

ClickPOS
Sales
Module

Rev130808



NEW ClickPOS SALES SCREENS: OVERVIEW

ClickPOS has a number of new features within its sales screens, designed to make working with ClickPOS easier for the end user. Many of these enhancements, whilst subtle, provide a much better experience, and streamlines the day-to-day sales process of many businesses.

NEW FEATURES OF ClickPOS SALES SCREENS:

- A built-in calculator function to automatically calculate change based on amounts tendered. Buttons representing physical cash are now provided, or amounts can be entered directly into the tender box.
- Multiple payments no longer require the user to select "Multi" as a payment prior to tendering sales, this is done automatically when an outstanding balance is detected.
- The ability to sell phones without IMEI is also available, ideal for customers who have stock drop-shipped to their location but need an invoice on the spot.
- Existing customers can now be searched on-the-fly with automatic filtering of customer name allowing for quick addition of existing customers without the need to re-create or follow a dedicated search process.
- The ability to add and select a different shipping location to the one already on file with a customer.

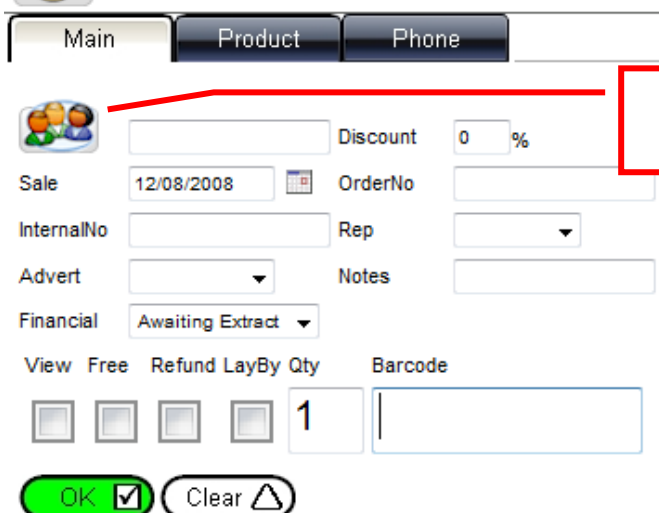
For all general enquiries, please contact ClickPOS Support by sending an email to help@clickpos.com or alternatively, call (03) 9092 5300.

Building Customers - Bill To and Ship To Addresses

Building a customer in ClickPOS, in many cases, is a necessity for clients who keep records for either marketing, billing, shipping, loyalty rewards or other programs.

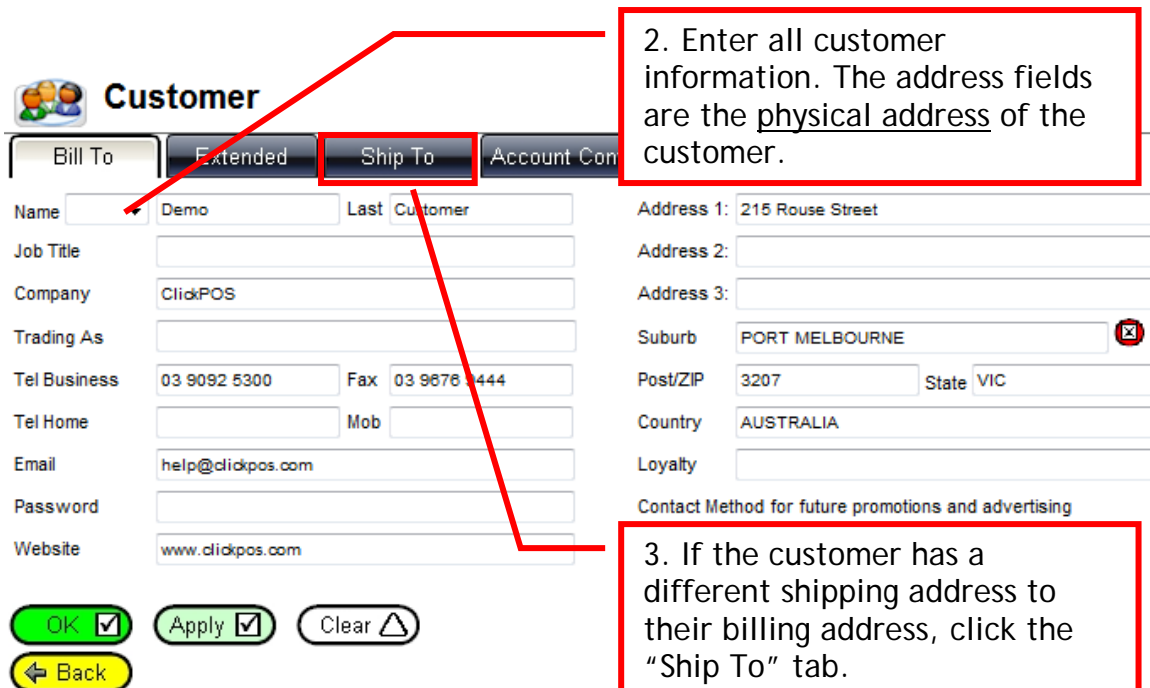
Here is how to create a customer with either a single billing and shipping address, or a billing and separate shipping address.

