



# ClickPOS Upgrade Notice

**Tue 10-07-2006 8am EST**

## Automatic upgrade.

The upgrade will be performed automatically. You do not require to download the upgrade.


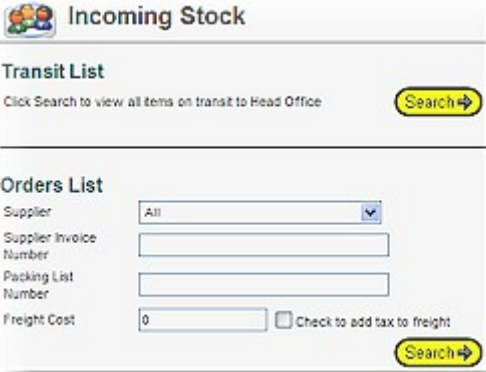
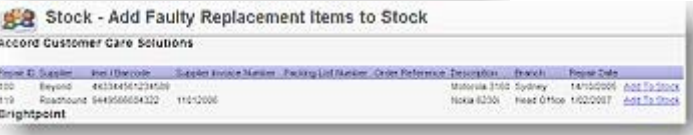
[www.clickpos.com](http://www.clickpos.com) for queries relating to this upgrade please email [help@clickpos.com](mailto:help@clickpos.com)

NOTE: this notice is confidential and only to be viewed by clients that are actively using the ClickPOS system.

If you have received this notice in error, or no longer use the ClickPOS system please email to [help@clickpos.com](mailto:help@clickpos.com) advising removal of your details from our mailing list.

### Stock | Orders

Impact: Low  
Directed To: Stock Manager

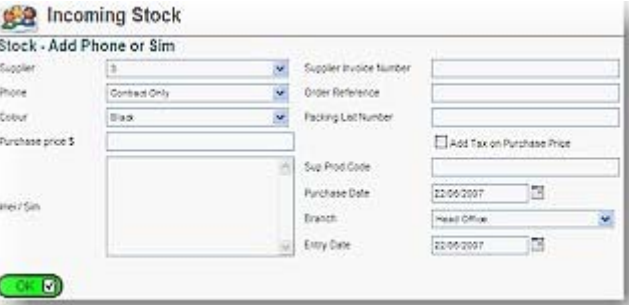




**View/Edit a Purchase Price in Add/Edit Mode**

Update Accessory Price in Catalogue

Update Phone Price in Phone List

**Change Purchase Prices in Stock and Sale**



The following screens under the 'Stock' area have now been updated to the new platform. Hence you when viewing these pages you'll notice a new screen layout. (See Opposite) The areas that have been updated are;

- Add Product To Stock
- Add Phone To Stock
- Incoming Stock
- Add Faulty Replacement

There has been the inclusion of 2 new permissions that allow the automatic updating of products and phone purchase prices within Maintain > Product Catalogue List from the Stock area.

For Example if you enter in a handset through Add Phone To Stock and you change the purchase price the system will return with a pop up asking if you wish to also update the product catalogue list as well.

Administrators will firstly need to go to Maintain > System Admin > User Permission and check the following;

- Update Accessory Price In Catalogue
- Update Phone Price In Phone List

Other additions to the Stock area include;

- If a phone has been noted as an EOL in Tariff Plan then a user will not be able to select this handset in ORDERS.
- Users will only be able to see 'Stock On Hand ALL' and 'On Order ALL' only for the branches they have been assigned to.
- All items in Transit will now show in the SOH and SOH ALL listing.

**Please Note:** The while your in 'Incoming Stock' if you select 'Tick To Add Tax' to a product then the system will automatically default to this option when adding in the remaining products. If the next product has tax included then you will need to uncheck 'Tick to Add Tax'.

### Sales | Customer

Impact: Low  
Directed To: Sales Reps/Administrator

There have been 3 new fields added within Bill To in Customer. These are Trading As, Country and Shipping Country within Ship To. We have also re-

## Customer

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

ordered some of the Bill To tab.

## Maintain | Tariff Plan | Plan Template

Impact: Low  
Directed To: Stock Manager

### Formula

Apply To:    
 Formula:    
 Remove Decimals  Round to nearest 10 - 1 dollar  Negative becomes 0

### Formula

Apply To:    
 Formula:    
 Remove Decimals  Round to nearest 10 - 1 dollar  Negative becomes 0

There have been a few small improvements to search area of Plan Template.

- All Formulas will now include GST so Rebate will now include GST if the stores enter the revenue from carrier without GST.

- Formulas can now be applied to Rebates, Bonus 1 and 2 and Sales Rep Commission.

- There is now a check box for decimal place rounding 'Remove Decimals'.

- We have also included a check box that will turn all negative amounts to 0.

There has also been a minor change to the 'Phone' tab. For future reference when an Administrator updates a phone name (within Tariff Plan) this new description will now be update through the Orders, Sales and Repairs Screen. Previously only the Phone and Tariff Plan areas were updated.

