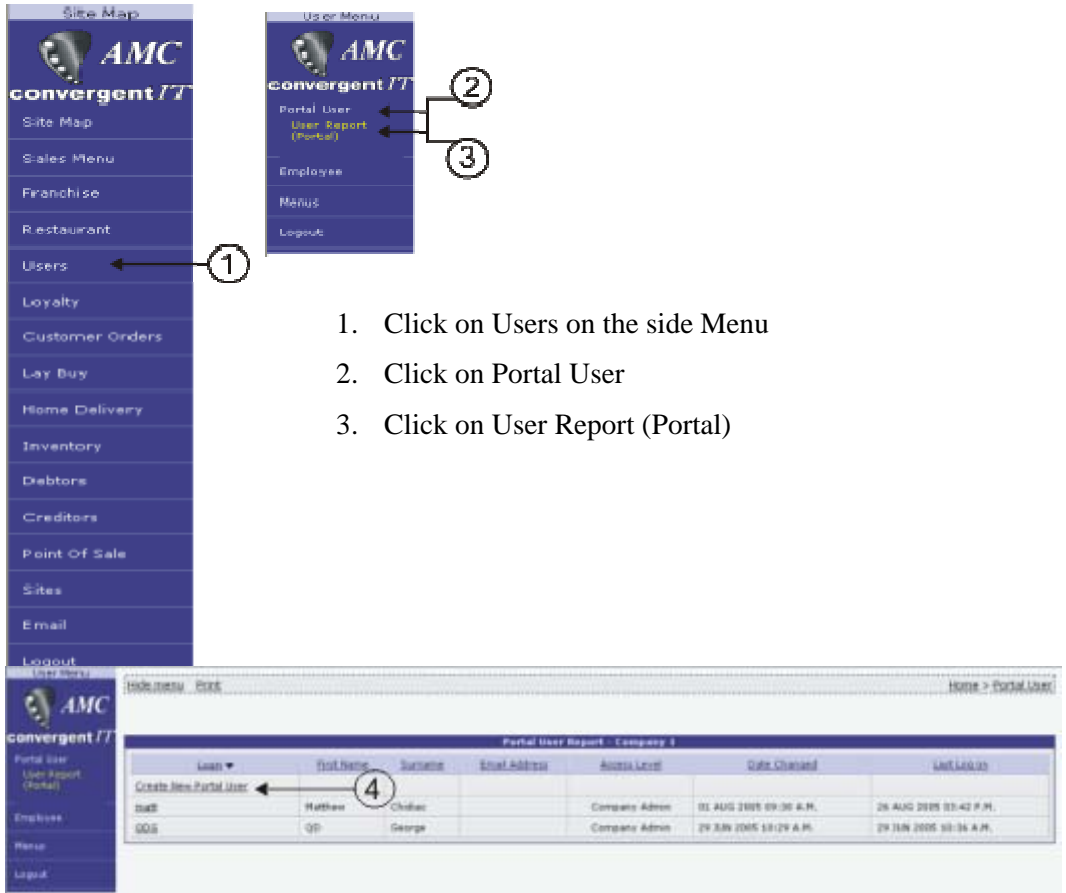
The side menu on the right contains the following items:

- Site Map
- AMC convergent IT
- Site Map
- Sales Menu
- Franchise
- Gift Voucher
- Users
- Customer
- Inventory
- Creditors
- Point Of Sale
- Sites
- Email
- Logout (highlighted with an arrow labeled '5')

1. Type the name company and your company number in the company field. E.g. company 1. Please note if you have entered the URL address as shown above with the correct company number you will not have to perform this step.
2. Type your user name \_\_\_\_\_
3. Type your password
4. Click the Ok button
5. On the side Menu shown above click on the Logout button to logout. This should always be done when you are finished using the Portal.

