ONE-POS™

ONE-POS Quick Manual: **Version 0606**

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Section 0:   Introduction of ONE-POS

ONE-POS is a FREE to use retail management system which is designed and developed to follow the DIY concept, resulting this is the most user friendly and practical software system available in the market.

ONE-POS is FREE of charge for single site usage. Why is it free? Well, why not? I want to give something back to the society. So if,

- You are the owner of a small start-up business or
- Your organization is non-profit making or
- Your merchandise is environmental friendly or
- Your business is helping the environment

then you are entitled to download and run ONE-POS for free to track your inventory, handle the daily administration and issue sales memo.

Good luck with your business ! Thanks for using ONE-POS.

Team ONE-POS

Section 0.1:   How to use this manual

This manual is organized in Sections.

One suggested approach is to skim through the introduction of each section and go direct to Section Z – Suggested Work Flow to learn by example on how to work on the different modules in ONE-POS system and create your first retail transaction.

Section 0.2:   Where to download ONE-POS

Become a member at http://www.one-pos.com and download the latest ONE-POS. Each member can request up to 20 copies of Free license.

Section 0.3:   System Requirements and Installation

ONE-POS is developed with the latest Microsoft technology for the Windows platform and it should run on most common PC systems.

System requirement: PC with Pentium 4 or above CPU, Windows XP SP2 or dot net frame work installed, 300MB disk space, 512M RAM, Internet connection. Before you install the system, you should make sure the PC is connected to the Internet and you should have these information ready:

- – Company details (Name, address, contact details)
- – Email server setting

Now run the set up file as downloaded from http://www.one-pos.com and follow Section 0.4 One Click Setup configuration wizard.

We have prepared many sets of sample data of different trades to demonstrate how how ONE-POS can be used.

Please visit http://www.one-pos.com for more samples.

To login, system default user account is '**admin**' with password '*admin*'

The best way to learn ONE-POS is to 'experiment'!

Explore the power of ONE-POS by backing up your database (FREE 1.X version only) (Section 1.3) and play around with the functions. Restore your database when necessary.

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Section 0.4:   **One Click Setup**

One Click setup gives you an easy "all in one" interface to set up all your system's main settings quickly to get your ONE-POS take off.

One Click console automatically shows up as part of the installation process. **Admin** can always come back to it at:

Menu Path: About -> One Click Setup

Part 1.   Sales Office Information
Name / Chinese Name (optional) / Address / Telephone / URL / Email, all the fields can be used as sales memo header (although you can suppress the header by changing the Print Header option in Part 8)

Company Logo: Upload company logo in all common image format. Make sure it is within 260 x 130 pix in size.

IP: Optional. No use in FREE 1.x version.

Working Hours: Booking Module uses this to build appointment template.

Part 2.   Email Server Setting
Define email server setting to send sales memo via email.

Part 3.   Sales Tax
ONE-POS supports 2 types of sales tax. You can define their rates here. (You must enable sales tax in the respective product maintenance to make this effective)

Part 4.   Birth Month Discount
A special treat for your customer. If their birth day (as defined on customer setup) falls in the current month, they would enjoy the discount as specified here. (You must enable sales tax in the product maintenance to make this effective)

Part 5.   Show Tool Tips
Tiny helpful pop up at the controls to tell you what to do.

Part 6.   Idle Time Logout
To avoid system being tempered with, it logs out when unattended for a period of time.

Part 7.   Auto Post Material Document
Inventory movement is auto confirmed without supervisor approval.

Part 8.   Auto Print Sales Memo

Control if the system will automatically print out the sales memo, and for how many copies.

Receipt Printer: Check this if you want to print in 80mm wide paper-roll receipt format. Un-checking this by printing in A4 / A5 format on common printers.

Printer Header: Check this if you do not want to print sales memo's header (company logo, name etc) this is useful if you have preprinted memo paper.

Part 9.   Administrator Password

Reset the "admin" password.

