



# ClickPOS Upgrade Notice

Upgrade Scheduled

**Wed 6-09-2006 11pm EST**

System availability during upgrade

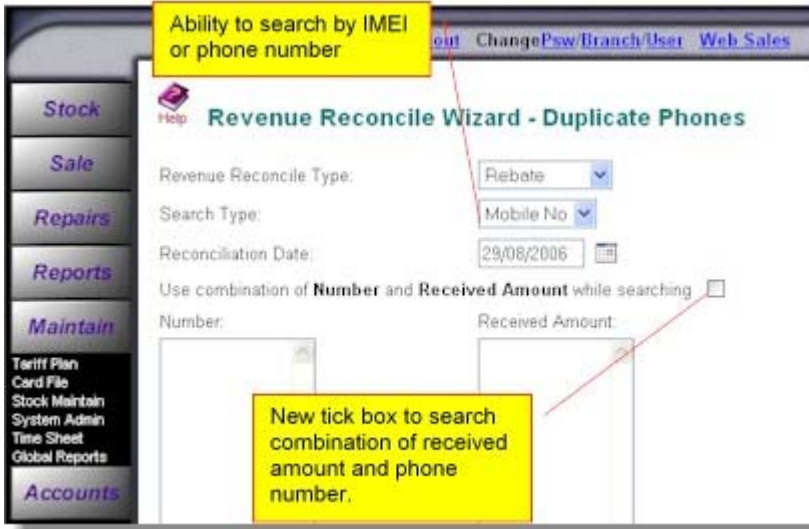
**Automatic upgrade.**

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

## Maintain | Tariff Plan | Reconcile Revenue | Wizard

Impact: Low

Directed To: Administration/Accounts



We have now added a new Search Type ability, "IMEI No" for Administrators and Accountants when Reconciling Revenue through Batch Reconciliation Wizard. (Rebate, Commission, Bonus 1 & 2 & Additions/Deductions)

**Use Combination of phone number and received amount while searching.**

Tick this box to use the combination of phone details (IMEI or phone number) AND received amount to retrieve correct entry.

This is used when there is a duplicate number or IMEI on the same invoice.

Please NOTE: If the amount paid from the carrier is incorrect using this search will not return an entry.

## Maintain | Tariff Plan | Reconcile Revenue | Outstanding Reconciliation Search

Impact: Low

Directed To: Administration/Accounts

Search Results - Rebate

Date From: 01/01/2005 Date To: 07/06/2006

Carrier: All Carriers

Connection Ref / Account No	Date	Invoice	Latitude/Longitude	State Rep	Branch	Mobile Number	IMEI/ISN	Plan	Expected Amount	Received Amount	Click To
	01/02/2006	2000	34461/ABC 12345	John Doe	L1000 Main Head Office	04112212	465546	Plan 52512	\$1,000.00	\$500.00	<input checked="" type="checkbox"/>
1004056	01/02/2006	2000	Milford Mills Branch		L1000 Main Head Office	709012		Plan 52512	\$1,000.00	\$0.00	<input checked="" type="checkbox"/>
1005075	09/02/2006	200111	11111/Milford Court		L1000 Main Head Office			Cap 51030	\$200.00	\$0.00	<input type="checkbox"/>
	07/06/2006	200115	11111/11111 ESt	My Name	L1000 Main Head Office	040500042	2232233	Plan 55524	\$1,200.00	\$0.00	<input checked="" type="checkbox"/>
<b>Total Rebate:</b>									<b>\$1,099.00</b>		
<b>Total Rebate Received:</b>									<b>\$550.00</b>		

OK

Within the Outstanding Reconciliation Search Accountants/Administrators will now have the ability to select multiple connections for Reconciliation. Tick the check box for ALL items you wish to reconcile and Click OK.

The system will automatically remove these items for the list.

## Maintain | Card File | Employees

Impact: Low

Directed To: Administrators

Administrators will now have the ability to add in a Sales Rep email address. This screen shall link to our Customer email list which we use when sending out UPGRADE NOTICES.