Product Sale - Invoice No ...



1. Click on the Customer icon

Once this is clicked, ClickPOS will bring you to the following screen:



2. Enter all customer information. The address fields are the physical address of the customer.

3. If the customer has a different shipping address to their billing address, click the "Ship To" tab.

ClickPOS - SALES MODULE

Within the Ship To tab, notice the address is greyed out (locked for editing). This is due to the "Use Bill To" option being ticked. When unticked (see below), this will allow the user to edit these fields and replace them with the new shipping address.

Customer

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

Use bill to

Ship To		Physical Address	
Company	ClickPOS	Address 1:	215 Rouse Street
Attention	Demo Customer	Address 2:	
Address 1:	215 Rouse Street	Address 3:	
Address 2:		Suburb	PORT MELBOURNE
Address 3:		Post/ZIP	3207 State VIC
Suburb	PORT MELBOURNE	Country	AUSTRALIA
Post/ZIP	3207 State VIC		
Country	AUSTRALIA		
Tel No.			

Apply Clear

Back

Customer

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

Use bill to

Ship To		Physical Address	
Company	ClickPOS	Address 1:	215 Rouse Street
Attention	Warehouse	Address 2:	
Address 1:	215 Warehouse Road	Address 3:	
Address 2:		Suburb	PORT MELBOURNE
Address 3:		Post/ZIP	3207 State VIC
Suburb	PORT MELBOURNE	Country	AUSTRALIA
Post/ZIP	3207 State VIC		
Country	AUSTRALIA		
Tel No.			

Apply Clear

Back

\$

Product Sale - Invoice No 310565

Main

Product

Phone

Demo Customer
ClickPOS

Discount %

Sale OrderNo

InternalNo Rep

Advert Notes

Financial

View Free Refund LayBy Qty Barcode

OK Clear

Product	Sale
Nokia 6230 Accessory Pack	20.00

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.

A4 - Letter Heac

Pay 1 Multi

Total 20.00
Change 0.00

Tender

100	50	20	10	5	2
1	.50	.20	.10	.05	clear

Cash	Eftpos
Nil Pay	Visa
Mcard	Amex
Bcard	Cheque
Account	

Paid 0.00
Total Discount 0.00
Total Invoice 20.00

Reference

4. Once a product has been added for sale, tender the sale, and the invoice should generate.

When the invoice generates, provided a separate ship-to address has been selected, the invoice should display both the customer being billed and the address the stock is being delivered to (see over).

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TAX INVOICE

MyCompany
 4543543543
 215 Rouse Street, Port Melbourne, 3207
 Tel: 03 9092 5300 Fax: 03 9676 9444
 help@clickpos.com



ClickPOS
 Demo Customer
 215 Rouse Street
 PORT MELBOURNE, VIC 3207
 AUSTRALIA

Ship To
 ClickPOS
 Warehouse
 215 Warehouse Road
 PORT MELBOURNE, VIC 3207 AUSTRALIA

Invoice Number: **310565**
 Order Reference:
 Store: Head Office

Internal Reference:
 Sales Rep: A U.
 Date: 12/08/2008

Qty	Barcode	Description	Discount	Total
1	NOK6230ACCP	*Nokia 6230 Accessory Pack		20.00
SUBTOTAL				20.00
TOTAL AMOUNT PAYABLE				20.00
<i>Total Includes GST of</i>				1.82
<i>Payment by Cash on 12/08/2008</i>				20.00
BALANCE				0.00

* Includes GST

5. As displayed here, the customer information on the left is the bill-to address, and on the right, the ship-to address

Selling A Product Part 1 (Single Tender Type)

In this Example we will sell the following Item. Payment Type will be Cash.

1 x Genuine Nokia 3100 Battery
\$66.00
<Insert Prod Code>



9300605247970|

Please note: If using a SCANNER the system will AUTOMATICALLY HIT the return carriage. If you are entering MANUALLY you will need to click on the OK button. Also note the last sales rep name and printing options will stay the same until they are changed.