Part 10.   Reset Customer Bonus Points

Reset the customer bonus points balance. (Refer to Section 6.6 Customer Bonus Point Reward Program for more information).

Part 11.   Bonus Points Configuration

Setup how many bonus point is earned for every dollar the customer purchases at your shop. (Refer to Section 6.6 Customer Bonus Point Reward Program for more information).

Part 12.   Auto Generate Product ID

(Does not apply to FREE 1.x version)

As a security control, **only** the headquarter office can maintain the Product information.

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Section 1:   **Master Information Setup**

The master information is all set up in a similar fashion. You will find the Add New, Edit, Delete buttons at the left bottom of the list screens.

Section 1.0:   **Brand Maintenance**

Menu path: Basic Information -> Brand -> Brand Maintenance

Brand setup is an optional setting for a product. This is the Brand name for the products.

Section 1.1:   **Category Maintenance**

Menu path: Basic Information -> Product -> Category Maintenance

Category is the physical classification of the products. e.g. In a mini store, you may set up Confectionery, Meat, Diary Products etc.

Section 1.2:   **Color Maintenance**

Menu path: Basic Information -> Product -> Color Maintenance

Maintain product color for apparel product use. e.g. Red, Blue, Green etc.

Section 1.3:   **Size Group Maintenance**

Menu path: Basic Information -> Product -> Size Group Maintenance

Maintain the choice of sizes for apparel product use and place them in groups. e.g. "US Shoe Size" - 8, 8 ½, 9, 9 ½, 10 etc

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Section 2:   **Product Maintenance**

Section 2.1:   **Introduction to Products**

A "Product" is an item to be sold in a Sales Memo. It could be one the followings:

1. Inventory item – we need to the know the stock balance

2. Service – it does not have an inventory balance

3. Prepaid Coupon – Recall this to redeem goods and services

In the Product Setup screen, you will see these information:

General Information

Product ID: Up to 13 characters, click Auto Gen if you system to automatically generate it.

Name: Short product name, to be seen on price tags, sales memo, up to 40 characters,

        must be entered.

Brand: Use this to specify the brand of the product. To preset this data, please refer to

        Section 4.1 Brand Maintenance.

Item Cat. Grp.:   Item Category Group – How the product's inventory is handled during a sales

        transaction:

        LT001:   Service – Stock balance is not reduced on check out.

        LT002:   Inventory Item - Stock balance will be reduced on check out.

        LT003:   Non-inventory - Stock balance is not reduced on check out.

        NOTE: Item Category Group is write once and cannot be changed after first save.

Category: Classification of the physical state of the product. Refer to Section 4.2 Category

        Maintenance.

Effective Period: Use this to determine if this product is valid for use.

barcode: Use this to store the barcode, default is Product ID.

Description: A long, text based description of the product. Can be used to generate information

        card, reports, etc.

UOM Setting

Sales Tax 1:   Same as below.

Sales Tax 2:   When checked, user can select T1 and or T2 options during POS check out. Refer to

        Section A.1 System Setting to determine system predefined tax rates.

Currency: System default.

Suggested Price: By 3 Customer Classes – how much the customer is paying for one piece of this

product. Every Customer belongs to a Class.

Cost: A fixed cost of this product for simple profit / loss analysis.

Logistic Information

Batch Management: If checked, stocks will be managed in batches for more detailed movement

tracking.

Warn if no Stock: If checked, user will be warned by a pop-up screen if there is not enough

stock during sales check out.

Storage Condition: This is a good feature for the Inventory add on module.

Base UOM: The standard stock kept unit.

Suggested Location: A quick reference on where the product is stored.

Photo

Each product can have a 190 * 150 pixel image.

Apparel Information

Refer to Section 2.4 Apparel Products

Discount Rules

Refer to Section 2.5 Discount Rules Handling

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Section 2.2: **Adding Products**

Menu path: Basic Information -> Product -> Product Maintenance

In the Product List screen, click Add Item button in the bottom of the screen. Product Maintenance screen will appear. Please follow Section 2.1:   Introduction on Products to complete the settings.