# Users

## Portal User



1. Click on Users on the side Menu

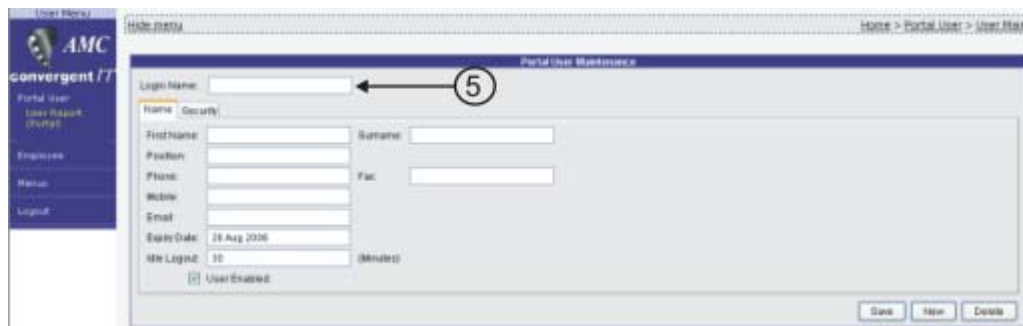
2. Click on Portal User

3. Click on User Report (Portal)

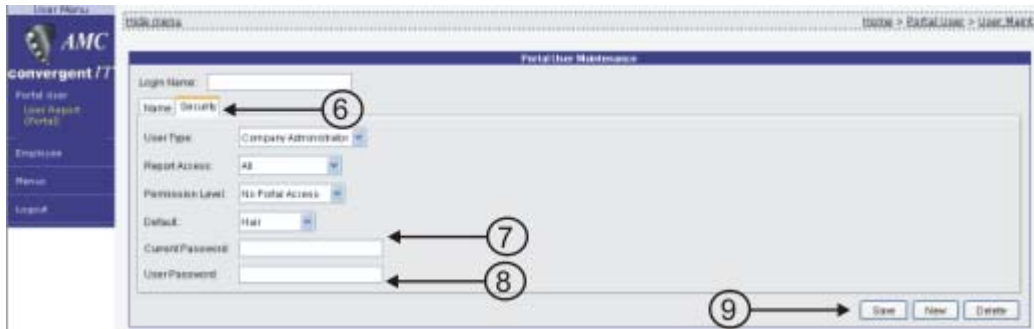
Load	User Name	Surname	Email Address	Access Level	Date Created	Last Login
<a href="#">Create New Portal User</a>						
000	Matthew	Chilker		Company Admin	01 AUG 2005 09:30 A.M.	26 AUG 2005 03:42 P.M.
005	GD	George		Company Admin	29 JUN 2005 10:29 A.M.	29 JUN 2005 10:36 A.M.

This report allows you to create a new portal user, view and edit existing portal users