**Add a Sales Representative:**

Sales Representative:   
Address:  Suburb:   
Home Phone:  Mobile:   
E-mail:

Sales Representative: **Jane Doe**

**Select the branches this user will be deleted from:**

**Tick All**   **Un-Tick All**

- 100 Head Office    200 London    202 Gold Coast  
 211 Melbourne

**Delete**

**✘ Jane Doe manages the customers listed below.**

109 Christian Node Co Go Well

Note: Assign new account managers to the the customers listed above, then proceed with the deletion process.

**Delete**

The second function we have added to Card File - Employees is the ability for administrators to multi delete a Sales Rep from branches. Select the Sales Rep you are going to remove and click delete. The system will automatically tick the store you selected, simply select additional branches they belong to from the matrix and click Delete.

The system will then check to see if the Sales Rep manages any customer accounts and if so the system will return with the message

**Note: Assign new account managers to the the customers listed above, then proceed with the deletion process.**

Administrators will need to assign a new sales rep to these customers before the deletion is allowed.

Please Note: When Administrators update a user name it automatically updates the sales rep list.

# Help

Impact: Low  
Directed To: All Users



## help

Welcome to help and user training guide.  
This document contains instructions on training all levels of your company staff, organising systems implementation, setting up your PC & staff training.

### Video Training

- Staff roles & duties within the company. Click on the appropriate role for short video training lessons.  
To play any video training, you must have SOUND on the PC and Flash Player installed. Clicking here to instal Flash Player
- Store Manager & Sales Reps
- Stock Control Officer
- System Administrator

The new look help screen has been updated for ease of use. It has been segmented into six separate areas of use and is the central point for any additional help and information requirements.

# Main | Logout

Impact: Low  
Directed To: All Users

Clicking Logout to exit the system will shut down the entire browser, this has increased the system security.



## Maintain | Tariff Plan | Plan Template| Phones

Impact: Low  
Directed To: Administrators



The phones screen has been updated to enable multiple deletion of phones. To use this hold the Ctrl Key on the keyboard and select all the phones to be deleted with your mouse.

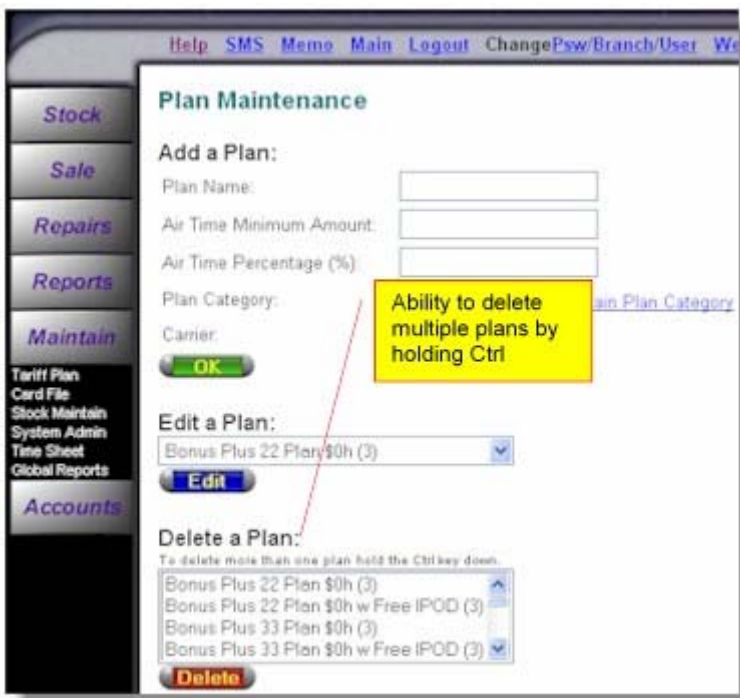
The system will then list the items to be deleted and ask for confirmation to delete.