Section 2.3: **Updating Products**

Menu path: Basic Information -> Product -> Product Maintenance

In the Product List screen, select the product that you want to edit. Click Edit Item button in the bottom of the screen. Product Maintenance screen will appear. Please follow Section 2.1: Introduction on Products to complete the settings.

Section 2.4: **Apparel Products**

ONE-POS supports apparel items with size / color matrix. To set up apparel items, you need to create a "parent" Product first. Using the parent product's Product ID as Style ID, you can then create a matrix of new sub-products where Product ID is the combination of Style ID + Size ID + Color. Each apparel will be maintained as a single product.

Section 2.5: **Discount Rules Handling**

A product is On Sale when it's associated Discount Rules become effective. To maintain a product's discount rules, go to Product Maintenance screen in edit mode and you will find the table of Discount Rules at the bottom.

Discounts can be awarded as

1. fixed value off
2. percentage off
3. absolute value, for all 3 Customer Classes.

Discount rules are controlled by effective dates and Site ID.

To add new discount rule simply click the Add New tab and the boxes will become ready for edit. Click Save button when done.

You are advised to keep a simple and clear design of discount policy to avoid conflicts among various Discount Rules.

Section 2.6:   Deleting Products

You are not advised to delete records from the POS database to avoid data collapse and broken links. A work around method is to change the Effective Dates of the products so that they become inactive for use. You can do this by editing the product.

If you really want to delete a Product, please go to Product List screen and click Delete. You will be warned before confirmation.

You cannot delete products that have been sold.

Section 3:   **Customer Maintenance**

Section 3.1:   **Introduction on Customers**

Each sales transaction requires the information of a customer. System has a default "Walk In" customer to handle the transactions that do not have a proper customer to match.

This software has a built-in Customer Points system. Customers earn Points (1 point for each dollar) when they perform a sale.

Automatic Customer Class upgrade can be set as a preference in System Settings.

In the Maintain Customer screen, you will see these information:

<u>Customer Basic Data</u>

Customer ID: If not entered, system will created one automatically. You can also manually enter it.

Points: Shows customer's accumulated Customer Points. Please refer to Section 3.4 Customer Points Maintenance for maintenance.

<u>Basic</u>

Customer Class: There are 3 levels to choose from. It determines which suggested selling price is used when selling a product.

Customer Name: Must enter the customer's name.

Membership ID: Optional ID for other reference.

URL: Optional web address.

Other ID: Must enter Other ID for alternate reference (could be HK ID / Passport ID etc)

Expired Date: To control if the customer is still valid for use.

<u>SD Group</u>

Self-Defined Groups is an ideal tool for customer relation management. There are up to 10 self defined groups in this POS system. You can generate sales reports, mailing labels, email etc by SD groups.

<u>Contact</u>

Address: Enter customer's postal address.

Communication: Enter email, phone and fax numbers.

<u>Remark</u>

Free entry remarks for reference.

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Section 3.2:   **Adding Customers**

Menu path: Basic Information -> Customer -> Search Customer / Click Add Item.

Add new customer for making sales.

Section 3.3:   **Updating Customers**

Menu path: Basic Information -> Customer -> Search Customer

In the Customer List screen, enter some information in the Search panel to return some customers. Highlight the Customer you want to edit, and click Edit Item.

Update customers' information.

Section 3.4:   **Deleting Customers**

Menu path: Basic Information -> Customer -> Search Customer

You are not advised to delete records from the POS database to avoid data collapse and broken links.

If you really want to delete a Customer, please go to Customer List screen and click Delete. You will be warned before confirmation.

You cannot delete customers that have connections to sales reocords..

Section 3.5:   **Customer Points Maintenance**

Menu path: Basic Information -> Customer -> Maintain Customer Points

Customers earn a point for every dollar they spend on a retail sale (RT document) and their accumulated point balance be maintained in this module in case of discrepancies.