4. To create a new Portal user click on Create New Portal User. Once you have done that the screen below will load.

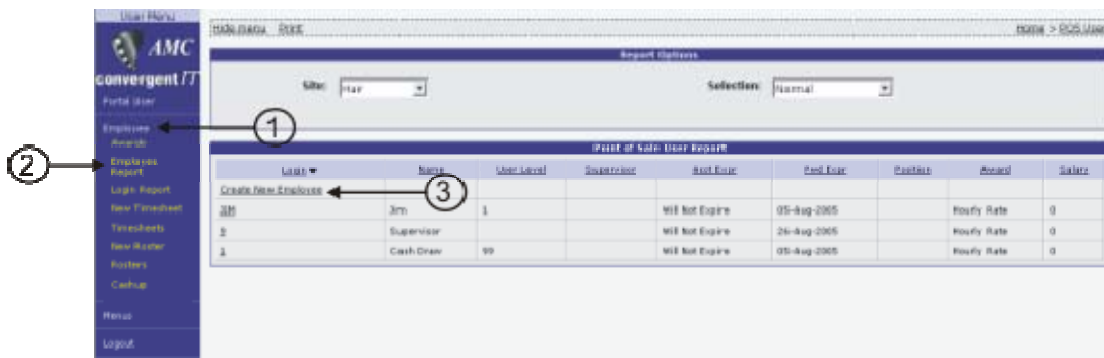


5. Enter a Login name for the new user; you can also fill in the details below if applicable.



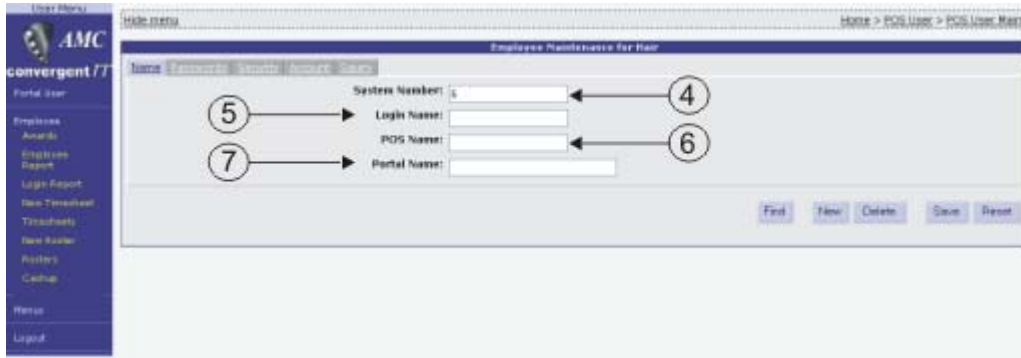
6. Click on the security Tab. This page allows you to set the rights the user will have on the portal.
7. After you have set the rights. Click on the Current Password field and enter YOUR PASSWORD
8. Then click on the User Password field and type a password for the user
9. Click Save. You will now be able to see the user in the Portal User Report.

### Employee

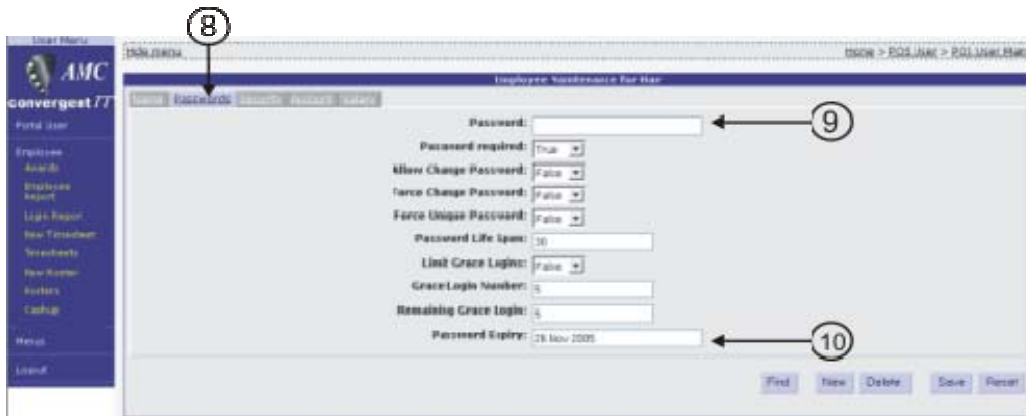


1. Click on Employee on the side Menu
2. Click on Employee Report  
This report allows you to create a new employee, view and edit existing employees. These users are for the point of sale.
3. To create a new employee click on Create New Employee

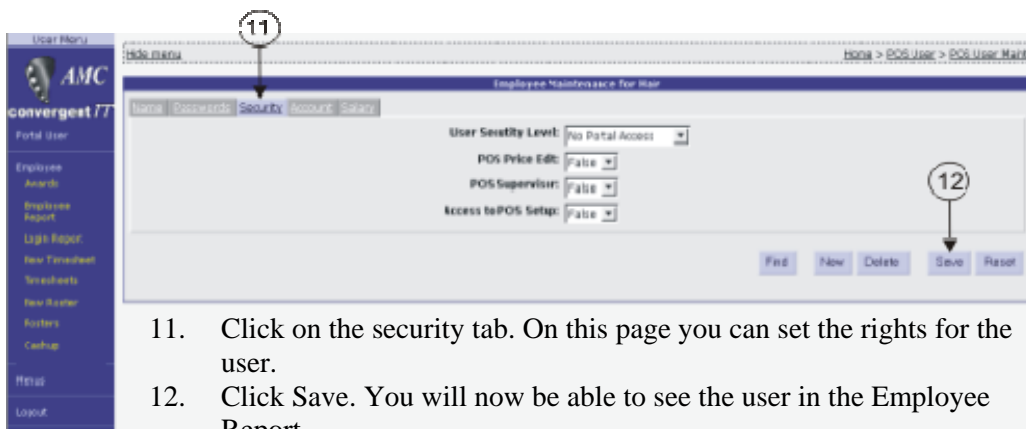




4. The system will generate a system number which you don't need to edit
5. Enter a Login name. This is usually a number as it is quicker and easier for the user when they are signing onto the point of sale system. **\*\*PLEASE NOTE** User 1 and 9 cannot be used as they are already reserved by the system for use as CASH DRAWERS.
6. Enter a POS name. This name will be seen on the point of sale system
7. Enter a Portal name. This name will be seen on the Portal.




