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1 Overview

This user guide will help you navigate through most aspects of ClickPOS. As the system constantly changes to benefit our users we appreciate your feedback. If you do have any other queries with a certain process or procedure in the system please don't hesitate to contact us - help@clickpos.com

2 Hardware Requirements & Setup

This module covers basic requirements and setup instructions for selected hardware (Basic Requirements)

2.1 OPOS (Cash-drawer & Epson T88 Thermal Printer)

2.1.1 OPOS Installation

Installing OPOS Version 2.5

1. OPOS Version 2.5 [Download](#) - 14MB
2. Click "Run"



3. Click "Run".



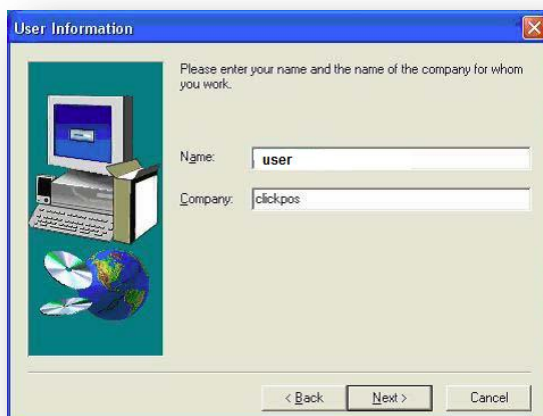
4. Unzip to C:\EPSON2.5.



5. Open **"My Computer"**.
6. Browse to **"C:\EPSON2.5\OPOSADK\V250e\disk1"**.
7. Click **SETUP.EXE**.
8. Click Next.
9. Click I accept then next, then click yes when asked if you really accept.



10. Click Next.
11. Type your Name and Company Name, then Click Next.



12. Click Next Leave Default Destination.
13. Click Next Leave just program files selected.
14. Leave EPSON CO selected then click next.



15. Click Next (Leave Default Option of Full Install).
16. Click Next leave default start menu settings.
17. Click Next then wait for files to copy.
18. Unselect View Release Notes and click Finish.

Installing OPOS 2.5 Service Pack 9

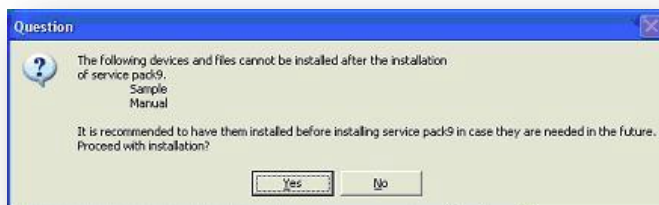
1. OPOS Service Pack 9 [Download](#) - 5MB.
2. Click "Run".



3. Click "Run".
4. Unzip to OPOS_SP9.



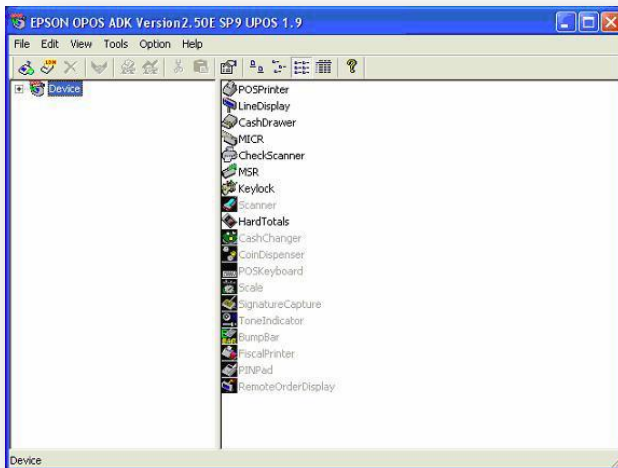
5. Browse to **C:\OPOS_SP9\OPOSADK\V250e\SP9\disk1**.
6. Double Click **SETUP.EXE**.
7. Press Yes if prompted with the below window.



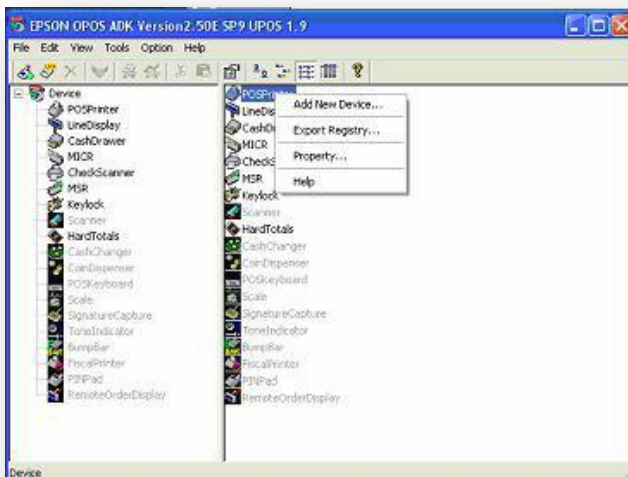
8. Follow the same procedure for installing the OPOS 2.5 drivers, select I agree to the licence agreement and then click next until prompted with the following screen
9. Click YES when asked **"Do you use Parallel I/F"**.
10. Click YES when asked **"Would you like to install the TMT88 USB Driver"**.
11. Reboot PC.

2.1.2 T88 USB Printer Setup

1. To open OPOS navigate to Start → Programs → OPOS → SetupPOS ver 2.00.



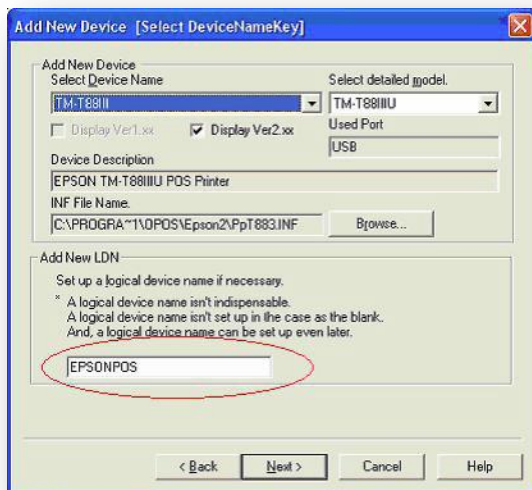
2. Right Click "POSPrinter".
3. Click "Add New Device".



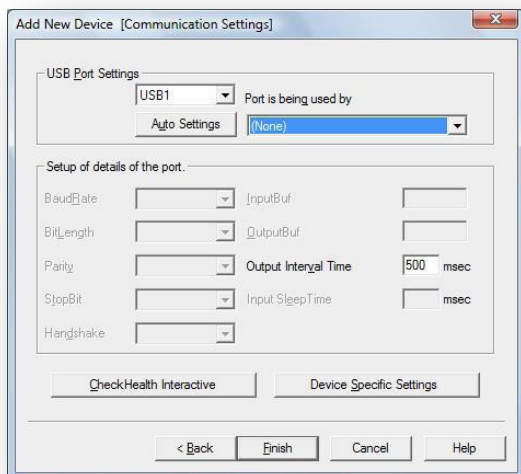
4. Select TM-T88 (followed by your model number, either ii, iii, iv) under "Select Device Name".
5. Select TM-T88iiiU (U is for USB models).

Please Note **USB** models will end with a **U**
Please Note **COM** models will not have a trailing letter
Please Note **LPT** models will end with a **P**

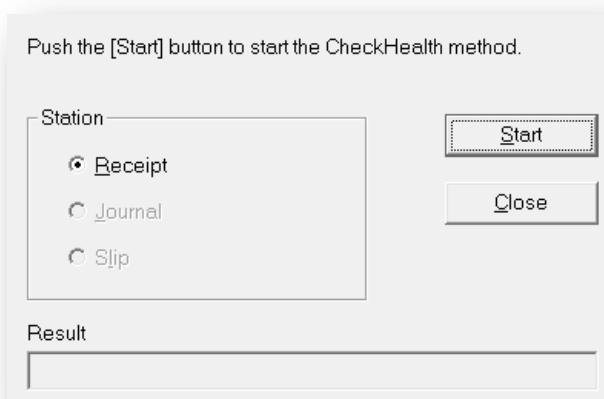
6. Enter **EPSONPOS** into "Add New LDN".
7. Ensure Printer is connected & turned on.
8. Click "Next".



9. Click Check Health Interactive then start.

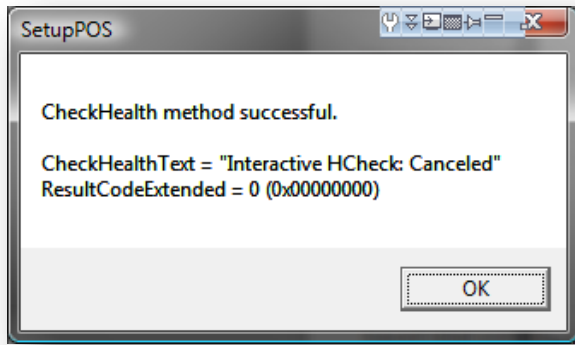


10. If you receive an error or the below dialogue does not appear then there will be an issue in the communication between the PC and the printer.
 - Check PC cables
 - Ensure the terminal is switched on & ready (ready light)
 - If no success after checking the above, call ClickPOS support on + 61 3 9092 5300
11. If Successful, click Start.



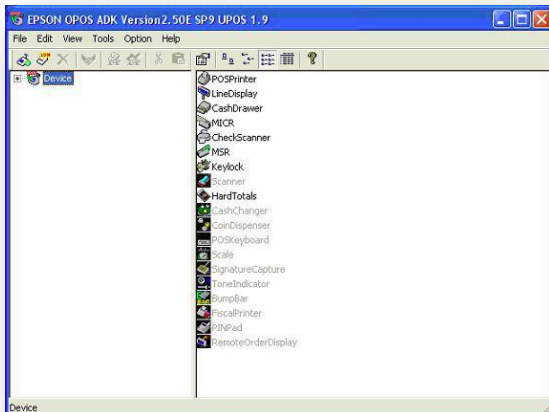
12. Your T88 should now print a test stub

13. Reboot PC if successful

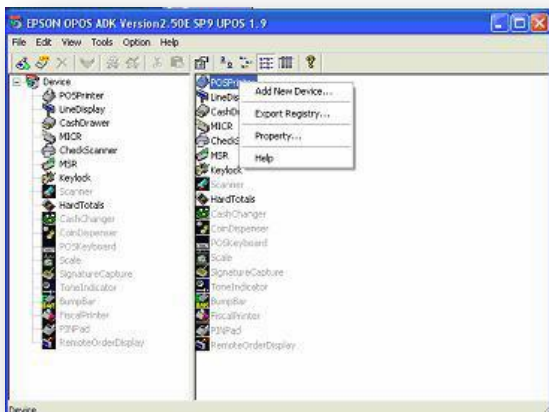


2.1.3 T88 Ethernet Printer Setup (Shared Network)

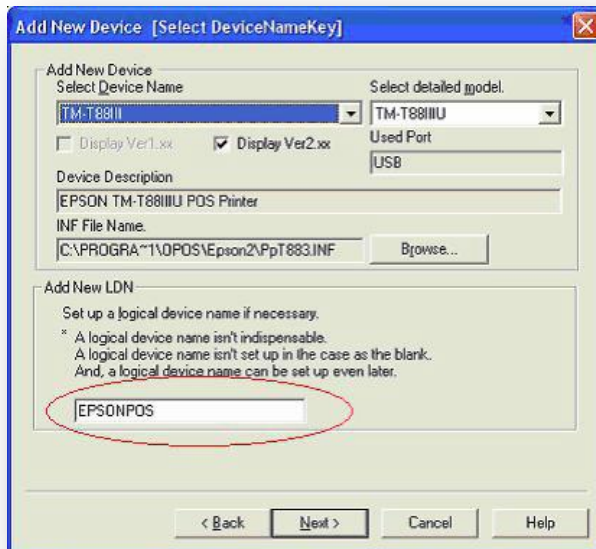
- The Ethernet version allows multiple users to share the same pos printer.
 - **Please Note: You are limited to 1 cash-drawer per printer.**
1. To open OPOS navigate to Start → Programs → OPOS → SetupPOS ver 2.00



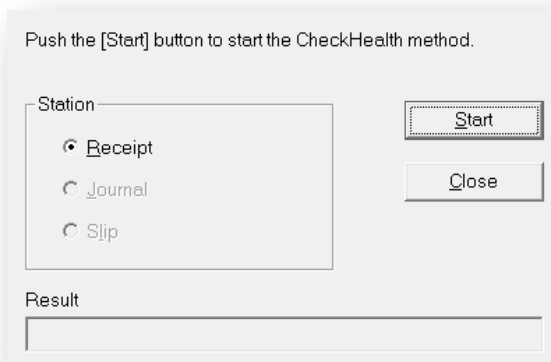
2. Right Click "POSPrinter".
3. Click "Add New Device".



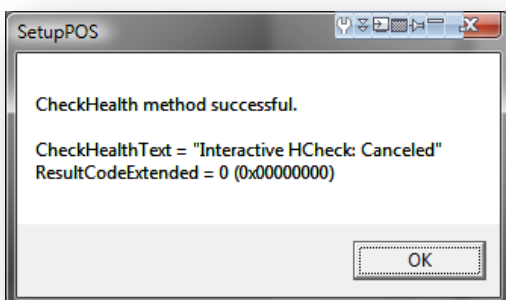
4. Select TM-T88 (followed by your model number, either ii, iii, iv) under “Select Device Name”.
5. Select TM-T88iiiE (E is for Ethernet models).
6. Enter **EPSONPOS** into “Add New LDN”.
7. Ensure Printer is connected & turned on.
8. Click “Next”.



9. Enter the IP address of the printer that has been assigned by your router.
10. Click Next
11. Click Check Health Interactive, then start.
12. If you receive an error, click back and check everything again.
13. If Successful, click Start.

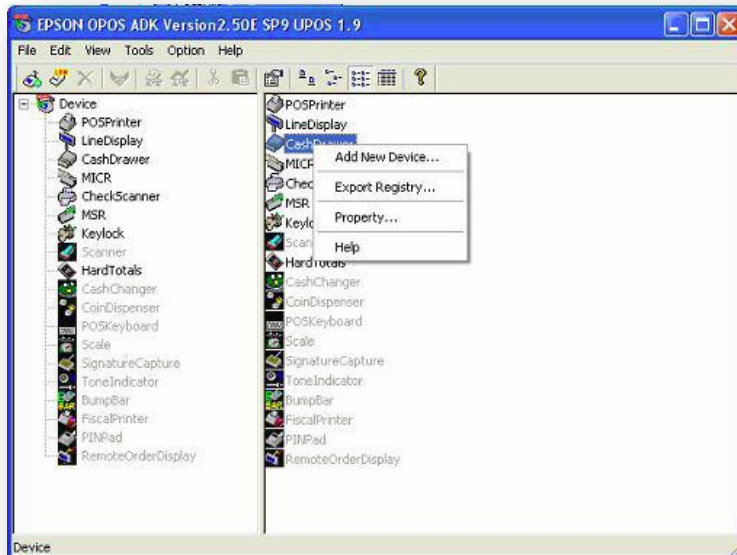


14. Your T88 should now print a test stub
15. Reboot PC if successful

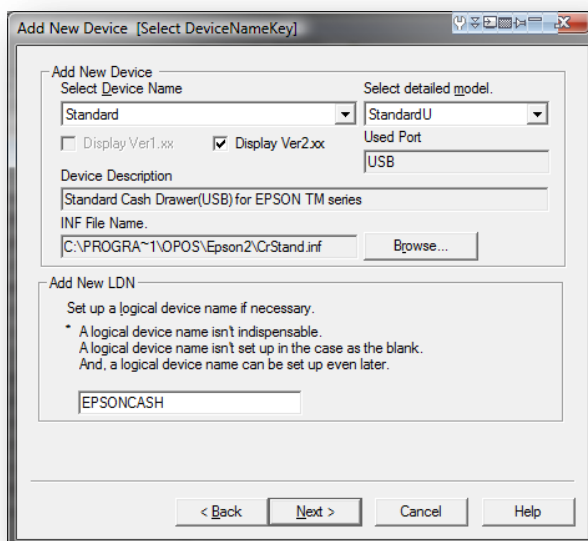


2.1.4 Compatible Cash-Drawer Setup

1. If OPOS is not open, start it from your **"Start"** menu in Windows.
2. Click Start > OPOS > SetupPOS ver2.00.
3. Right click CashDrawer and click Add New Device.
 - **Note:** The steps here were conducted with an Epson Cash Drawer with a 6-pin RJ Connector.
 - **Note:** If you have an Epson Cash Drawer with a 6-pin RJ Connector,
 - You must connect the cash drawer to the back of the receipt printer now.



4. Select the type of the cash drawer used.
 - In most situations **"StandardU"** will be selected in the "detailed model" field – USB Model.
 - If using Ethernet – StandardE.
 - If using Parallel - StandardP.
 - If using Serial – Standard.
5. Enter EPSONCASH into the LDN field.
6. Click Next.



7. Click **"Check Health Interactive"**.

Verifone contains :

1 x DPS Software
1 x PIN PAD
1 x USB to Serial Adapter
1 x USB lead
1 x Serial Adapter w/ DC attachment
1 x Power lead

Ingenico package :

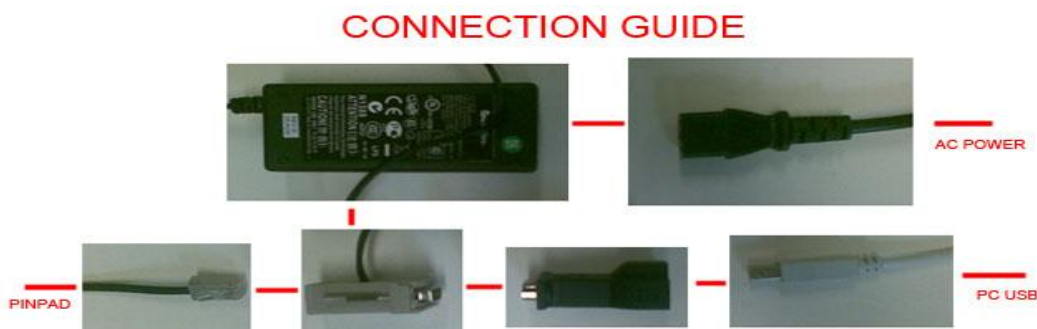
1 x PIN PAD
1 x USB lead

8. Click Start to test the cash drawer.
 - If below dialogue does not appear then there will be an issue in the communication between the PC and the printer.
 - Check PC cables.
 - Ensure the terminal is switched on & ready (ready light).
 - If no success after checking the above, call ClickPOS support on + 61 3 9092 5300.
9. If successful the cash drawer will open.
10. Reboot PC.

2.2 Integrated Merchant E.F.T Terminals (DPS)

- ClickPOS offer a fully integrated EFTPOS terminal using the services of Direct Payment Solutions & BankWest.

2.2.1 Hardware Setup (Connection Guide)



2.2.2 Software Installation

- [Verifone Install Package](#)
- [Engenico Install Package](#)

1. Click relevant link above to download your relevant installation package.
2. Save the file to your PC → Then Run the file by double clicking the saved file.

Please note:

(PXeftinstaller.exe for Verifone Model or PXeftinstaller_ingenico.exe for the Ingenico Model).
XP users must be logged into windows as an administrator to install DPS.
Vista user must right click on the downloaded file and choose "Run as Administrator".

3. After downloading the installer, close all running programs and then execute the file. Selecting "**RUN**".



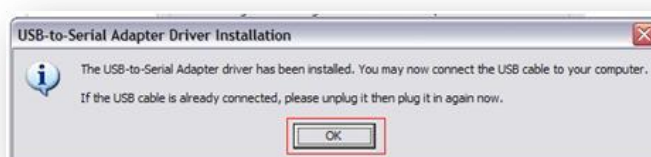
4. Verify the Install location is correct, continue by selecting install.



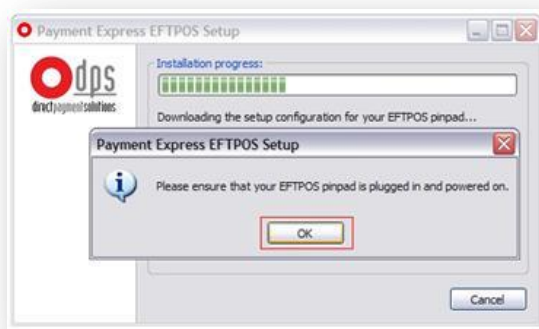
5. You will have to read & agree to the terms & conditions, "**Yes, I agree**" will appear when you scroll to the bottom.



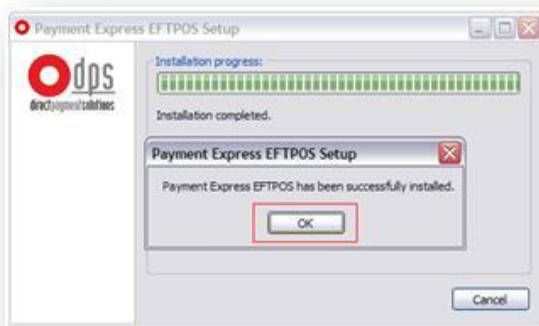
6. You are now required to plug in the DPS USB to Serial Adaptor, If already plugged in, unplug it then plug it back in again. (please refer to connection guide).



7. It will prompt you to plug in the EFTPOS Pin-pad if you have not done so already. After plugging in or if already plugged in, continue by hitting **"OK"**.



8. Complete.
You may now restart your computer to ensure all changes take effect.



2.2.3 Adding Payment Type to ClickPOS

1. Nominate the tender type as the EFTPOS terminal.
2. In the following example we have used the **"DPS"** as the payment type.
3. Login to ClickPOS,
4. Go to MAINTAIN → SYSTEM ADMIN → PAYMENT TYPE.
5. Add a Payment section; fill in details as per below diagram.
Please note: Payment Type (name) can be anything you like we called it DPS.
DPS Integrated solution must be ticked.