## Maintain | Tariff Plan | Plan Template | Plans

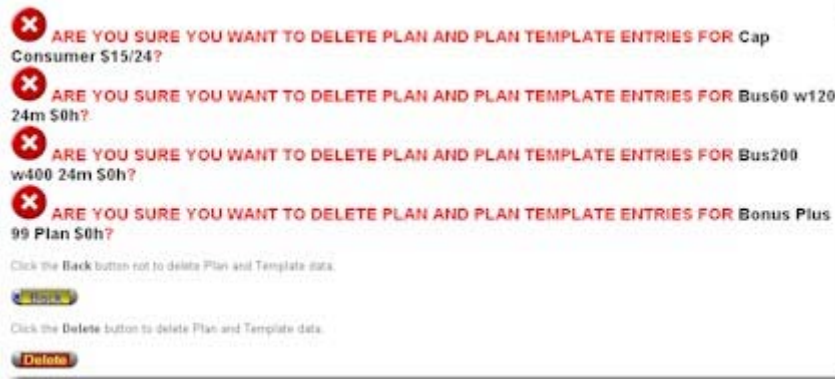
Impact: Low  
Directed To: Administrators

The plans screen has been updated to



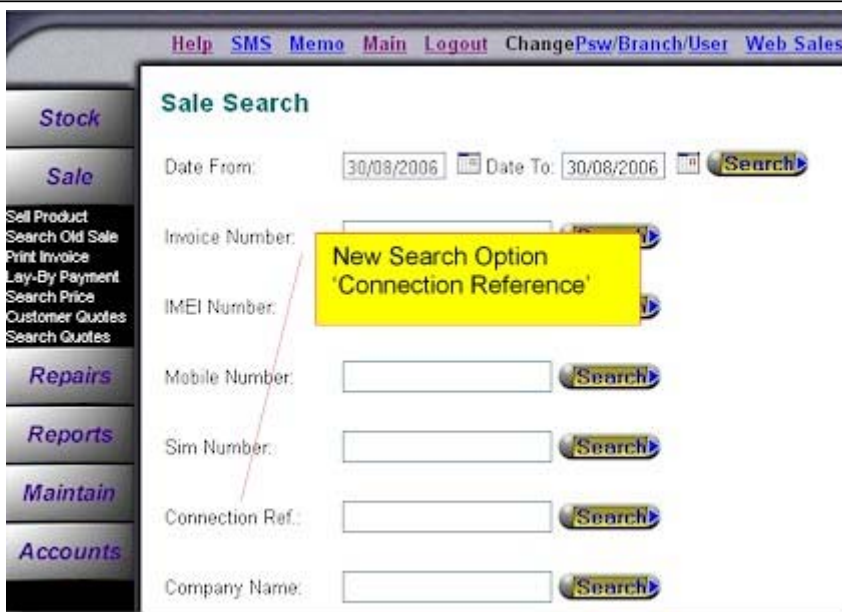
enable multiple deletion of plans. To use this hold the Ctrl Key on the keyboard and select all the plans to be deleted with your mouse.

The system will then list the plans to be deleted and ask for confirmation to delete.



## Sale | Search Old Sale

Impact: Low  
Directed To: All Users



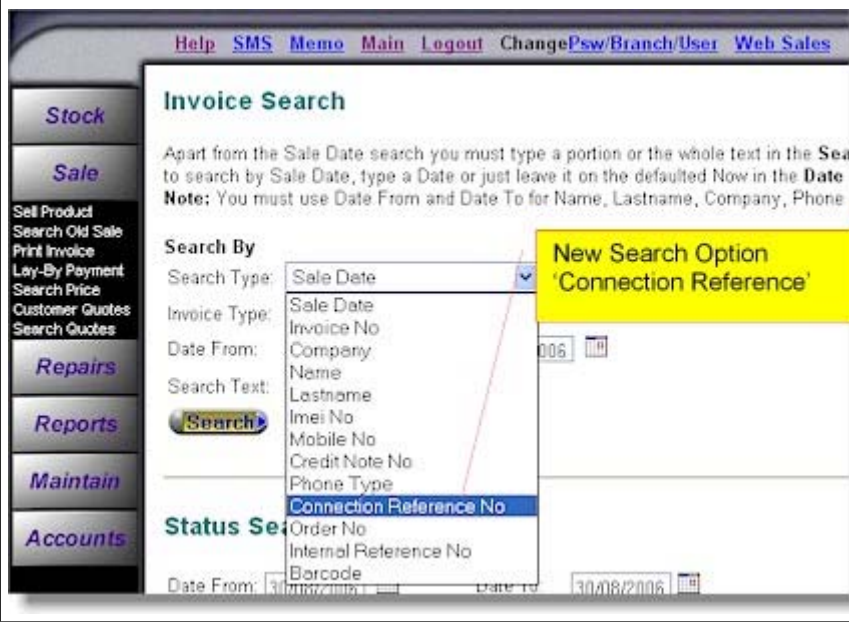
The 'search old sale' screen has been updated with a new search option 'connection reference'.

You can now search an old invoice using the connection reference provided to you by carrier.

## Sale | Print Invoice

Impact: Low  
Directed To: All Users



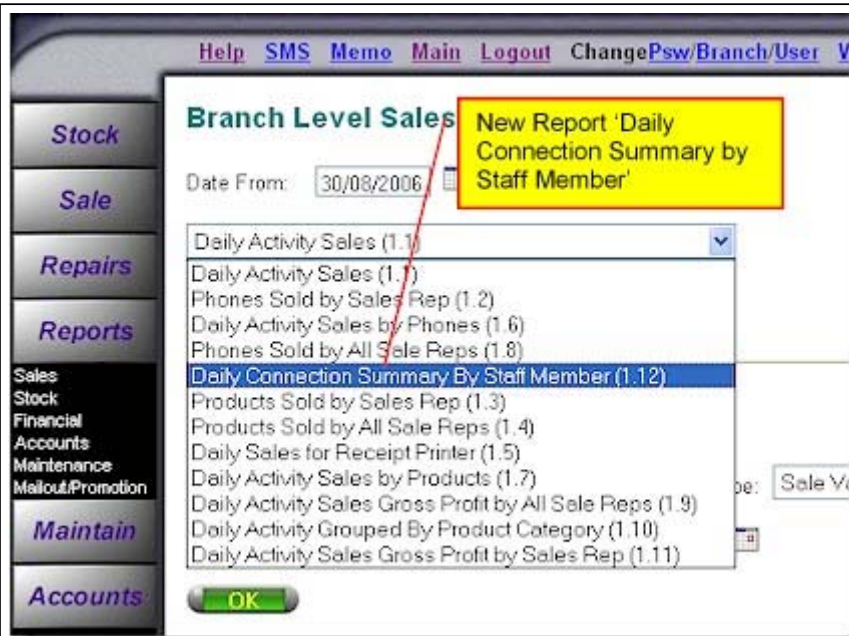


The 'print invoice' screen has been updated with a new search option 'connection reference'.

You can now print an old invoice using the connection reference provided to you by carrier.

## Reports | Sales

Impact: Low  
Directed To: Administrators



A new report has been added to branch level sales reports. Daily Connection Summary by Staff Member (1.12).

The report details the daily connection by staff Member and includes detail such as Carrier, IMEI, phone number and customer details ordered by each sales rep.

Date	Invoice	Connection Ref.	Mobile No.	Customer	Description	Imei No.	Sim No.	Carrier	Plan Type	Filed	Sale	RRP	Payment Type
07/08/2006	200184		0495682635	Ted Dyes of Mr Fantastic	Nokia 8210	88888888		Outright	Outright	0	\$599.00	\$599.00	Visa
07/08/2006	200185		0495688842	Sabin Akhat of Pearl Ent	Nokia 8210	22322233		vodafone	Plan \$550.00	0	\$0.00	\$0.00	N/A
<b>Total Sales:</b>						2							
<b>Total IMEIs Sold:</b>						2							
<b>Total RRP of Handsets:</b>						\$599.00							
<b>Total SalePrice of Handsets:</b>						\$599.00							

## Stock | Search Phone or Product | Stock Entry Confirmation Report

Impact: Low  
Directed To: Administrators

The stock entry confirmation report has been updated with a new area 'Update Stock and Sale'.