The screenshot shows the ClickPOS sales module interface. It includes fields for Sale date (25/07/2008), InternalNo, Advert, Financial (Awaiting Extract), Discount (0%), OrderNo, Rep (Demo), Notes, and a Barcode field (300605247970). The quantity is set to 1. There are OK and Clear buttons at the bottom. Two red boxes with arrows point to the Rep dropdown menu and the quantity field, with the following instructions:

- 1. Select Rep Name.
- 2. Enter Quantity of 1

Selling A Product Part 1 (Single Tender Type)

4. Check to see Printer Type is correct

The screenshot shows the ClickPOS sales interface. A red box highlights the printer type dropdown menu, which is set to 'EPSON Direct'. Another red box highlights the 'Pay 1' dropdown menu. A third red box highlights the 'Tender' field, which contains the value '66.00'. A fourth red box highlights the numeric keypad, which includes buttons for 100, 50, 20, 10, 5, 2, 1, .50, .20, .10, .05, and a 'clear' button. A fifth red box highlights the 'Cash' button in the payment method grid. A sixth red box highlights the 'OK' button. A seventh red box highlights the 'Loyalty Program' section, which contains text about loyalty points and instructions on how to assign a loyalty barcode. Arrows point from the first three boxes to the printer type dropdown, the 'Pay 1' dropdown, and the 'Tender' field respectively. An arrow points from the fourth box to the numeric keypad. An arrow points from the fifth box to the 'Cash' button. An arrow points from the sixth box to the 'OK' button. An arrow points from the seventh box to the 'Loyalty Program' section.

5. Enter tendered amount directly or click the buttons to select amounts

6. Click Cash

Product: **Nok 3100 Batt Genuine** Sale: 66.00

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.

Payment Summary:
Total: 66.00
Change: 0.00
Tender: 66.00
Paid: 0.00
Total Discount: 0.00
Total Invoice: 66.00

Selling A Product Part 1 (Single Tender Type)

FULL INVOICE DETAILS

MyCo-Demo Site
 4543543543
 215 Rouse Street, Port Melbourne VIC
 Tel: 03 9999 9999 Fax: 03 9999 9999
 sales@clickpos.com
 www.clickpos.com

7. Receipt will Display and automatically print to the EPSON T88

Demo Customer Ship To
Demo Customer

Invoice Number: **1001570** Internal Reference:
 Order Reference: Sales Rep: My C.
 Store: Head Office Date: 25/07/2008

Qty	Barcode	Description	Discount	Total
1	9300605247970	*Nok 3100 Batt Genuine Supp. Inv No.: 2331313		66.00
SUBTOTAL				66.00
TOTAL AMOUNT PAYABLE				66.00
<i>Total includes Tax of</i>				6.00
<i>Payment by Cash on 25/07/2008</i>				66.00
BALANCE				0.00

* indicates taxable supply

Thank-you for shopping at "Your Business"
 Exchange or store credit only. Strictly no refunds.

Selling A Product Part 2 (Multi Tender Type)

For this example, we will process the same sale, but with multiple tender types. i.e Customer paying half the total in cash, the other half in eftpos/credit card.

4. Check to see Printer Type is correct

Product: **Nok 3100 Batt Genuine** Sale: 66.00 Del

Printer Type: A4 - Letter Heac

Total: 66.00
Change: -36.00
Tender: 30.00


6. Click Cash

Note that the tendered amount of \$30 cash now leaves a balance of \$36 outstanding.

Paid: 0.00
Total Discount: 0.00
Total Invoice: 66.00

The key feature of this new screen is the ability to auto-detect when a multi-payment is being processed based on the amount tendered by the user.

Selling A Product Part 2 (Multi Tender Type)

 **Product Sale - Invoice No 1001583**

Main Product Phone Ship To

Demo Customer

Discount 0 %

Sale 31/07/2008 OrderNo

InternalNo Rep Demo Name

Advert Notes

Financial Awaiting Extrac

View Free Refund LayB

OK Clear

Product Sale

Nok 3100 Batt Genuine 66.00 Del

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.

A4 - Letter Heac 31/07/2008

Pay 2 Multi

Total 66.00

Change 0.00

Tender 36.00

100 50 20 10 5 2
1 .50 .20 .10 .05 clear

Now Finance Account 30day

Cash Eftpos

Visa Master Card

Nil Pay BankCard

Cheque AMEX

Direct Deposit Voucher

Paid 30.00
Total Discount 0.00
Total Invoice 66.00

Reference

Now ClickPOS recognises that a second payment needs to be made, and expects \$36 to be tendered

Click "Eftpos"

Selling A Product Part 2 (Multi Tender Type)

TAX INVOICE

MyCo-Demo Site
 4543543543
 215 Rouse Street, Port Melbourne VIC
 Tel: 03 9999 9999 Fax: 03 9999 9999
 sales@clickpos.com
 www.clickpos.com

This receipt now reflects that a split payment has been received for both Cash and Eftpos, and shows both amounts for each tender type

	Ship To
Demo Customer	Demo Customer
,	,
Invoice Number: 1001583	Internal Reference:
Order Reference:	Sales Rep: Demo N.
Store: Head Office	Date: 31/07/2008

Qty	Barcode	Description	Discount	Total
1	9300605247970	*Nok 3100 Batt Genuine		66.00
		SUBTOTAL		66.00
		TOTAL AMOUNT PAYABLE		66.00
		<i>Total Includes GST of</i>		6.00
		<i>Payment by Cash on 31/07/2008</i>		30.00
		<i>Payment by Eftpos on 31/07/2008</i>		36.00
		BALANCE		0.00

Selling A Pre-Paid Voucher / Recharge Card

In this example we will be selling a Recharge PrePaid Plus \$60. Barcode is provided.