A screenshot of the 'Payment Maintenance' form. The title 'Payment Maintenance' is in green. Below it is the section 'Add a Payment:'. To the right of this section is the text 'ENTER BUTTON NAME' in red. The form contains several fields: 'Payment Type:' with a text box containing 'DPS'; 'Sale View Order' with a text box containing '2' and a red label 'CHOICE' next to it; 'This item is Cash (Notes and Coins):' with a dropdown menu showing 'No'; 'Base Rate %:' with a text box containing '0'; 'View Large Button:' with a checked checkbox and a red label 'OPTIONAL' next to it; 'On Account:' with an unchecked checkbox; and 'Dps Integrated Solution:' with a checked checkbox and a red label 'TICK' next to it. At the bottom left is a green 'OK' button.

You are now ready to use your DPS unit!

PLEASE NOTE

DPS questions not relating to Clickpos must be directed to DPS Direct as they support their own system. These areas Include; Installation, General Faults and Billing Issues

Support Email	support@paymentexpress.com
International	+64 9 309 4693
Australia	1 800 006 254
New Zealand	0800 PAYMENT (729 6368) or 09 309 4693
Singapore	+65 3 1031353
South Africa	+27 11 4613223
United Kingdom	+44 20 33183298
USA	+1 212 8012396

2.3 Barcode Scanner Setup

The barcode font, technically referred to as the "**3 of 9 Barcode**" is just like all other fonts used for word processing. Once downloaded, the font is available where ever you choose a font such as Word or Excel. You can use the Barcode font to create your own product labels for pricing, so you can scan the barcodes directly from the products you sell.

ClickPOS uses the barcode font in various sections, including some reports such as Product List report 5-2, and to produce labels from the Label printer.

If you have invested in the recommended label printer, then you need to download this font.

Here is a sample size and label ClickPOS produces.



Once uploaded, it will be in the list of barcodes as displayed below.

NOTE: if you are creating your own labels in Word or Excel, you must include an asterisk * on both sides of the barcode.

Also note that in MS Word, when you type the end asterisk, the characters changes to Bold, you need to undo, that is Ctrl Z, then highlight the entire barcode including the asterisks, then change to the barcode font. You will also require using minimum of font size 14+, and printing on high quality laser printer.



2.3.1 Barcode Font Installation Instructions

1. Click [here](#) to download the barcode installer.
2. Select Run this program from its Current Location - Click "OK".
3. Do you want to install and run "BarcodeFont.exe" from clickpos.com - Click "Yes".
4. Do you want to completely remove the selected application and all its components - Click "OK".
5. Note: Once font installer finishes, you must activate the font. To do this, simply open Control Panel, then click "Fonts". The system will automatically register a new font called "3 of 9 Barcode". You can now use the barcode font within any application such as Word or Excel, just as you would any other font

2.3.2 Default Posiflex CCD barcode to factory settings

Click below link and follow instructions.

<http://www.clickpos.com/site/DefaultSite/filesystem/documents/POSIFLEX%20Barcode.pdf>

3 Software Requirements & Setup

- This module covers Internet Explorer requirements and Security setup examples.

3.1 General Information

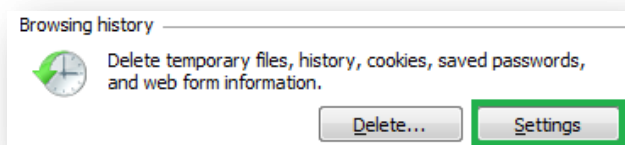
- ClickPOS only support Microsoft Internet Explorer Version 5.5, 6 & 7
- Internet Explorer 8 is supported by ClickPOS, but only in compatibility view mode (Call ClickPOS support for more details).
- We advice you remove all unnecessary toolbars and add-ons.
- Skype has been known to interfere with IE version 6 & ClickPOS

3.2 Internet Explorer Setup (Version 6, 7 & 8)

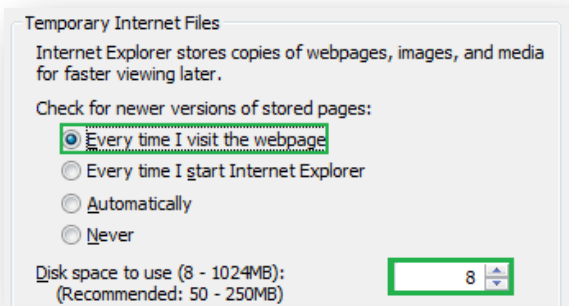
Note: ClickPOS only support Internet Explorer.



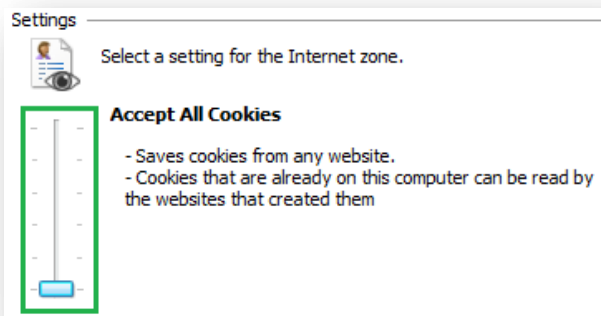
1. Download and Run [ClickPOS Security Resolution](#)
2. Open Internet Explorer → Tools → Internet Options → General Tab → Settings (under browsing history).



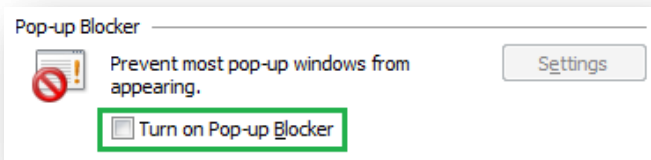
3. Temporary Internet Files = Every time I visit the webpage.
4. Disk space to use = 8mb.
5. Click apply.



6. Internet Explorer → Tools → Internet Options → Privacy Tab.
7. Drag slider bar to bottom; accept all cookies.



8. Either un-check the pop-up blocker or add our sites to settings to allow ClickPOS pop-ups.



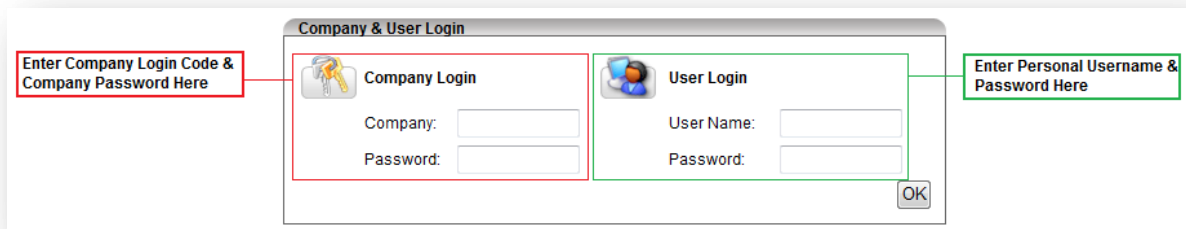
9. Click OK to save.
10. Reboot your PC.

4 Login / Logout

- This module will cover the login and logout processes for manual / barcode entry methods.

4.1 Manual Login/logout Process

1. Enter your company login code into the "Company field" & password into the "Company Password" field.
2. Enter your username into the "User Name" field & your password into the "User Password" field.
3. Click Ok.



Company & User Login

Enter Company Login Code & Company Password Here

Company Login

Company:

Password:

User Login

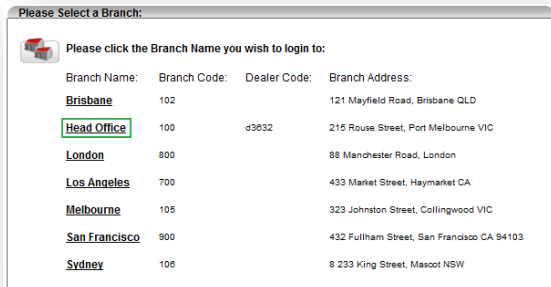
User Name:

Password:

Enter Personal Username & Password Here

OK

4. Select branch from the branch selection list.
5. Complete – You are now logged into ClickPOS.



Please Select a Branch:

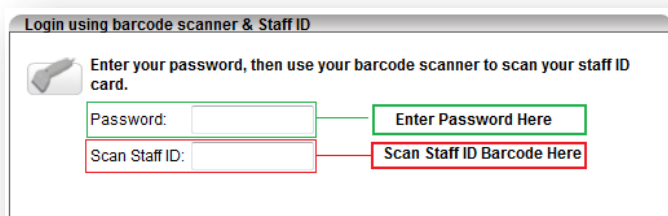
Please click the Branch Name you wish to login to:

Branch Name:	Branch Code:	Dealer Code:	Branch Address:
<u>Brisbane</u>	102		121 Mayfield Road, Brisbane QLD
<u>Head Office</u>	100	d3632	215 Rouse Street, Port Melbourne VIC
<u>London</u>	800		88 Manchester Road, London
<u>Los Angeles</u>	700		433 Market Street, Haymarket CA
<u>Melbourne</u>	105		323 Johnston Street, Collingwood VIC
<u>San Francisco</u>	900		432 Fullham Street, San Francisco CA 94103
<u>Sydney</u>	106		8 233 King Street, Mascot NSW

4.2 Barcode Login Process

- Barcode must be printed before attempting to login using this method (See 3.4 Printing Staff ID barcodes).

1. Enter Password Into “Password” field.
2. Scan “Main Screen” barcode into “Scan Staff ID” field.



Login using barcode scanner & Staff ID

Enter your password, then use your barcode scanner to scan your staff ID card.

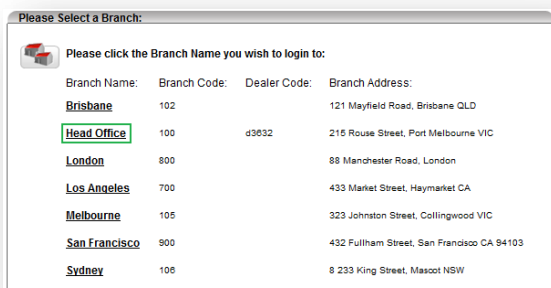
Password:

Enter Password Here

Scan Staff ID:

Scan Staff ID Barcode Here

3. Select branch from the branch selection list.
4. Complete – You are now logged into ClickPOS.



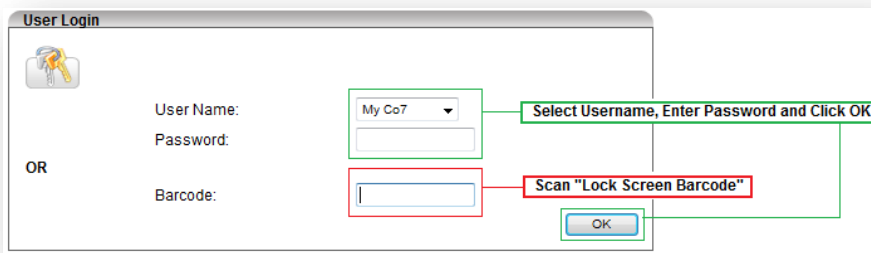
Please Select a Branch:

Please click the Branch Name you wish to login to:

Branch Name:	Branch Code:	Dealer Code:	Branch Address:
<u>Brisbane</u>	102		121 Mayfield Road, Brisbane QLD
<u>Head Office</u>	100	d3632	215 Rouse Street, Port Melbourne VIC
<u>London</u>	800		88 Manchester Road, London
<u>Los Angeles</u>	700		433 Market Street, Haymarket CA
<u>Melbourne</u>	105		323 Johnston Street, Collingwood VIC
<u>San Francisco</u>	900		432 Fullham Street, San Francisco CA 94103
<u>Sydney</u>	106		8 233 King Street, Mascot NSW

4.3 Lock Screen after Sale

If lock screen is enabled, you will be required to log back into ClickPOS after the completion of a sale.



The image shows a 'User Login' dialog box. It has a 'User Name:' field with a dropdown menu showing 'My Co7', a 'Password:' field, and a 'Barcode:' field. An 'OK' button is at the bottom right. Annotations include a green box around the 'User Name' and 'Password' fields with the text 'Select Username, Enter Password and Click OK', and a red box around the 'Barcode' field with the text 'Scan "Lock Screen Barcode"'. A green line connects the 'OK' button to the 'Select Username, Enter Password and Click OK' text.

4.3.1 Manual Access

1. Select Username.
2. Enter Barcode.
3. Click OK.
4. You will be directed back to the sale screen.

4.3.2 Barcode Access

1. Scan barcode.
2. You will be automatically redirected back into a fresh sale screen.

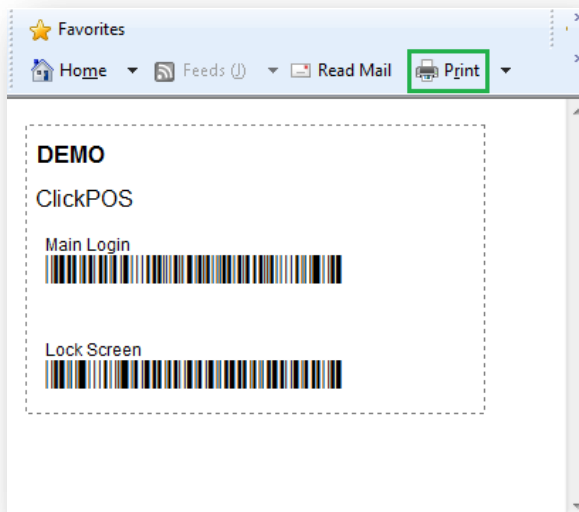
4.4 Printing Staff ID Barcodes

5. Go to MAIN → CHANGE PASSWORD → Staff Identification Card.
6. Click "HERE" to Print.



The image shows the ClickPOS 'User Password - Changing' screen. It has a navigation bar with 'Home', 'Sale', 'SMS', 'Web Sales', and 'Change Password'. The 'Change Password' button is highlighted with a red box. Below the navigation bar, there are fields for 'Old Password', 'New Password', and 'Confirm Password'. An 'Apply' button with a checkmark is below these fields. At the bottom, there is a section titled 'Staff Identification Card' with a link 'Click Here to print ID card' highlighted with a red box. A red line connects the 'Change Password' button to the 'Click Here to print ID card' link.

7. Window appears, showing 2 barcodes – 1 for the main screen and the other for Lock Screen.
8. Click Print (If print is not visible, right click and select print).
9. Check your A4 printer for result.



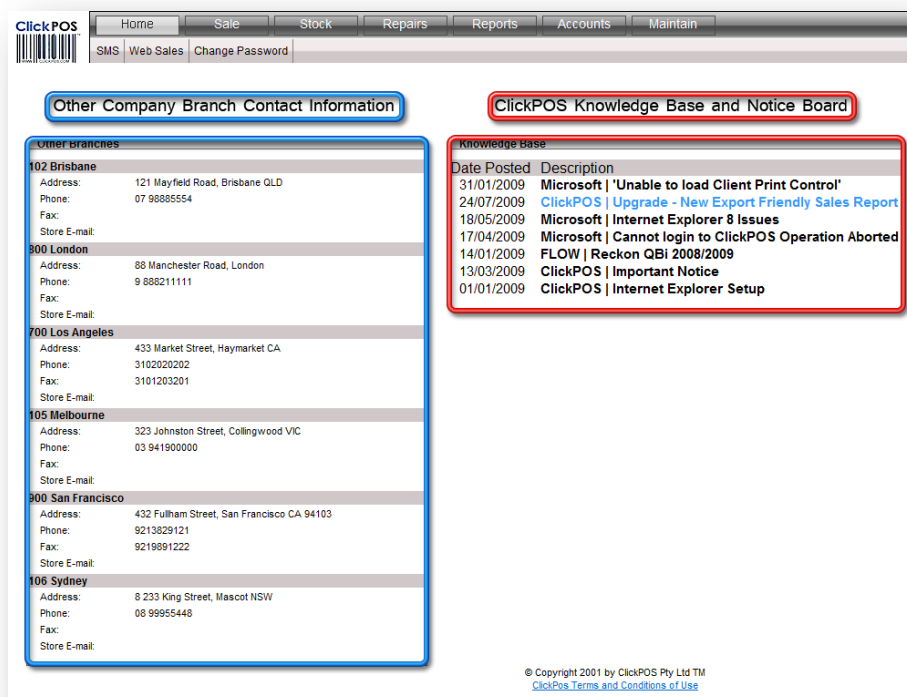
Note: You may copy and paste into other documents like Word or Photoshop. Do not edit code!

5 Navigating & Using ClickPOS

Main Menu – Video Tutorial 

5.1 Main

This area contains branch contact information, SMS access for advertising and customer VAS also offering a quick method of printing staff I.D.'s and changing user passwords.



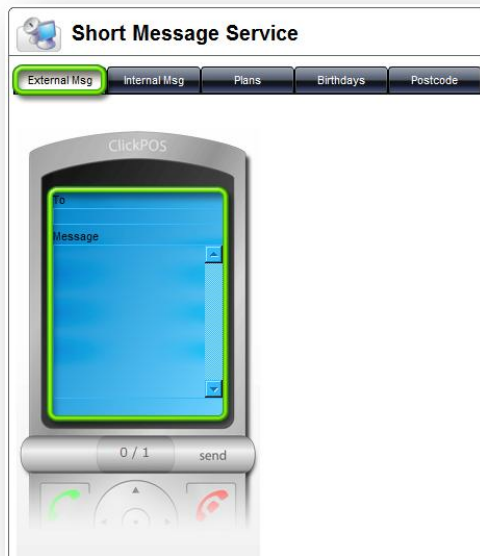
5.1.1 SMS

You have the option to communicate with your staff and customers using SMS

For cost: Contact ClickPOS Accounts or ClickPOS Sales (+61 3 9092 5300).

External SMS Message

This is useful for those once-off messages required to send from time to time.

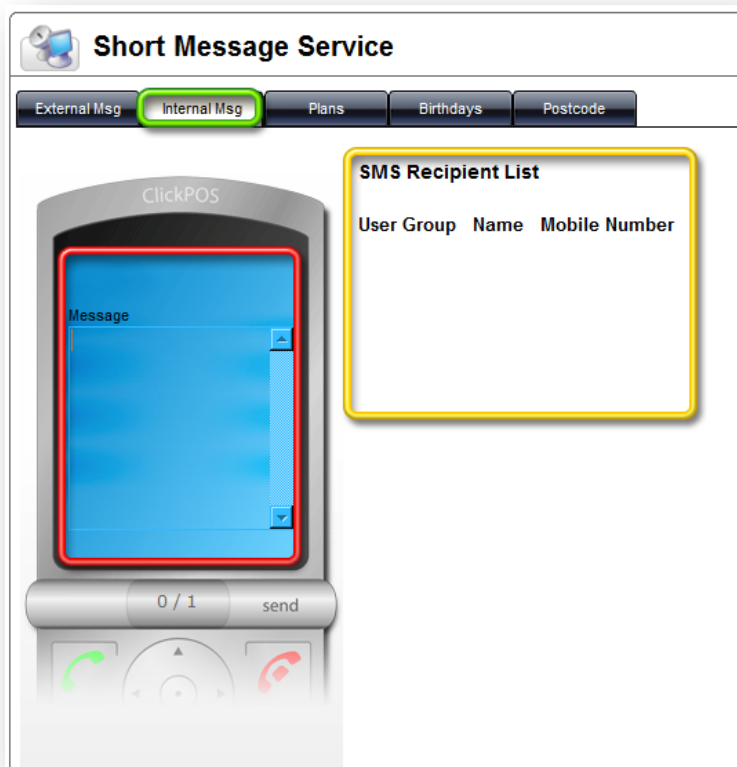


Creating & sending a simple external text message

1. Enter recipient telephone number into the "To" field.
2. Enter your message into the "Message" field.
3. Click the Green Phone Icon (send key).
4. Your message will now be despatched to your intended recipient.

Internal SMS Message

This function allows you to despatch SMS to staff or other internal contacts that have been predefined.



Creating & sending a simple internal text message

- Select Recipients from the “Recipient List”.
- Enter your message into the “Message” field.
- Click the Green Phone Icon (send key).
- Your message will now be despatched to your intended recipient/s.

Plan Expiry notification SMS Message

This function allows you to despatch SMS to clients who are nearing the end of their contractual periods. This encourages prompt response to local marketing and drives repeat business back into the store.

The screenshot shows the 'Short Message Service' interface. At the top, there are tabs for 'External Msg', 'Internal Msg', 'Plans', 'Birthdays', and 'Postcode'. The 'Plans' tab is selected and highlighted with a green box. Below the tabs, there is a form with fields for 'Contract Start Date' (10/08/2007), 'Contract End Date' (10/08/2009), 'Phone', 'Carrier', and 'Plan', all set to 'All'. There is a checkbox for 'Only for Customers Accepting SMS Messages' and a 'Search' button. Below the form, there is a 'ClickPOS' device with a 'Message' field and a 'send' button. To the right of the device, there is a list of recipients with their names and phone numbers, including Belinda Wonder, Cameron White, Credit Note, Dolly Brown, Grace Glunta, Henry Smith, Irene Small, Jahan Spatchurst, James Russell, Jane Doe, and Jane Doe (042424242).

Creating & sending a Plan Expiry SMS Message

1. Select plans, contract period & search.
2. Select Recipients from the “Recipient List”.
3. Enter your message into the “Message” field.
4. Click the Green Phone Icon (send key).
5. Your message will now be despatched to your intended recipient/s.

Birthday Greeting SMS Message

This function allows you to despatch a friendly “Birthday Greeting”.