## Maintain | CardFile | Customer Details

Impact: Low  
Directed To: Administrator

- [Stock](#)
- [Sale](#)
- [Repairs](#)
- [Reports](#)
- [Maintain](#)
- [Tariff Plan](#)
- [Card File](#)

**Customer**

**Customer Purchase History** - Bob Smith - [Print Version](#)

Invoice	Date	Sale Location	Sales Rep	Sale Price \$
1001415	5/06/2007	Head Office		0.00
1001205	7/02/2006	Head Office	Demo Name	-36.00

Customer Purchase History

Name: Bob Smith

Date	Invoice	Sale Location	Sales Rep	Phone Inet	Disc Date	Carrier Plan	Plan Category	Mob	Credit Note No	Contract Length	Auth No	File Ref	Pin/PUL	Sale Price \$
5/06/2007	1001415	Head Office		Nokia 1000	3333333333333	Outright Sale			1234567	0				50.00

Phone / Plan Purchases \$0.00

Date	Invoice	Sale Location	Sales Rep	Product	Barcode	Sale Price \$
7/02/2006	1001205	Head Office	Demo Name	AC FAST CHARGER SAMSUNG S	9310018949114	-36.00

Product Purchases -\$36.00  
Total Purchases -\$36.00

**Customer Repair History**

No Record Found

We have included a 'Print Version' link for Customer Purchase History. This report displays all invoices and items purchased by the customer, as per the old platform.

Another search function has been included within CardFile. By selecting the Search tab you will now find a Detailed Search for 'Show ALL Inactive'.

**Customer**

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

Detailed Search: Search All Fields [v] [Search]

Customer Class Search: Company [Search]

Our account manager: Last Name [Search]

Reference Search: Customer ID Type No [v] [Search]

Registration/Installation No [v] [Search]

Fault or Bill Reference [v] [Search]

Bill Analysis Reference [v] [Search]

Back

Show All Inactive

## Maintain | Global Reports | Stock Reports

Impact: Low  
Directed To: Stock Manager/Administrator

Report 2-3  
**MyCo-Demo Site**

**Phone By Location Detailed List** 21/06/2007 10:53:13 AM

[View Phone Matrix](#)

**Brisbane**

Imei	Phone	Supplier	Color	Purchase Date
4545454545454545	Alcatel Easy HF	Cellnet	Blue	12/12/2000
454545455	Alcatel Easy HF	Cellnet	red	09/12/2000
7857858585858585	Alcatel Easy HF	Cellnet	Blue	09/12/2000
243542342424234	Alcatel Easy HF	Cellnet	Orange	11/12/2000

Report 2-4  
**MyCo-Demo Site**

**Phone By Type Report** 21/06/2007 11:36:08 AM

**2.5G - Motorola V3 Black**

Imei	Location	Purchase Date	Color	On Transit	Purchase price
222	Los Angeles	14/03/2000	Black	Yes	\$391.57
<b>Total Count</b>	<b>1</b>	<b>Total Purchase Price</b>			<b>\$391.57</b>

**Phones**

Phone	Colour	Reorder Level	Sales	Stock On Hand	Outstanding Orders	Order
Blackberry 7100 (HED)	Blue	0	0	0	0	_____
Blackberry 7130 (HED)		0	0	0	2	_____
Blackberry 7230 (HED)	No Color	0	0	0	0	_____
Blackberry 7290 (HED)	No Color	0	0	0	0	_____
Blackberry 8700 (HED)	No Color	0	0	0	0	_____
Blackberry 8707 3G	Silver	0	0	0	0	_____

Within Stock Reports you will now have the ability to see handset colours within the following reports.

- Phones By Location 2.3
- Phones By Type 2.3
- Produce Stock ReOrder Report 2.13

This will allow for easier tracking and ordering of a specific handset that may come in a multitude of colours.

**Please Note:** That the colour will NOT carry through into 'View Phone Matrix' in Report 2.3.

Also please keep in mind that Products/Phones that are set to Discontinued will no longer appear on Report 2.13.

## Maintain | System Admin | User Groups

Impact: Low  
Directed To: Administrator

Customer must be selected before selling phone

Customer must be selected before selling Product

Phone Sale Mobile number is mandatory

User Groups now has a new permission 'Phone Sale Mobile Number Is Mandatory'. By ticking the above permission you are forcing your sales reps to add a mobile number in the phone sale area. They will not be allowed to leave the value blank.

Please Note: The value must be NUMERIC with no spaces or other non-numeric characters.

We have also moved the security 'Maintain the Sales Rep. List' to Maintain System Administration.

- Maintain System Administration**
- Allow to Logout Users
- Change Company Details
- Inquire the Log File
- Maintain Disclaimers
- Maintain Options
- Maintain Payment Types
- Maintain Promotion Types
- Maintain Stores
- Maintain User Groups
- Maintain the Sales Rep. List**

## Generic & Apparel Users Please Take Note

### Stock | Orders

Impact: High  
Directed To: Stock Manager

You will now have the new Orders Screen and Customer Screen, as well as Incoming Stock as explained in this and the May Upgrade Notice . For more details on the new functionality of the Orders screen please [Click Here](#) or refer to the May 2007 Upgrade Notice. Please Note you will have the ability to search using a 'STYLE' which will be located under Order Wizard.

### DEMO SITE

To preview the new changes prior to upgrade date, please visit our demo site

Cellular industry users

[www.clickpos.net/login](http://www.clickpos.net/login)

myco

myco

myco1 through to myco10

password

Apparel and other generic system users

[www.clickpos.com.au/login](http://www.clickpos.com.au/login)

demo

password

demo1 through to demo10

password

Website

Company login

Company password

User Login

User Password