Recharge PrePaid Plus \$60



9321146044408

The screenshot shows the ClickPOS sales interface with the following elements and callouts:

- 1. Select Sales Rep:** A red box highlights the 'Rep' dropdown menu, which is currently set to 'Demo Name'.
- 2. Enter Quantity of 1:** A red box highlights the 'Qty' input field, which contains the number '1'.
- 3. Scan Barcode:** A red box highlights the 'Barcode' input field, which contains the number '9321146044408'.
- 4. Check to see Printer Type is correct:** A red box highlights the printer type dropdown menu, which is set to 'EPSON Direct P'.
- 5. Click Cash:** A red box highlights the 'Cash' button in the payment method selection grid.

Other visible interface elements include:

- Discount: 0 %
- Sale Date: 28/07/2008
- OrderNo: [Empty]
- InternalNo: [Empty]
- Rep: Demo Name
- Advert: [Empty]
- Notes: [Empty]
- Financial: Awaiting Extract
- View: Free, Refund, LayBy, Qty
- Barcode: 9321146044408
- Buttons: OK (checked), Clear
- Product: Recharge PrePaid Plus \$60 (Sale 60.00)
- Printer Type: EPSON Direct P
- Date: 28/07/2008
- Payment Method: Pay 1 (checked), Multi (unchecked)
- Total: 60.00
- Change: 0.00
- Tender: 60.00
- Payment Grid: 100, 50, 20, 10, 5, 2, 1, .50, .20, .10, .05, clear
- Payment Options: Now Finance, Account 30day, Cash, Eftpos, Visa, Master Card, Nil Pay, BankCard, Cheque, AMEX, Direct Deposit, Voucher
- Summary: Paid 0.00, Total Discount 0.00, Total Invoice 60.00
- Reference: [Empty]

Selling A Pre-Paid Voucher / Recharge Card

6. Receipt Will Display

TAX INVOICE

MyCo-Demo Site
4543543543
215 Rouse Street, Port Melbourne VIC
Tel: 03 9999 9999 Fax: 03 9999 9999
sales@clickpos.com
www.clickpos.com

Invoice Number: 1001573 Internal Reference: Demo N.
Order Reference: Sales Rep: Demo N.
Store: Head Office Date: 28/07/2008

Qty	Barcode	Description	Discount	Total
1	9321148044408	*Recharge PrePaid Plus \$80		80.00
		SUBTOTAL		60.00
		TOTAL AMOUNT PAYABLE		60.00
		<i>Total Includes GST of</i>		<i>5.45</i>
		<i>Payment by Cash on 28/07/2008</i>		<i>60.00</i>
		BALANCE		0.00

* Includes GST

Thank-you for shopping at "Your Business"
Exchange or store credit only. Strictly no refunds.

Selling A Plan/Handset Combination - Contract Only

There are a number of different phone sale combinations using the ClickPOS system. Please see further for detailed instructions on how to process each sale.

- a) Outright Sales, Plan/Handset Combinations, Prepaid - Scan IMEI
- b) Contract Only - Do not scan IMEI
- c) MRO Sales - Scan IMEI

Outright Sales

The Phone Sale screen is designed specifically for selling handset and dealing with carriers. In addition it can capture services such as insurance.

The screenshot shows the 'Phone Sale' screen in ClickPOS. It features several input fields and buttons. Three red boxes with arrows point to specific elements, indicating the steps for creating an invoice:

- 1. Select Rep:** A red box highlights the 'Rep' dropdown menu, which currently shows 'Demo'.
- 2. Click OK to Create Invoice:** A red box highlights the 'OK' button, which has a checkmark icon.
- 3. Click On Customer Icon:** A red box highlights a small customer icon (a globe with people) located at the top left of the form.

Other visible elements include: 'Discount' set to 0%, 'Sale' date of 25/07/2008, 'InternalNo', 'Advert', 'Financial' set to 'Awaiting Extract', 'View Free Refund LayBy Qty' buttons, a 'Barcode' field, and a 'Clear' button.

Selling A Plan/Handset Combination - Contract Only

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

Name Demo 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
Website

Contact Method for future promotions and advertising
 SMS Phone Email Post

4. Enter Customer details.

Name	Company	Tel Business	Mobile No	Address
<input checked="" type="checkbox"/> Demo Customer				

5. If customer details already exist, select the green check box to select the customer.

Note: System will display any customers that have the same first name. If the customer appears in this list then Select For Sale.