Short Message Service

External Msg Internal Msg Plans **Birthdays** Postcode

Number of Days in Advance: 50

Only for Customers Accepting SMS Messages: ☒

Search ➔

ClickPOS

Message

0 / 1 send

- ☐ Belinda Wonder (0411000123)
- ☐ Cameron White (0404)
- ☐ Credit Note (0)
- ☐ Credit Note (01)
- ☐ Dolly Brown (040000003)
- ☐ Dolly Brown (040000987)
- ☐ Grace Giunta (0410 439 387)
- ☐ Henry Smith (78896478)
- ☐ Irene Small (0405555555)
- ☐ Jahan Spatchurst (12341234)
- ☐ James Russell (040000002)
- ☐ James Russell (123)
- ☐ James Russell (1233435456)
- ☐ James Russell (asd)
- ☐ Jane Doe (0400000002)
- ☐ Jane Doe (040000002)
- ☐ Jane Doe (0400999999)
- ☐ Jane Doe (042424242)

Creating & sending a "Birthday Greeting" SMS Message

1. Select plans, contract period & search.
2. Select Recipients from the "Recipient List".
3. Enter your message into the "Message" field.
4. Click the Green Phone Icon (send key).
5. Your message will now be despatched to your intended recipient/s.

Postcode SMS Message (Marketing)

This function allows you to despatch a text msg based on demographics.

Short Message Service

External Msg Internal Msg Plans Birthdays **Postcode**

Search by Customer Postcodes between: 1000 and 3108

Only for Customers Accepting SMS Messages: ☐

Search ➔

ClickPOS

Message

0 / 1 send

- ☐ Belinda Wonder (0411000123)
- ☐ Cameron White (0404)
- ☐ Credit Note (0)
- ☐ Credit Note (01)
- ☐ Dolly Brown (040000003)
- ☐ Dolly Brown (040000987)
- ☐ Grace Giunta (0410 439 387)
- ☐ Henry Smith (78896478)
- ☐ Irene Small (0405555555)
- ☐ Jahan Spatchurst (12341234)
- ☐ James Russell (040000002)
- ☐ James Russell (123)
- ☐ James Russell (1233435456)
- ☐ James Russell (asd)
- ☐ Jane Doe (0400000002)
- ☐ Jane Doe (040000002)
- ☐ Jane Doe (0400999999)
- ☐ Jane Doe (042424242)

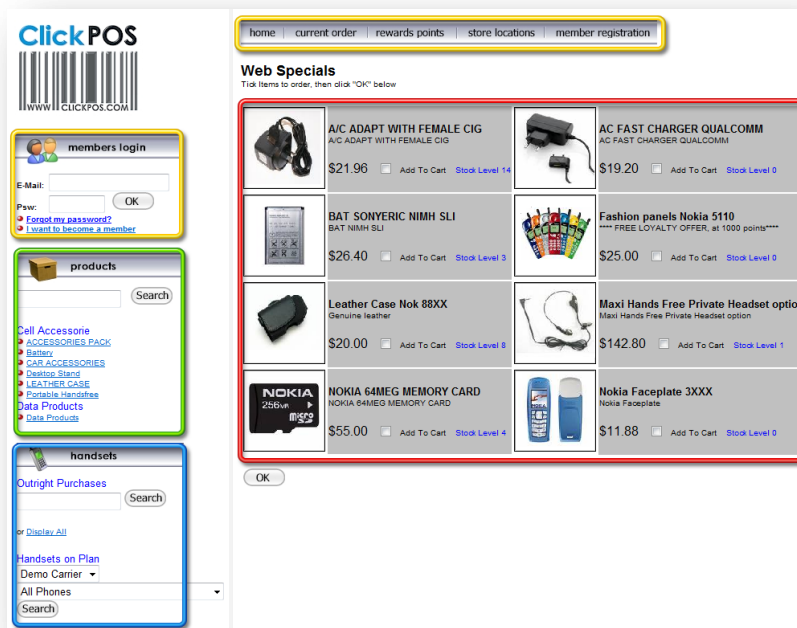
Creating & sending a Demographic SMS Message

1. Enter postcode range.
2. Optional: Tick "Only for Customers Accepting SMS Messages".
3. Select Recipients from the "Recipient List".
4. Enter your message into the "Message" field.
5. Click the Green Phone Icon (send key).
6. Your message will now be despatched to your intended recipient/s.

5.1.2 Web Sales

Offers a link to your own ecommerce site provided by ClickPOS.

This site can be used to advertise specials and also shows the customer what plans and devices are available (Telecommunication only).



Maintaining Web Sale Stock & Web Specials overview

ClickPOS offer a simple method of attaching your stock into a neat online catalogue that can be utilised by your staff and the client.

Stock must be designated as Web Sale and/or Web Specials with the product catalogue. You may also upload images to correspond with the item.

Websales automatically looks at stock levels and plan templates. So the end user can feel comfortable knowing they can check phone/plan combinations quickly and without the need to contact the store. Please note:

Websale does not link to an e-commerce backend, so if you would payments to be processed through Websales contact ClickPOS support for more information.

Setting a product line as Web special or Web sale item

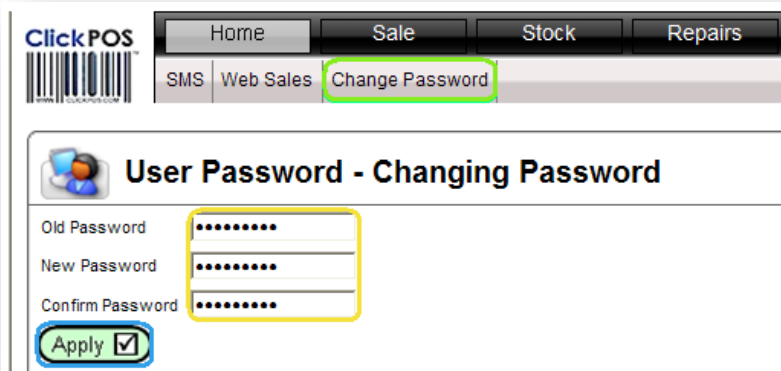
1. Navigate to Stock → Product Maintain → Search existing catalogue for items that you wish to designate as web items.
2. Edit mode for the selected product.
3. Tick the "Display on Website" checkbox (sets items as active via websales).
4. Tick "Website Special" if you would like this to be seen as an Item "on sale" or "Special".
5. Click Apply to save changes.
6. Would like images? If so, call ClickPOS support for more information and training.

5.1.3 Change Password

Ability to change personal password

- ***Your password should be changed on regular basis for security purposes and to stop possible fraudulent behaviour within the business. We advise your password to be kept confidential at all times.***

1. At the home screen navigate to the “Change Password”.
2. Enter in current password followed by new password and press “Apply”.



ClickPOS

Home Sale Stock Repairs

SMS Web Sales **Change Password**

User Password - Changing Password

Old Password

New Password


Confirm Password

Apply ☒

Print out barcode staff ID's

- ***Each staff can use an ID Card to log into ClickPOS.***

1. To print the ID Card the specific user needs to click “Change Password” on the “Home” Tab.
2. Click on the “Here” hyperlink under “Staff Identification Card” and this will print off the users unique ID Card.



ClickPOS

Home Sale Stock Repairs Reports Accounts

SMS Web Sales **Change Password**

User Password - Changing Password

Old Password

New Password

Confirm Password

Apply ☒

Staff Identification Card

Click [Here](#) to print ID card.

Use the ID card to login to the system quicker.

The ID card will be printed for the user that is currently logged into the system.

Print ID card, then cut it to size to fit into a plastic ID insert.

John C.

Telecommunications

5.2 Sale - Create Sales, quotes, Lay-bys and more

Sale Screen Overview – Video Tutorial 

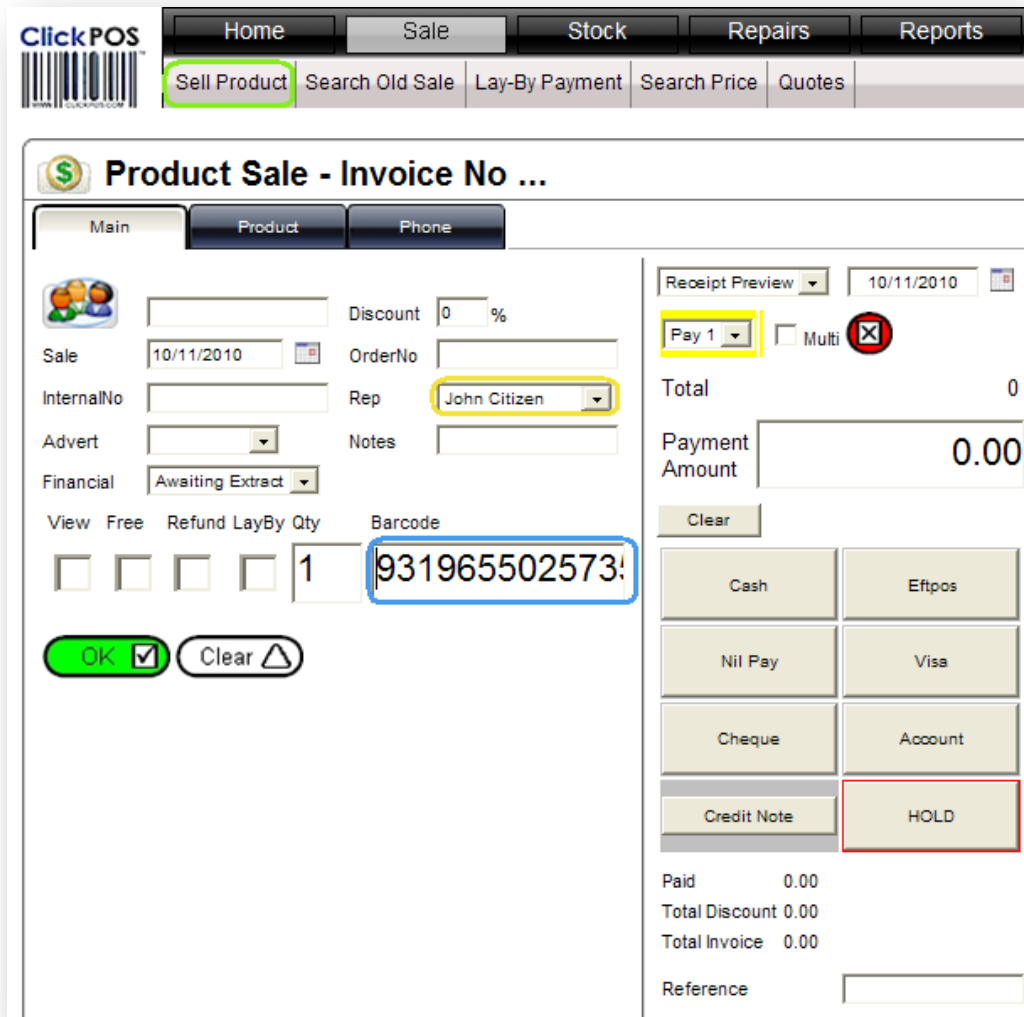
Payment Tender Options – Video Tutorial 

5.2.1 Basic Product Sale

- *Selling out a product that doesn't have a specific serial number and that has a barcode would be considered a basic sale.*

Creating a Basic Sale – Video Tutorial

1. Navigate to the “Sale” Tab & click on “Sell Product”.
2. Drop down from the “Rep” list and choose a Sales Representative.
3. Scan the products barcode in the barcode field.



The screenshot shows the ClickPOS interface for creating a basic product sale. The top navigation bar includes 'Home', 'Sale', 'Stock', 'Repairs', and 'Reports'. The 'Sale' tab is active, and the 'Sell Product' button is highlighted. Below the navigation bar, the 'Product Sale - Invoice No ...' screen is displayed. The 'Main' tab is selected, and the 'Product' sub-tab is active. The 'Rep' dropdown is set to 'John Citizen'. The barcode field contains '931965502573!'. The 'HOLD' button is highlighted in red. The 'Payment Amount' is 0.00. The 'Total' is 0. The 'Paid' amount is 0.00. The 'Total Discount' is 0.00. The 'Total Invoice' is 0.00. The 'Reference' field is empty.

4. The product will be displayed on the invoice with the sale price and quantity.

 **Product Sale - Invoice No 310950**



Discount %

Sale

OrderNo

InternalNo
Rep

Advert
Notes

Financial

View ☐ Free ☐ Refund ☐ LayBy ☐ Qty Barcode

☒

Product	Qty	Item	Sale
Leather Case Force Nokia 6120	1	19.95	19.95 Delete

- Finalise the sale by clicking on the payment type (E.g. Cash, Eftpos, and Amex).

5.2.2 Adding Customers to Invoices

- Adding a customer to the invoice is normally done when selling out a product with a serial number or selling out a mobile plan.*

Customer Screen Overview – Video Tutorial



- Navigate to the “Sale” tab & click “Sell Product”.
- Click on the customer Icon to enter in customer details.

ClickPOS 

 **Product Sale - Invoice No ...**



Discount %

Sale

OrderNo

InternalNo
Rep

Advert
Notes

Financial

View ☐ Free ☐ Refund ☐ LayBy ☐ Qty Barcode

☒

The following screen has multiple tabs to that can be filled edited. For a standard customer you can just fill in the “Bill To” tab. This is where basic information about the customer is held, such as Name, Address, Contact Number and Company details. You can also select the method of how they should be contacted for future promotions and advertising (on this page only the name is mandatory).

5.2.3 Advanced Product Sale


- *If a product doesn't have a barcode to scan in or if you don't physically have the stock item you will have to search for that item.*
1. Navigate to the “Sale” tab & click “Sell Product”.
 2. Click on the “Product” tab.

3. You can search for a product through multiple fields such as Product Descriptions, Barcode, Name, Code, Category etc...

5.2.4 Phone Sale

- *Selling out a phone with a plan is done in a few steps.*

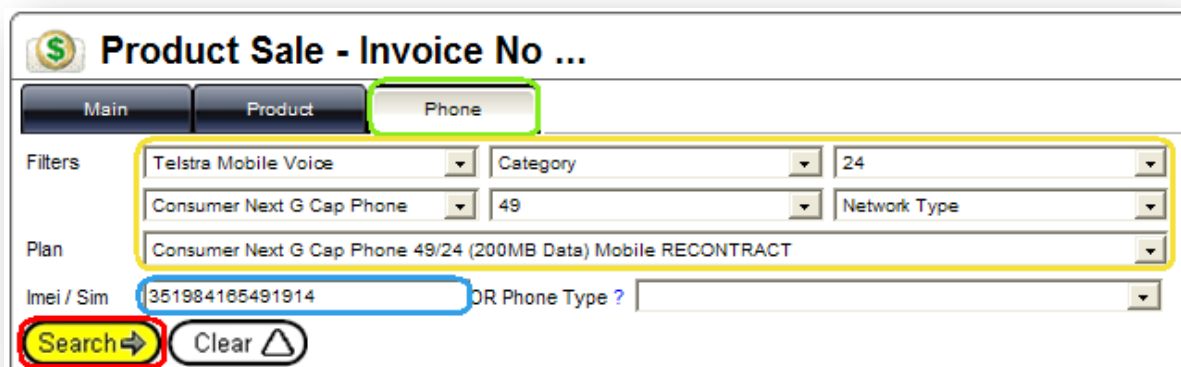
Phone Sale Overview – Video Tutorial 

Phone Sale Example – Video Tutorial 

Editing an Existing Phone Sale – Video Tutorial 

Telstra MRO Phone Sale – Video Tutorial 

1. Navigate to the “Sale” tab & click “Sell Products”.
2. Click on the customer icon to enter in customer details.
3. Click on the “Phone” tab to select the phone/plan combination.



4. Use the product filter to narrow down the correct plan/phone combination (a \$49 Consumer Cap Plan will be used for this example).
5. Enter in the IMEI Number and select “Search”.
6. Several more Tabs appear which can be filled in depending whether the handset is an MRO, the customer is an Account level customer, the item is shipped or the landline installation details are required. You will need to enter in the customers Mobile number and choose whether the contract has commission due (inside 90 days of contract) or not.
7. Select “OK” and you will be returned back to the main screen.
8. Confirm the details are correct and complete the sale by clicking “NIL PAY”.

Phone/Plan	Imei	Mobile	Sale
Apple iPhone 4 32GB/Consumer Next G Cap Phone 49/24 (200MB Data) Mobile RECONTRACT	351984165491914	0412345678	0.00 Delete

5.2.5 Lay-By Sale

- *Lay-By is a way a customer can make payments towards a product in instalment.*

Layby Sale and Tracking Payments – Video Tutorial 

1. Navigate to the **"Sale"** tab & click **"Sell Product"**.
2. Choose a customer from the Customer icon.
3. Scan in or select a product from the **"Product"** tab.
4. Click on the LayBy checkbox and in this case the customer wishes to make a payment of \$20 towards the product.
5. Type \$20 in the payment amount field and select the payment method (E.g. Cash, Credit).

Product Sale - Invoice No 310951

Main | **Product** | Phone | Ship To

Cust. No. 230
Jane Smith

Discount 0 %

Sale 10/11/2010 OrderNo

InternalNo Rep John Citizen

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

OK ☒ Clear ☐

Product	Qty	Item	Sale
Nokia Bluetooth Headset BH-300	1	199.00	199.00

Receipt Preview 10/11/2010

Pay 2 ☒ Multi ☒

Total 199.00

Payment Amount 179.00

Clear

Cash Eftpos

Nil Pay Visa

Cheque Account

Paid 20.00

Total Discount 0.00

Total Invoice 199.00

6. Now select **"Nil Pay"** to put the remaining amount into outstanding.
7. This amount will now show as owing under this invoice number for this customer.
8. When the customer wants to pay the outstanding amount you will need to search for it. Select **"Search Old Sale"** and search previous sale by the many options under the **"Search type"**.

ClickPOS

Home | **Sale** | Stock | Repairs

Sell Product **Search Old Sale** Lay-By Payment Search Price Quotes

Sale Search

Sale Search

Search Type Date

Branch All

Date From 10/11/2010 To 10/11/2010

Search

9. Once the old sale is found it will show the Customers name, amount owing and original sale date. Click on the invoice number hyperlink to finalise sale.

<input type="checkbox"/> Invoice	Name	Company	Sale Location	Sales Rep	Sale Date	Total Amt	Paid Amt	Due Amt	
<input checked="" type="checkbox"/> 310951	Jane Smith		Head Office	John Citizen	10/11/2010	199.00	20.00	179.00	Full Details

- Take the remaining payment for the product or you can repeat this process for multiple payments.

5.2.6 Performing a Refund

- Perform a refund if you want to bring the product back into stock and reversing the payment.*

Performing a Refund – Video Tutorial



- Navigate to the “Sale” Tab & click “Sell Product”.
- Click on the “Refund” checkbox.
- Enter in the invoice number and select the “Refund” hyperlink next to product.

Product Sale - Invoice No 310952

Cust. No. 230
 Jane Smith

Discount 0 %

Sale 10/11/2010 OrderNo

InternalNo Rep John Citizen

Advert

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

☐ ☐ ☒ ☐ 1

Product	Qty	Item	Sale
Nokia Bluetooth Headset BH-300	1	-199.00	199.00 Delete Refund

Receipt Preview 10/11/2010

Total -199.00

Payment Amount -199.00

- The refunded product will appear on screen and the amount to be refunded. Finalise refund by clicking on the payment method (E.g. Visa, Cash).

5.2.7 Applying Discounts

- This is when you want to discount the sale price of a product in stock. There are 3 different ways that a discount can be done.*

- Navigate to the “Sale” Tab & click “Sell Product”.
- Scan in product or select it from the “Product” Tab.
- Once the product is displayed in the invoice click on the product name hyperlink.

Product Sale - Invoice No 310960

Main Product Phone

Discount 0 %

Sale 11/11/2010 OrderNo

InternalNo Rep John Citizen

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

OK Clear

Product	Qty	Item	Sale
Blueant Bluetooth X3 Micro HSet	1	99.00	99.00 Delete

4. In this field you can either put the dollar value of discount in the **"Discount"** field or you can manually change the price in the **"Sale Price"** field.

Product Blueant Bluetooth X3 Micro HSet

Notes

Purch Price 71.50 Retail Price 99.00

Tax % 10.00 Discount 0.00

Status 0 Sale Price \$ 99.00

5. Once price has been changed press the **"OK"** button and process the sale as normal.
6. The 3rd option is to enter in the discount percentage in the **"Discount"** field on the main sale screen. You must do this before the product is added and it will automatically discount the product.

Product Sale - Invoice No 310960

Main Product Phone

Discount 10 %

Sale 11/11/2010 OrderNo

InternalNo Rep John Citizen

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

OK Clear

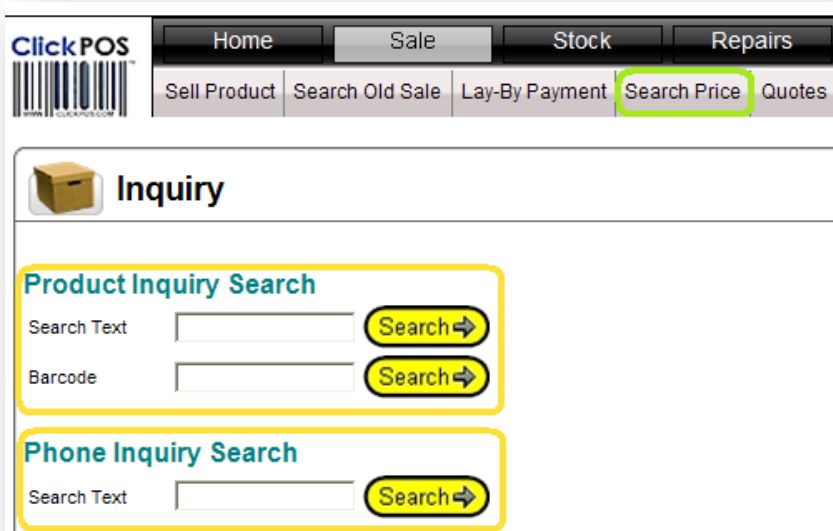
Product	Qty	Item	Sale
Blueant Bluetooth X3 Micro HSet	1	89.10	89.10 Delete

5.2.8 Price lookup

- You can perform a price lookup if you don't physically have the stock and you would to quote a customer.

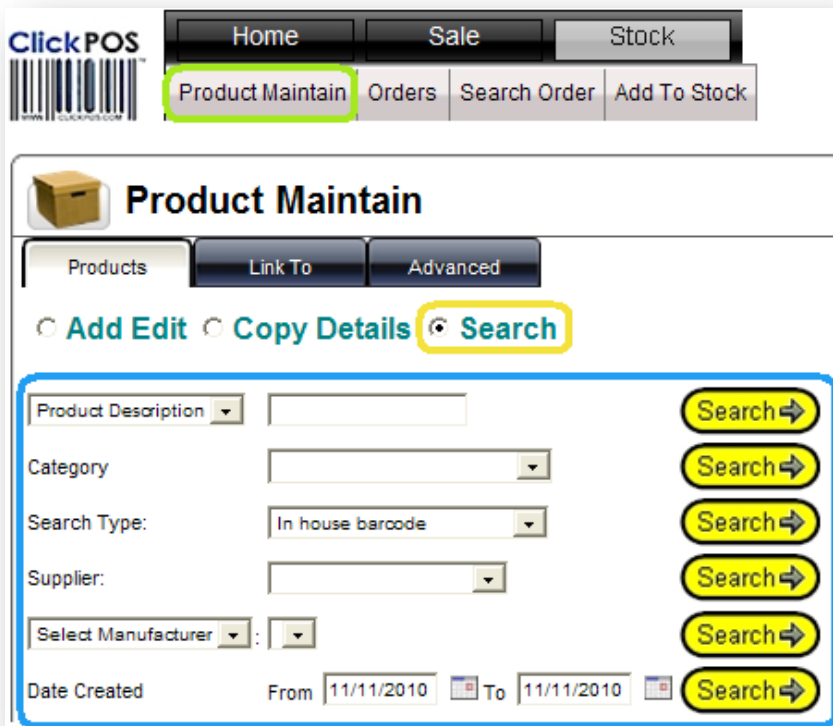
Search Pricing – Video Tutorial

1. There are several ways you can search for the price of a stock item. The easiest way would be to navigate to the “Sale” tab and “Search Price”. You have several fields in which you can search for a stock item’s price whether that item is in stock or not.



The screenshot shows the ClickPOS web interface. At the top, there is a navigation bar with tabs: Home, Sale, Stock, and Repairs. Below these, there are sub-tabs: Sell Product, Search Old Sale, Lay-By Payment, Search Price (highlighted with a green box), and Quotes. The main content area is titled 'Inquiry' with a box icon. Below this, there are two search sections: 'Product Inquiry Search' and 'Phone Inquiry Search'. Each section has a 'Search Text' input field and a 'Search' button with a magnifying glass icon.

2. Another option to search for a stock item’s price is to navigate to the “Stock” tab and “Product Maintain”. Click on the “Search” option and again you have multiple fields to help find the stock item if it’s in stock or not.



The screenshot shows the ClickPOS web interface. At the top, there is a navigation bar with tabs: Home, Sale, and Stock. Below these, there are sub-tabs: Product Maintain (highlighted with a green box), Orders, Search Order, and Add To Stock. The main content area is titled 'Product Maintain' with a box icon. Below this, there are three sub-tabs: Products, Link To, and Advanced. The 'Search' option is selected and highlighted with a yellow box. Below the sub-tabs, there are several search fields: Product Description, Category, Search Type (set to 'In house barcode'), Supplier, Select Manufacturer, and Date Created (From 11/11/2010 To 11/11/2010). Each field has a corresponding 'Search' button with a magnifying glass icon.

5.2.9 Search Old Sale

- *Search Old Sales for editing or for Invoice Re-Prints*
- *There are many reasons for why you would need to search for an old sale, such as reprinting invoices or refunding an old sale.*

Search and Edit Old Sale – Video Tutorial



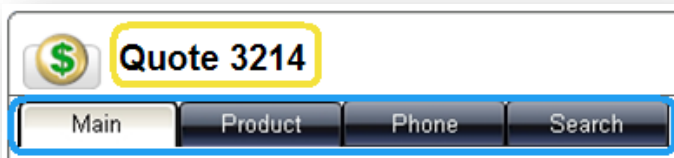
1. Navigate to the **"Sale"** Tab and then **"Search Old Sale"**. You can search for an old sale in many ways, such as Invoice No, Name, Mobile No, IMEI and Barcode etc...
2. Drop down the **"Search Type"** options and choose the desired option.

5.2.10 Quotes

- *Quote customer using stock lists and plan templates*
- *You can quote a customer for a product as well as a Phone & Plan combination.*

1. Navigate to the **"Sale"** Tab & click **"Quote"**.
2. You need to either choose an existing customer or create one.

3. Select a customer and it will add a **"Product"** & **"Phone"** tab. Under the **"Product"** tab you can search for a product to add into the quote. If you select the **"Phone"** tab you can select a phone for an outright quote or you can select a phone/plan combination.



4. Once the product is selected click “OK” and you will be directed back to the Main screen. Here you can adjust the price, quantity and print the Quote. Repeat process for multiple products,

Description	Colour	Notes	RRP \$	Sale Price \$	Quantity	Tax %	Discount \$	Total \$
Apple iPhone 4 32GB Outright Sale	Black		1200.00	1200.00	1	10.00	0.00	1200.00

5.3 Stock

- **Create products, orders, add items directly to stock, transfer stock between branches and Create Stock-takes.**

5.3.1 Product Maintain

- **Build new product lines. Maintain supplier info, Control stock levels & more.**

Maintain Product Catalogue Overview - Video Tutorial 

Maintain Product Catalogue – Video Tutorial 

1. Navigate to the “Stock” and “Product Maintain” to create a new stock item. Enter in the product description and details including the product Barcode, Product Supplier Code etc. Wherever there is a (*) that field is mandatory. You can add more Manufactures, Colour, Category’s and Suppliers from clicking on the blue hyperlinks next to that field. Be uniform in choosing Categories for reporting purposes.

ClickPOS

Home Sale Stock Repairs

Product Maintain Orders Search Order Add To Stock Add Phone To Stock

Product Maintain

Products Link To Advanced

Add Edit Copy Details Search

Date Created 11/11/2010

Barcode *

Sup.Prod.Code *

Manufacturer [Maintain Manufacturer & Colors](#)

Product Name *

Description

Colour

Category [Maintain Category](#) [Maintain Master Category](#)

Supplier [Maintain Supplier](#)

PAN

2. Continue to fill out the other fields such as Purchase Price and Sale Price. You can put in a Minimum RRP if you don't want the product to be sold under a certain value.
 - **"Add Tax on Purchase Price"** - You would leave this checkbox unless the purchase price didn't include tax.
 - **"In house barcode"** - If the product doesn't have a barcode you can print one for it and scan from catalogue.
 - **"Display on Website"** - If you want the product to be displayed on internal website.
 - **"Is Credit Note"** - If you need to issue credits to customers from refunded sales you need to have this checkbox ticked and create a product called "Credit Note"
 - **"Sell Without Entry in Stock"** - If you sell a product that you don't physically hold in stock such as Ebay or a service fee you should tick this checkbox.
 - **"Serialized Product"** - If an item has its own unique serial code tick this checkbox.
 - **"Website Special"** - Product will be displayed in the Special field on Website.
 - **"End Of Line (EOL)"** - You can tick on this checkbox if the item is no longer available
3. You can set also a Min & Max level for stock so you won't be able to over order the stock item.

Purchase price \$ 0

Tax Free Amount \$ 0

Tax % 10.00

RRP (Retail Price) 0

Minimum RRP 0

Commission Percentage 0

Weight 0

Height 0

Width 0

Length 0

End Of Line (EOL) ☐

Discontinued ☐

Branch Profile Superstore

Min 1 Max 5

OK Clear Delete

☐ Add Tax on Purchase Price ☐ Is Credit Note

☐ In house barcode ☐ Sell Without Entry In Stock

☐ Very Important (VIP) ☐ Serialized Product

☐ Display on Website ☐ Website Special

☐ Include In loyalty offer

4. Complete the entry by click on the **"OK"** button.

5.3.1.1 Changing Barcodes & Product Name

1. Navigate to **"Stock"**, **"Product Maintain"** and then click on the **"Advanced Tab"**.

The screenshot shows the ClickPOS web application interface. At the top, there are navigation tabs: Home, Sale, Stock, and Repairs. Below these, a sub-menu is visible with options: Product Maintain (highlighted with a green box), Orders, Search Order, Add To Stock, and Add Phone To Stock. The main content area is titled 'Product Maintain' and contains three sub-tabs: Products, Link To, and Advanced (highlighted with a yellow box). Under the Advanced tab, there are two sections: 'Change Product Name' and 'Change Product Barcode'. Each section includes a text input for 'Existing' and another for 'New', followed by an 'OK' button with a checkmark icon. A note below each section states: 'This area is used to change Product Names in the Product Catalogue, Stock, Order and Sale lists. Special characters "#%&'+'<>' cannot be typed for the New Name.'

2. Here you can change a Product Name and Barcode. Enter in the existing details followed by the new details and press **"OK"**.

5.3.2 Orders

- *Create Supplier Purchase Orders for stocked items*

5.3.2.1 Create Supplier

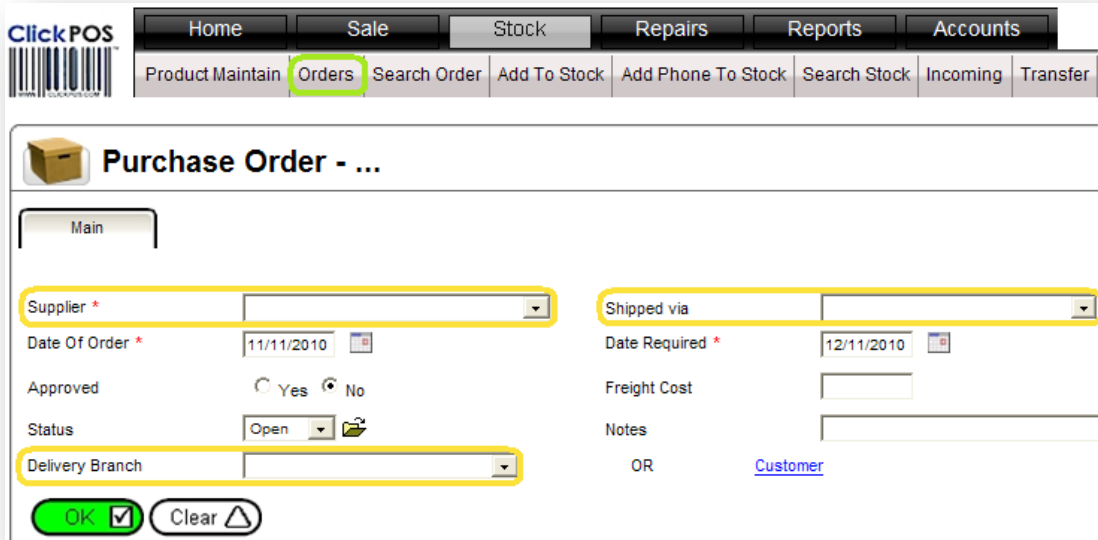
1. Navigate to **"Maintain"**, **"Card File"** and then **"Suppliers"**.
2. Enter the company details in followed by the **"Supplier Type"**. This field is important as it will determine how this Supplier/Company will be used.
 - **"Trade"** – Choose this If you order products to sell from this supplier.
 - **"Repairer"** – Choose this if you use this company as a repair agent only.
 - **"Shipping"** – Choose this if it is a courier company.

The screenshot shows the ClickPOS web application interface for 'Supplier Maintenance'. At the top, there are navigation tabs: Home, Sale, Stock, Repairs, Reports, Accounts, Maintain, and Card File. Below these, a sub-menu is visible with options: Tariff Plan, Card File (highlighted with a green box), System Admin, Time Sheet, and Global Reports. The main content area is titled 'Supplier Maintenance' and contains a form with various input fields. The 'Supplier Type' dropdown menu is highlighted with a blue box and shows 'Trade' selected. The form includes fields for Supplier Name, Address, Post/ZIP, Phone, Contact Name, Suburb, Email, Fax, and Supplier Account. At the bottom, there are 'OK' and 'Clear' buttons.

5.3.2.2 Purchase Orders

Purchase Order Overview – Video Tutorial


1. To place a Purchase Order from a Supplier navigate to **“Stock”** and **“Orders”**.
2. The main fields you need to enter in are the **“Supplier”**, **“Delivery Branch”** and **“Shipped Via”**.



ClickPOS

Home Sale **Stock** Repairs Reports Accounts

Product Maintain **Orders** Search Order Add To Stock Add Phone To Stock Search Stock Incoming Transfer

 **Purchase Order - ...**

Main

Supplier *

Date Of Order * 11/11/2010

Approved ☐ Yes ☒ No

Status Open

Delivery Branch

Shipped via

Date Required * 12/11/2010

Freight Cost

Notes

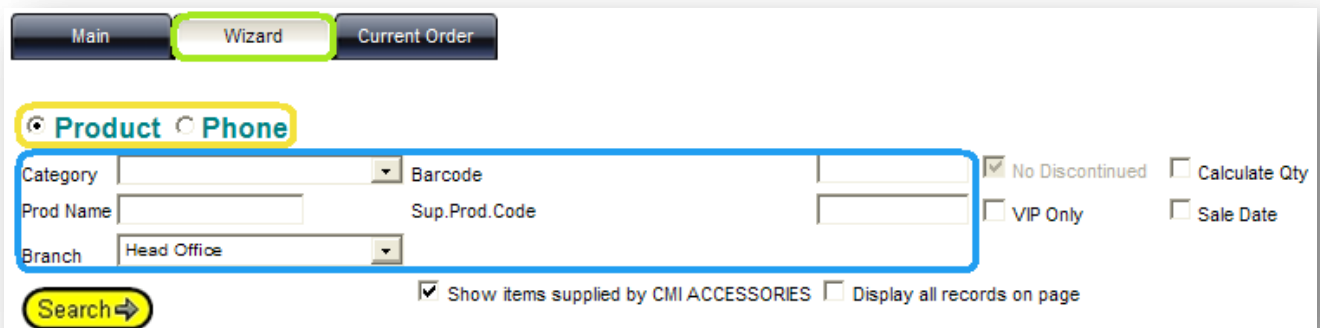
OR [Customer](#)

OK ☒ Clear

3. The **“Approved”** checkbox is used when the order is complete and approved by a Manager/Administrator. Click **“OK”** and a purchase order will be generated. Click on the purchase order hyperlink to add items.

ID	Supplier	Shipped via	Ordered By
 310104	CMI ACCESSORIES	Australia Post	ausert7

4. There are several ways of adding products to the purchase order. If you choose the **“Wizard”** tab you can search by Category, Barcode, Product Name and Supplier Product Code for a product. There is also Phone option where you can also search by Phone type.



Main **Wizard** Current Order

☒ **Product** ☐ Phone

Category Barcode


Prod Name Sup.Prod.Code

Branch Head Office

☒ No Discontinued ☐ Calculate Qty

☐ VIP Only ☐ Sale Date

☒ Show items supplied by CMI ACCESSORIES ☐ Display all records on page

Search 

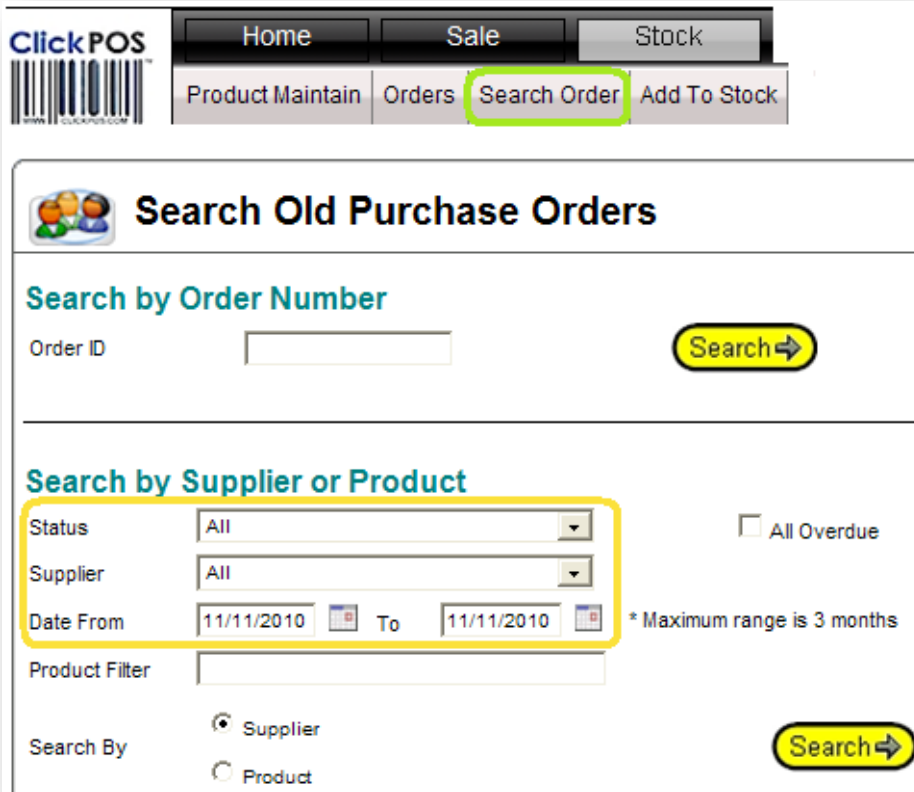
5. On the **“Current Order”** tab you see what items you have added to the current order. It also will allow you to make changes in the ordered amounts by clicking on the product displayed.

5.3.3 Search Order

- *Search Old and existing purchase order. These can be current, outstanding or old.*

Search old Purchase Order – Video Tutorial

1. To search for an old order navigate to **“Stock”** and **“Search Order”**. This will give you multiple fields in how you can search for any old purchase order such as **“Supplier”**, **“Date”** and **“Status”**. If you know the invoice number you can also enter this in and press **“Search”**.




5.3.4 Add product directly into Stock

- *Add items directly into stock without the need to place a purchase order first.*


Add Product directly into Stock – Video Tutorial

1. Navigate to **“Stock”**, **“Add To Stock”** and scan product in or look it up via the **“Product Category”**.
2. Once the product is selected check the product details are correct to what is stated on the invoice (Purchase Price, Supplier Product Code, Barcode etc). Enter in the amount of items received as well as the invoice number. Only check the **“Add Tax on Purchase Price”** if the purchase price doesn't include tax. It is recommended to include tax in Purchase Price amount.
3. Complete the stock entry by pressing **“OK”**.

ClickPOS 

Home Sale **Stock** Repairs Reports Accounts

Product Maintain Orders Search Order **Add To Stock** Add Phone To Stock Search Stock Incoming Transfer

 **Incoming Stock**

Stock - Add Product

Supplier	Force	Supplier Invoice Number	00112233
Sup.Prod.Code	L-5612	Order Reference	
Packing List Number		Qty	10

Product	Leather Case Force Nokia 6120	Purchase Date	12/11/2010
Purchase price \$	5.00 <input type="checkbox"/> Add Tax on Purchase Price	Sale Price \$	19.95
Branch	Head Office	Entry Date	12/11/2010
Tax %	0.00	Tax Free Amount \$	0

☐ No Duplicates


Barcode	9319655025735	Serial Number	
---------	---------------	---------------	--

5.3.5 Add Phone to Stock

- Add Telecommunication devices directly into stock without the need to place a purchase order first.


Add Phone into stock – Video Tutorial 

1. Navigate to “**Stock**”, then “**Add Phone To Stock**”.
2. On this screen you will need to Select the Supplier, Phone, enter in the Supplier Invoice Number and scan in the IMEI/Serial numbers of the select device. You can scan multiple IMEI’s in the same field.
3. Once all the IMEI’s are entered in complete stock in by pressing “**OK**”.

ClickPOS 

Home Sale Stock **Repairs** Reports Accounts **Maintain**

Product Maintain Orders Search Order Add To Stock **Add Phone To Stock** Search Stock Incoming Transfer Change Prices

 **Incoming Stock**

Stock - Add Phone or Sim

Supplier	Telstra CLOC	Supplier Invoice Number	R123456
Phone	Apple iPhone 4 32GB	Order Reference	
Colour	Black	Packing List Number	
Purchase price \$	990	Tax %	10.00 <input type="checkbox"/> Add Tax on Purchase Price
Imei / Sim	351234561234561 351234561234562 351234561234563 351234561234564 351234561234565	Sup.Prod.Code	111555
		Purchase Date	12/11/2010
		Branch	Head Office
		Entry Date	12/11/2010

5.3.6 Search Stock

- *Search items in Stock and also items that can be ordered which are not in stock*

1. Navigate to **"Sale"**, then **"Sell Product"**.
2. Click on the **"Product"** tab to search for the stock item.
3. You have two options to search for a stock item. You have the **"Search In Catalogue"** and **"Search In Stock"** fields. If you are searching for an item that is NOT in stock or it is an item that you don't physically have such as a Service Charge or an Epay use the **"Search In Catalogue"** field. Searching for any product that is in stock and isn't serialised use the **"Search In Stock"** field.

ClickPOS

Home Sale Stock

Sell Product Search Old Sale Lay-By Payment Search Price

Product Sale - Invoice No ...

Main Product Phone

Search In Catalogue Search In Stock

Product Description [] Search

Category [] Search

Search Type: In house barcode Search

Supplier: [] Search

Select Manufacturer [] Search

5.3.7 Incoming

- *Receive Incoming supplier purchase orders*

1. Navigate to **"Stock"**, then **"Incoming"**.
2. Drop down the Supplier from the list and enter in the Supplier Invoice Number.
3. Press **"Search"**.