Repairs

Reports

Maintain

Accounts

**Totals** 3 \$9,000.00

**Grand Totals** 3 \$9,000.00

Adjustment For Supplier Invoice Num

Update Stock and Sale

Update Supplier Invoice No. in the Stock and Sale lists for the Supplier Invoice No. above.

Supplier Invoice No.:

**Edit**

Change Supplier Invoice/ Packing List Number here.

This can be used if the supplier invoice number or packing list number has been entered incorrectly while accepting stock.

It will update the supplier invoice number or packing list number in sale and stock lists.

## Maintain | Sytem Admin | Transaction Log for Audit

Impact: Low  
Directed To: Administrators

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

Stock

Sale

Repairs

Reports

Maintain

Tariff Plan  
Card File  
Stock Maintain  
System Admin  
Time Sheet  
Global Reports

Accounts

Log File Inquiry

Log File search is completed, click Back for a new Search.

**Back**

http://www.phonestudio.net - Report Window - Microsoft Internet Explorer

Log File Inquiry Report

Local Date/Time 30/08/2006 02:43:36 PM  
Search Date From 30/05/2006  
Search Date To 30/08/2006

Entry Date	Branch	User	Action	Screen	Details
2006-05-30T14:12:00	211	ptest	Add	Accounts -> Cust. Payments	Payment ID:116,ABC STORE,Consulting,Cemisa Cheque,09/05/2006
2006-05-30T14:12:00	211	ptest	Add	Accounts -> Cust. Payments(SP)	Payment ID:116,Invoice:200129,30,Cheque, 09/05/2006
2006-05-30T14:12:00	211	ptest	Add	Accounts -> Cust. Payments(SP)	Payment ID:116,Invoice:211109,400,Cheque, 09/05/2006, Melbourne
2006-05-30T16:37:00	200	ptest	LOGIN	USER LOGIN	ptest
2006-05-	...	...	...	...	...

The Transaction Log for Audit has been updated to a pop up window report. This means the report will run more efficiently.

## Maintain | Tariff Plan | Plan Template | Phone Sale Price Wizard V.3

Impact: Low  
Directed To: Administrators

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

Stock

Sale

Repairs

Reports

Maintain

1 2 3

Select Carrier Edit Phone Edit from Purchase Prices

Phone Sale Price Wizard - (1) Select Carrier

Select the carrier you wish to change and set a profit margin for that carrier.

3

Next >>

The plan template screen has a new area 'Phone Sale Price Wizard Version 3'.

This is to be used by administrators who wish to calculate their sales price based on the formula: Sales Price of Handset = Purchase Price - Rebate.

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

1 2 3

Select Carrier Edit Phone Edit from  
Purchase Prices

### Phone Sale Price Wizard - (2) Review/Change Phone P

Review and change the purchase prices for each phone bound to a carrier in the ex  
Apply all changes by clicking the "Apply" button. If you do not want to change the  
Remember that by clicking "Apply", you are updating the purchase price of all pho

Alcatel Easy HF	12.99	Contract Only	0.00
LG U8120	0.00	LG U8138	0.00
LG U8180	0.00	Mot A1000	0.00
Mot C975	0.00	Mot E1000	0.00

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

1 2 3

Select Carrier Edit Phone Edit from  
Purchase Prices

### Phone Sale Price Wizard - (3) Edit Plan Details

Change any details of the plans listed below which are currently available in your ex

Plan	Contract Period	Profit Margin	Rebate	Commission	Bonus 1	B1 S
Update Fields:						
Bonus Plus 22 Plan \$0h	24	0.00	0.00	160.00	0.00	No De
Bonus Plus 22 Plan \$0h w Free IPOD	24	0.00	0.00	90.00	0.00	No De
Bonus Plus 33 Plan \$0h	24	0.00	0.00	235.00	0.00	No De
Bonus Plus 33						

