

ClickPOS Upgrade Notice

Wed 24-05-2007 11pm EST

**This upgrade requires Administrator to perform settings after the upgrade.
You will be contacted by one of our consultants to guide you through the process.**

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

www.clickpos.com for queries relating to this upgrade please email 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 advising removal of your details from our mailing list.

New Video Tutorials



[Purchase Orders - video tutorial on how to create a Purchase Order](#)



[Customer Screen - video tutorial on how to add and search a customer](#)

Important Upgrade Notice

Administrators take note as the following upgrade has had a high impact on the system.


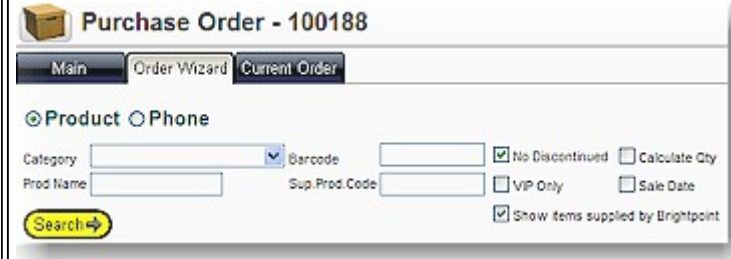
ClickPOS is currently updating its system with a new technology that has allowed for an innovative and functional enhancement of some of its screens, namely Orders, Customer and Tariff Plan. For example the process of stock control is a far more automated process and therefore more efficient and effective.

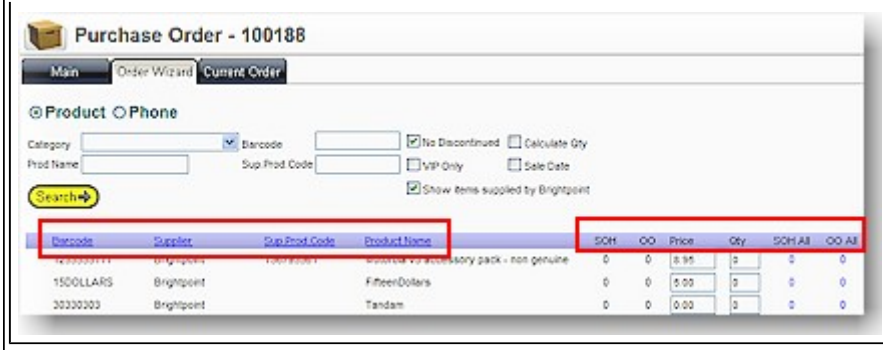
Because we have made substantial changes to the Orders and Tariff Plan screens we have written in depth documentation to help guide administrators through all changes. ALL ADMINISTRATORS will need to click on the links below to access this information.

[New Orders Screen](#) +

[New Tariff Plan Screen](#)