Main | Product | Phone

Demo Customer

Discount 0 %

Sale 28/07/2008 OrderNo

InternalNo Rep Demo Name

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

6. The Phone Tab should now appear


7. Click OK

Selling A Plan/Handset Combination - Contract Only


The screenshot shows the 'Phone' tab of the ClickPOS interface. A red box highlights the filter section, which includes dropdown menus for Carrier, Category, Months, Plan Type, Value, and Network Type. Below these is a Plan dropdown menu set to 'Outright Sale'. There are also input fields for 'Imei / Sim' and 'OR Phone Type ?'. A red callout box with a white background contains the text: 'Filters allow you to narrow down a list of plans that are available, rather than selecting from a complete drop down list.'

The screenshot shows the 'Product Sale - Invoice' screen. A yellow callout box at the top right contains the text: 'For This Example, a Consumer \$80 Member Plan will be sold as contract only, with NO MRO added.' Below this, the filter section is populated with 'Telstra Next G', 'NEW', '24', 'Consumer Member', '80', and 'Next G'. The Plan dropdown shows 'Consumer Member 80/24 Next G NEW'. A red callout box points to the 'Search' button with the text: '8. Select all relevant filters and click "Search"'. Below the filters are tabs for 'Ph Details', 'Services', 'Account', 'Other', 'Shipping', and 'Landline'. The 'Handset Details' section includes fields for Mobile No (0499999999), Phone Type (Contract Only), Colour, Sale Price (\$), RRP (Retail Price), Discount, Tax %, Credit No., and SIM. A red callout box points to the 'Comm Due' dropdown menu, which is set to 'Yes', with the text: '9. Enter customer mobile number and click "OK". N.B - If this is an "Early Upgrade" - "Comm Due" = "NO"'. At the bottom left, a red callout box points to the 'OK' button with a checked checkbox.

Selling A Plan/Handset Combination - Contract Only

 **Product Sale - Invoice No 1001577**

Main		Product		Phone		Ship To	
------	--	---------	--	-------	--	---------	--

 Demo Customer <input type="text"/> Discount <input type="text" value="0"/> %		A4 - Letter Heac <input type="text" value="30/07/2008"/>							
Sale <input type="text" value="30/07/2008"/> OrderNo <input type="text"/>		Pay 1 <input type="checkbox"/> Multi <input checked="" type="checkbox"/>							
InternalNo <input type="text"/> Rep <input type="text" value="Demo Name"/>		Total <input type="text" value="0.00"/>							
Advert <input type="text"/> Notes <input type="text"/>		Change <input type="text" value="0.00"/>							
Financial <input type="text" value="Awaiting Extract"/>		Tender <input type="text" value="0.00"/>							
View Free Refund LayBy Qty Barcode		100 50 20 10 5 2 1 .50 .20 .10 .05 clear							
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text" value="1"/> <input type="text"/>		Now Finance Account 30day							
<input type="button" value="OK"/> <input checked="" type="checkbox"/> <input type="button" value="Clear"/>		<input type="button" value="Cash"/> <input type="button" value="Eftpos"/>							
<table border="1"> <thead> <tr> <th>Phone/Plan</th> <th>Imei Mobile</th> <th>Sale</th> </tr> </thead> <tbody> <tr> <td>Contract Only/Consumer Member 100/24 Next G New</td> <td>0499999999</td> <td>0.00 Del</td> </tr> </tbody> </table>				Phone/Plan	Imei Mobile	Sale	Contract Only/Consumer Member 100/24 Next G New	0499999999	0.00 Del
Phone/Plan	Imei Mobile	Sale							
Contract Only/Consumer Member 100/24 Next G New	0499999999	0.00 Del							
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.									
		<input type="button" value="Nil Pay"/> <input type="button" value="BankCard"/>							
		<input type="button" value="Cheque"/> <input type="button" value="AMEX"/>							
		<input type="button" value="Direct Deposit"/> <input type="button" value="Voucher"/>							
		Paid <input type="text" value="0.00"/> Total Discount <input type="text" value="0.00"/> Total Invoice <input type="text" value="0.00"/> Reference <input type="text"/>							

10. Once you have confirmed these details are correct, click "Nil Pay".

Selling A Plan/Handset Combination - Contract Only

No feeds detected on this page (Alt+J)
Feeds provide updated website content

TAX INVOICE

MyCompany
4543543543
332 St Kilda Road, Melbourne,
Tel: 03 92662939 Fax:

Demo Customer

Ship To
Demo Customer

Invoice Number: **310542** Internal Reference:
Order Reference: Sales Rep: t/s t.
Store: Head Office Date: 28/07/2008

Qty	Barcode	Description	Discount	Total
1		*Contract Only 0499999999 Telstra Next G Consumer Member 80/24 Next G NEW 24 months		0.00
SUBTOTAL				0.00
TOTAL AMOUNT PAYABLE				0.00
Total Includes GST of				0.00
BALANCE				0.00

* Includes GST


^Use of iPhone constitutes acceptance of the iPhone terms and conditions and other third party terms and conditions found in the iPhone box, or at http://www.apple.com/legal/iphone/us/terms/service_all.html

^^Warranty managed directly by manufacturer. Please consult device literature for information on warranty processes. Please do not return faulty device to store.