ClickPOS

Home Sale Stock Repairs Reports Accounts

Product Maintain Orders Search Order Add To Stock Add Phone To Stock Search Stock Incoming Transfer

Incoming Stock

Incoming Transfers
Click Search to view incoming stock transfers from company owned stores in transit to Head Office Search

Incoming Purchase Orders
Incoming stock delivered from suppliers

Supplier Force Search


Supplier Invoice Number F987854

Packing List Number []

Freight Cost 0 ☐ Check to add tax to freight

Supplier Invoice Date 12/11/2010 Search

- You will be directed into the Purchase Order where you need to tick the checkboxes of the stock items you have received from the Supplier. If it is a product that is serialised you will be required to click on the “**Add Manually**” hyperlink to enter in the IMEI/Serial numbers.


Incoming Stock

Incoming Purchase Order
Supplier
Supplier Invoice Number F987654
Packing List Number
Freight Cost \$0.00
Supplier Invoice Date 12/11/2010

Force
Order ID: [310106](#) Ordered By: Head Office Ordered Date: 12/11/2010 Required By: 13/11/2010 Approved: True Sent to Supplier: False

Description	Barcode	Sup.Prod.Code	Ord. Qty	Rec. Qty	Tot Qty Received	Unit Price	Total	Tick Products Received	
Leather Case Force Nokia 6120	9319655025735	L-5612	10	0	0	\$5.00	\$50.00	<input checked="" type="checkbox"/>	Add Manually
LG 9100 Leather Case	93125465	C-Is91	5	0	0	\$9.95	\$49.75	<input checked="" type="checkbox"/>	Add Manually
Total			15	0	0		\$99.75		

- Press “**OK**” to complete stock in.

5.3.8 Transfer

- Transfer stocked items and telecommunication devices between branches and to reps.*

Transfer Stock to another Branch – Video Tutorial




Accept Stock from another Branch – Video Tutorial



- Navigate to “**Stock**”, then “**Transfer**”.
- Under “**Branch**” choose the location you wish to send the items to and enter in consignment number or Name of staff member.
- For products without a serial number scan them in under the “**Product Transfers**” field and choose the quantity. For phones and items with an IMEI/ Serial number scan the IMEI/Serial of the device under the “**Phone Transfers**” field.

ClickPOS
Home Sale **Stock** Repairs Reports Accounts Maintain
Product Maintain Orders Search Order Add To Stock Add Phone To Stock Search Stock Incoming **Transfer** Change Prices


Transfer Stock To Another Branch


Branch: Melbourne
Consignment No.: John Smith OR John Smith
Transit Date: 12/11/2010
On Transit?: ☒ (Tick to confirm acceptance, untick to transfer directly)

Back OK Clear

Product Transfers
Enter barcode and corresponding quantity.
Barcode: 9319655025735 Quantity: 5

Phone Transfers
Enter IMEESN/SIM to transfer.
IMEESN/SIM: PhoneNotes:

4. Press “OK” to confirm stock items for transfer. This will now give you the option to print a consignment for the transfer and display the details of transfer.

 **Transfer Stock To Another Branch**

[Print on A4](#)

Incoming Transfers

[Print Consignment List with Epson T88](#)

Date :12/11/2010 Consignment No. :John Smith

From Branch
Head Office


To Branch
Melbourne
My Shop pty ltd
323 Johnston Street,
Collingwood VIC

Product List

Barcode	Product	Qty	Cost Price
9319655025735	Leather Case Force Nokia 6120	5	\$25.00


Total Purchase Price \$25.00
Grand Total Purchase Price \$25.00

5. To receive the stock you must be logged in under the other Branch/Store. Navigate to “Stock”, “Incoming” and then press “Search” to find any incoming orders.

 **ClickPOS**

Home Sale **Stock** Repairs Reports Accounts

Product Maintain Orders Search Order Add To Stock Add Phone To Stock Search Stock **Incoming** Transfer


 **Incoming Stock**

Incoming Transfers

Click Search to view incoming stock transfers from company owned stores in transit to Melbourne


Search ➔

6. You will be able to see any active incoming transfer for products and phones. For products and phones all you need to do is click on the “Tick” button next to the stock item to complete transaction.

 **Incoming Stock**

Stock - Transit Items ☐ Show All

Products in Transit

Barcode	Product	From Branch	Consignment No.	Qty	Rec.Qty	Accept
9319655025735	Leather Case Force Nokia 6120	Head Office	John Smith	5	5	

5.3.9 Change Sale Prices

5.3.9.1 Change sale price of stocked items

1. Navigate to **“Stock”**, then **“Product Maintain”**.
2. Use the **“Search”** field to find the product using the multiple search options.
3. After selected product is chosen it will display all information about this product including the RRP. Make the required adjustments to price and click **“Apply”**.

ClickPOS Home Sale Stock Repairs
Product Maintain Orders Search Order Add To Stock Add Phone To Stock

Product Maintain
Products Link To Advanced

☒ Add Edit ☐ Copy Details ☐ Search

Date Created: 10/06/2008
Barcode *: 9319655025735
Sup. Prod. Code *: L-5612
Manufacturer: [Maintain Manufacturer & Colors](#)
Product Name *: Leather Case Force Nokia 6120
Description:
Colour:
Category: Case - Leather (Phone Accessory) [Maintain Category](#) [Maintain Master Category](#)
Supplier: Force [Maintain Supplier](#)
PAN:
Purchase price \$: 5.00 ☐ Add Tax on Purchase Price ☐ Is Credit Note
Tax Free Amount \$: 0.00 ☐ In house barcode ☐ Sell Without Entry In Stock
Tax %: 0.00 ☐ Very Important (VIP) ☐ Serialized Product
RRP (Retail Price): 19.95 ☐ Display on Website ☐ Website Special
Minimum RRP: 17.95 ☐ Include In loyalty offer

5.3.9.2 Change sale price of a phone

1. Navigate to **“Maintain”**, **“Tariff Plan”**, **“Plan Template”** and then the click the **“Phone”** tab.
2. Click on the **“Search”** field and enter in the phone name and click on the **“Search”** button.

ClickPOS Home Sale Stock Repairs Reports Accounts Maintain Card File
Tariff Plan Card File System Admin Time Sheet Global Reports

Tariff Plan
Carrier Plan Phone Plan Template Update Wizard

☐ Add Edit ☐ Copy Details ☒ Search

Phone Name: apple iphone 4 ☐ Show EOL
Search By: All
Search

<input type="checkbox"/>	Name	Tax %	Tax Free Amount \$	Price	RRP
<input type="checkbox"/>	Apple iPhone 4 16GB	10.00	0.00	836.00	1100.00
<input type="checkbox"/>	Apple iPhone 4 32GB	10.00	0.00	990.00	1200.00

3. The RRP field will now be displayed for the specified phone and update price as required.

5.3.10 Faulty Replacement

- Add faulty items into stock which have been linked from the repairs area.

1. Navigate to “Repairs”, “Repair/Service” and click the “Phone” search field to enter in the IMEI details.

ClickPOS Home Sale Stock Repairs Reports Accounts Maintain

OBF - Out of Box Failure Repairs/Service

Repair

Main Search

Repair contact details

Contact Name Mobile No Email

Product Phone

Imei 012345678945612 SIM Mobile No Sale Invoice No Lock Code Call Timer Warranty Insurance Claim Number OrderRefNo

Model Supplier Pin Sale Date Sales Rep John Smith Insurance Company/Branch

Clear

Imei	Invoice	SIM	Prod Desc	Mobile No	Purchase Date
<input checked="" type="checkbox"/> 012345678945612	310968		Apple iPhone 4 16GB	0404945612	15/11/2010

**Top 20 Results Only

2. Select the IMEI by clicking on the green tick box.
3. Click on the “Replacement Items” tab and click on the “Supplier will replace faulty item” checkbox. In doing this it will create a purchase order so when the new phone is delivered you can receive it.

ClickPOS Home Sale Stock Repairs Reports

OBF - Out of Box Failure Repairs/Service

Repair

Main Job Description Loan Item Replacement Items History Search

Replacement Item Given to Customer (Swap Faulty Item in Sale):

☒ Supplier will replace faulty item with a New/Refurbished one(Must tick this option to receive stock from supplier.)

Replace Phone * Use this area to change the faulty IMEI in sale with a new one from stock

* ☐ Tick here to Return Phone to Stock

Existing IMEI 012345678945612 Replacement IMEI OK ☒

Repairer Replacement * Enter replacement IMEI without affecting stock or sale

Replacement IMEI OK ☒

Parts Replaced/Other Charges

Search Type to begin search

Barcode Part/Charge Description

- Navigate to **"Stock"**, **"Faulty Replacement"** and there you should see the phone for replacement. Once stock has been received from supplier click on the **"Add to Stock"** hyperlink.

Repair ID	Supplier	IMEI/Barcode	Supplier Invoice Number	Packing List Number	Order Reference	Description	Branch	Repair Date	
75		356929020082699				HTC Touch Diamond (Next G)	Melbourne	16/11/2009	Add To Stock
119	Telstra Cloc	012345678945612	r987654			Apple iPhone 4 16GB	Head Office	15/11/2010	Add To Stock

- Choose from the dropdowns the Supplier and colour of handset. Enter in the Invoice Number and new IMEI and the purchase price should be \$0.

- Go back into the customer repair and click on the **"Replacement Item"** tab. Enter the new IMEI into the **"Repairer Replacement"** field and click **"OK"**. You will now receive confirmation of the IMEI swap and this will also take the new IMEI out of stock.

5.3.11 Stock-take

- Create Stock-takes, enter count & compare variance

Performing a Stocktake -

1. Navigate to **“Stock”** and then **“Stocktake”**. Here you can choose whether you would like to perform a **“Phones only”**, **“Products only”** or an **“All”** stocktake. **“All”** will be chosen for this exercise.

ClickPOS

Home | Sale | **Stock** | Repairs | Reports | Accounts | Maintain | Card File

Product Maintain | Orders | Search Order | Add To Stock | Add Phone To Stock | Search Stock | Incoming | Transfer | Change Prices | Faulty Replacement | **Stocktake** | Stock Confirmation

Stocktake

This module provides the user with the facilities to reconcile the stock in the system with the physical stock. To perform a stocktake, you are required to take a "Snapshot" of the existing stock in the system, then count and enter all items into the system to produce a comparison report.

Create SnapShot - Perform Step 1 [All] **OK** ✓

Click OK to create a snapshot copy of the physical stock in the system for the branch you are currently logged into.

Product Catalogue List **OK** ✓ **Phone List** **OK** ✓

Print a list of all the products in the system, to manually record the stock quantity. Then use the barcode on the list to scan in quantities when performing a physical stock count. You do not need to produce this list if you are using a you are manually scanning the actual product barcode directly into the system.

Produce Stocktake Report For All Branches **OK** ✓

Perform Stocktake For Branch Head Office

ID	Type	Date/Time Begin	Date/Time End	Approved By	Step 2 Add Stock Count	Edit Count	Enter Notes	Compare & Print	Step 3 End Stocktake
<input type="checkbox"/>	24	All	15/11/2010 11:19 AM	Incomplete	OK ✓	Edit	Notes	Compare Report	End Stocktake

2. You will now see the new stocktake. Click on the **“OK”** button to start scanning the items in.

ID	Type	Date/Time Begin	Date/Time End	Approved By	Step 2 Add Stock Count	Edit Count	Enter Notes	Compare & Print	Step 3 End Stocktake
<input type="checkbox"/>	24	All	15/11/2010 11:19 AM	Incomplete	OK ✓	Edit	Notes	Compare Report	End Stocktake

3. A window will now appear so you can start scanning in the items. There are two ways you can scan the items in. You can either scan in multiples of the same item by scanning in the item in the top field and choosing the amount (This only works for accessories/products). The second option is to scan them in individually on the bottom field. NOTE: For serialised devices you must scan the serial only into the second field.

Add Stock Count

Stocktake ID 24 All

Use this screen to perform a physical stock count in the system. You have two options of adding a physical stock quantity. You may use one or both while stocktaking;

Scan by Quantity

You may specify the quantity then scan the barcode. You may also use this option to scan the same item many times given the quantity is 1.
Eg. Scan the same barcode 5 times with quantity 1.

Quantity:

Barcode: **OK** ✓

Scan Each Barcode

Use this option for scanning each product more than once. In this option you cannot specify a quantity as it is defaulted to 1. You must SCAN ALL ITEMS, useful for those that use a portable scanner to scan all items on the shelves, or copy and paste all barcodes taken from a portable scanner.

OK ✓

4. Once all items have been scanned in, close down the window and click on the **“Compare Report”** hyperlink to see any discrepancies. If you accidentally over counted an item you can adjust it from the **“Edit”** button. This field should only be used to remove stock, not to add. If you have under counted a product, add it into the stocktake by pressing the **“OK”** button and scan the product in. NOTE: You can only perform a stocktake with products that either have a barcode or an in-house barcode.
5. To adjust the stock levels to what the stocktake report says you first need to either print the **“Compare Report”** information or print it to a soft copy on your computer (.xps file).
6. Click on the **“End Stocktake”** hyperlink to finish stocktake.
7. All of the missing stock now needs to be taken out of the system using the report you now have. You first should create a Sales Consultant and a customer called **“Stocktake”** for tracking purposes.
8. Navigate to the sales screen and sell out all of the stock items you have missing at \$0. This will take the stock out of the system at the purchase price and will show as a negative dollar amount for the day.

1. Once you have received the stock into the system you should perform a stock confirmation to make sure that the invoice matches what has been entered. Navigate to **"Stock"** and **"Stock Confirmation"**.
2. Enter in the supplier invoice number in the search field and press **"Search"**. The system will now bring up all of the items that have come in under that supplier invoice number.

4. If all of the prices are correct the stock controller can now print the report and attach it to the supplier invoice.

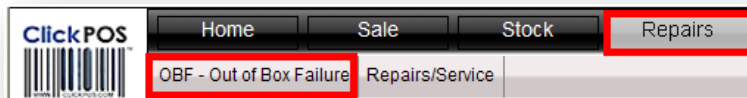
5.4 Repairs

- *Log and monitor repair/ service jobs*
- *Useful in warranty situations*
- *A must for the telecommunications industry*

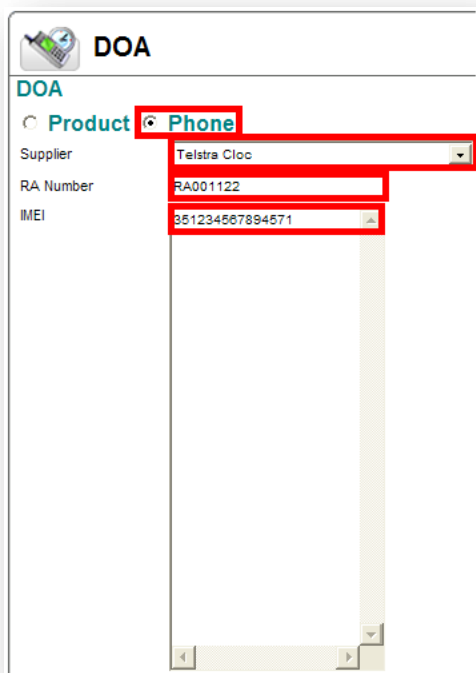
5.4.1 OBF - Out of box failure (DOA)

- *Log and return faulty stock back to supplier for a replacement or credit note*

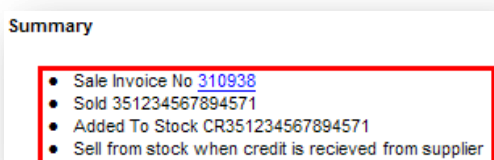
1. Navigate to the “Repairs” tab & then the “OBF/DOA” option.



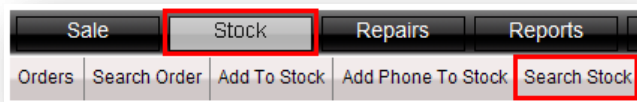
2. Select “Phone”, “Supplier”, enter in RA number & IMEI.



3. Press “OK” & you will be given a summary with the raised Credit Note. This will also put the system into negative GP until credit note is received.



- Once you receive a Credit Note from the supplier you need to remove the item from stock. Click on **"Stock"** & **"Search Stock"** to find item to remove.



- Select the **"Phone"** option and enter **"CRNOTE"** in the name field to search for faulty IMEI number.

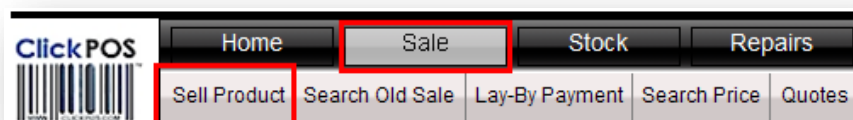
The screenshot shows the 'Search Stock' form. The 'Main' tab is selected. Under 'Search By', the 'Phone' radio button is selected and highlighted with a red box. The 'Name' field contains 'CRNOTE' and is also highlighted with a red box. There are 'Search' buttons next to the Name, Imei, Category, Status, and Purchase Date fields. The Status field is set to 'Faulty Stock'.

- Copy the IMEI number starting with CR.

IMEI/Barcode	Description	Colour	Consignment No.	Status	Purchase Date	Store	Supplier
CR5544887799778855	CRNOTE	Black			18/02/2010	Head Office	Brightstar/Telstra RFO
CR356859894546845	CRNOTE	White			16/10/2009	Head Office	Telstra Cloc
CR21361641611313131	CRNOTE	none			19/02/2010	Head Office	Telstra Cloc
CR351234567894571	CRNOTE	Grey			8/11/2010	Head Office	Telstra Cloc
CR987654321	CRNOTE	Black			23/07/2008	Melbourne	Brightstar/Telstra RFO
CR356929020082699	CRNOTE	Black			16/11/2009	Melbourne	Telstra Cloc

At the bottom left of the table, there is a 'Delete' button with a red 'X' icon. Below the table, there is a 'Warehouse Labels' button.

- Enter the sales screen by clicking on the **"Sale"** tab followed by the **"Sell Product"** field.



- For tracking purposes create a customer that's specific to the supplier (E.g. TELSTRA CLOC RETURNS) & use the same customer for any future returns through that supplier. Click on the **"Phone"** tab.

Product Sale - Invoice No ...

Main Product **Phone**

TELTRA CLOC RETURNS

Discount 0 %

Sale 8/11/2010 OrderNo

InternalNo Rep

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

OK ☒ Clear

9. Enter the CR number in the “IMEI” field and press “Search” to sell it out as an outright sale.

Product Sale - Invoice No ...

Main Product **Phone**

Filters Carrier Category Months

Plan Type Value Network Type

Plan Outright Sale

Imei / Sim **CR351234567894571** OR Phone Type ?

Search

10. In the “Mobile No” field enter in your CR number and press “OK”.

Ph Details Services Account Other Shipping Landline

Handset Details

Mobile No **CR223344**

Phone Type CRNOTE

Colour Grey

Sale Price \$		Service Provider	
Sale	0.00	Con Ref	
RRP (Retail Price)	0.00	Carrier	Outright Sale
Discount	0.00	Active	8/11/2010
Tax %	10.00	Months	0 End
Credit No.		Notes	
SIM		Comm Due	Yes <input type="checkbox"/> Multi
Purchase price \$	-427.13	Inv Notes	

OK ☒

11. There will be no sale price in the transaction and click “NIL PAY” to complete the sale. This will add a credit back into the system and zero out the previous negative sale.

Product Sale - Invoice No 310939

Main Product Phone Ship To

TELTRA CLOC RETURNS

Discount 0 %

Sale 8/11/2010 OrderNo

InternalNo Rep

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

OK Clear

Phone/Plan	Imei	Mobile	Sale
CRNOTE/Outright Sale	CR351234567894571	CR223344	0.00 Delete

Loyalty Program

No Loyalty points/values have accumulated for this customer

Start by assigning a Loyalty Barcode by clicking Customer, Loyalty tab. Scan loyalty number into the customer textbox in the top left hand of screen to retrieve Customer details.

5.4.2 Repairs/ Service

- **Create new repair jobs, track and monitor progress**
 - **Offers the ability to email or SMS clients upon status change**
1. If a customer has a faulty mobile device that needs to be sent away for repair, replacement or a credit note it gets done through the **"Repair"** section of the system. To create a new repair job navigate to the **"Repair"** tab, **"Repairs/Service"** and click on the phone search field to enter in the IMEI number.
 2. Enter the IMEI number in the **"Imei"** field and press the green tick next to field.
 3. This will look through the system to find any sale with this IMEI number in it. The IMEI number will now be displayed at the bottom of the screen.
 4. Click on the green tick at the bottom of the screen to confirm the device for repair.

ClickPOS Home Sale Stock Repairs Reports Accounts Maintain

OBP - Out of Box Failure Repairs/Service

Repair

Main Search

Repair contact details

Contact Name

Mobile No

Email

Product Phone

Imei 012456789123456

Mobile No

Sale Invoice No

Lock Code

Call Timer Hrs/Min/Sec

Warranty

Insurance Claim Number

OrderRefNo

SIM

Model

Supplier

Pin

Sale Date

Sales Rep John Smith

Insurance Company/Branch

Clear

Imei	Invoice	SIM	Prod Desc	Mobile No	Purchase Date
012456789123456	310969		Apple iPhone 4 16GB	0404888999	15/11/2010

****Top 20 Results Only****

5. You will now be directed to a screen where there will be multiple tabs to enter in information about the repair job. The main tab will show the general information such as customer mobile number, invoice number sale date and supplier.
6. Click on the **“Job Description”** tab to enter in the details relating to the faulty device.