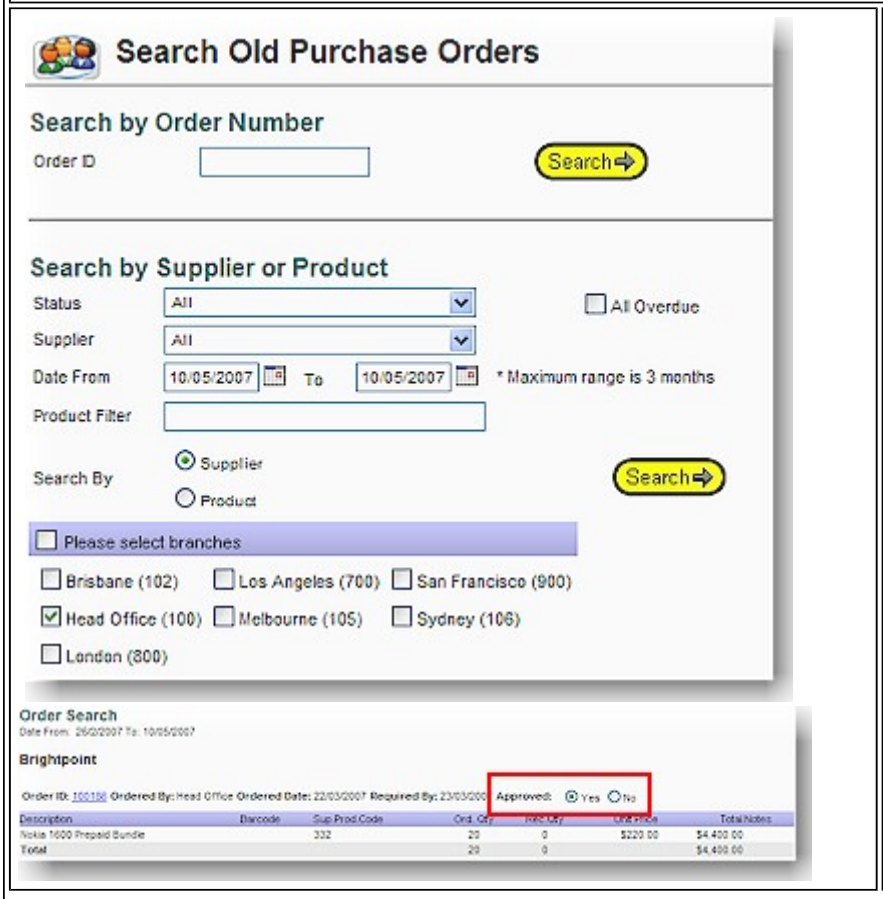
Below you'll find details on general updates within the system, please read carefully for full details.

Stock Orders	
<p>Impact: High Directed To: Stock Manager and Administrators</p>  	<ol style="list-style-type: none"> 1. Orders area has been given a new facelift with a new screen layout. We have also given the Stock control officer the ability to not only approve an order but to also select a status. For example if OnHold is selected it means that the branch might still need to add items to the order. The Head Office then knows not to approve the order until the store has closed the order. 2. When entering Orders you'll be able to view a list of Orders belonging to that branch that are either Open or OnHold. Once an order is closed it will drop from the list. 3. We have also included more advanced Search features for both Product and Phone under the Order Wizard tab. For example you can choose to only view product supplied by Brightpoint. 4. Another new function is the ability to see Stock On Hand (SOH) and On Order (OO) for that branch when adding products or phones. On the far right hand side you will locate all Stock On Hand (SOH ALL) and for On Order (OO) for other stores. 5. Finally, you now have the ability to sort by feature in the list of products or phone. To do this simply click on the highlighted feature i.e. Product Name and the list will resort alphabetically.



Stock | Search Old Orders

Impact: Low
Directed To: Stock Manager and Administrators



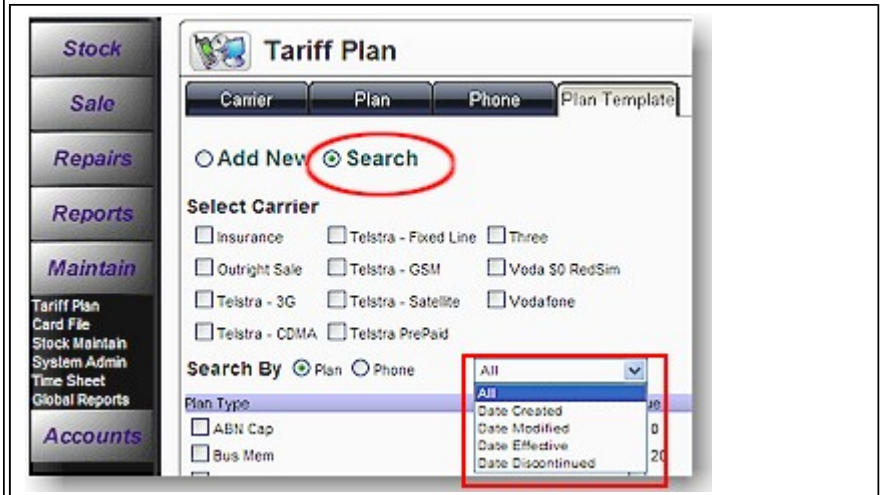
1. Users will now view a new screen layout when using Search Old Orders. We have also included the ability to be able to search orders for multiple branches. This will only apply if the user has been given permission to log into more than 1 branch.