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

1 2 3

Select Carrier Edit Phone Edit from  
Purchase Prices

### Phone Sale Price Wizard - (4) Completed Plan Template Wiz

You have successfully modified the plan template and set profit margins for the carrier.  
To view the full list of plans and phones with profit and sale prices for 3, click here to [vie](#)  
To refine the plan template you have just modified, click here to [refine template](#) en

## Maintain | Tariff Plan | Reconcile Revenue | Edit Screen

Impact: Low  
Directed To: Administrators/Accounts

When reconciling revenue for addition/deduction entries the check boxes in edit mode have become read only.

The system will automatically select the correct check box from the information entered when the addition/deduction was created.

This will minimise any errors that can occur from manual processing.



Check boxes are read only, and the system will automatically select the correct option.

### Addition/Deduction

	Amt.	Date Exp.	Received Amt	Date Rec.	Revenue From Carrier	Display on Invoice	Display Carrier Revenue on Invoice
Connect Fee	100.00		100.00	30/05/2005	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	0.00		0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	0.00		0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Service Disconnect Date:  Credit Note No.:

OK

## Maintain | System Admin | Company Details

Impact: Low  
Directed To: Administrators

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

Address: 101 Main Street  
City: Melbourne  
Postcode: 3000  
Country:  
Phone Number: 61398215000  
Fax Number: 61398214877  
ACN: 453534943  
ABN: 4543543543  
E-mail: sales@phonestudio.com.au  
Web Address: www.phonestudio.com.au

OK

### Change Company Password

Old Password:   
New Password:   
Confirm New Password:

OK

Change your own company password area.

The company details screen has been updated to include the ability to change the company password of the system.

To change the password you will need to enter the existing password and then enter the new password twice.

Previously this was a function performed by ClickPOS upon request. This increases the security level of the system.

## Maintain | Tariff Plan | Phone | Maintain Account Reference

Impact: Low  
Directed To: Administrators

Help ChangePsw/Branch/User Web Sales

### Phone

Add a Phone:

Phone:

Account Reference:  Maintain Account Reference

ReOrder Level:

New Area to build 'Maintain Account Reference'

This screen has been updated in readiness for the upcoming integration into accounting packages such as Quickbooks.

This screen is not to be used unless the integration function is in use.



Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

**Account Reference Maintenance**

**Add an Account Reference:**  
Account Reference Name:

**Edit an Account Reference:**  
To change the name of an account reference, select the one you wish to change, then enter the new name into the text box, then click the Edit button. The system will update all relevant details

**Search an Account Reference:**  
Use the search to view/change all categories to the selected account reference.

**Delete an Account Reference:**

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

## Maintain | Stock Maintain | Add New Product | Maintain Category | Maintain Account Reference

Impact: Low  
Directed To: Administrators

Logout ChangePsw/Branch/User Web Sales

**New area to build 'maintain account reference'**

Use the Product Category Maintenance to group certain products and specify the

Master Category:

Account Reference:

Category:

Tax %:

Include in Loyalty offer:  Min purchase prior to applying Loyalty/Discount

Stock  
Sale  
Repairs  
Reports  
Maintain

This screen has been updated in readiness for the upcoming integration into accounting packages such as Quickbooks.

This screen is not to be used unless the integration function is in use.