Repair

Repair ID 120 Date Created 15/11/2010 Date Modified 15/11/2010

Repair contact details

Cust. No.: 228
John Citizen

Contact Name John Citizen

Mobile No

Email

Product Phone

Imei 012456789123456

Mobile No 0404888999

Sale Invoice No 310969

Lock Code

Call Timer HrsMinSec

Warranty ☐

Insurance Claim Number

OrderRefNo

SIM

Model Apple iPhone 4 16GB

Supplier Telstra Cloc

Pin

Sale Date 15/11/2010

Sales Rep John Smith

Insurance Company/Branch

- **“Job Description”** - In this tab you can select the status of the job, what items are included in the repair, the fault of the device, where the device is going, notes from the Repairer and any internal notes.
 - **“Loan Item”** – In this tab you can issue the customer a loan phone and put any notes referring to loan unit.
 - **“Replacement Item”** – On this tab you can replace a phone with one that has been sent from a supplier, replace a phone from stock, replace a phone from repairer and charge customer for any parts for the repair job if applicable.
 - **“History”** – View any repair history for that customer.
 - **“Search”** – You can search for a repair job by various methods such as IMEI, customers name, date range and repair ID.
7. Once all of the details for the repair have been entered you can print a repair sheet that you can give to a customer and/or send it to the repair centre with all references for the repair job. Drop down the **“Select Printer”** field to select the format in which you would like to print.

5.5 Reports

Below is the current pre-defined report set found within ClickPOS

Each report contains sensitive information and ClickPOS advise that all administrators view the report before assigning it to staff. Each user group will have options specific to that group.

TO MAINTAIN PERMISSIONS PROCEED TO....

**MAINTAIN → SYSTEM ADMIN → USER GROUPS → EDIT PERMISSIONS IN A GROUP (FOR REQUIRED GROUP)
+ REPEAT FOR OTHER ADDITIONAL USER GROUPS**

5.5.1 Sale Reports

Sale reports cover varied sale information from basic transaction advice through to more detailed reports containing revenue and other sensitive information.

Daily Activity Sales Report (1-1)

Phone Sale by Plan (1-2-1)

Phone Sale by Phone (1-2-2)

Phone Sale by All Sales Rep (1-2-3)

Phone Sale by Carrier Type (1-2-4)

Phone sale By Internal Ref (1-2-5)

Phone Sale Report by Plan Category (1-2-6)

Daily Transaction Advice by Phone (1-3-1)

Daily Transaction Advice by Product (1-3-2)

Daily Activity Report by Phone no Tax (1-3-3)

Daily Activity Report by Product no Tax (1-3-4)

Daily Activity Report by Product Category (1-3-5)

Daily Activity Report by Product Category no Tax (1-3-6)

Product by Type Report (1-4-1)

Product Sales by Sales Rep Report (1-4-2)

Product by Branch Report (1-4-3)

Daily Activity Report (1-5-1)

Daily Activity Report by Sales Rep (1-5-2)

Daily Activity Report no Tax (1-5-3)

Daily Activity Report by Sales Rep no Tax(1-5-4)

Total Sales Grouped by Branch and Sales Rep (1-6)

Sales Rep Commission by Carrier Percentage (1-7)

Phone Sale Total Grouped by Plan Type (1-8-1)

Phone Sale Total Grouped by Plan Category (1-8-2)

Phone Sale Total Grouped by Carrier (1-8-3)

Product Category Total by Branch (1-9)

Product Master Category Total by Branch (1-10 -1)

Product Master Category Total by Sales Rep (1-10-2)

Plan Category by Branch (1-11-1)

Plan Category by Sales Rep (1-11-2)

Contract Plan Expiry by Customer (1-12)

Daily Connection Summary by Sales Rep (1-13)

Daily Activity Sales by Customer (1-14-1)

Daily Activity Sales by Branch and Customer (1-14-2)

Daily Activity Report for Receipt Printer (1-16)

Produce Phone Connection by Branch and Plan Type (1-15)

Full Invoice Detail Using Barcode (1-17)

Transaction Report (1-18)

Sales Rep Commission by Product Percentage (1-19)

Daily Activity Sales Report Discount Sale (1-20)

Daily Activity Sales -Export Friendly Format (1-21)

5.5.2 Stock Reports

Stock reports cover varied stock & supplier information. You will see Orders, Stock Confirmation, Catalogue and much more

Product List (2-1)

Phone List (2-2)

Product by Location (2-3-1)

Product by Product Type (2-3-2)

Phone by Location (2-3-3)

Phone by Phone Type (2-3-4)

Sales Re-Order Report (2-4)

Stock Transit Report (2-5)

Product Label for Shelves (2-6)

Product Re-Order Stock Report (2-7-1)

Phone Re-Order Stock Report (2-7-2)

Phone Qty by Location and Supplier (2-8)

Purchase Report (2-9)

VIP Products List (2-10-1)

VIP Phone List (2-10-2)

Category Total by Location (2-11)

Product Master Category Total by Location (2-12)

Stock Re-Order Report (2-13)

Produce Phone Purchase Report (2-14-1)

Phone Purchase Report by Phone (2-14-2)

Product Matrix (2-15)

Phone Matrix (2-16)

5.5.3 Finance Reports

Finance reports cover sensitive financial information. ClickPOS advise only admin/accountants access these reports.

Banking Report (3-1)

Tax Report (3-2)

Accounts Outstanding (3-3-1)

Accounts Outstanding Ageing Summary (3-3-2)

Ageing Summary of Debtors (3-4)

Supplier Report (3-5)

Brief Connection Report (3-6)

Daily Sales Summary (3-7)

Category Summary (3-8)

Sales Discrepancy (3-9)

Detailed Connection Listing (3-10)

Stock Purchase Price on Hand (3-11)

Outstanding Revenue (3-12-2)

Revenue from Carrier (3-12-1)

Detailed Phone Report (3-13)

Sale and Stock Total Grouped by Category (3-14)

Detailed Phone Sale Report (3-15)

Purchase Total for All Suppliers (3-16)

Gross Total of Sale by Branch (3-17)

Movement Trial Balance Report (3-18)

Average Contract Value (3-19-1)

Value of Airtime Percentage (3-19-2)

Sales Total by Plan (3-20)

Daily Activity Cash Flow (3-21)

Supplier Summary Report (3-22)

5.5.4 Accounts Reports

Accounts reporting cover basic financial information. ClickPOS advise only admin/accountants access these reports.

List Payables (4-1)

List Receivables (4-2)

Transaction List and Summary Payable and Receivables (4-3)

Daily Reconcile Discrepancy (4-4)

5.5.5 Maintenance Reports

Maintenance reporting gives general info relating to stock, templates and employees.

Product List Report (5-1)

Product Type List (5-2)

User List (5-3)

Phone List (5-4)

Loan Phone List (5-5)

Phone Price List (5-6)

Full Template List (5-7)

Reference Product Group List (5-8)

Branch/Sales Rep List (5-9)

Product Type by Supplier Barcode List (5-10)

Timesheet Report by Branch (5-11-1)

Timesheet Report by Employee (5-11-2)

In House Barcode Product Type List (5-13)

5.5.6 Mail-out Reports

Mail-out reports show information relating to marketing and promotional campaigns

Adverts Report (6-1)

Customer Report (6-2)

5.5.7 Performance Reports

(Permission located under “Branch Level Sale Reports”)

Similar to sales reporting but more specific to performance rather than GP, Net, etc..

Produce New Sales Performance Reports

- View Sales Price
- View Gross Profit
- View Gross Margin Indicator (GMI)

5.5.8 Report Generator

(Permission located under “View Global Reports”)

Offers flexible options to build and maintain your own user defined reports

5.6 Accounts

5.6.1 Receivable

- In account Receivables you can perform multiple tasks such as taking payments for an Account Customer, receive a payment towards the company that are not invoiced and search for outstanding account invoices and past payments.
1. Navigate to “Accounts” and “Receivable”. The “Receivable” tab is used if a lump sum is made towards the company that isn’t from an Invoice. This payment won’t be shown in the sales reports; it will only be tracked through the Receivables report. On this tab you can maintain Accounts, Suppliers and Banks.

The screenshot shows the ClickPOS software interface. At the top, there is a navigation bar with tabs: Home, Sale, Stock, Repairs, Reports, and Accounts. The 'Accounts' tab is highlighted. Below the navigation bar, there is a sub-navigation bar with tabs: Receivable, Payment, and Daily Reconciliation. The 'Receivable' tab is active. The main content area shows a form titled 'Income' with a green arrow icon. The form has three tabs: Receivable, Cust Pay, and Search. The 'Receivable' tab is active. The form contains the following fields:

- Date: 17/11/2010
- Account: debtor payments (dropdown menu)
- Supplier: a (dropdown menu)
- Bank: National Australia Bank (dropdown menu)
- Payment Type: Account (dropdown menu)
- Invoice Number: (text field)
- Reference No: (text field)
- Amount: 0 (text field)
- Tax Incl: ☒ Yes ☐ No
- Notes: (text field)

There are also links for 'Build Account', 'Build Supplier', and 'Build Bank' next to their respective dropdown menus.

2. On the “Cust Pay” tab you can look up an existing customer that has an amount that is outstanding. Once customer is found you can choose the payment type, what Bank it’s from, Reference number and any applicable note. When a payment is made it needs to be placed in the “Payment Amount” field in the outstanding invoice number line and then press “OK”.

Income

Receivable **Cust.Pay** Search

Cust. No. 228
Mr John Citizen

Date: 17/11/2010
Account: debtor payments [Build Account](#)
Bank: National Australia Bank [Build Bank](#)
Payment Type: Account
Reference No:
Amount: 0
Tax Incl: ☒ Yes ☐ No
Notes:

Invoice Number	Sale Date	Purchase Order No	Amount Expected	Amount Paid	Payment Date	Payment Amount	Customer Owing Amount
310970	17/11/2010		1298.00	0.00	17/11/2010	0.00	1298.00
			Total Payable Amount		0		
Total Expected			1298.00				
Total Paid			0.00				
Total Customer Owing Amount			1298.00				

3. Once payment has been made (in this case \$500) it will show up under **"Amount Paid"** in the invoice line, it will show the amount outstanding there will be a summary at the bottom of the screen.

Invoice Number	Sale Date	Purchase Order No	Amount Expected	Amount Paid	Payment Date	Payment Amount	Customer Owing Amount
310970	17/11/2010		1298.00	500.00	17/11/2010	0.00	798.00
			Total Payable Amount		0.00		
Total Expected			1298.00				
Total Paid			500.00				
Total Customer Owing Amount			798.00				

4. On the **"Search"** tab you can search for previous receivable and customer payments. There are multiple fields in the drop down that you can use. Once payment is found you can also edit this by clicking on the blue **"Edit"** button in the search results.

Income

Receivable Cust.Pay **Search**

☐ Receivable ☒ Customer Payment

Search By: Date
From: 17/11/2010 To: 17/11/2010

Search

	Date	Account	Customer	Bank	Payment Type	Invoice	Reference No	Receivable
<input checked="" type="checkbox"/>	17/11/2010	Cheque Account	Mr John Citizen	National Australia Bank	Cheque			500.00

5.6.2 Payment

- *The Payment section is used when you want to pay a specific supplier, make a payment towards something that isn't in the system and search for previous payments.*

1. In the **"Payable"** tab you can make a payment towards anything that hasn't been recorded as an invoice. In the **"Supp. Pay"** tab you can choose the Supplier that you wish to pay, how the payment is being made and which invoice from the supplier you are paying.

ClickPOS

Home Sale Stock Repairs Reports Accounts Maintain

Receivable **Payment** Daily Reconciliation

Payment

Payable **Supp. Pay** Search

Supplier: Telstra Cloc

Branch: Head Office

From: 1/10/2010 To: 31/10/2010

Show only outstanding invoices ☐

Search ➔

2. Once you have chosen a Supplier and date range, press **"Search"** to bring up the list of supplier invoices. You can enter in the amount you wish to pay per invoice in the **"Payment Amount"** field and this will total in the **"Amount"** field under account information.

Date: 17/11/2010

Account: purchases [Build Account](#)

Bank: National Australia Bank [Build Bank](#)

Payment Type: Account

Reference No:

Amount: 1925.00

Tax Incl: ☒ Yes ☐ No

Notes:

Supplier Invoice Number	Amount	Payment Amount	Paid Amount
10703832	0.00	0.00	0.00
10706554	1089.00	1089	0.00
10710856	836.00	836	0.00
12345678	836.00	0.00	0.00
59298	1089.00	0.00	0.00
r23456789	2970.00	0.00	0.00
test123	836.00	0.00	0.00

3. Press **"OK"** once amounts have been entered and the invoice will now state how much has been paid towards each invoice.
4. The **"Search"** tab is used to search for find any previous payments that have been made.

Payment

Payable Supp. Pay **Search**

Payable **Supplier Payment**

Search By Date From 17/11/2010 To 17/11/2010 **Search**

Date	Account	Supplier	Bank	Payment Type	Invoice	Reference No	Receivable
17/11/2010	purchases	Telstra Cloc	National Australia Bank	Account	10706554		1089.00
17/11/2010	purchases	Telstra Cloc	National Australia Bank	Account	10710856		836.00

5.6.3 Daily Reconciliation

- **Count cash registers and reconcile against trading**
- **A count of the tills should be done before trading at the end of the business day to prevent discrepancies. Normally your opening and closing float will be the same from day to day. Using the Daily Reconciliation is very important for balancing your daily transactions and banking.**

Daily Reconciliation – Video Tutorial

1. Navigate to “Accounts”, “Daily Reconciliation” and search the required date.

ClickPOS Home Sale Stock

Receivable Payment **Daily Reconciliation**

Daily Reconciliation

1.Main - Head Office (310)

Date 17/11/2010 Shift 1 **Search**

Shift Times Employees

2.Cash

- Opening Float : At BEGINNING of Shift complete Yellow cells.
- Closing Amount/New Float: At END of Shift complete these cells to update Banking Amount.
- Key in quantity in cells Not \$Amounts. Tab key will move to Next cell; Shift Tab for Previous.

Denominations	Previous Float	Opening Float	Closing Amount	New Float	Banking Amount
100.00	0.00	0.00	0.00	0.00	0.00
50.00	0.00	0.00	0.00	0.00	0.00
20.00	0.00	40.00	100.00	40.00	60.00
10.00	0.00	100.00	150.00	100.00	50.00
5.00	0.00	50.00	50.00	50.00	0.00
2.00	0.00	40.00	40.00	40.00	0.00
1.00	0.00	10.00	9.00	10.00	-1.00
0.50	0.00	5.00	10.00	5.00	5.00
0.20	0.00	2.00	2.00	2.00	0.00
0.10	0.00	2.00	2.00	2.00	0.00
0.05	0.00	1.00	0.95	1.00	-0.05
Totals	0.00	250	363.95	250	113.95

- Before the start of the day whoever operates the till should count the float and enter the amount in to the system. After the amount is entered in the system press **"Apply"** to save the amounts. After all the transactions of the day have been entered you will then need to count the cash and enter it in the **"Closing Amount"** field. The **"New Float"** amount will be the same as the **"Opening Float"** and the **"Banking Amount"** will be the amount you need to take out for banking.
- Enter in the **"Payment Tendered Details"** manual section the total amounts of each type of payment (E.g. Cash, EFT, VISA etc). This should equal what ClickPOS states to be correct.
- "Other Terminals"** is usually for Epay so you can keep track on what has been printed off through the Epay machine to what has been charged through ClickPOS.
- Once all figures have balanced the person processing the end of day reconciliation should put their name in the **"Signed By"** field for tracking purposes.

3.Payment Tendered Details

Payment Type	ClickPOS	Manual
Cash	113.95	113.95
Cheque	500.00	500.00
Eftpos	99.00	99.00
Visa	159.00	159.00
Totals	871.95	871.95

Discrepancy b/w Sale Price & Payments 202 [click for Details](#)
Discrepancy b/w Opening/Closing and Till 113.95 - 113.95 = -0.00

4.Other Terminals

ClickPOS	Manual	TotSalePrice
159.00	159.00	Click here for details 159.00

4.Notes

4.Approvals

Deposit Slip Bag No.

Banked By How Banked

Signed By CreatedBy johns

5.7 Maintain

5.7.1 Tariff Plan

- The Tariff plan is how you maintain your mobiles, plans and commission/bonus structure. If you were to make changes to the Tariff Plan there should be one or two people that can do this as you can change or delete things if you are not familiar with this part of the system. Please call ClickPOS if you are unsure.*

Tariff Plan Overview – Video Tutorial 

Tariff Plan Maintain Phone – Video Tutorial 

1. The Plan Template is made up of Carrier, Plan and Phone tabs. You are required to build and maintain all three tabs, and then join them together in the Plan Template along with the expected revenue. If a new phone is on the market, you need to add the phone in through the Phone Tab, then go to the Plan Template Tab to specify what plans can be sold with handset.
2. Navigate to **"Maintain"**, **"Tariff Plan"** and **"Plan Template"**. The first thing you should do is click **"Maintain Network Type"** hyperlink. Here you can maintain things like the **"Category"**, **"Months"**, **"Network Type"**, **"Plan Type"**, **"Value"**, **"Manufacturer"** and **"Colour"**. These fields will be used for when you make your plans and phone combinations. Type in the Network types and press **"OK"** (E.g. Bigpond, PrePaid and Fixed).

Network Type

Add New -->

OK

3. Once you have made the **"Network Type"** list you can now start to build the plans. Create a **"Carrier Name"** and **"AccountRef"** (E.g. Telstra) and tick the applicable option in the **"Network Type"** list. The **"AccountRef"** field talks to accounting software so it should be a name that it recognises. After selecting those fields ClickPOS generates a list of Carrier/Plan type combinations that will be listed underneath the **"Current Carriers"** list (E.g. Telstra Bigpond, Telstra Mobile Voice).

ClickPOS

Home Sale Stock Repairs Reports Accounts Maintain

Tariff Plan Card File System Admin Time Sheet Global Reports

Tariff Plan

Carrier Plan Phone Plan Template Update Wizard

Carrier Maintenance - Add/Edit

Carrier Name *

AccountRef

Rep. Comm. Percentage % 0.00

Include in Debtor Account

Network Type * [Maintain Network Type](#)

☐ Bundle ☐ PrePaid

☐ Fixed ☐ Satellite

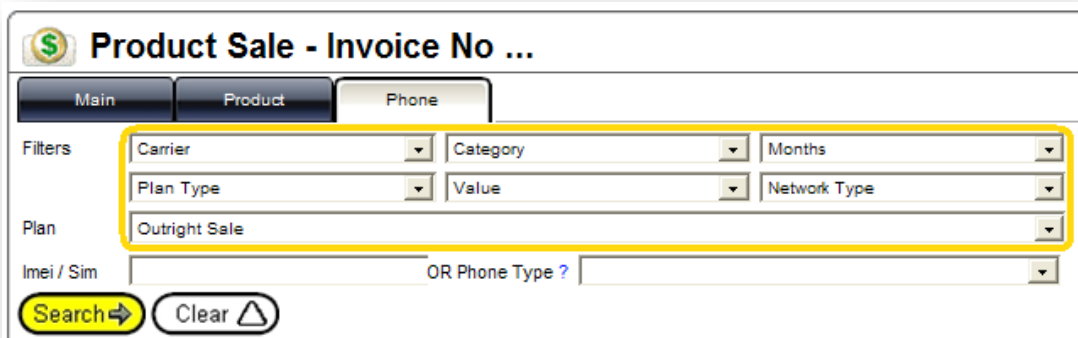
☐ Foxtel ☐ Services

☐ Mobile ☐ Wireless

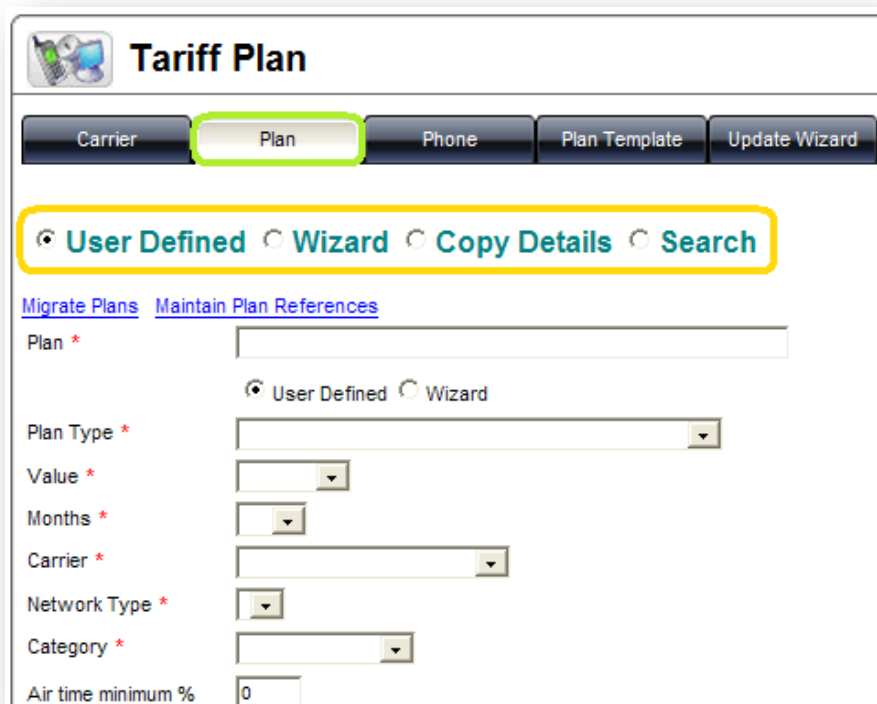
☐ Outright

Current Carriers							
<input type="checkbox"/>	Carrier Name	Network Type	AccountRef	Rep Comm %	Include in debtor	Date Created	Date Modified
<input type="checkbox"/>	Telstra Bigpond	Wireless, Fixed	Telstra	0	False	20/12/2006	17/11/2010
<input type="checkbox"/>	Telstra Bundle	Bundle	Telstra	0	False	22/06/2010	22/06/2010
<input type="checkbox"/>	Telstra Fixed	Fixed	Telstra	0	False	1/12/2006	8/08/2010
<input type="checkbox"/>	Telstra Foxtel	Foxtel	Telstra	0	False	23/10/2007	23/10/2007
<input type="checkbox"/>	Telstra Mobile Broadband	Mobile	Telstra	0	False	25/09/2009	12/05/2010
<input type="checkbox"/>	Telstra Mobile Voice	Mobile	Telstra	0	False	1/12/2006	17/11/2010
<input type="checkbox"/>	Telstra MRO	Mobile, Wireless	Telstra	0	False	6/08/2010	10/09/2010
<input type="checkbox"/>	Telstra PrePaid	PrePaid	Telstra	0	False	1/12/2006	25/09/2009
<input type="checkbox"/>	Telstra Satellite	Satellite	Telstra	0	False	30/01/2007	21/06/2007
<input type="checkbox"/>	Telstra Services	Services	Telstra	0	False	25/09/2009	25/09/2009

4. The next thing to do is to build the references for the plans such as months, value of plans and Category of plans. Some of these plan references will act as filters when selling out plans in the system. Below you can see the fields you need to use to help filter the plan types.



5. The next step is to make the plans using the “Plan” tab. In this tab there will be four fields that you can utilise such as “User Defined”, “Wizard”, “Copy Details” and “Search”.
- “User Defined” – You can type your own plan names in and choose the corresponding fields it falls under, such as plan type, value, carrier etc. This will also only create one plan at a time.
 - “Wizard” – This will let you choose multiple fields at the same time to create plans by ticking the desired checkboxes. This is also a good way of making bulk plan types.
E.g. **Carrier Name** = Telstra, **Plan Type** = Consumer Member Plan, **Value** = \$10, **Months** = 12, **Category** = NEW.
This will generate the following plan: Telstra Consumer Member Plan \$10 over 12 months.
The system will also generate its own naming structure for these plans which you can change if desired.
Once the plans have been generated you can click on the plan name hyperlink and click the “User Defined” option under the “Plan” name to change the name.
 - “Copy Details” – If a new plan comes out that is replacing an existing plan and the commission and bonuses are the same as the new plan you can copy the attributes from one plan to another.
 - “Search” – Here you can search to see if a plan exists already.



6. Once all of your plans have been generated you can now populate the phones. Navigate to **"Phone"**, and **"Add Edit"**.
 - **"Manufacturer"** – Select the maker of the phone. You can add or delete these through the hyperlink beside this field.
 - **"Phone Name"** – Enter in the phone name as you would like it to be displayed in the system.
 - **"AccountRef"** – Again this is for syncing with accounting software (E.g. Telstra).
 - **"Website Special"** – Phone will be listed on the website as a special.
 - **"Very Important (VIP)"** –
 - **"Web Description"** – How it is described on the website.
 - **"Web Link"** – Put in a direct link to manufacturer or applicable website (E.g. www.gsmarena.com).
 - **"End Of Line (EOL)"** – Choose this if the product line has ended.
 - Also enter in the applicable pricing.

The main details you need to add are Manufacturer, Phone Name, Purchase Price and RRP. Once the plan is generated, click on the **"Maintain Supplier Product Code"** hyperlink to enter the supplier product code.

The screenshot shows the 'Phone' tab selected in the top navigation bar. Below the navigation bar, there are three buttons: 'Add Edit' (highlighted in yellow), 'Copy Details', and 'Search'. The main form area contains several fields and links:

- Manufacturer:** A dropdown menu showing 'Apple'.
- Phone Name *:** A text field containing 'Apple iPhone 4 16GB'.
- AccountRef:** A dropdown menu.
- Website Special:** A checkbox.
- Very Important (VIP):** A checkbox.
- Web Description:** A text field.
- Web Link:** A text field containing 'http://'.
- End Of Line (EOL):** A checkbox at the bottom left.

On the right side of the form, there are several links and a table of pricing information:

- [Maintain Manufacturer & Colors](#)
- [Maintain Supplier Product Code](#) (highlighted with a red box)
- [Maintain Account Reference](#)

Tax %	10.00
Tax Free Amount \$	0.00
Purchase price \$	836.00
RRP (Retail Price)	1100.00
Weight	0.00
Height	0.00
Width	0.00
Length	0.00

7. The next step is to combine the plans and phones together with the **"Plan Template"** tab. Tick all of the checkboxes that relate to the plan you are wishing to add and press **"Search"**. This will now display the desired plan/plans. The plan/plans will be listed on the left hand side of the screen and you now have to match them up with at least one of the **"Phone Name"** products. If a plan includes a phone you should select the appropriate phones in the list under **"Phone Name"** and link them to the plan/plans on the left list. In this case it is a plan without a phone so you need to choose **"Contract Only"** and press **"OK"**. **"Contract Only"** needs to be added in the phone list before you can add it.

ClickPOS Home Sale Stock Repairs Reports Accounts Maintain Card File

Tariff Plan Card File System Admin Time Sheet Global Reports

Tariff Plan

Carrier Plan Phone **Plan Template** Update Wizard

Add New Search

Plan Search

Phone Name contract Search

Plan	Date Created	Phone Name
<input checked="" type="checkbox"/> Consumer Plan Member 10/12 Mobile NEW	2/12/2006	<input checked="" type="checkbox"/> Contract Only

8. You can at this stage enter in the supplier commission and rebates however it is advised when doing multiple plans and phone combinations to do this after the plans have been added. This guide will cover how to do this in section 10.

Sale Price \$	<input type="text"/> 0.00	Rebate	<input type="text"/> 0.00	Comm	<input type="text"/> 0.00	Rep Comm	<input type="text"/> 0.00
Bonus 1	<input type="text"/> 0.00	From	<input type="text"/>	To	<input type="text"/>	No Comm. Amount	<input type="text"/> 0.00
Bonus 2	<input type="text"/> 0.00	From	<input type="text"/>	To	<input type="text"/>		
Date Effective	<input type="text"/>	Discontinued	<input type="text"/>	Plan Code	<input type="text"/>		

9. Once all of the plans have been matched up with at least one of the **"Phone Name"** products, navigate back to the **"Plan Template"** tab and click on **"Search"**. Use the checkboxes available to search for the newly added plans and then press **"Search"**. The plans will now be displayed on the left side of the screen. Click on the **"Show Phones"** hyperlink to see what plans/phones are attached to the plan as well as the expected revenue.

Tariff Plan

Carrier Plan Phone **Plan Template** Update Wizard

Add New **Search**

Plan	Phone	Purchase price \$	Sale Price \$	Rebate	Comm	Bonus 1	From	To	Bonus 2	From	To	Rep Comm	No Comm. Amount	Plan Code	Date Effective	Date Discontinued	Date Created	Date Modified
<input checked="" type="checkbox"/> Consumer Plan Member 10/12 Mobile NEW Show Phones	<input type="checkbox"/> Contract Only	0	0	0	3.77	0	6/10/2006	31/03/2007	0			0	0	MA010M12	8/09/2004	31/12/2999	1/01/1900	30/06/2010
<input type="checkbox"/> Consumer Plan Member 10/12 Mobile RECONTRACT Show Phones																		
<input type="checkbox"/> Consumer Plan Member 10/24 Mobile NEW Show Phones																		
<input type="checkbox"/> Consumer Plan Member 10/24 Mobile RECONTRACT Show Phones																		

10. You can now tick the plan you want to attach the Commission and Bonus to. If you are adding Bonuses you need to put in a date range for it otherwise it won't take effect. You can tick multiple plans that have the same payment properties if you need to (E.g. If a plan upgrades before the 90 day Comms Due period it gets a default payment amount no matter what the value of the plan is).

5.7.1.1 Additions and Deductions

- *The Additions and Deductions are used when selling out a Phone Plan, where you may include any additional revenue from Carrier or add services to an invoice.*

Maintain Additions and Deductions – Video Tutorial



1. Navigate to “Maintain”, “Tariff Plan” and “Additions & Deductions”. Here you can maintain additional services you wish to add to a Phone Sale such as a Bonus.

2. Under “Addition/Deduction” you name the product you would like to add. Under “Amount” you can add the amount of revenue/GP you would like to add to the sale (This can also be a negative amount).
 - “Show on Invoice” – You can choose whether to have product appear on the Invoice.
 - “Revenue from Carrier” – Select “Yes” if you would expect to get this amount back from your Carrier.
 - “Display Revenue Amount on Invoice” – Choose “Yes” if you would like the amount to show on the Invoice.
 - “Read Only” – Select “Yes” if you would like the amount to not be able to be changed during the sale.
3. Once you have added the Addition/Deduction of your choice you can add this to the sale by clicking on the “Services” tab and choosing the product from the drop down options.

5.7.1.2 Loan Phones

- *You can create loan phones in this area that you would use when doing a repair for a customer.*
1. Navigate to **“Maintain”, “Tariff Plan”** and **“Loan Phones”**. Enter in the name of the Phone, tick the checkbox to say whether it is a phone or another type of device, input the IMEI number, enter in Bond if applicable, place in any specific note you may want to add, choose the branch it will be held at and leave the **“Disabled”** checkbox un-ticked. Press **“OK”** and it will be added to the Loan Phone list in the Repair section.

The screenshot shows the 'Maintain Loan Phones' interface in ClickPOS. The top navigation bar includes 'Home', 'Sale', 'Stock', and 'Repairs'. Below it, a sub-menu bar has 'Tariff Plan' (highlighted with a green box), 'Card File', 'System Admin', 'Time Sheet', and 'Global Reports'. The main form area is titled 'Maintain Loan Phones' and contains the following fields:

- Loan Items:** Add New -->
- Description:** Nokia 6720
- Item Is Phone:** ☒
- Imei:** 355778899447559
- Bond:** \$ 0
- Notes:** Includes AC Charger, Includes PHF
- Branch:** Head Office
- Disabled:** ☐

An 'OK' button with a checkmark is located at the bottom right of the form.

5.7.1.3 Reconcile Revenue

- *The reconcile Revenue offers powerful features to rapidly reconcile your carrier revenue. This feature is used for the Mobile Telephone Industry where the Carrier pays commission on contracted mobile Phone sales.*

Reconcile Revenue – Video Tutorial

1. Navigate to **“Maintain”, “Tariff Plan”** and **“Reconcile Revenue”**. There are several ways you can reconcile your phone plans from your Carrier. Option 1 is to click on the **“Reconcile”** search field and you can now search for the plan you wish to reconcile through multiple fields. This is for reconciling Individual plans at a time.
 - **“Active Date”** – On the first drop down you can search for the plan via the active date of the contract.
 - **“Sale Date”** – On the first drop down you can search for the plan via the sale date of the contract.
 - **“Reconciliation Date”** – You can search for previously reconciled contracts.
 - **“IMEI Number”** – You can enter in an Imei number to search for the contract.
 - **“Customer Last name”** – Enter in customers last name to find the contract.
 - **“Company Name”** – Search for contracts via Company Name.
 - **“Mobile Number”** – Enter in number to search for contract.
 - **“Invoice Number”** – Enter in Invoice number to search for a contract.
 - **“Credit Note Number”** – Enter in Credit Note number to find a contract.
 - **“Connect Reference”** – If you have entered in a **“Cons Ref”** number when selling out a plan you can search for it in this field.

Reconcile Revenue

Search
Main
Wizard

Search type

☒ Reconcile ☐ Outstanding Reconciliation

☐ Active Date: From 1/11/2010 To 29/11/2010 All Carriers

☐ Reconciliation Date: From 29/11/2010 To 29/11/2010 Rebate

☐ IMEI Number:

☐ Customer Lastname:

☐ Company Name:

☐ Mobile Number:

☐ Invoice Number:

☐ Credit Note Number:

☐ Connect Reference:

2. In this case we will search via the “Active Date” drop down and choose the date range of November.
3. Press “Search” and a list of invoices will be displayed.

310991	30/11/2010	04123456443	Contract Only	Consumer Next G Cap Member 49/24 (1GB Data) Mobile RECONTRACT	Kumar John
--------	------------	-------------	---------------	---	------------

4. Click on the Invoice hyperlink to bring up the expected carrier revenue.

Customer/Phone Plan Details

Invoice: 310991

SaleDate: 30/11/2010

First Name: Last name: Company:

IMEI: Date Connected: 30/11/2010 Phone: Contract Only/Purch. 0.0000

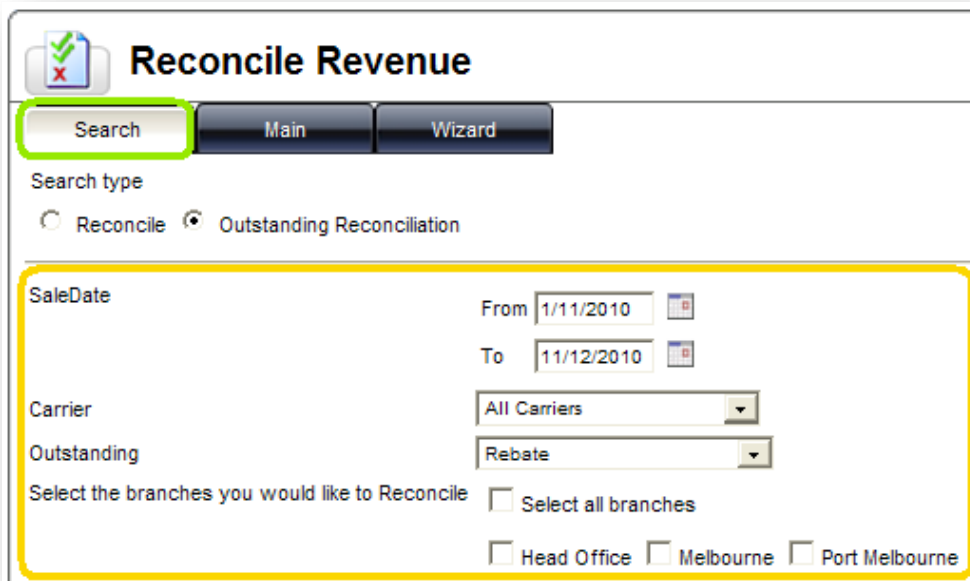
Carrier: Telstra Mobile Voice Mobile Number: 04123456443 Plan: Consumer Next G Cap Member 49/24 (1GB Data) Mobile RECONTRACT

Connect Reference:

	Expected Amount	Received Amount	Date Received
Rebate:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>
Commission:	<input type="text" value="12.32"/>	<input type="text" value="0.00"/>	<input type="text"/>
Bonus1:	<input type="text" value="5.39"/>	<input type="text" value="0.00"/>	<input type="text"/>
Bonus2:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>
SalesRepCommission:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>

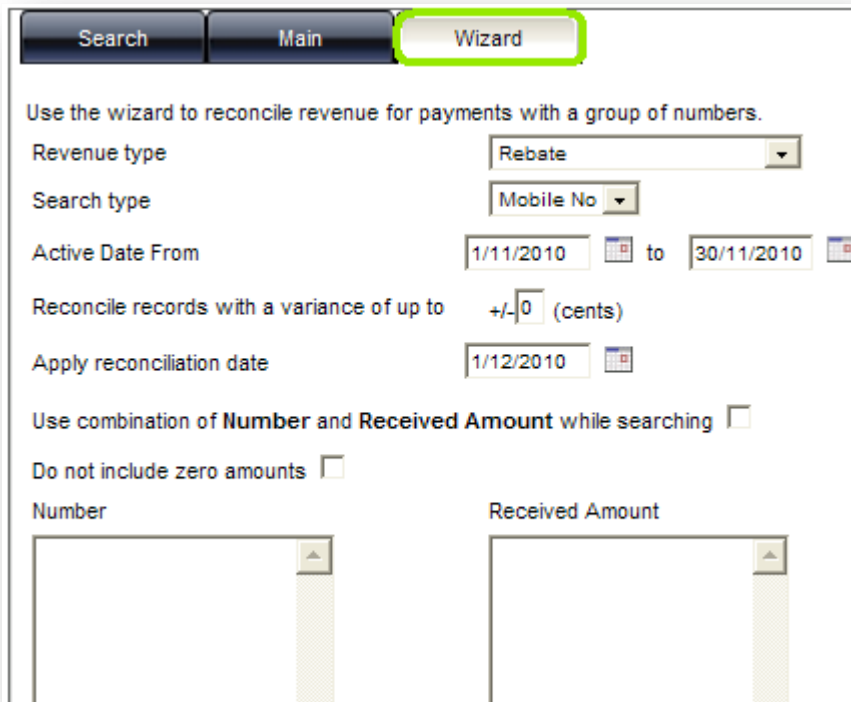
5. In this page it will display the connection details for that invoice and the expected revenue from Carrier. If you have received the same as the expected revenue you can double click on the “**Received Amount**” field to input the amount or you received or you can click and manually type in the amount.
6. The Additions/Deductions area will show if any of these amounts are due from Carrier. Double click or add amounts manually in this area to reconcile.

7. To search for transactions that have an expected amount not equal to the received amount click on the **“Outstanding Reconciliation”** field. You can search via date range, Carrier, outstanding type and which branch you would like to select.



The screenshot shows the 'Reconcile Revenue' window. The 'Search' tab is highlighted with a green box. Below the tabs, the 'Search type' section has two radio buttons: 'Reconcile' and 'Outstanding Reconciliation', with the latter being selected. A yellow box highlights the search criteria section, which includes: 'SaleDate' with 'From' and 'To' date pickers set to 1/11/2010 and 11/12/2010 respectively; 'Carrier' with a dropdown menu set to 'All Carriers'; 'Outstanding' with a dropdown menu set to 'Rebate'; and a section for selecting branches with checkboxes for 'Select all branches', 'Head Office', 'Melbourne', and 'Port Melbourne'.

8. For reconciling a large amount of numbers at a time the easiest and quickest way to do this is through the **“Wizard”** tab.
9. Simply choose the **“Revenue Type”** and **“Date Range”**. Copy the mobile numbers from the spreadsheet supplied from the Carrier and paste them into the **“Number”** field. Do the same for the **“Received Amount”** and press **“OK”**. This will bring up a list of now reconciled invoices. It will also show if any Invoices have any discrepancies which you can fix straight away by entering in the correct details.



The screenshot shows the 'Reconcile Revenue' window with the 'Wizard' tab highlighted with a green box. The wizard instructions state: 'Use the wizard to reconcile revenue for payments with a group of numbers.' The form fields include: 'Revenue type' dropdown set to 'Rebate'; 'Search type' dropdown set to 'Mobile No'; 'Active Date From' and 'to' date pickers set to 1/11/2010 and 30/11/2010; 'Reconcile records with a variance of up to' set to +/- 0 (cents); 'Apply reconciliation date' date picker set to 1/12/2010; 'Use combination of Number and Received Amount while searching' checkbox (unchecked); 'Do not include zero amounts' checkbox (unchecked); and two large text input fields for 'Number' and 'Received Amount'.

5.7.2 Card File

- *Cardfile is used for maintaining customer details, Account Manager information and Maintaining Suppliers.*
1. Navigate to **“Maintain”** and **“Customer Details”**. There are multiple tabs which you can use to gather customer details and maintain account information.
 - **“Bill To”** – Main customer details such as Address, Company Details, Contact numbers, email, password for website login and loyalty details.

Bill To Extended Ship To Account Contact Loyalty Account Manager Installation Search

Cust. No.: 228 ☐ Inactive Date Created: 3/11/2010 Date Modified: 18/11/2010

Name Last Address 1:
Job Title Address 2:
Company Address 3:
Trading As Suburb
Tel Business Fax Post/ZIP State
Tel Home Mob Country
Email Loyalty
Password Contact Method for future promotions and advertising
Website ☐ SMS ☐ Phone ☐ Email ☐ Post

- **“Extended”** – You can add more information such as ABN, Industry, Department and ID of customer.

Bill To Extended Ship To Account Contact Loyalty Account Manager Installation Search

Tax No.
Tax Office
Industry
Department

Bill to persons details

ID Type	Number	Expiry	Place of Issue	DOB
License	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Authorisation to access client details

Start Date End Date Password

- **“Ship To”** – You can enter in a alternative shipping and physical address.

Bill To	Extended	Ship To	Account Contact	Loyalty	Account Manager	Installation	Search
<input checked="" type="checkbox"/> Use bill to							
Ship To		Physical Address					
Company				Address 1:			
Attention	John Citizen			Address 2:			
Address 1:	1 Smith St			Address 3:			
Address 2:				Suburb			
Address 3:				Post/ZIP		State	
Suburb	MELBOURNE			Country			
Post/ZIP	3001		State		VIC		
Country	AUSTRALIA						
Tel No.							

- **“Account Contact”** – You can set a class for the customer whether they are a Retail Store, Telemarketer, farming or an industry specific customer. There is a **“Master Account”** field that you can use to group a customer is it falls under a master billing system. You can assign a sales rep to the customer in the **“Our Account Manager”** field. You can also utilise other company details as well as payment methods to the customer and record credit card details.

Bill To	Extended	Ship To	Account Contact	Loyalty	Account Manager	Installation	Search
Customer class and manager							
Class				Master Account			
Our account manager							
Region							
Customer Accounts Department Contact							
A/C number				A/C Executive			
Contact							
Tel No.				Fax			
Email							
Discount Rate %							
Details							
Customer Payment Method							
Payment Type				<input type="checkbox"/> On Account			
Name on card							
Card No.				Expiry			
Memo							

- **“Installation”** – If you wish to track an installation for a product you can do it under this tab. The **“Status”** field is where you can customise your own statuses depending on whether it is in progress, complete or pending etc. There are also other fields in which you can utilise that have reference to the installation.