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Section 4:   **Inventory Operations**

Introduction to ONE-POS inventory's system design:

Each Sales Office is associated with one Plant. A plant is a warehouse where stocks are kept. In the current version of ONE-POS, we assume there is only linear relationship between Sales Office, Plant and Storage Location.

It means each Sales Office belongs to one Plant and each Plant only has one Storage Location. The movement of stocks is controlled by material documents.

Confused? Just think of your shop is a single site (sales office) with only one inventory.

Stock balance is made up of different stock types that represent different status. Some examples are "Unrestricted - URC" for general sale, "On loan - LOA" for leased out stock and "Write off - WOF" for damaged goods.

Section 4.1:   **Stock In**

Menu path: Inventory -> Movement -> Stock In

A set of material documents is available for checking stock into the inventory.

On Loan Return	:	Stock on loan is being returned.
Repair Return	:	Stock taken to repair is fixed and being return.
Manual Stock In	:	Quick Entry to check in new stock.
Plant to Pant Transfer	:	Acknowledge the Internal stock transfer from one site to another.
Purchase Order Delivery	:	Offset the Purchase Order. (not available in FREE version)
Advance	:	Detailed stock check in.

Posting or Document confirmation maybe needed, depending on the System setting where Auto Posting is selected in System Setting.

If Posting is required, then Inventory is not updated until the Document is acknowledged in Confirm Transaction.

Section 4.2:   **Stock Out**

Menu path: Inventory -> Movement -> Stock Out

A set of material documents is available for checking stock out of the inventory.

Write Off	:	Changing the stock type from URC "Unrestricted Use" to WOF "Written Off".
On Loan	:	Loan out inventory by customers.
Repair	:	Stock is taken to repair.
Plant to Plant Transfer	:	Internal site to site transfer.
Return to Supplier	:	Return stock to supplier.
Advance	:	Detailed stock check out.

Posting or Document confirmation maybe needed, depending on the System setting where Auto Posting is selected in System Setting.

If Posting is required, then Inventory is not updated until the Document is acknowledged in Confirm Transaction.

Section 4.3:   Stock Enquiry - Inventory Lookup

Menu path: Inventory -> Stock Enquiry

The main table tells you how much stock are there in your shop. The URC column tells you how much stock is available for sale. The Qty column is the total sum of all stock types.

Click the More button to see the inventory movement in details.

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Section 5:   **Sales Operations**

Section 5.1:   **POS Sale**

Menu path: Sales -> Sales Document -> POS System

This user friendly POS interface is the heart of the front end retail check out operation. It is best used with touch screen terminal equipped with barcode readers; but it is still pretty user friendly by using keyboard and mouse.

General screen layout:

The top of the screen contains the most frequently used buttons with Function Key mapping:

F1: Search Customer	F3: Add	F4: Reduce	F5: Add New Item
F6: Edit Item	F8: Check Out	F9: Cancel	F12: Input Method

Procedure for creating a Sales Memo:

Step1:   Select a Customer

- Select and enter customer code in Member Information panel

Step2:   Select Products

- Enter a product code in Production Information panel. You can use a barcode scanner (if the barcode has been set up in the product details), or you can look it up from the database.
- Or you can use the graphical interface (hit F12) to select a product
- Enter the quantity and hit enter

Step3:   Check Out

- Hit Check Out and proceed with payment.
- In System Settings -> Personal Setting you can set up if the system should print the Sales Receipt automatically, choose it's format and how many copies to be printed

Section 5.2:   **Cancel a Sale**

Depending on you business flow and operation control. To cancel a sale can be performed through various steps and procedure. ONE-POS is not designed to give you a rigid approach, rather you should think about –

1. how to return the returned stock back to the inventory
2. how do you handle refund

The "Quick and Easy" Way

Menu path: POS shortcut -> One Click Void Sales Document

Use the One-Click VOID function if you want to void "same day" sales transaction. This function will change the status of the sales memo to 'Void', return it's stock to the inventory. This operation is only valid if the sales memo was issued at the same sales office and on the same working day (before system Day End function was performed). Go to Operation -> Drawer In/Out to take cash out of the cash drawer.