^ For iPhone Sales; ^^ For Phone System Sales

Selling A Plan/Handset Combination - Phone/Plan Combination

Repeat Steps 1 through 7 as if selling "Contract Only" except adding the IMEI for the handset before clicking "Search" and "OK"



Product Sale - Invoice

Main | **Product** | **Phone**

Filters: Telstra Next G | NEW | 24
Plan Type: 80 | Next G
Plan: Consumer Phone 80/24 Next G NEW
Imei / Sim: 010100010001002 | OR Phone Type ?

Search → | **Clear** ↴

Ph Details | **Services** | **Account** | **Other** | **Shipping** | **Landline**


Handset Details

Mobile No	0499999999	Phone Type	Apple iPhone 8GB	Colour	Black
Sale Price \$	0.00	Service Provider	Telstra Next G		
RRP (Retail Price)	0.00	Carrier	Telstra Next G		
Discount	0.00	Active	28/07/2008		
Tax %	10.00	Months	24	End	28/07/2010
Credit No.		Notes			
SIM		Comm Due	Yes	<input type="checkbox"/> Multi	
		Inv Notes			

OK ✓ | **Back** ↴

N.B - Notice now that the IMEI is recognized as an Apple iPhone 8GB model in Black

Selling A Plan/Handset Combination - Phone/Plan Combination

 **Product Sale - Invoice No 1001576**

Main | Product | Phone | Ship To

Demo Customer

Discount 0 %

Sale 30/07/2008 OrderNo

InternalNo Rep

Advert Notes

Financial Awaiting Extract

View Free Refund LayBy Qty Barcode

1

OK Clear

Phone/Plan	Imei	Mobile	Sale
Apple iPhone 3G 8GB/Consumer Phone 100/24 Next G New	010100010001001	0499999999	0.00 Del

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.

A4 - Letter Heac 30/07/2008

Pay 1 Multi

Total 0.00

0.00

100 50 20 10 5 2
1 .50 .20 .10 .05 clear

Now Finance Account 30day

Cash Eftpos

Visa Master Card

Nil Pay BankCard

Cheque AMEX

Direct Deposit Voucher

Paid 0.00
Total Discount 0.00
Total Invoice 0.00

Reference

Once all details are confirmed, check printer and click "Nil Pay"

Now the IMEI appears as well as the plan combination

N.B – The "Nil Pay" option is used where money is NOT being received immediately from the client, or is on an account arrangement. Payment is received at a later date

Selling A Plan/Handset Combination - Phone/Plan Combination

This process is similar to selling "Contract Only" however, the MRO/Handset Repayment is added as a separate product.

Filters: Telstra Next G, NEW, 24, Consumer Member, 80, Next G

Plan: Consumer Member 80/24 Next G NEW

Imei / Sim: OR Phone Type ?

Search, Clear

Ph Details, Services, Account, Other, Shipping, Landline

Handset Details

Mobile No	0499999999	Phone Type	Contract Only	Colour	
Sale Price \$		Service Provider			
Sale	0.00	Con Ref			
RRP (Retail Price)	0.00	Carrier	Telstra Next G		
Discount	0.00	Active	28/07/2008		
Tax %	10.00	Months	24	End	28/07/2010
Credit No.		Notes			
SIM		Comm Due	Yes	<input type="checkbox"/> Multi	
		Inv Notes			

OK

Back

The "Sale Price" fields should always be blank or \$0 for the sale of contracts, as no money is collected from the customer, unless there is an upfront component payable.

Selling A Plan/Handset Combination - Phone/Plan Combination

Product Sale - Invoice No 1001578

Main Product Phone Ship To

Filters: Telstra - Next G, MRO, 24, Plan Type, Value, Network Type

Plan: MRO 0/24 Next G MRO

Imei / Sim: 010100010001002 OR Phone Type ?

Search Clear

Ph Details **Services** Account Other Shipping Landline

Handset Details

Mobile No: 0499999999 Repeat: 0499999999

Phone Type: Apple iPhone 3G 8 Colour: Black

Sale Price \$ **Service Provider**

Sale: 1099.00 Con Ref:

RRP (Retail Price): **1099.00** Carrier: Telstra - Next G

Discount: 0 Active: 30/7/2008

Tax %: 10.0 Months: 24 End: 30/07/2010

Credit No. Notes:

SIM Comm Due: Yes Multi

Purchase price \$: 729.00 Inv Notes:

OK Back

Repeat the process as if adding a phone, except choosing "MRO" in the filters.

Zero out the RRP as this payment will be added under the "Services" tab.

Selling A Plan/Handset Combination - Phone/Plan Combination

The screenshot shows the 'Services' tab in the ClickPOS interface. Under the 'Additions and Deductions' section, there is a table for adding services. The first row has 'Mobile Repayment Option' selected in the 'Select Service' dropdown and '1099.00' entered in the 'Amount' field. Below this are two empty rows with '0.00' in the amount field. The 'Status' section below has a 'Select Current Status' dropdown. At the bottom left, there is a green 'OK' button with a checkmark icon and a yellow 'Back' button with a left arrow icon. A red-bordered text box on the right contains the instruction: 'Select "Mobile Repayment Option" from the list, enter the value and click "OK"'. Red lines connect the text box to the 'Mobile Repayment Option' dropdown, the '1099.00' field, and the 'OK' button.