Please Note: Search results have now been limited to a 3 month time period to improve the performance when returning records. For example you can still search back in 01/04/2005 to 31/06/2007 and the system will return search results.

2. Orders can now be approved from Search Old Orders. Once you have performed your search and the system returns the results you can select yes to approve the order.

Maintain | Tariff Plan | Tariff Plan Maintenance

Impact: High
Directed To: Administrators



1. Within the Search area of 'Plan Template' you will now have the ability to search the existing plan template for information using 2 new fields, 'Date Effective' OR 'Date Discontinued'. These search fields apply to both plans and phones.

2. Administrators will now be able to generate a Sale Price using the formula wizard. To find the 'Formula' function go to - Maintain/Tariff Plan/Plan and select Maintain Plan References then scroll down to Plan Template Formula. Firstly name your new formula then place your cursor into the formula text box, a popup will appear with the field selection. Just select the criteria required to build your formula then apply when building your templates.



Tariff Plan

Carrier **Plan** Phone Plan Template

User Defined Wizard Copy Details Search

Maintain Plan References

Plan *

Plan Template Formula Sale Price

Formula

Plan Type

Select Fields				
ppp	ppp	reb	+	-
com	bon1	bon2	+	/
src	()	%	

Maintain | Tariff Plan | Additions & Deductions

Impact: Low
Directed To: Administrator

Maintain Additions/Deductions

Addition/Deduction *

Amount

Show on Invoice

Revenue from Carrier

Display Revenue Amount on Invoice

<input type="checkbox"/>	Addition/Deduction	Amount	Show on Invoice	Revenue from Carrier	Display Revenue Amount on Invoice
<input type="checkbox"/>	Clearback	-10.00	No	Yes	No
<input type="checkbox"/>	Connect Fee	65.00	Yes	No	No
<input type="checkbox"/>	Customer Payout	0.00	Yes	No	No

Additions and Deductions now have a new screen layout.

Maintain | Tariff Plan | Loan Phones

Impact: Low
Directed To: Stock Manager/Administratior

Maintain Loan Phones

Loan Phones

Branch

Loan Phones now have a new screen layout.

Maintain | Card File | Customer Details

Impact: Low
Directed To: Sales Staff/Administrators

There have been several new functions added to Customer as well as a new screen layout.

1. Company Name and Loyalty are both now located on Bill To just under Job Title.
2. The customer screen will now list any current customer in the system in reference to the details being entered. For example if your enter Molly Bloom any customr with the same name will appear at the bottom of the screen. Simply select the correct customer. **Please Note:** You must pause before entering in last name so the system has time to find any current customers.
3. The new screen will now hold previously entered

Customer

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

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

OK [] Apply [] Clear []
Back []

Name	Company	Tel Business	Mobile No.	Address
<input checked="" type="checkbox"/>	Molly Brown			16 Grovedall Ave Melbourne VIC 3000
<input checked="" type="checkbox"/>	Molly Brown			

suburbs, Post Codes and State details. **Please Note:** Australian users **ONLY** will receive a complete listing of suburbs.

4. We have also added a Physical Address under Ship To. This is for recording purposes only and will not display on invoice. For Example a Company might have numerous Departments where a 'Ship To' address and 'Physical' address is different for that department.

5. From inside the Search Tab under Customer Details you can now select customers to email or sms. Sales Reps and Administrators must have assigned the 'Contact Method for future promotions and advertising' which can be found on the 'Bill To' page. Once this is complete then under the Search Tab in customer complete a Detailed Search. Secondly, tick the check box besides all customers you wish to send an email to, make sure 'Only for Customers Accepting Email or SMS Message' is tick.

Please Note: If you do not tick this box and have ticked an incorrect customer then he/she will receive the SMS or email.

Next, click either send SMS or email and fill in the appropriate details. If using the SMS feature for your company please make sure this is enabled by contacting help@clickpos.com where we will give any further directions.