Alternate Ways

If you want to a cancel a sale transaction which is more than one day old, you should use the Good Returns function.

Menu path: POS shortcut -> Goods Return

Full Return by Cash Memo: Return the a new batch of stock into the inventory, automatically generate a credit note with the same value of the cash memo. Customers can use the credit note to pay for a new purchase.

Return by Line Item: Same as above operation, but you can select only some of the items on the sales memo to cancel.

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Section 5.3: **Receipt Remark Maintenance**

Edit the remark at the bottom of the Sales Memo with your company's Terms and Conditions, special messages or just a simple greeting.

Menu path: Operation -> System Setting -> Receipt Maintenance

Section 5.4: **Hardware Integration**

Barcode

Itemize your products with barcode to make it more efficient in managing your inventory. If the products do not come with barcode, you will need to create barcode for them. You can use the Product ID as barcode.

You need a reliable barcode printer to print barcode label. You are not advised to use conventional printers to print barcode as the barcode labels usually comes in paper rolls and you need special built in barcode font to print the barcodes. To read off the product barcode during POS check out, you need a barcode scanner (aka barcode reader). Barcode scanners are readily available in the market and they are easy to connect.

Print barcode label

For the latest list of barcode printers and scanners supported by ONE-POS, please visit http://www.one-pos.com

To prepare barcode labels to tag the merchandise, go to Product Maintenance -> Product List and hit the Print Report button. Check the stocks you want to print, select the correct barcode size and barcode printer and proceed with printing.

You can also print barcode label in the product setup.

Print barcode list

Sometimes it is easier to prepare a barcode list for POS check out when the merchandise does not stick barcode label, or the merchandise is not physical. (e.g. Service item) To print out the barcode list, go to Product List and hit the Print Report button. Select barcode sheet and proceed.

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Section 5.5:   Sale Memo Print Out (and Reprint)

Sales Memo format and printer setup

To assignment which printer and paper format for the sales memo on POS check out, please go to One Click Setup part 8.

To reprint a Sales Memo

Menu path: Sales -> Sales Document Maintenance

Select the sales memo you want to reprint and hit the "Print Header" or "Print without Header" button.

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Section 6: **Advanced Sales Operations**

Following features are designed for advance users only.

Section 6.1: **Gift Voucher Management**

A Gift voucher is also known as a gift certificate. It has a preset face value and can be used as a form of payment to settle a Sales Memo.

Work flow:

Use the Gift Voucher feature to generate a pool of system predefined gift vouchers and then sell them to your customers. When customers redeem these vouchers the system has the option to verify the validity of the voucher.

Menu path: Basic Information -> Gift Voucher

In the Search Gift Voucher screen, a list of all gift vouchers is defined in the system. To add a new set of gift vouchers, hit Add Item in the bottom of the screen.

In the Maintain Gift Voucher form, you will need to enter these information:

Campaign ID: The identification ID for this batch of gift vouchers. 6 characters long.

For example, if you are selling gift vouchers for Spring Summer Collection, try SS2008.

Name: The name of the campaign.

Face Value: Customers will be able to redeem this voucher with this value to pay for their purchase.

Allow Multiple Use: A voucher cannot be redeemed more than one time if this option is unchecked.

Range: Use "From – To" to generate unique ID for each voucher. 7 figure is allowed. Input 0 if you do not need unique ID on the vouchers.

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Section 6.2:   Coupon Management

This is a great feature if you are selling prepaid coupons to customers and want to keep track of how many of them have been sold and redeemed.

Each set of coupon type is defined with a list of associated products to be redeemed. During the POS check out, cashier can simply input a coupon code and the system will automatically list out the linked products.