Customer Customer Installation

John Citizen

Status	<input type="text"/>	Contact	<input type="text"/>
Installer Name	<input type="text"/>	Installation Date	<input type="text"/>
Address	<input type="text"/>	Contact No	<input type="text"/>
Model	<input type="text"/>	Identification	<input type="text"/>
Sent To	<input type="text"/>	Date Sent To	<input type="text"/>
Notes	<input type="text" value=""/>		

(max 150 chars)

- **“Search”** – You can search for customers in many fields

Customer

Bill To Extended Ship To Account Contact Loyalty **Search**

Detailed Search	<input type="text" value="Search All Names"/>	<input type="button" value="Search"/>
Customer Class Search	<input type="text" value="Farming"/>	<input type="button" value="Search"/>
Our account manager	<input type="text"/>	<input type="button" value="Search"/>
Reference Search	<input type="text" value="Corporate (Account Manager)"/>	<input type="button" value="Search"/>


5.7.3 System Admin

- *System Administration can be used to make changes to User Groups, Employee's, Company Details, Store Maintenance, ability to view log files, Payment Types, Adjust Tax from Revenue and restrict IP addresses to access the system.*

5.7.3.1 User Group

User Group – Video Tutorial 

1. Navigate to **“Maintain”, “System Admin”** and **“User Groups”**. The options you have here are to create user groups, edit the user group permissions and copy the permissions from one group to another. Once you have chosen the desired group to change the permissions click on the **“Edit”** button.



Home	Sale	Stock	Repairs	Reports	Accounts	Maintain
Tariff Plan	Card File	System Admin	Time Sheet	Global Reports		

Maintain User Group

User Group:

Copy User Group: From To

5.7.3.2 Employees


Employee – Video Tutorial



Employee – Unique Vs Shared Login – Video Tutorial



1. Navigate to **“Maintain”, “System Admin”** and **“Employees”**. Here you can add new staff members, assign a group permission and delete old staff members. In the **“User”** field enter in the staff members details which have to unique to the group. In the **“Branch”** and **“Display In Sale”** field you can choose what branch that person will fall under and also whether that person will show up in the sale screen.
 2. In the **“Search”** field you can search for any staff members you wish to delete or change their permission group.
- Note: If you want to change the user name you must delete that user and enter them in the system again.



Home	Sale	Stock	Repairs
Tariff Plan	Card File	System Admin	Time Sheet
Global Reports			

Employee Maintenance

☒ Add ☐ Edit ☐ Search

User

User Name: Group:

First Name: Last Name:

Password: Confirm Password:

Sales Representative

Sales Rep:

Address: Suburb:

Phone: Mobile No:

Email:

☐ Branch ☒ Display In Sale

☒ 310 Head Office ☒

☐ 320 Melbourne ☐

☐ 330 Port Melbourne ☐

5.7.3.2 Logout Users

Logout Current Users – Video Tutorial



1. Navigate to **“System Admin”**, **“System Admin”** and **“Logout Users”**. In this section you can logout users by ticking the checkbox of the corresponding staff member and pressing **“OK”**. You can also see how many licences and available logins are left.

ClickPOS

Home Sale Stock Repairs Reports

Tariff Plan Card File **System Admin** Time Sheet Global Reports

Logout User

Logout Current Users

<input type="checkbox"/> User Name	Full Name	User Group	Login Details
<input type="checkbox"/> auser3	Ali Muha	Administrator	19/11/2010 8:04 AM
<input type="checkbox"/> johns	John Smith	Administrator	19/11/2010 12:35 PM

OK ☒

No Licences 13

Login Count 2

Actual Login Count 2

Available Logins 11


Back

5.7.3.4 Company Details

Company Details – Video Tutorial



1. Navigate to **“Maintain”**, **“System Admin”** and **“Company Details”**. Here you can enter in your company’s contact details, ACN, ABN, Marquee Message (scrolling message on the top of the screen), colour of the skin and also upload an image to show in ClickPOS as well as invoices. You can also change the password for the Company login with the **“Change Password”** tab.



Home

Sale

Stock

Repairs

Reports

Accounts


Tariff Plan

Card File

System Admin

Time Sheet

Global Reports



Company Details

Edit Details

Change Password

Company Name

My Shop pty Ltd

Contact Name

ClickPOS

Address

215 Rouse Street

City

St Kilda

Country

Australia

Email

sales@clickpos.com

Web Address

Post/ZIP

3207

Phone Number

03 9092 5300

Fax Number

03 9676 9444

ACN

ABN

Marquee Message

Skin

Black

Select Company Logo

[Click Here](#)
 MyCo LOGO TLSTEST.jpg (408 x 178 pixels)
Warning!
 The Image selected exceeds the recommended maximum image size of 360 (H) x 210 (W)
 Please note your image will be resized for Invoices.
 Contact ClickPOS support for more information.

File Name	Description	File Size	Date/Time Uploaded
MyCo LOGO TLSTEST.jpg		46152	24/09/2010 1:51:18 AM
1 item(s)		46152	Insert File
Quota Used: 1.36% 1422701 Bytes Used, 103434899 Bytes Free, 104857600 Bytes Total			

5.7.3.5 Store Maintenance

Store Maintenance – Video Tutorial

1. Navigate to “Maintain”, “System Admin” and “Store Maintenance”. Here you can edit the profile of the store (E.g. Superstore, Kiosk), put in a contact person for the store, edit contact details and edit the text that will show on the invoice.

ClickPOS [Home](#) [Sale](#) [Stock](#)

[Tariff Plan](#) [Card File](#) [System Admin](#) [Time Sheet](#) [Global Reports](#)

Store Maintenance

Edit Store Details

Branch Name:

Branch Code:

Branch Profile: [Maintain Branch Profile](#)

Branch Contact:

Postal Address

Address:

Suburb/State/PostCode:

Shipping Address

Address:

Tel No.:

Fax No.:

Email:

Dealer Code:

Display On Invoice line 1:

Display On Invoice line 2:

Display On Invoice line 3:

- You can also see the printer version and choose whether you would like to have a touch screen layout on the sale screen. **“Extended Option For Sale”** is if you want all the Sales Reps to be displayed on the sale screen as buttons, **“Stock Adjustments Department”** is if you want to tag the branch as a stock adjustment department, **“DPS Enabled”** is if you are using a DPS machine for Eftpos, Text and background colour and whether you would like a separate logo for the branch.

T-88 Opos Version:

Zebra Printer Label Horizontal Alignment:

Date Format:

Time Difference (EST) min:


Current Store Time: 22/11/2010 09:54:33


Touch Screen Mode: ☐

Extended Option For Sale: ☒

Stock Adjustments Department: ☐

DPS Enabled: ☒

Text Colour:  ☐

Background Colour:  ☐

Branch Logo: [Click Here](#)
Recommendation maximum size (360 x 210 pixels)
[Use Default](#)

[Edit](#)

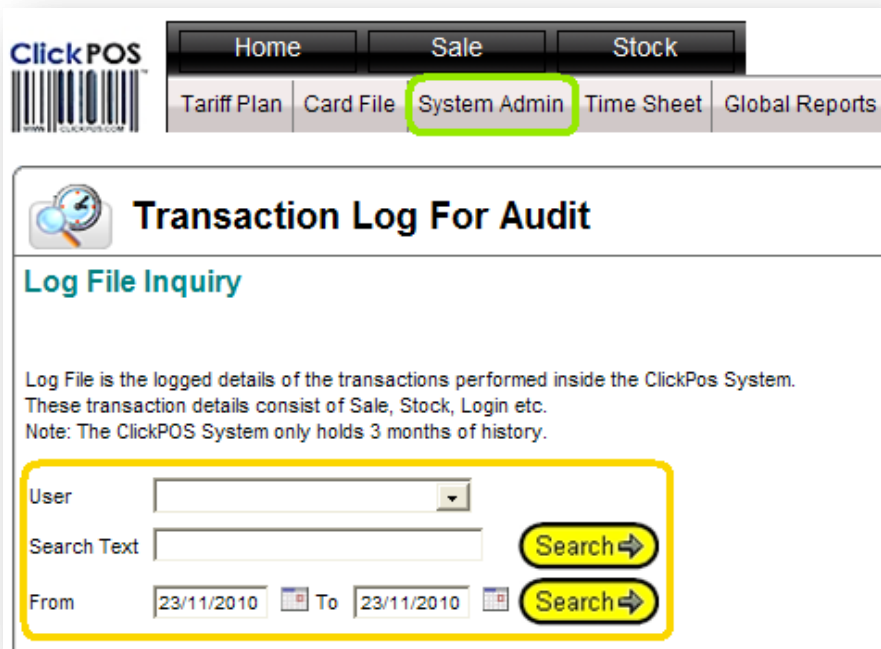
File Name	Description	File Size	Date/Time Uploaded
No Record Found			
0 item(s)		0	Insert File

Quota Used: 1.36% 1422701 Bytes Used, 103434899 Bytes Free, 104857600 Bytes Total

5.7.3.6 Transaction Log for Audit

Transaction Log for Audit – Video Tutorial

Transaction Log for Audit is where you can monitor certain movements in the system. This can be done by specific staff members, wording/text and by date range. E.g. you can see if a staff member has deleted a sale, added products into the system, deleted products from the system and which staff member sold out an invoice. Choose which method you wish to search by and press “**Search**”.



ClickPOS

Home Sale Stock

Tariff Plan Card File **System Admin** Time Sheet Global Reports

Transaction Log For Audit

Log File Inquiry

Log File is the logged details of the transactions performed inside the ClickPos System. These transaction details consist of Sale, Stock, Login etc.
Note: The ClickPOS System only holds 3 months of history.

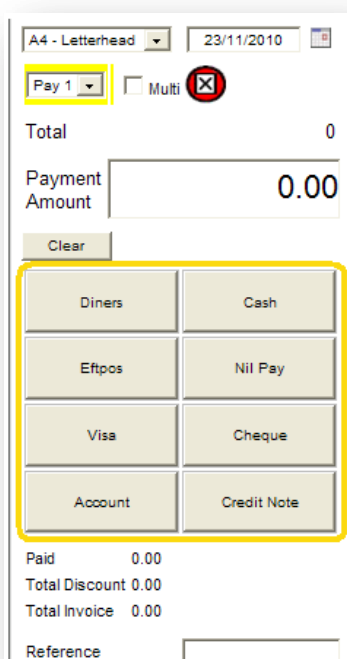
User

Search Text **Search** ➔

From To **Search** ➔

5.7.3.7 Payment Type

Payment Type is where you can choose what payment options you would like to use for the sale screen.



A4 - Letterhead 23/11/2010

Pay 1 ☐ Multi ☒

Total 0

Payment Amount

Clear

Diners	Cash
Eftpos	Nil Pay
Visa	Cheque
Account	Credit Note

Paid 0.00
Total Discount 0.00
Total Invoice 0.00
Reference

1. To create or change a payment type, navigate to **“Maintain”, “System Admin”** and **“Payment Type”**. Here you can Choose the Payment Type (E.g. Cash, Cheque), colour of the button, which order the button will be placed and if the payment type is cash.
 - **“On Account”** if no payment type taken in the transaction. The amount will go into the customer’s account for a later payment.
 - **“Large Button”** if you would like a big button for the payment type on the sales screen.
 - **“DPS”** if the button is linked to a DPS machine for Integrated Eftpos transactions.
 - **“Credit Note”** if the transaction gives the customer a credit note towards the invoice. You must select the **“Zero Value”** checkbox as well.
 - **“Zero Value”** if no tender type is needed for the transaction. E.g. On Account and Credit Note.
 - **“Reference is Mandatory”** If a note is required before you can take payment.

Payment Maintenance

Payment Denomination

Add Payment

Payment Type

Colour

Order

This item is cash (Notes and Coins)

Base Rate %

On Account ☐

Large Button ☐

DPS ☐

Credit Note ☐

Zero Value ☐

Reference is Mandatory ☐

OK ☒ Clear


5.7.3.8 Maintain Sale Reference

Maintain Customer Disclaimer – Video Tutorial



Navigate to **“Maintain”, “System Admin”** and **“Maintain Sale Reference”**.

- **“Advertisement Maintenance”** if you want to record the marketing side of the sale. E.g. Letter drop, TV etc.
- **“Reason Codes”** When an item or sale is deleted you need to enter a reason. You can create predefined reasons that a staff member can choose from a drop down field.
- **“Disclaimer Maintenance”** You can choose which printing option you want to add a Disclaimer onto. This can vary for different kinds of paper sizing. You can also specify the Branch this applies to.



Home	Sale	Stock	Repairs	Reports	Accounts
Tariff Plan	Card File	System Admin	Time Sheet	Global Reports	

Maintain Sale Reference

Advertisement Maintenance
Add New -->
 ☒

Reason Codes
Delete
Add New -->
 ☒


Disclaimer Maintenance
Credit Note A4

Select Branch
All Branches

5.7.3.9 Options

Navigate to “Maintain”, “System Admin” and “Options”. There are multiple fields you can maintain in this area.

- “Tax Adjustments and Inclusion” If you would like to change the default Tax percentage. Tick the “Revenue from Carrier” checkbox if the revenue amounts from Carrier include tax.



Options

Tax Adjustment and Inclusion

You have the option to adjust the Tax Level and to choose if Revenue From Carrier is Tax inclusive or exclusive.

Tax Percentage %

Tax included in all

Revenue From Carrier ☒

 ☒

- “Phone Sale Refund Days” You can adjust the amount of days you can perform a refund for.

Phone Sale Refund Days

You have the option to adjust the phone sale refund days.

Refund Days

 ☒

- “Salesrep Commission On Products Sold” Commission on the total sale price of the product, NOT a percentage of the GP amount. E.g. If the sale price is \$120 and you set the commission percentage to 50%, the commission the sales representative will receive is \$60.

Salesrep Commission On Products Sold

You have the option to adjust commission on products sold for salesreps.

Commission %

☒

- **“Category Heading Maintenance”** You can add more categories under the **“Product Maintain”** field to class the product.

Category Heading Maintenance

Specify Category heading names for display purposes.

Category 2

Category 3

Category 4

Location 1 (ie shelf)

Location 2

☒

- **“Status Product Sale”** You can select a status for the sale item and you can also create your own statuses. You can use this information for reporting purposes and search for it under **“Search Old Sale”**. To change the status of a sale item click on the product name in the sale and there will be a drop down named **“status”**.

Status - Product Sale

The status below is used in the Sale screen to change the status of the product being sold.
At any stage you may query the status of product for evaluation and action purposes.
Use "Search old sale" screen, to find items in with assigned status.
Following shows examples of status
130- Product on Backorder
140- Shipped

Status Type

☒


- **“Mobile Number Regular Expression”** You can set the format in which the mobile numbers will be viewed and imputed into ClickPOS.

5.7.3.10 Network Address Restriction

Network Address Restriction – Video Tutorial



Navigate to **“Maintain”**, **“System”** and **“Network Address Restriction”**. Here you can decide whether the user has to logon from a specific IP range. E.g. This will prevent people outside of business hours to login to the system from their home computers. Click **“New”** to add an IP range or click **“Edit”** to change the IP range.



Allowed Network Addresses

	Label	Address	Start Range	Address	Start Range
Delete Select	localhost	127.0.0.1		127.0.0.1	

Network Address Details

Label localhost

IP Start Range 127.0.0.1

IP End Range 127.0.0.1

[New](#)


[Edit](#)

5.7.4 Time Sheets

Time Sheets can be used for tracking employees working, annual leave and sick hours. You can maintain your own categories for the timesheets such as Overtime, Public holidays and Parental Leave.

Time Sheets – Video Tutorial

1. Navigate to **“Maintain” “Time Sheet”**. From the drop down list choose the representative you wish to add the hours to and press **“Search”**. You will now have a row where you can choose the date, time worked, time for lunch and whether the hours are towards Normal hours, sick hours etc. Once completed press **“OK”** and it will be shown towards the bottom of the screen.



Employee Timesheet Maintenance

[Add Hours](#)
[Verify Hours](#)
[Delete Hours](#)
[Categories](#)

Rep [Search](#)

John Smith

Add Hours

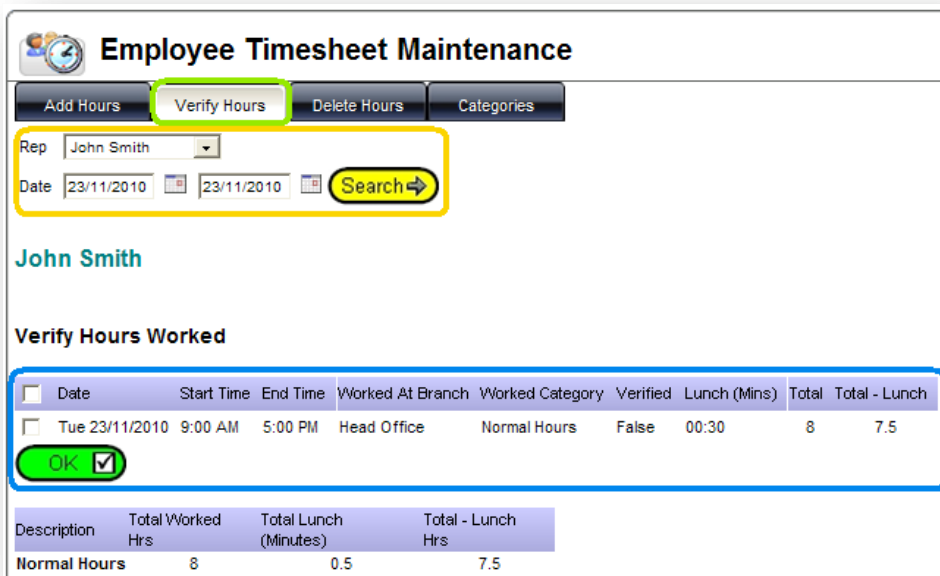
Date	Start Time	End Time	Lunch (Mins)	Branch	Category	
23/11/2010	12:00 PM	12:00 PM	0	Head Office	Annual Leave	<input checked="" type="checkbox"/> OK

Added Time Sheet Details

Date	Start Time	End Time	Branch	Category	Lunch (Mins)	Total	Total - Lunch Hrs
<input type="checkbox"/> Tue 23/11/2010	9:00 AM	5:00 PM	Head Office	Normal Hours	00:30	8	7.5

[Delete](#)

2. **“Verify Hours”** tab you can choose the staff member from the dropdown list that you would like to approve the hours for and press **“Search”**. This will show all un-verified hours for that representative. Tick the checkbox next to the hours to verify and press **“OK”**.



Employee Timesheet Maintenance

Rep:

Date:

John Smith

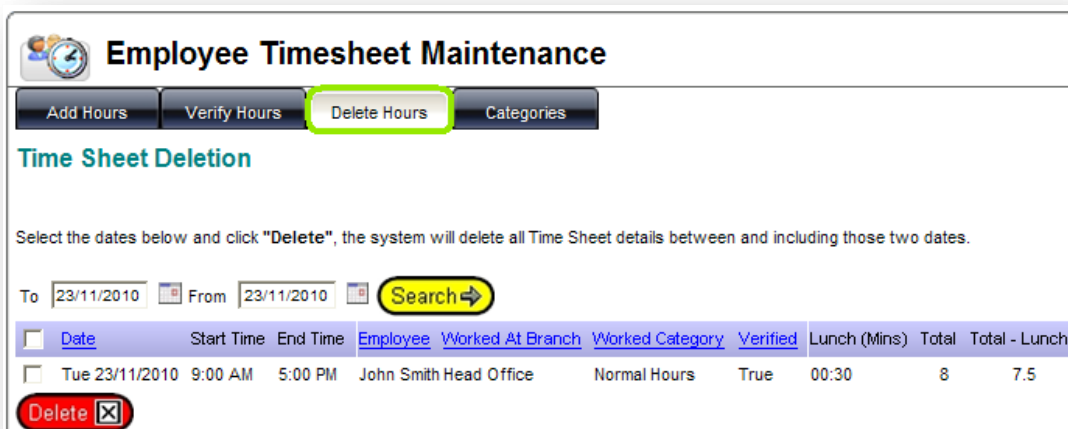
Verify Hours Worked

Date	Start Time	End Time	Worked At Branch	Worked Category	Verified	Lunch (Mins)	Total	Total - Lunch
<input type="checkbox"/> Tue 23/11/2010	9:00 AM	5:00 PM	Head Office	Normal Hours	False	00:30	8	7.5

☒

Description	Total Worked Hrs	Total Lunch (Minutes)	Total - Lunch Hrs
Normal Hours	8	0.5	7.5

3. **"Delete Hours"** tab you can select a date range to view and tick the checkbox next to the delete button to remove the logged hours from the system.



Employee Timesheet Maintenance

Time Sheet Deletion

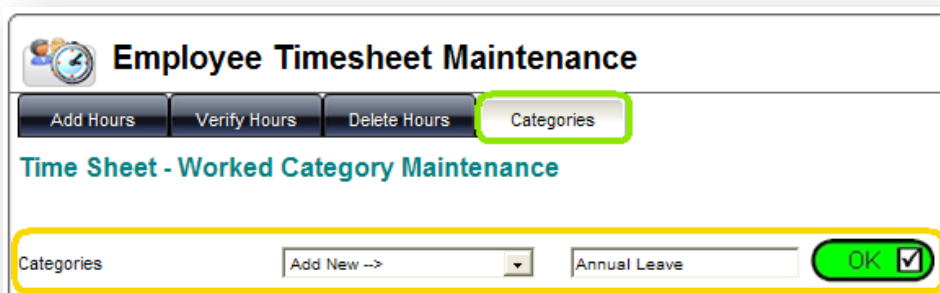
Select the dates below and click "Delete", the system will delete all Time Sheet details between and including those two dates.

To: From:

Date	Start Time	End Time	Employee	Worked At Branch	Worked Category	Verified	Lunch (Mins)	Total	Total - Lunch
<input type="checkbox"/> Tue 23/11/2010	9:00 AM	5:00 PM	John Smith	Head Office	Normal Hours	True	00:30	8	7.5

☒

4. **"Categories"** tab you can maintain your own category of hours. Enter in the desired category and press **"OK"**, this will now become a field to select when adding hours.



Employee Timesheet Maintenance

Time Sheet - Worked Category Maintenance

Categories: ☒

5.7.5 Global Reports (to be removed)