Select Service	Amount
Mobile Repayment Option	1099.00
	0.00
	0.00

Select Current Status

OK

Back

Select "Mobile Repayment Option" from the list, enter the value and click "OK"

Selling A Plan/Handset Combination - Phone/Plan Combination

\$

Product Sale - Invoice No 1001578

Main
Product
Phone
Ship To

Demo Customer

Discount %

Sale OrderNo

InternalNo Rep

Advert Notes

Financial

View Free Refund LayBy Qty Barcode

OK Clear

Phone/Plan	Imei	Mobile	Sale
Contract Only/Consumer Member 100/24 Next G New		0499999999	0.00 Del
Apple iPhone 3G 8GB/MRO 0/12 Next G MRO	010100010001002	0499999999	0.00 Del

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.

A4 - Letter Heac

Pay 1 Multi

Total 0.00
Change 0.00

Tender

100

50

20

10

5

2

1

.50

.20

.10

.05

clear

Now Finance
Account 30day

Cash
Eftpos

Visa
Master Card

Nil Pay
BankCard

Cheque
AMEX

Direct Deposit
Voucher

Paid 0.00
Total Discount 0.00
Total Invoice 0.00

Reference

Now both the contract and handset repayment components are added to the invoice. Click "Nil Pay" to close off the sale.

Selling A Plan/Handset Combination - Phone/Plan Combination

TAX INVOICE

MyCo-Demo Site
 4543543543
 215 Rouse Street, Port Melbourne
 Tel: 03 9999 9999 Fax: 03 9999 9
 sales@clickpos.com
 www.clickpos.com

Demo Customer Ship To
Demo Customer

Invoice Number: **1001578** Internal Reference:
 Order Reference: Sales Rep: Demo N.
 Store: Head Office Date: 30/07/2008

Qty	Barcode	Description	Discount	Total
1		Contract Only 0499999999 Telstra - Next G Consumer Member 100/24 Next G New 24 months		0.00
1	010100010001002	*Apple iPhone 3G 8GB 0499999999 \$1,099.00 Telstra - Next G MRO 0/12 Next G MRO 12 months Mobile Repayment Option		0.00 1,099.00
SUBTOTAL				0.00
TOTAL AMOUNT PAYABLE				0.00
Total Includes GST of				99.91
BALANCE				0.00

* Includes GST

Refunds - Cash and Non Cash Items

Product Sale - Invoice No ...

Main Product Phone

Discount 0 %

Sale 30/07/2008 OrderNo

InternalNo Rep

Advert

Financial Awaiting Extract

View Free Refund LayBy Q

1

OK Clear

1. From the Sales screen, tick the "Refund" box. And a new dialog box should appear

Untitled Page - Windows Internet Explor...

http://216.14.207.186/login/Sale/PSSale_Refund.aspx

Sale Refunds

Search By: Invoice Number

OR

Imei Number

Store Credit Claim

Must have one credit note product

A4 - Letter Heac 30/07/2008

Pay 1 Multi

Total 0

Change 0

0.00

100 50 20 10 5 2

1 .50 .20 .10 .05 clear

Now Finance Account 30day

Cash Eftpos

Visa **Master Card**

Nil Pay BankCard

Cheque AMEX

Direct Deposit Voucher


Paid 0.00

Total Discount 0.00


Total Invoice 0.00

Reference

Refunds - Cash and Non Cash Items

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

Main
Product
Phone

 Discount %

Sale OrderNo

InternalNo Rep

Advert Notes

Financial

View Free Refund LayBy Qty Barcode

A4 - Letter Heac

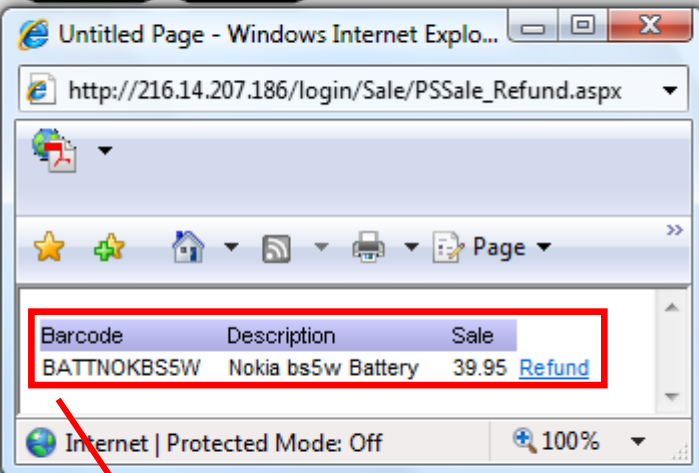
Pay 1 Multi

Total

Change

Tender

Paid
 Total Discount
 Total Invoice
 Reference



2. Once the invoice number is selected, the dialog box will now show all items on an invoice. Multiple items can be refunded individually if only part of an invoice needs to be refunded.