Menu path: Basic Information -> Prepaid Coupon

In the Search Coupon screen, you can add a new coupon type by hitting Add Item in the bottom of the screen.

In the Maintain Coupon form, here are the important details your should enter:

Coupon ID: Identification ID for this book of coupons.

Name: Name description of the coupons.

Value: This is the face value of this book of coupons to be sold to the customer.

Quantity: Minimum of coupons as sold.

Items: In this panel, add the list of products to be associated with this coupon.

Validity: The validity of this coupon set is controlled by 2 conditions:
                 1. "From / To" period is the time where the customer can redeem his coupons. e.g. "2006/01/01 – 2009/08/31"
                 2. "Effective Days" is the number of days in which the customer must redeem the coupons after he bought them. e.g. "100 days"

To check a customer's coupon balance, please go to Customer Maintenance.

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Section 6.3:   **Customer Bonus Point Reward Program**

Bonus points are great incentives for customers to come back to your shop. Bonus points are rewarded to a customer for every Sales Memo he creates at your shop. He can subsequently use these points to redeem certain goods and services.

To Earn Bonus Points

To enable Bonus Point reward program, please go to One Click setup Part 11. Bonus Point Configuration.

– Ensure Auto. Reward Bonus Points is checked.

– Enter for each dollar how many Bonus Point is awarded. (Usually $1 = 1 Point)

To Edit Bonus Points Balance

To manually change the balance of the customer's bonus point account, go to Basic Information -> Customer -> Bonus Point Maintenance

Select the customer you want to edit. Hit Edit button to change the point balance. In the edit screen, enter +/- value in the Adjustment box and save the changes.

Bonus Points Expiry Date

To make sure your shop is not carrying too many 'payable' bonus points, you can reset the customer's point balance by force. Note: ALL points will be cleared by this function. To can enable this function you need to go to One Click Setup, Part 10. Enable Reset Bonus Points, and select how frequent should this happen in the Recurrence pull down box (it ranges from 1 month to 36 months). Go to the customer setup and make sure this Reset Points property is also set there.

Bonus Points Redemption

To use bonus points as a form of payment, simply enter the number of points to be deducted in the POS check out screen.

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Section 6.4:   Discount Rules Setup

Basic discount rules are not as complicated as they look. They can set up in the Product Maintenance screen for each product.

The parameters of the discount rules are Effective Date + Product + Customer Class + Sales Office and the action is to affect the three classes of selling price by percentage % or by fixed amount or fixed value.

To setup the discount rules of a product, go to Product Maintenance.

Menu path: Basic Information -> Product -> Product Maintenance -> Edit or Add Product

Go to Add New Discount tab at the bottom of the screen.

Hit Add button, enter these information:

Effective From: Period of effectiveness

Active: Uncheck it if you want to disable the rule even if Effective From is valid.

Do Not Show Price Difference as Separate Line Item:

                     Disable this if you the price change shown on sales memo as a seperate item.

Adjust By: Choose the method you want to affect the selling prices by

    –   Percentage: %

    –   Value: Fixed amount of price change

    –   Absolute: Fixed new selling price

Apply to Office: Select the sales office that will be affected.

Apply to Customer Class: Select the customer class that will be affected.

Section 7:   Appointment Booking Module

Introduction:

ONE-POS comes with the free Appointment Booking Module and it is well suited for business where appointment booking is an important aspect of the operation. Beauty salon, clinic and pet grooming are just some sample business that can make use of the 'appointment book' module.

Special words used in Booking Module:

Asset: The main object to be controlled by bookings. An assets are defined into 3 types:

    1.   Venue (for example: a room, a chair)

    2.   Equipment (for example: a car wash machine, scanner)

    3.   Service provider (for example: doctor, hair stylist)

        To maintain Asset: Menu Path: Booking -> Asset Maintenance

Service: The action to be performed by the assets. (for example: Service "Haircut" to be carried out by Asset "Hair Stylist")

> To maintain Service: Menu Path: Booking -> Service Maintenance

System Logic:

Book Module partitions everyday into 15 min time slots. The "15 min" duration is predefined in ONE-POS 1.x FREE version and cannot be changed.

The Start Time and Finish Time is of a typical work day is defined in One-Click setup. Double-book is allowed and the clashing time slots will be flashing in the main screen.

Section 7.1:   Appointment Maintenance

Menu Path: Booking -> Appointment Maintenance

Use the top filters to organize the view of the appointments by Asset type or by Service. The right side of the screen sits the appointment detail controls. Use the mini calendar to browse the appointments.

To Add a New Appointment: Click the Add New button, in the Appointment Detail screen, build your combination of Service and Asset (Venue / Equipment / Provider) and choose the appointment time.

You can revise the status of the appointment by Complete, Canceled, No Show for further analyze.

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Section A: **System Utilities**

Section A.1:   **System Setting**

System configuration is set during installation but can be revised any time. The all-in-one One-Click setup also covers some of these settings, but System Setting is designed to give ONE-POS more detail setup.

Menu path: Operation -> System Settings

Retail Configuration

The system should come with one predefined Office ID. You can look it up and edit your information such as contact details and default customer etc.

Email Settings

With these settings, you can email your customer Sales Memo and other documents.

Receipt Maintenance

Use this to maintain the footnote of the Sales Memo (RT sales document). For useful examples are: Terms and Conditions, Greetings and Special Note to Customer. The items are ordered by the item number.

Class Points Maintenance

Three customer classes are defined in ONE-POS. If Auto Update Customer Class is checked, a customer's class will be raised after a transaction if his points meet the number of points defined here.

VPN Setting

For ONE-POS Network Version use. Please consult any ONE-POS Authorized Agent for more information about running multi site ONE-POS. Please visit http://www.one-pos.com for the latest list of agents.

Personal Settings

More refined system preferences are set here. ONE-POS supports two types of sales tax, Sales Tax One and Sales Tax Two. If they are enabled, then the cashier can change the line item's tax value during POS operations.

Birth Month Discount is used to give % off discount to customers. The products will need to have this feature enabled too.

Use Sales Receipt setting to determine how many copies of the POS sales memo should be printed.

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Section A.2:   Backup and Restore Database

Menu path: Operation -> Maintain Database

To backup the system database:

Click Backup Database -> Enter the path when database will be saved.

To restore the system database:

NOTE: Existing database will be overwritten!

Click Restore Database -> Enter the path of which database will be restored.

Section A.3:   Terms and Conditions

You should always maintain your terms and conditions on your sales memo to tell your customers about your shop's policy to protect your legal rights.

T&C appear after the line items on the sales memo.

Menu path: Operation -> Terms and Conditions

Section A.4:   Check Cashier Amount

Use this function to check the current cash balance of your cash register. This is a running balance until End of Day note is performed.

Section A.5:   Drawer Cash In/Out

Use this function to record the non-sale related withdrawal or deposit of cash at the cash register. Use this function to keep track of temp staff payroll, petty cash etc.

Section A.6:   End of Day Operation

Close your day by performing Day End operation. You need to reconcile the cash balance in your cash register. It will print a detail report with payment by types and it will empty the cash register.

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Section Z: **Suggested Work Flow**

Section Z.1:   **Basic Work Flow**

Objectives: Walk through ONE-POS and complete the basic tasks to perform a retail sale.

Task List	*Notes*
Step 1 Backup the Database - good practice to make frequent database backup / see Section A.2 Step 2 System Setup - verify company information / see Section A.1 Step 3 Master Information Setup - to keep it simple lets maintain Category only / see Section 1.2 Step 4 Product Setup - set up a few new products / see Section 2.1 Step 5 Customer Setup - set up a new customer (or you can ignore this by using default Walk-in customer) / see Section 3.2 Step 6 Inventory Setup - check in some of new products as created in Step 4 for sale / see Section 4.1 Step 7 POS Create a sale using POS / see Section 5.1	