8. Click on the Passwords tab
9. Enter a password for the user. This is usually four numbers e.g. 2323
10. Change the Password Expiry by clicking on the field

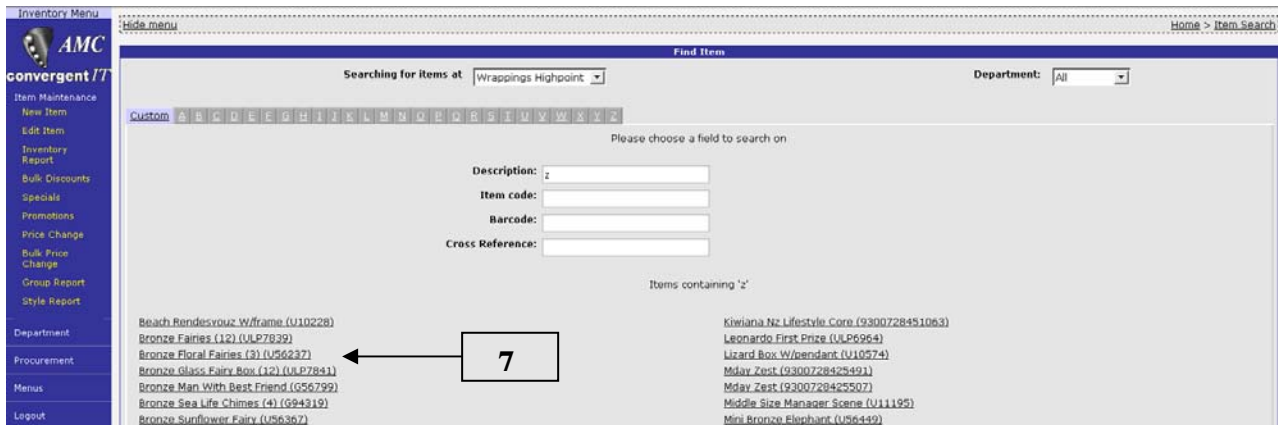


11. Click on the security tab. On this page you can set the rights for the user.
12. Click Save. You will now be able to see the user in the Employee Report.

## Inventory



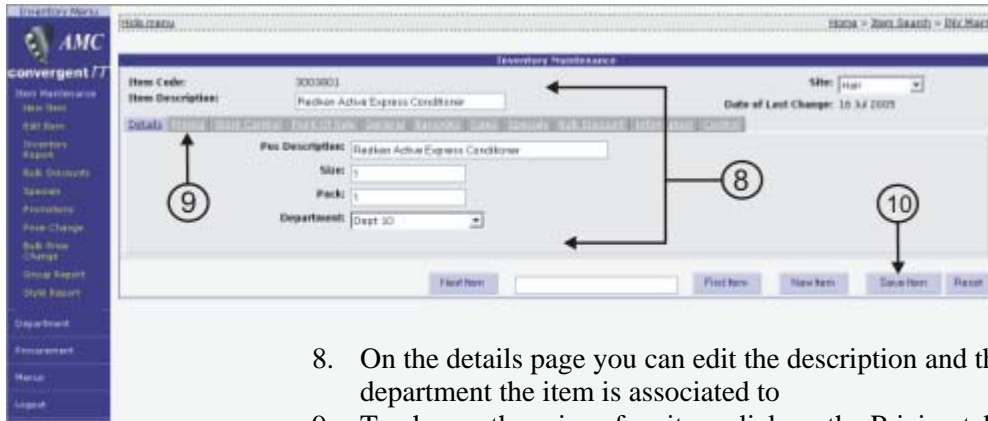
1. Click on Menus
2. Click on Inventory
3. Click on Inventory Maintenance
4. Click on Edit Item
5. This page allows you to search in alphabetical order or you can perform a Custom search by entering a Description or an Item code or Barcode.
6. If you perform a custom search click on the search button once you have entered the details on the page



Items containing 'z'	
Beach Rendezvous W/frame (U10228)	Kiwiana Nz Lifestyle Corn (9300728451063)
Bronze Fairies (12) (ULP7839)	Leonardo First Prize (ULP6964)
Bronze Floral Fairies (3) (U56237)	Lizard Box W/pendant (U10574)
Bronze Glass Fairy Box (12) (ULP7841)	MJay Zest (9300728425491)
Bronze Man With Best Friend (G56799)	MJay Zest (9300728425507)
Bronze Sea Life Chimes (4) (G94319)	Middle Size Manager Scene (U11195)
Bronze Sunflower Fairy (US6367)	Mini Bronze Elephant (US6449)

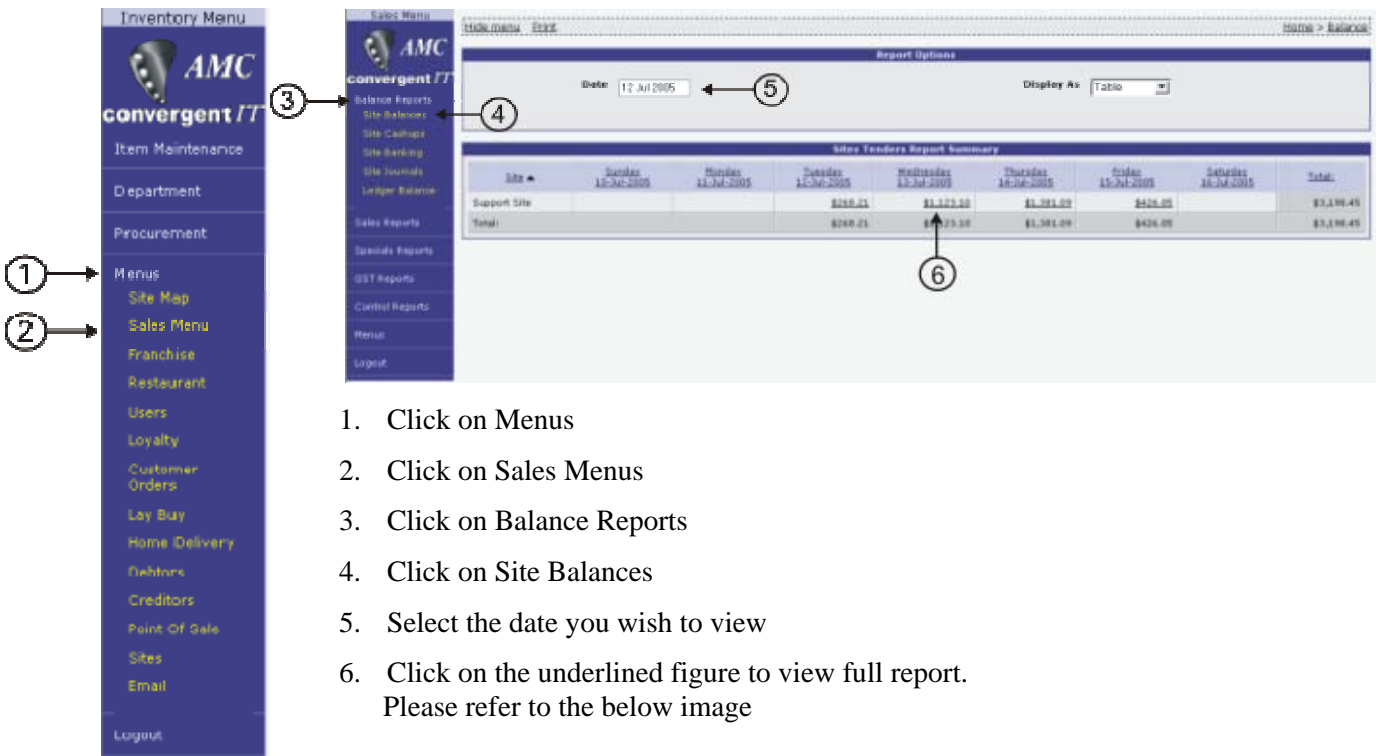
Once you have performed a search either by alphabetical order or custom, a list will generate as shown in the diagram above

7. Click on the item you wish to edit



8. On the details page you can edit the description and the department the item is associated to
9. To change the price of an item click on the Pricing tab and change the Retail Price
10. If you are a franchise operation there may be an INDUSTRY REF or CROSS REFERENCE tab, this is where, if used, you must set up the *franchisor cross* reference for the item. If in use, you cannot save a changed item until this is set up. To obtain the franchise cross reference number consult the Portal under Franchise Menu then Xref.
11. Once you have finished editing the item Click the Save Item button.

## Balance Reports



Site	Sunday 12-Jul-2005	Monday 13-Jul-2005	Tuesday 14-Jul-2005	Wednesday 15-Jul-2005	Thursday 16-Jul-2005	Friday 17-Jul-2005	Saturday 18-Jul-2005	Total
Support Site			<u>\$249.21</u>	<u>\$1,375.50</u>	\$1,381.09	\$426.00		\$3,196.45
<b>Total</b>			<u>\$249.21</u>	<u>\$1,375.50</u>	\$1,381.09	\$426.00		\$3,196.45

1. Click on Menus
2. Click on Sales Menus
3. Click on Balance Reports
4. Click on Site Balances
5. Select the date you wish to view
6. Click on the underlined figure to view full report. Please refer to the below image

Stack Menu: **AMC convergent IT**

- Balance Reports
- Site Settings
- Site Customers
- Site Banking
- Site Journals
- Ledger Balance
- Sales Reports
- Special Reports
- GST Reports
- Control Reports
- Home
- Logout

Stack Menu: **Stack Menu** **Stack** **Report Options** **Home > Balance > Site Balance**

Site: **Support Site** Date: **13 Jul 2005**

Sales			
Reference	Customers	Sales	Debit Total
<u>Cash</u>	47	\$2,096.81	\$2,096.81

Tenders			
Takings	Amount	Sub Total	Total Credit
CASH	\$195.10		
SET	\$7.00		
Other Voucher	\$98.00		
Amount Customers	\$496.00	\$1,123.00	
Pending	\$963.71		
<b>Rounding</b>	\$0.00	\$963.71	\$2,096.81

Information		
Reference	Customers	Amount
<u>Start Customers</u>	56	
Endorse per Customer		\$35.04
Sale Voids		\$307.26
Item Voids		\$31.82
<b>Shorts</b>		<b>-\$6.36</b>

Banking / Cash	
Reference	Amount
Money Banked - Not Declared	
Daily Item / Department Sales	\$2,096.81
Net Sales (Sales - Discount)	\$2,096.81
Net Takings	\$1,123.00
<b>Rounding</b>	\$0.00

To examine in detail any area of interest, click on the figure of interest (if underlined) and the supporting information is shown.

# Control Reports

## Time Hour

Time	Sunday 10-Jul-2005	Monday 11-Jul-2005	Tuesday 12-Jul-2005	Wednesday 13-Jul-2005	Thursday 14-Jul-2005	Friday 15-Jul-2005	Saturday 16-Jul-2005	Total
9:00 - 9:59				8	8	4		28
10:00 - 10:59				14	1	2		17
11:00 - 11:59			3	5	3	9		16
12:00 - 12:59			12	5	4	10		31
13:00 - 13:59			4	3	2	6		15
14:00 - 14:59			3	4	2			9
15:00 - 15:59			8	3	9			20
16:00 - 16:59			6	11	2			19
17:00 - 17:59					4			4
18:00 - 18:59			1	1				2
19:00 - 19:59				1				1
<b>Total</b>			<b>37</b>	<b>59</b>	<b>32</b>	<b>29</b>		<b>157</b>

\*\*Please note we are still in Sales Menu

1. Click on Control Reports
2. Click on Time Hour
3. To view sales between each hour Click on the Filters tab

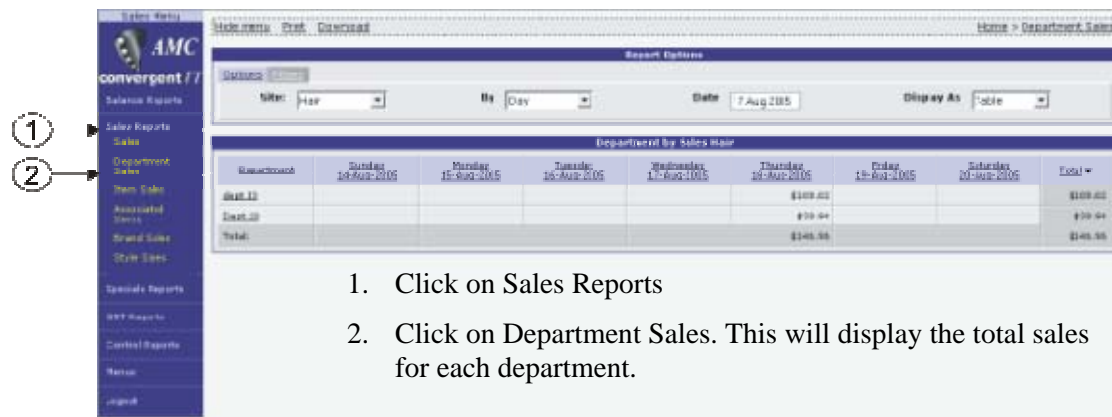
Time	Sunday 10-Jul-2005	Monday 11-Jul-2005	Tuesday 12-Jul-2005	Wednesday 13-Jul-2005	Thursday 14-Jul-2005	Friday 15-Jul-2005	Saturday 16-Jul-2005	Total
9:00 - 9:59				<b>-\$250.16</b>	<b>\$299.00</b>	<b>\$127.00</b>		<b>\$176.84</b>
10:00 - 10:59				<b>\$546.97</b>	<b>\$45.00</b>	<b>\$112.49</b>		<b>\$104.46</b>
11:00 - 11:59			<b>\$54.73</b>	<b>\$7.00</b>	<b>\$45.00</b>	<b>\$212.76</b>		<b>\$139.48</b>
12:00 - 12:59			<b>\$85.76</b>	<b>\$244.00</b>	<b>\$129.00</b>	<b>\$323.14</b>		<b>\$668.90</b>
13:00 - 13:59			<b>\$49.25</b>	<b>\$94.00</b>	<b>\$501.74</b>	<b>\$49.85</b>		<b>\$725.85</b>
14:00 - 14:59			<b>\$125.76</b>	<b>\$277.00</b>	<b>\$142.00</b>			<b>\$434.76</b>
15:00 - 15:59			<b>\$132.00</b>	<b>\$69.00</b>	<b>\$199.20</b>			<b>\$460.20</b>
16:00 - 16:59			<b>\$7.80</b>	<b>\$309.00</b>	<b>\$19.70</b>			<b>\$126.50</b>
17:00 - 17:59				<b>\$827.00</b>				<b>\$827.00</b>
18:00 - 18:59			<b>\$35.00</b>	<b>\$35.00</b>				<b>\$70.00</b>
19:00 - 19:59				<b>\$49.00</b>				<b>\$49.00</b>
<b>Total</b>			<b>\$577.01</b>	<b>\$1,096.01</b>	<b>\$1,382.04</b>	<b>\$626.00</b>		<b>\$4,182.79</b>

Note: Money values include non item-related sales or transactions

4. Click on the Type drop down menu and select Sales  
The sales will then be displayed between each hour as shown above.



## Sales Reports



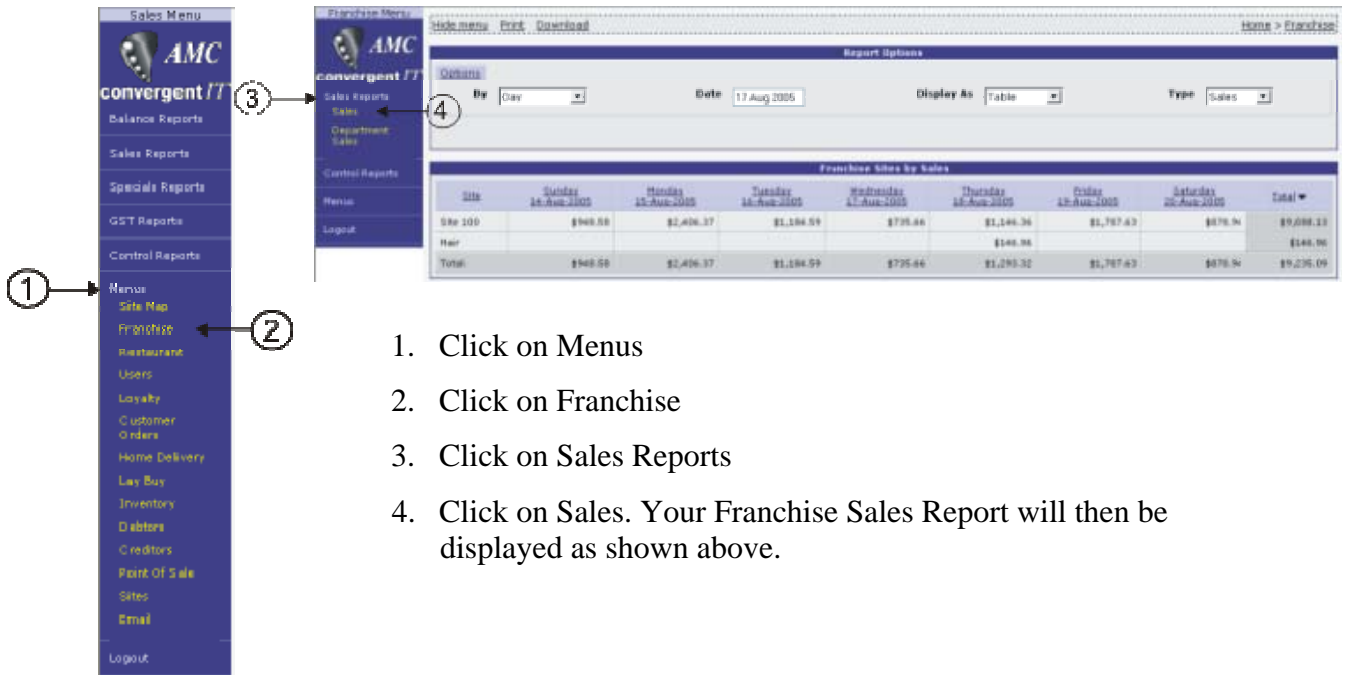
① → Sales Reports  
② → Department Sales

Department	Sunday 14-Aug-2005	Monday 15-Aug-2005	Tuesday 16-Aug-2005	Wednesday 17-Aug-2005	Thursday 18-Aug-2005	Friday 19-Aug-2005	Saturday 20-Aug-2005	Total
Dept. 11					\$109.02			\$109.02
Dept. 22					\$79.94			\$79.94
<b>Total:</b>					<b>\$188.96</b>			<b>\$188.96</b>

1. Click on Sales Reports
2. Click on Department Sales. This will display the total sales for each department.

To view item sales click on Item Sales below Department Sales.

## Franchise Report



① → Menus  
② → Franchise  
③ → Sales Reports  
④ → Sales

Site	Sunday 14-Aug-2005	Monday 15-Aug-2005	Tuesday 16-Aug-2005	Wednesday 17-Aug-2005	Thursday 18-Aug-2005	Friday 19-Aug-2005	Saturday 20-Aug-2005	Total
Site 100	\$948.58	\$2,406.37	\$1,184.59	\$725.44	\$1,144.36	\$1,787.43	\$876.94	\$9,098.23
Hair					\$144.96			\$144.96
<b>Total:</b>	<b>\$948.58</b>	<b>\$2,406.37</b>	<b>\$1,184.59</b>	<b>\$725.44</b>	<b>\$1,289.32</b>	<b>\$1,787.43</b>	<b>\$876.94</b>	<b>\$9,295.09</b>

1. Click on Menus
2. Click on Franchise
3. Click on Sales Reports
4. Click on Sales. Your Franchise Sales Report will then be displayed as shown above.