6. When adding a customer Loyalty No. the system will now check against product barcodes and other loyalty numbers to ensure it is unique. If not then the system will return with **Loyalty number must be unique and not an accessory barcode on Bill To Tab.**

7. You can also view a customer purchase history in Bill To by clicking on the yellow arrow.

Customer

Bill To | Extended | Ship To | Account Contact | Loyalty | Attach File | Diary | Installation | Search

Use bill to Ship To Physical Address

Company: Grey Engineering Address 1: Level 1 Swift Street
Attention: Grant Bluescope Address 2: []
Address 1: Level 3, 33 Station St Address 3: []
Address 2: [] Suburb: CARNEDIE
Address 3: [] Post/ZIP: 3163 State: VIC
Suburb: MELBOURNE Country: Australia
Post/ZIP: 3004 State: VIC
Tel No: []

Customer

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

Detailed Search: Search All Fields [] Search []
Customer Class Search: 30 Days [] Search []
Our account manager: [] Search []
Reference Search: (Account Manager) [] Search []

Name	Company	Tel Business	Mob	Email
<input checked="" type="checkbox"/>	Gracie Jones	986475754	0400000001	gjones@hotmail.com

Only for Customers Accepting Email or SMS Messages

Send SMS [] Send Email [] Email Customer [] Delete []

Back []

Maintain | Card File | Maintain Cust Reference

Impact: Low
Directed To: Administrators

Maintain Customer Reference

Account Manager: Add New --> [] OK []
Account Status: Add New --> [] OK []
Diary: Add New --> [] OK []
Pipelines: Add New --> [] OK []
Class: Add New --> [] OK []

Maintain Customer Reference now has a new screen layout. The references have now been slip into separate groups. See opposite.

Maintain | Card File | Suppliers

Impact: Low

Directed To: Stock Manager

Supplier Maintenance

Supplier Name * Contact Name
 Address Suburb
 Postcode Email
 Phone Fax
 Supplier Type: Trade Supplier Account

Supplier Name	Contact Name	Supplier Type	Phone	Fax	Email	Supplier Account
3	4	Trade	7	10	9	
ABC supplier (past site)		Trade				

Suppliers has now been updated with a new screen layout.

Maintain | System Administration | User Groups

Impact: Low
Directed To: Administrator

- Maintain the Card File (ie: Suppliers, Customers)**
- Maintain the Customer List**
 - Do not allow to change a customers Inactive status
 - Edit a Customer

- Accessing the Orders Screen**
 - Approve and Edit Order After Approval
 - Do not allow to exceed maximum stock

- Add a Phone to Stock
- Search/Edit/Transit a Phone**
 - Edit IMEI Number

We have also included a new User Permission that deals with Inactive Customers. By ticking 'Do Not Allow to Change a Customers Inactive Status' you stop Sales Reps being able to untick Inactive and therefore being able to add that customer to a sale.

The second new permission relates to the Min/Max setting on Products and Phones. By ticking the permission 'Do not Allow to Exceed Maximum Stock' Administrators can restrict the quantity of ordering, hence users will not be able to order above the set maximum.

Lastly, we have included the ability for administrators to Sales Reps from Editing an IMEI number by unticking the permission 'Edit an IMEI Number'.

Maintain | System Admin | Global Reports | Sales Reports

Impact: Low
Directed To: Stock Manager

Plan Category By Branch 25/05/2007 10:11:05 AM

Brisbane		6
Total		6
Head Office		8
	Business	2
	Loyalty	1
	MRO	5
	New	1
	Outright	6
Total		23
Melbourne	Outright	3
Total		3
Sydney		3
Total		3
Grand Total		35

Administrators can now view a new report 'Plan Category By Branch'.

DEMO SITE

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

	Cellular industry users	Apparel and other generic system users
Website	www.clickpos.net/login	www.clickpos.com.au/login
Company login	myco	demo
Company password	myco	password
User Login	myname	ouser1
User Password	password	password
Or Alternatively		
Company login	myco	

Company password

myco

User Login

auser1 through to auser10

User Password

password

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