Help SMS Memo Main Logout ChangePsw/Branch/User Web Sales

**Account Reference Maintenance**

**Add an Account Reference:**  
Account Reference Name:

**Edit an Account Reference:**  
To change the name of an account reference, select the one you wish to change, then enter the new name into the text box, then click the Edit button. The system will update all relevant details

**Search an Account Reference:**  
Use the search to view/change all categories to the selected account reference.

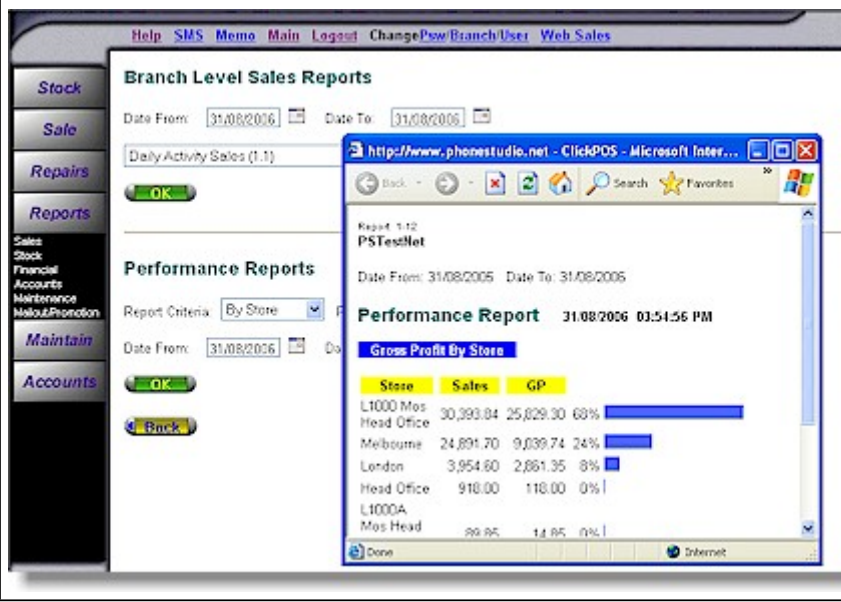
**Delete an Account Reference:**

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

## Reports | Sale | Performance Reports

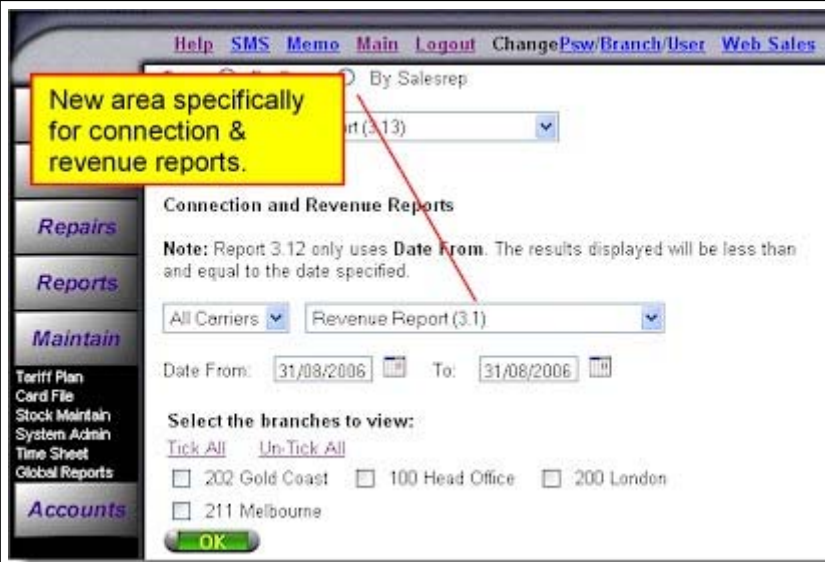
Impact: Low  
Directed To: Administrators

All performance reports in branch level sales reports are now **inclusive** of GST.



## Maintain | Global Reports | Financial Reports

Impact: Low  
Directed To: Administrators



The revenue and connection reports have been split into their own area.

## General Notes

Impact: Low  
Directed To: Administrators

The time sheet area has been updated so that if a user is deleted from the sales rep list they will still appear in the time sheet.

### DEMO SITE

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

Website	Cellular industry users	Apparel and other generic system users
Company login	www.clickpos.net/login	www.clickpos.com.au/login
Company password	myco	demo
User Login	myco	password
User Password	myname	user1
	myname	password
<b>Or Alternatively</b>		
Company login	myco	
Company password	myco	
User Login	user1 through to user10	
User Password	password	