Refunds - Cash and Non Cash Items

Product Sale - Invoice No 1001581

Main
Product
Phone
Ship To

Demo Customer

Discount %

Sale OrderNo

InternalNo Rep

Advert Notes

Financial

View Free Refund LayBy Qty Barcode

Product	Sale
Nokia bs5w Battery	-39.95 Del

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.

A4 - Letter Heac

Pay 1 Multi

Total -39.95

Change 0.00

Tender -39.95

100 50 20 10 5 2

1 .50 .20 .10 .05 clear

Now Finance

Account 30day

Cash

Eftpos

Visa

Master Card

Nil Pay

BankCard

Cheque

AMEX

Direct Deposit

Voucher

Paid 0.00

Total Discount 0.00

Total Invoice -39.95

Reference

3. The item will now appear with a negative figure in the "Tender" box, and must not be adjusted when performing a refund. The tender type used to make the original purchase should be used. For this example, assume it is cash.

Refunds - Cash and Non Cash Items

TAX INVOICE

MyCo-Demo Site
 4543543543
 215 Rouse Street, Port Melbourne
 Tel: 03 9999 9999 Fax: 03 9999 9999
 sales@clickpos.com
 www.clickpos.com

14. Click Print Icon and close page

13. Receipt will display

Ship To
 Demo Customer

Invoice Number: 1001581 Internal Reference:
 Order Reference: Sales Rep: Demo N.
 Store: Head Office Date: 30/07/2008

Qty	Barcode	Description	Discount	Total
1	BATTNOKBS5W	*Nokia bs5w Battery		-39.95
SUBTOTAL				-39.95
TOTAL AMOUNT PAYABLE				-39.95
<i>Total Includes GST of</i>				-3.63
<i>Payment by Cash on 30/07/2008</i>				-39.95
BALANCE				0.00

* Includes GST

Thank-you for shopping at "Your Business"
 Exchange or store credit only. Strictly no refunds.

Additional Features: Colour Co-ordinated Payment Buttons

Payment type buttons can now also be colour-coded to assist end-users in classifying a payment type. By default, all tender type buttons have a uniform grey shadow, which is displayed in the screenshot below.

The screenshot displays the ClickPOS interface with the following elements:

- Header: "A4 - Letter Heac" dropdown and "13/08/2008" date field.
- Payment Type: "Pay 1" dropdown (highlighted in yellow) and "Multi" checkbox (checked with a red 'X').
- Summary: "Total" and "Change" both set to "0".
- Tender: A text input field containing "0.00".
- Amount Buttons: A grid of buttons for values 100, 50, 20, 10, 5, 2, 1, .50, .20, .10, .05, and a "clear" button.
- Payment Method Grid: A 5x2 grid of buttons for "Cash", "DPS", "Eftpos", "Visa", "BankCard", "Cheque", "Voucher", "Account 30day", "Credit Note", and "Nil Pay".
- Financial Summary: "Paid 0.00", "Total Discount 0.00", and "Total Invoice 0.00".
- Reference: A text input field labeled "Reference".

To edit the background colours of the buttons, follow the procedure as per the screenshots on the following pages.

Additional Features: Colour Co-ordinated Payment Buttons



Maintenance



Tariff Plan Maintenance



Card File Maintenance



System Administration



Employee Timesheet



Global Reports

Click "Maintain", then "System Administration".



System Administration



User Groups



Employees



Logout Current Users



Company Details



Store Details



Transaction Log for Audit



Payment Type



Maintain Sale Reference



Options



Network address restriction

Click "Payment Type"

Back

Additional Features: Colour Co-ordinated Payment Buttons

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:

Select the button you wish to modify, then change the colour and click "Edit/OK"

Payment Type	Order	Cash and Coins	Base Rate %	On Account	DPS	Credit Note	Zero Value	Large Button	Colour
Account 30day	7	False	0	True	False	False	True	True	grey
BankCard	4	False	0	False	False	False	False	True	grey
Cash	0	True	0	False	False	False	False	True	grey
Cheque	5	False	0	False	False	False	False	True	grey
Credit Note	8	False	0	False	False	True	True	True	grey
DPS	1	False	0	False	False	False	False	True	grey
Etpos	2	False	0	False	False	False	False	True	grey
Nil Pay	9	False	0	False	False	False	True	True	grey
Visa	3	False	2	False	False	False	False	True	grey
Voucher	6	False	0	False	False	False	False	True	grey

NB: The DPS button will always remain in red, as this payment type covers all forms of electronic payments, regardless of card type.

This process needs to be repeated for each button that you wish to change. The end result should look as per the screenshot on the following page:

