Human Incubator

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easyPOS

EasyPOS User Manual

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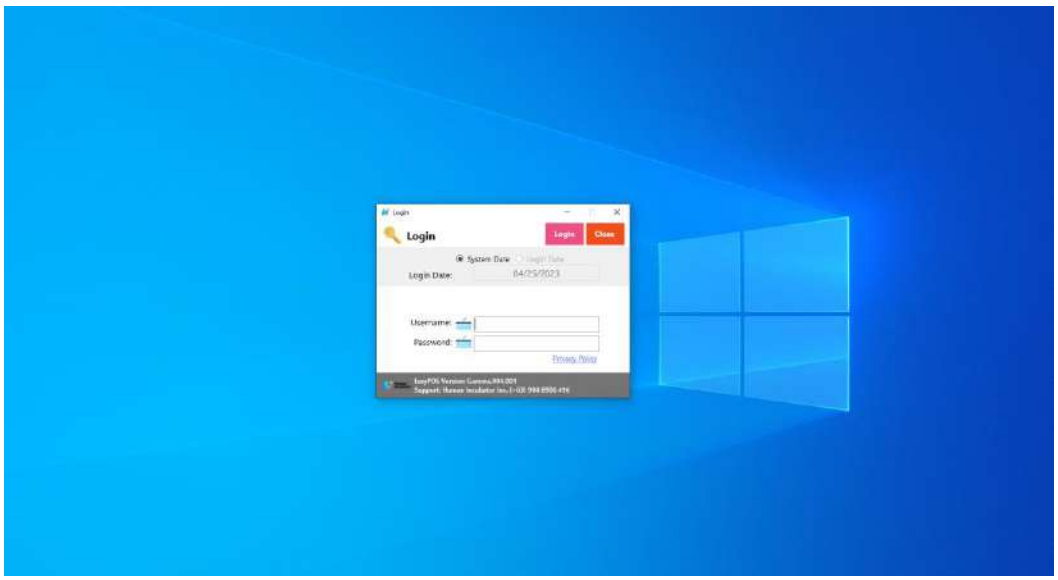
Section I: Login Page

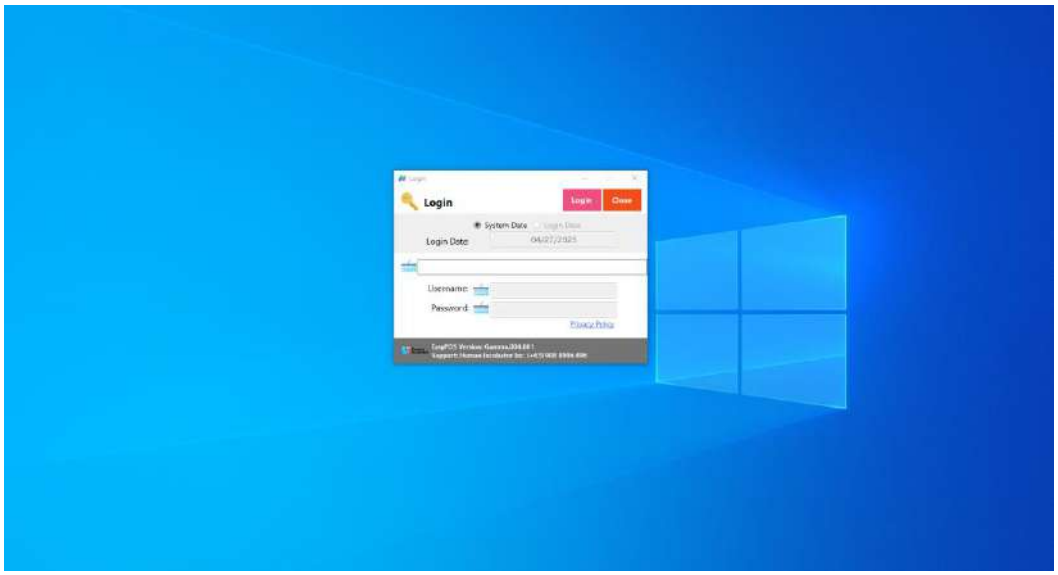
Login Page

Overview

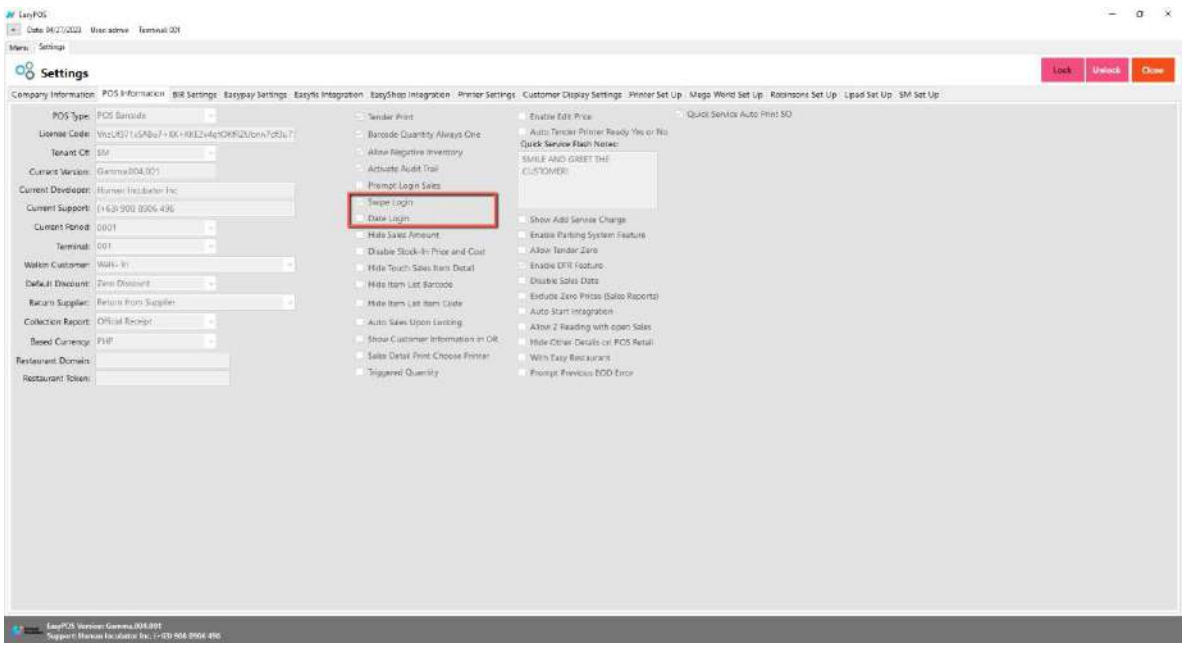
- There are two(2) types on how to login in EasyPOS.
    - Login using username and password credentials.



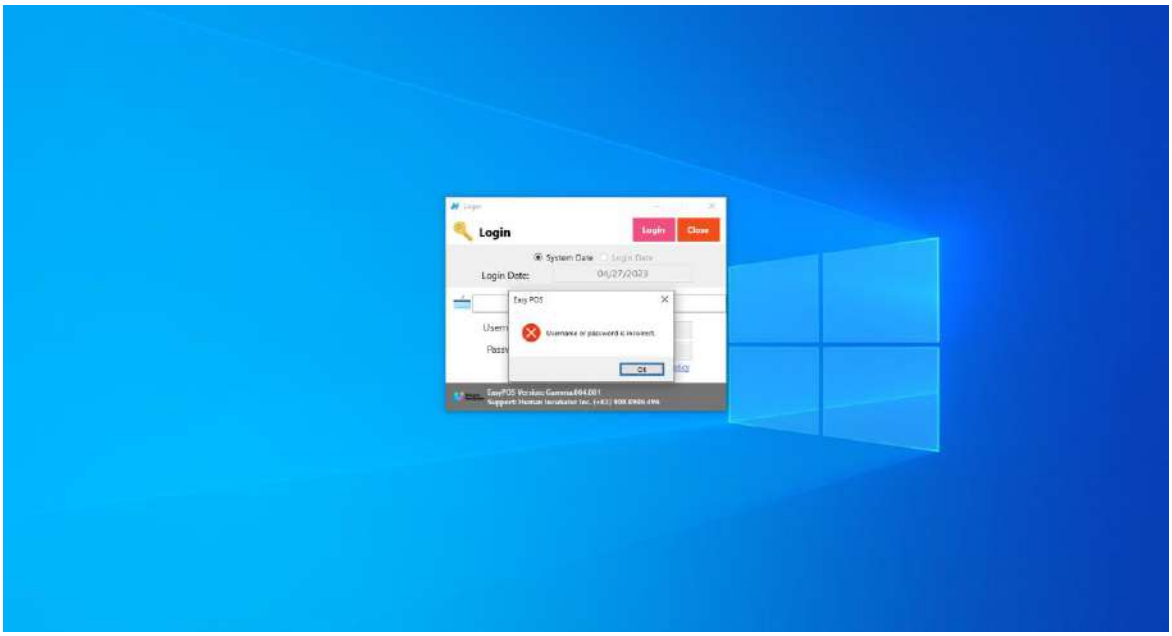
    - Login using card number and user code



- Users can also use the System Date or the Login Date. Configuration can be found on the EasyPOS settings page.



- Validation triggered on EasyPOS Login will protect the system from possible unauthorized accounts, so make sure to enter valid credentials.

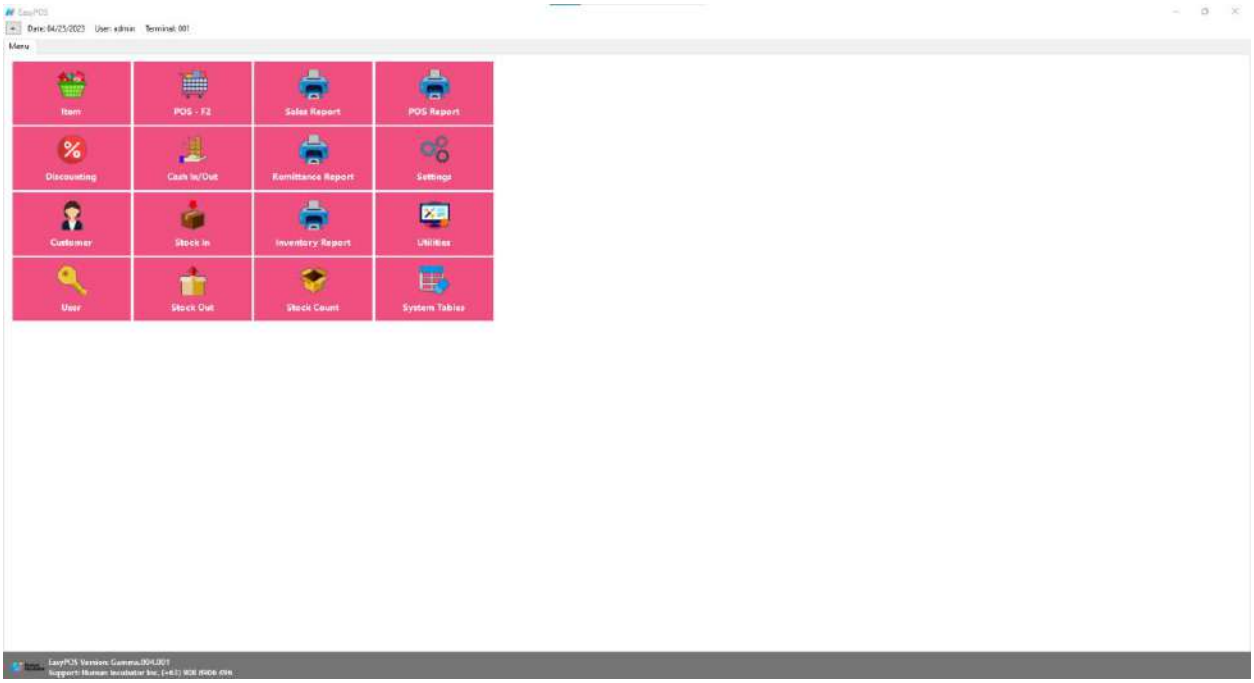


Section II: System Menu Page

System Menu Board

Overview

- Once login is successful, the user will be redirected to this page.
- **Menu** - shows all features that users can use in the system.



Definition of Terms

- **Item** → where to set up items to be used for sales transactions. Users can add, edit, and delete.
- **POS** → where the users can do sales transactions.
- **Sales Report** → where users can see the sales reports.
- **POS Report** → where users can see the final sales report within the day. Also, this is where users can generate reports that are needed for BIR such as Z-Reading.

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- **Discounting** → where to set up preferred discounts to give during the sales transactions with customers.

- **Cash In/out** → allows to keep track of incoming and outgoing payments.
- **Remittance Report** → where users can see the reports for Cash/In Out so with the Remittance report.
- **Settings** → where users can manage the functions of EasyPOS such as enabling/disabling the EasyPOS features, Easy series integrations, printer setup, etc.
- **Customer** → where to set up customers to be used during sales transactions.
- **Stock In** → where to set up items that are onhand or available.
- **Stock Out** → where to set up items that are not available in stock. Example, damaged items.
- **Stock Count** → where to set up the physical number of stock.
- **Inventory Report** → where users can see different inventory reports. Also, it allows users to keep track of the movement of the items.
- **Utilities** → where users can use the EasyPOS utilities such as barcode printing, truncate transactions, etc.
- **System Tables** → where users can set up other useful modules for EasyPOS such as Pay Types, Accounts, Units, Supplier, Forms, Card Type, etc.

Section III: Set Up

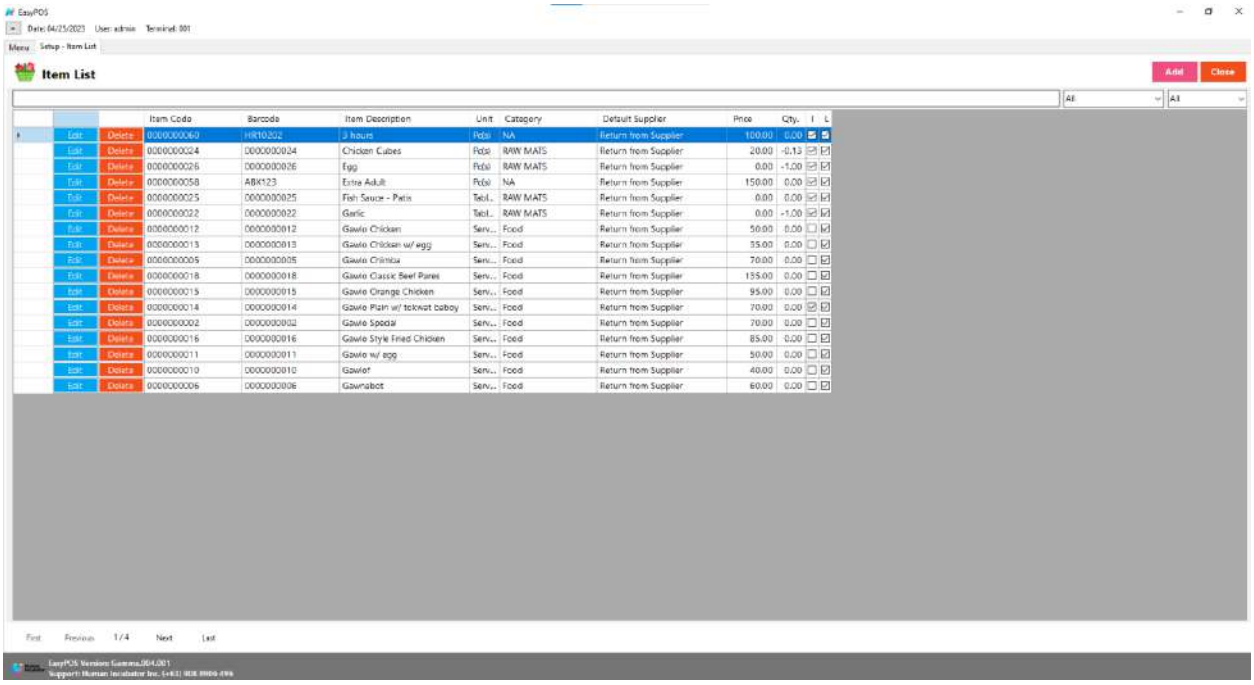
Item Setup

Overview

- Items will be used in making Sales Transaction, Stock In, Stock Out, Stock Count, Inventory, etc.

Item List

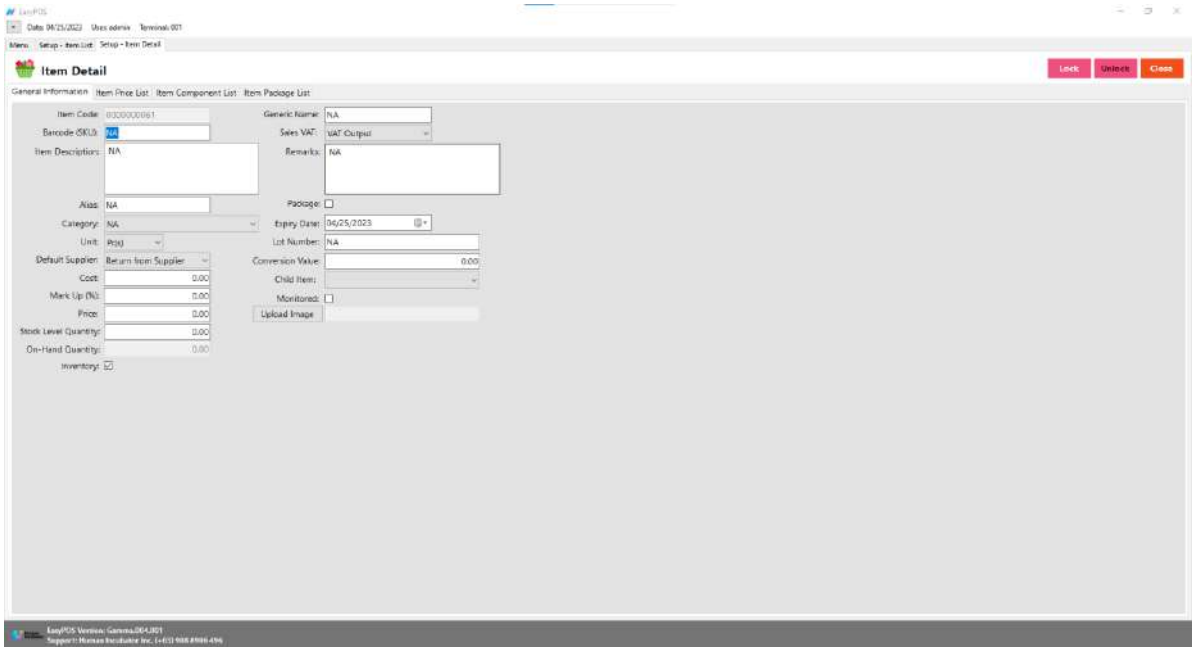
- Shows the list of all added items.
- Delete button will proceed to deleting unlocked item record detail.
- Edit button will proceed to updating item detail.



Item Detail

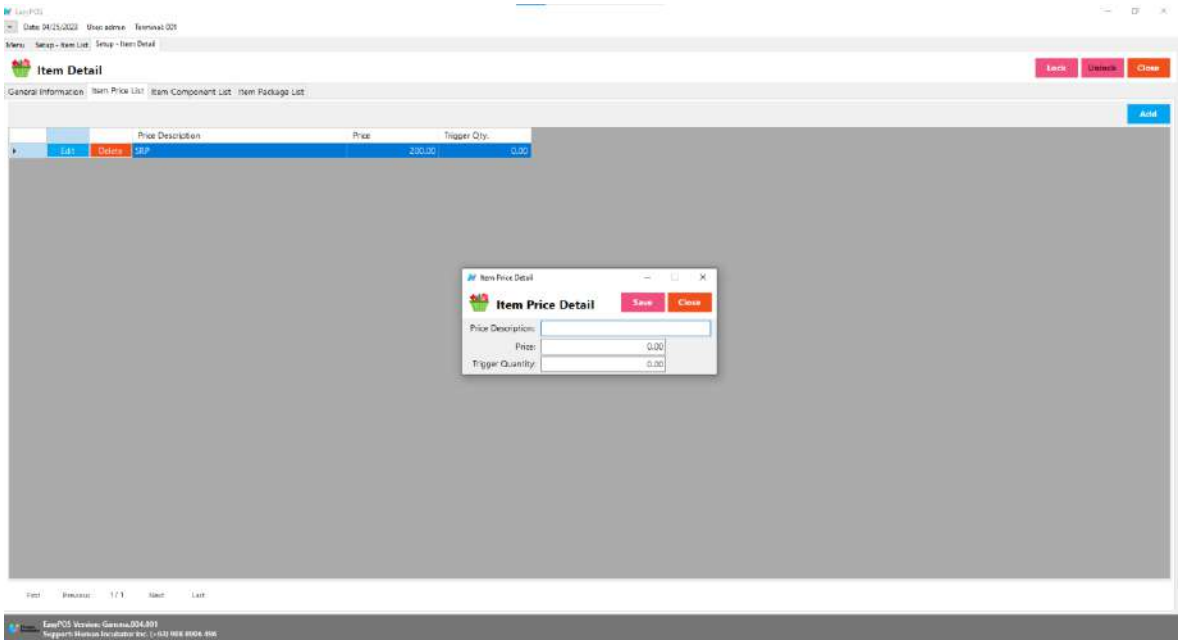
- **Assumption**: **Add** button is already clicked on the upper right corner in the item list.
- Fill up all the necessary information like
    - Bar Code, Description, Alias, Cost, Price
- Some fields are optional like Stock Level Quantity, Package, Monitored, Conversion Value, Lot Number.

- In the Inventory checkbox, tick/check if the item is Inventory and if the item is non-inventory just leave untick/uncheck.



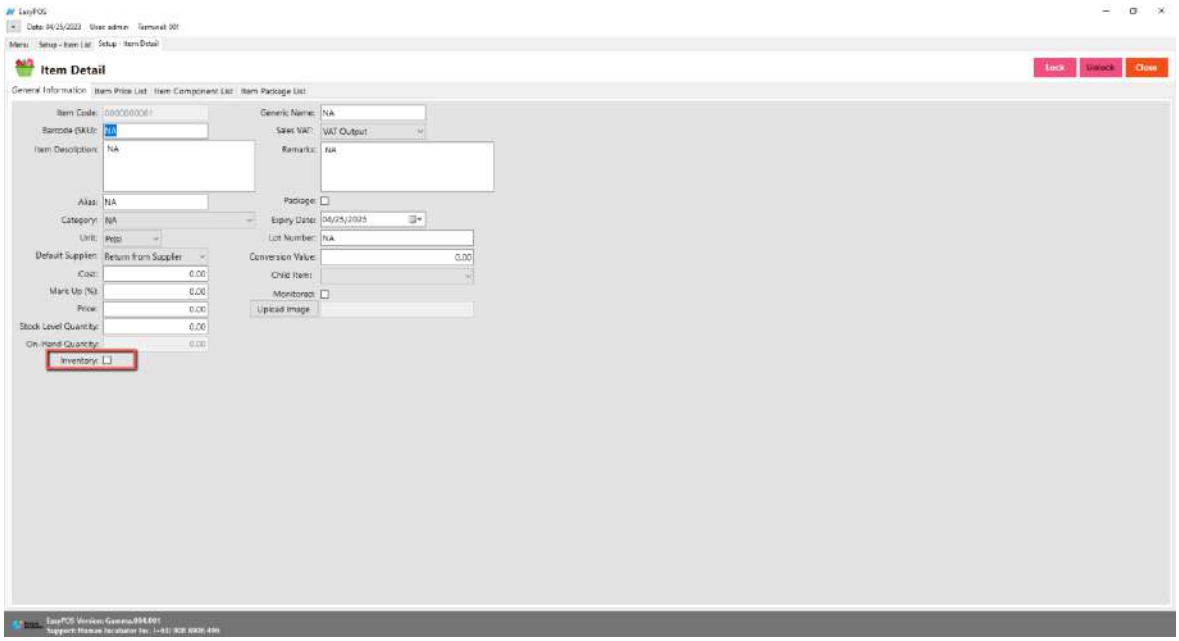
Item List Price

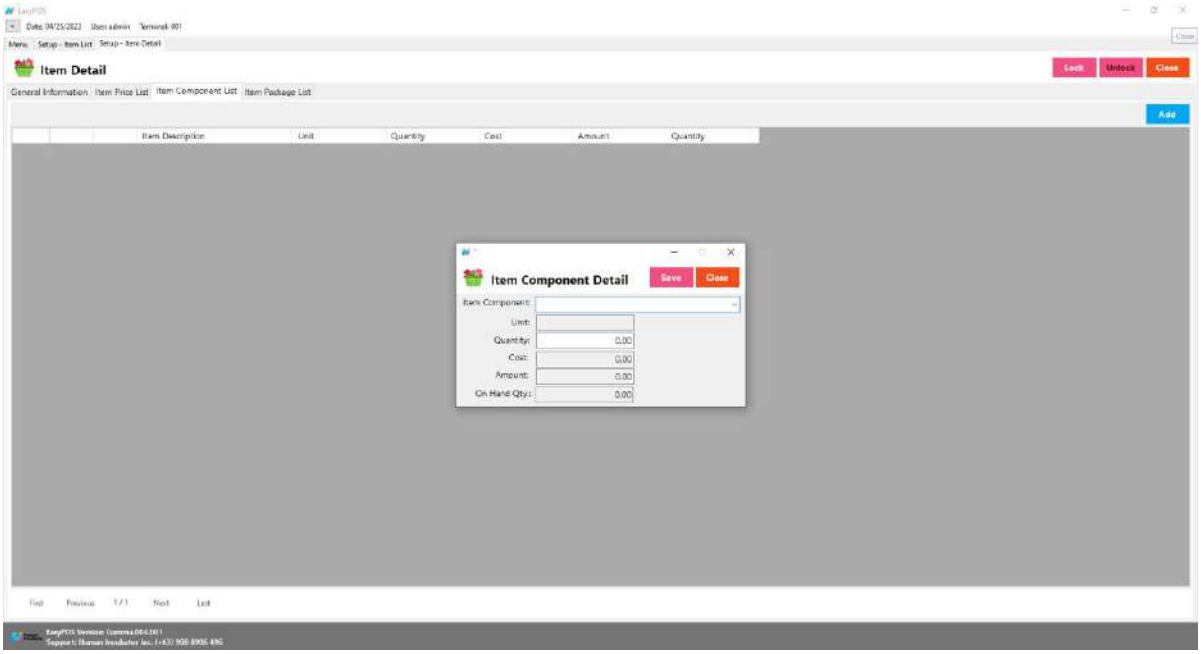
- The item price list tab is used when items have multiple prices.
    - Just click the **ADD** button to add item price details.



Item Component List

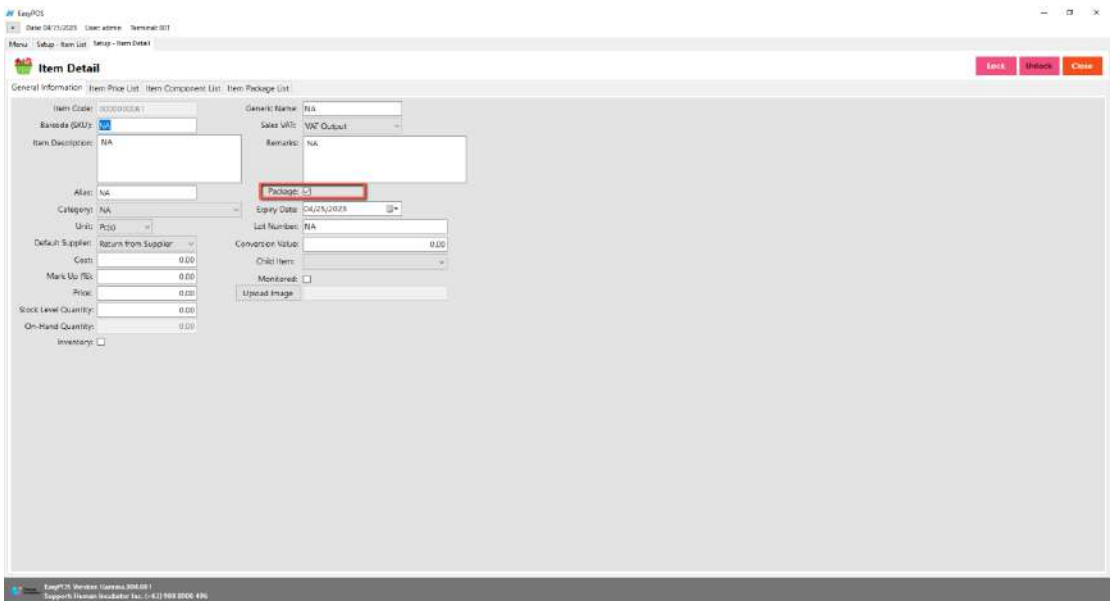
- The Item Component List tab is used to add the raw materials that were used to produce the finished products/goods. This is only applicable if the item created is a finished good/product. Make sure to set the Inventory checkbox to False before setting an item component(s).
    - Just click the **ADD** button to add item component details.

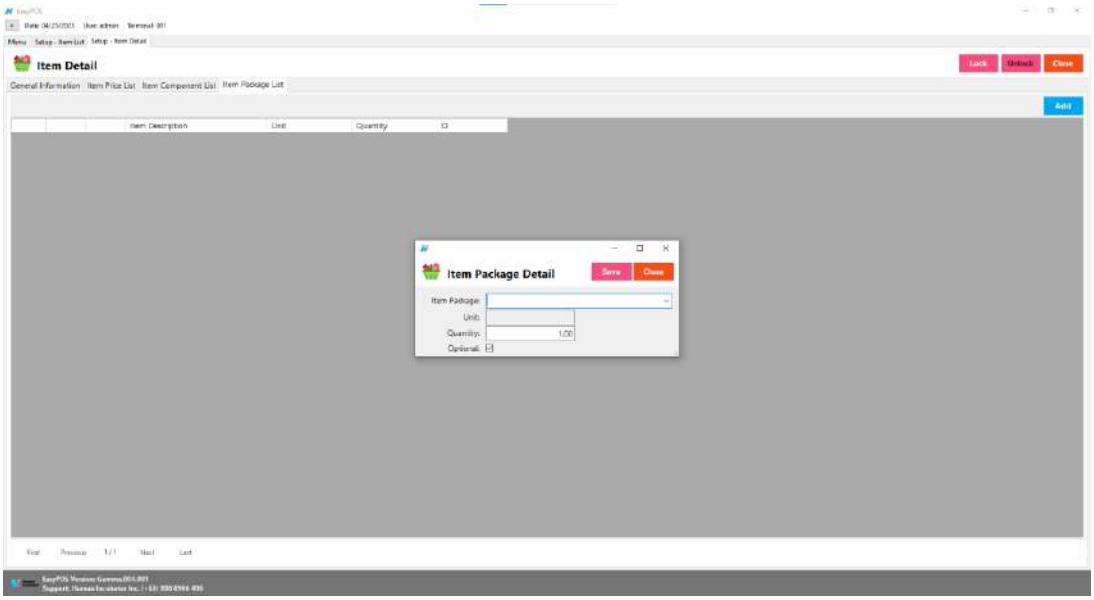




Item Package List

- The Item Package List Tab is only used when the created item is a package. Meaning to say, this is the list of items that is included on the created package. Make sure to set the Packaged checkbox to True before setting an item component(s).
    - Just click the **ADD** button to add item package details.





Save/Lock

- Make sure to save/lock the record so that in every transaction the item will show.

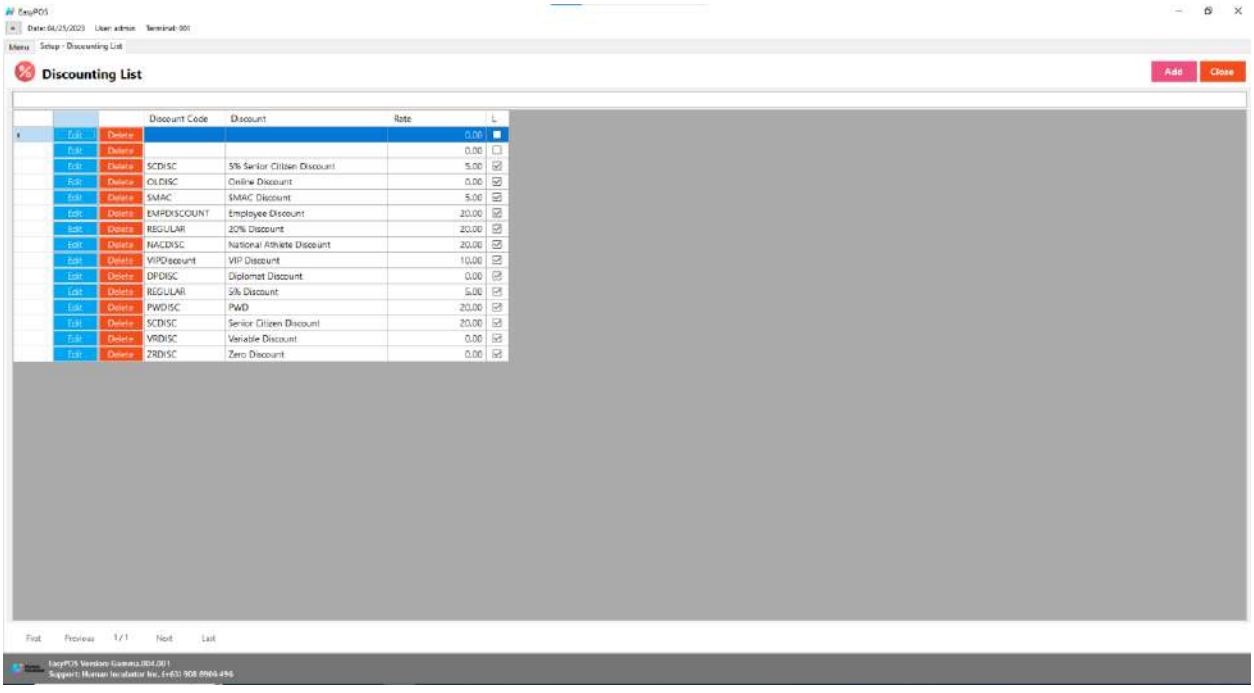
Discounting Setup

Overview

- Discounting is where to set up preferred discounts to give during the sales transactions with customers.

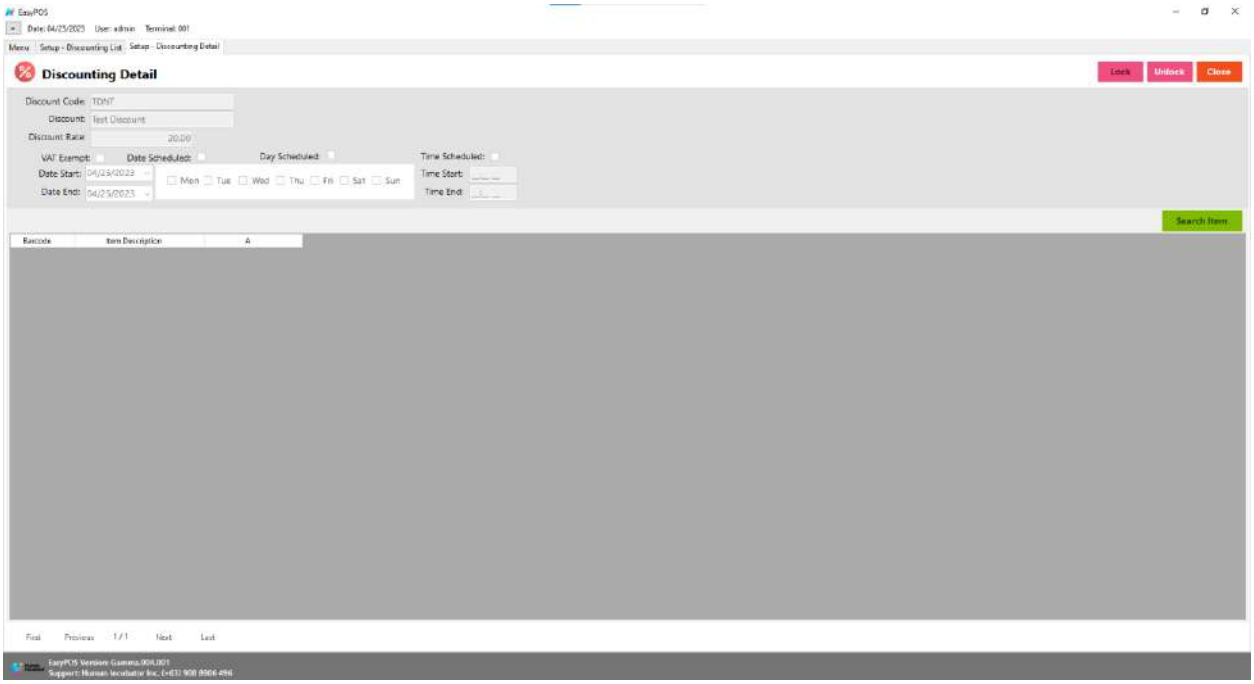
Discounting List

- Shows the list of all added items.
- Delete button will proceed to deleting unlocked discount record detail.
- Edit button will proceed to updating discount detail.
- Add button will proceed to adding a new discount.
- Close button will proceed to closing the discount list page.



Discounting Detail

- **Assumption**: **Add** button is already clicked on the upper right corner in the discounting list.
- Fill up all the necessary information like
    - Discount Code, Discount, Discount Rate
- Click Save and lock buttons to save and lock the discount detail.
- Click the Unlock button to unlock the discounting detail and enable editing/updating discount details, lock to save.



Customer Setup

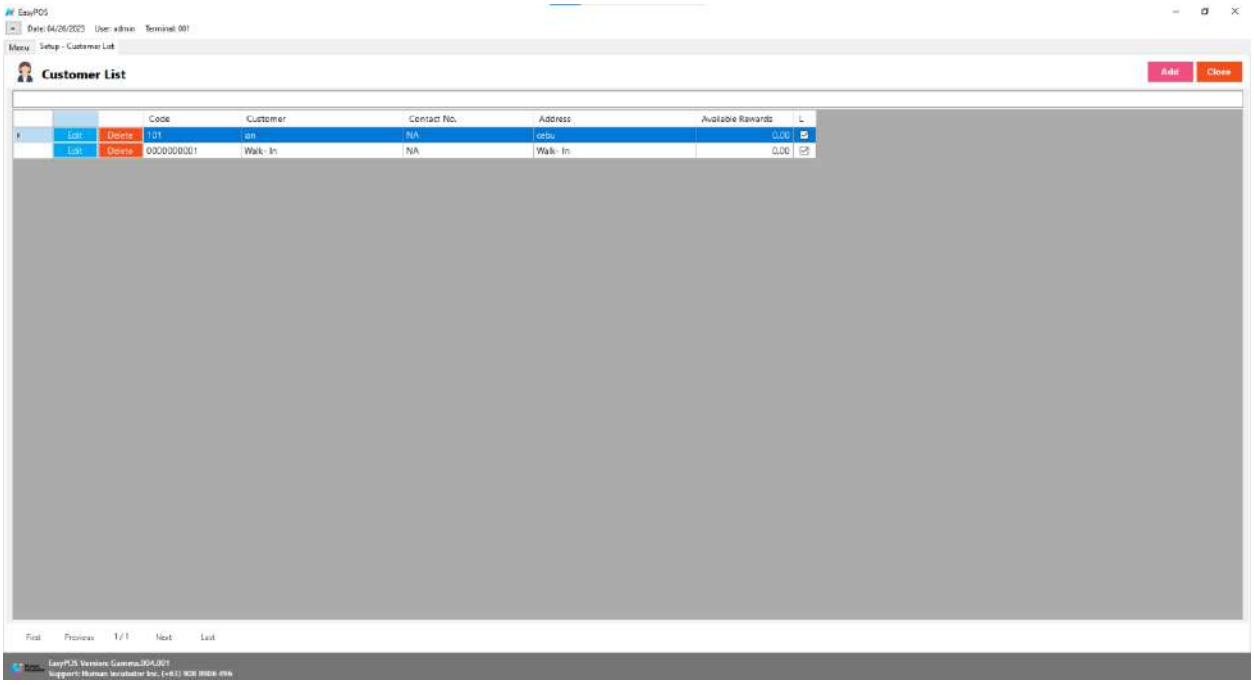
Overview

- Customers are used in making sales transactions.

Customer List

- Shows the list of all added customers.
- Delete button will proceed to deleting unlocked customer record details.
- The Edit button will proceed to updating customer details.
- Add button will proceed to adding a new customer .

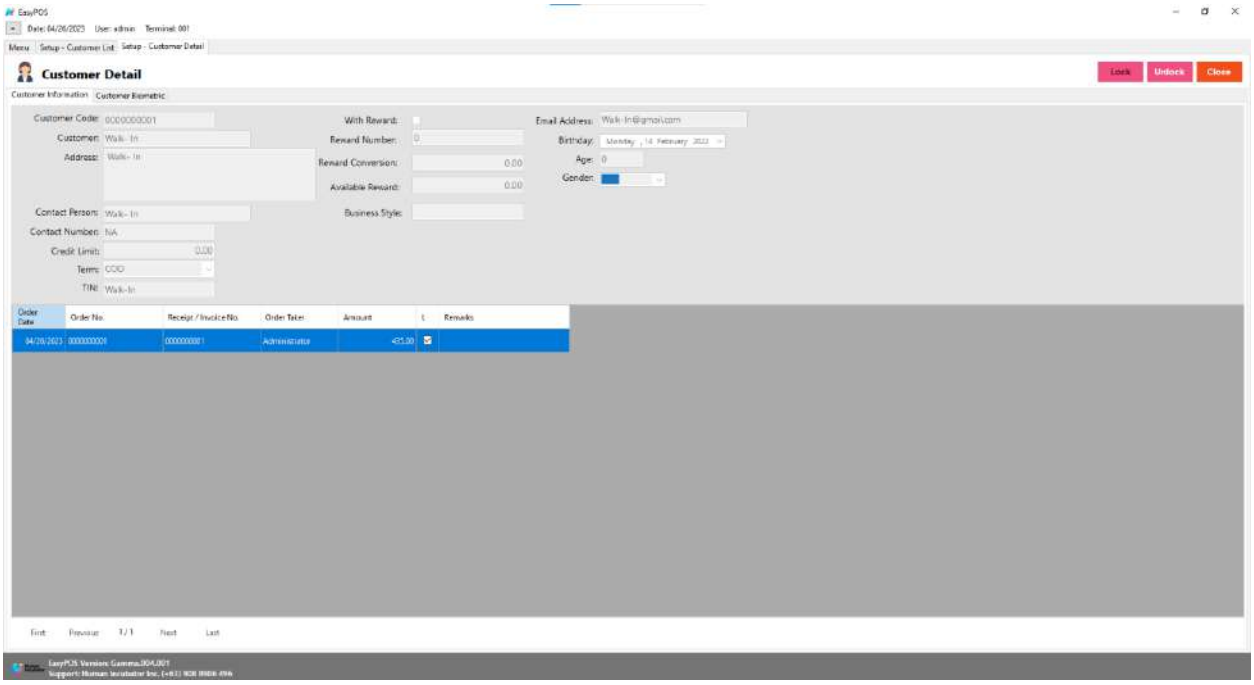
- Close button will proceed to closing the customer list page.



Customer Detail

- **Assumption**: **Add** button is already clicked on the upper right corner in the customer list.
- Fill up all the necessary information like:
    - Customer Code, Customer, Address, Contact Person, Contact Number, Credit Limit, Term
- Other optional information:
    - Email Address, Birthday, Age, Gender
- Click Save and lock buttons to save and lock the customer detail.
- Click the Unlock button to unlock the customer detail and enable editing/updating customer details, lock to save.

.



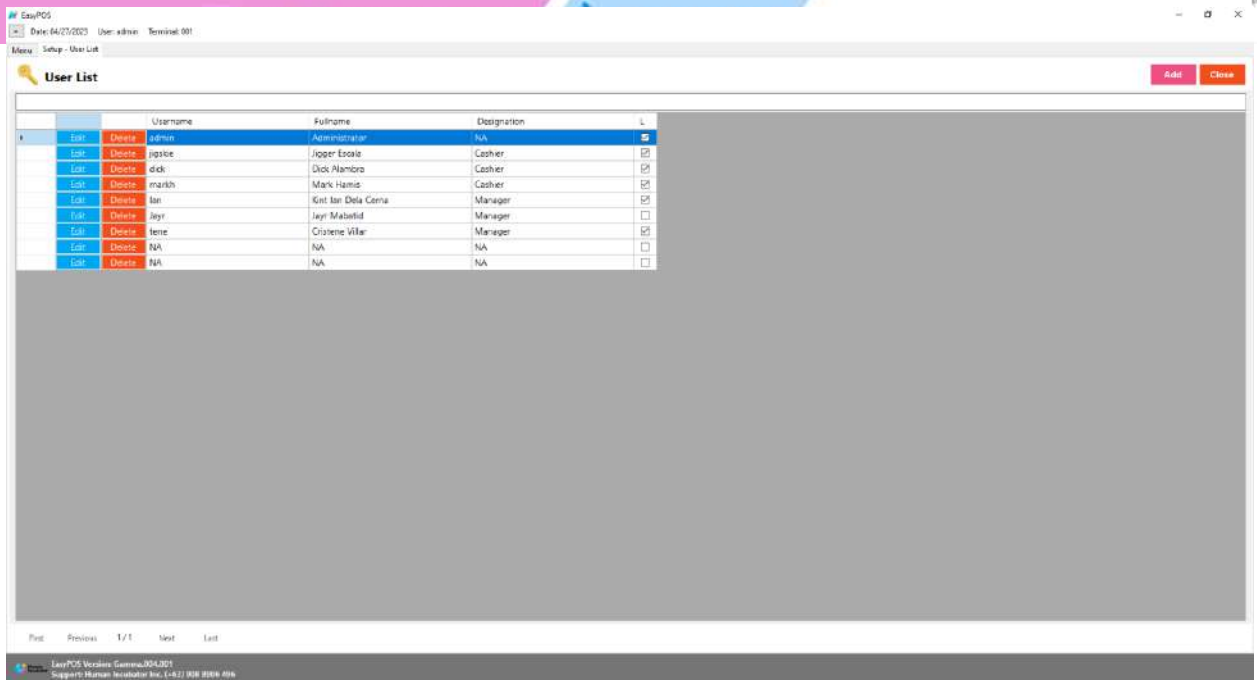
User Setup

Overview

- This is where to set up system users with their form access rights.

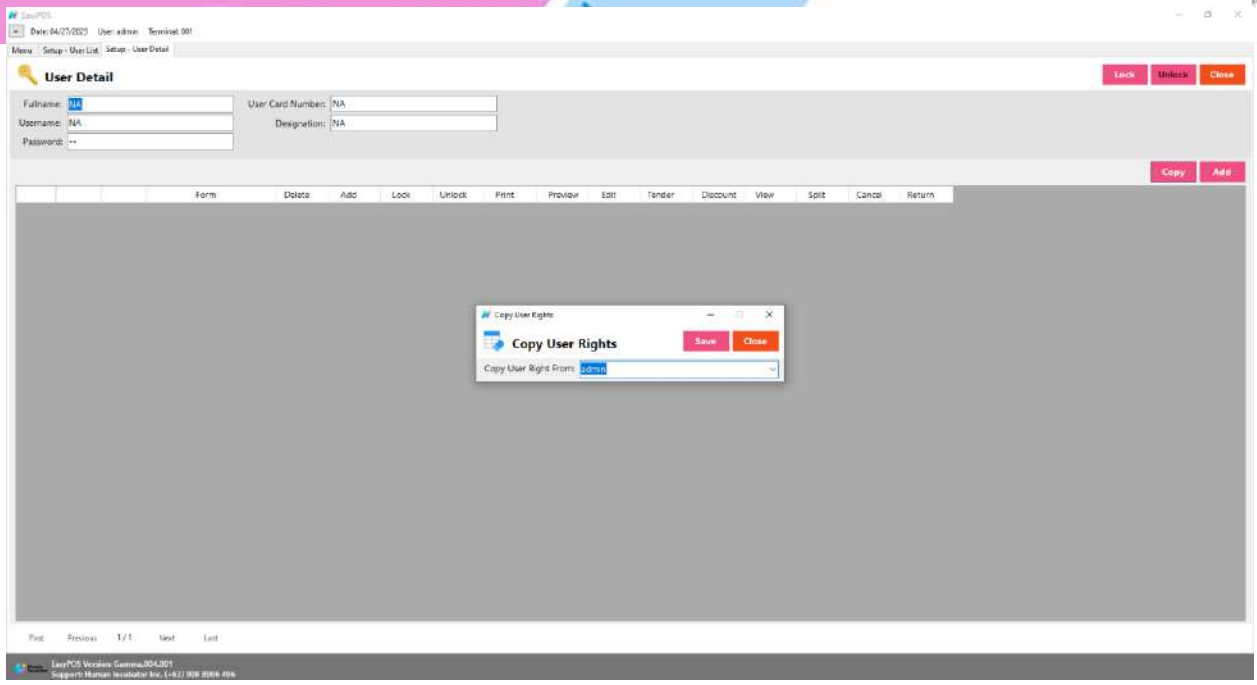
User List

- Shows the list of all added system users.
- Delete button will proceed to deleting unlocked user record details.
- The Edit button will proceed to updating user details.
- Add button will proceed to adding a new user.
- Close button will proceed to closing the user list page.

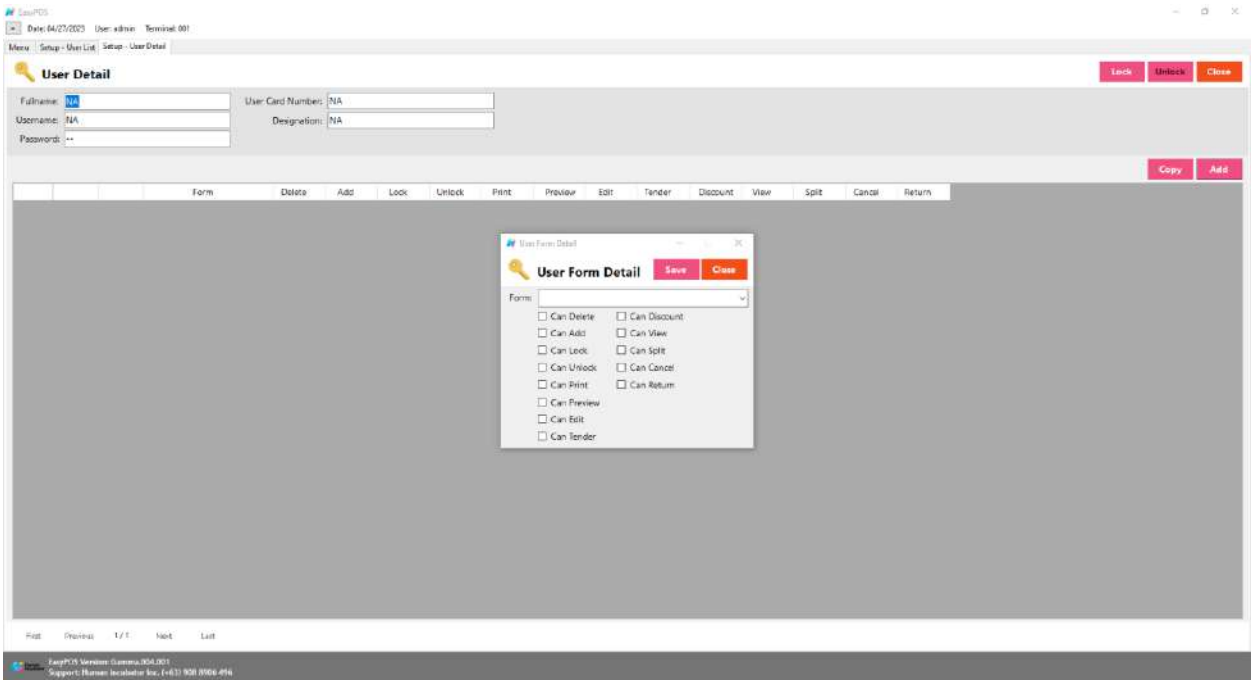


User Detail

- **Assumption**: **Add** button is already clicked on the upper right corner in the user list.
- Fill up all the necessary information like:
    - Full Name, Username, Password
- Other optional information:
    - User Card Number, Designation
- The Copy User Rights button will proceed to copying the user rights from the existing system user. Make sure to provide the correct **Copy User Right From**.



- The **Add** button will proceed to customizing the user rights.



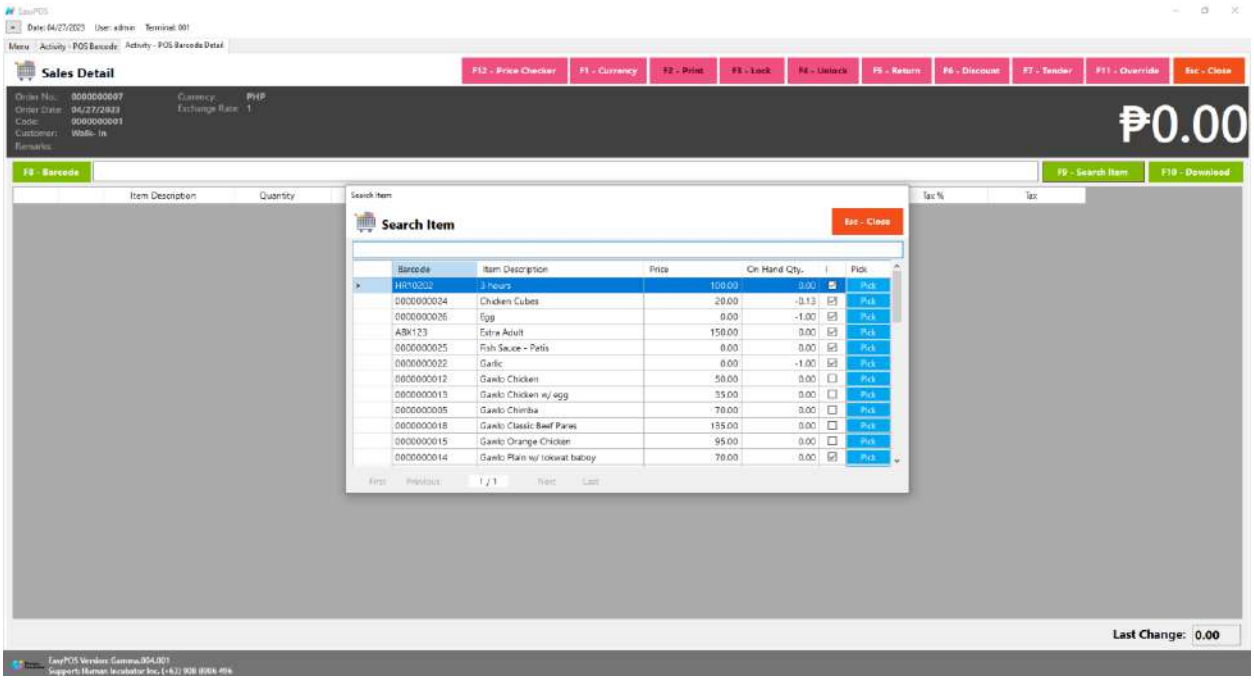
- Click Save and lock buttons to save and lock the user detail.
- Click the Unlock button to unlock the user detail and enable editing/updating user details, lock to save.

Activity - POS Barcode

Overview

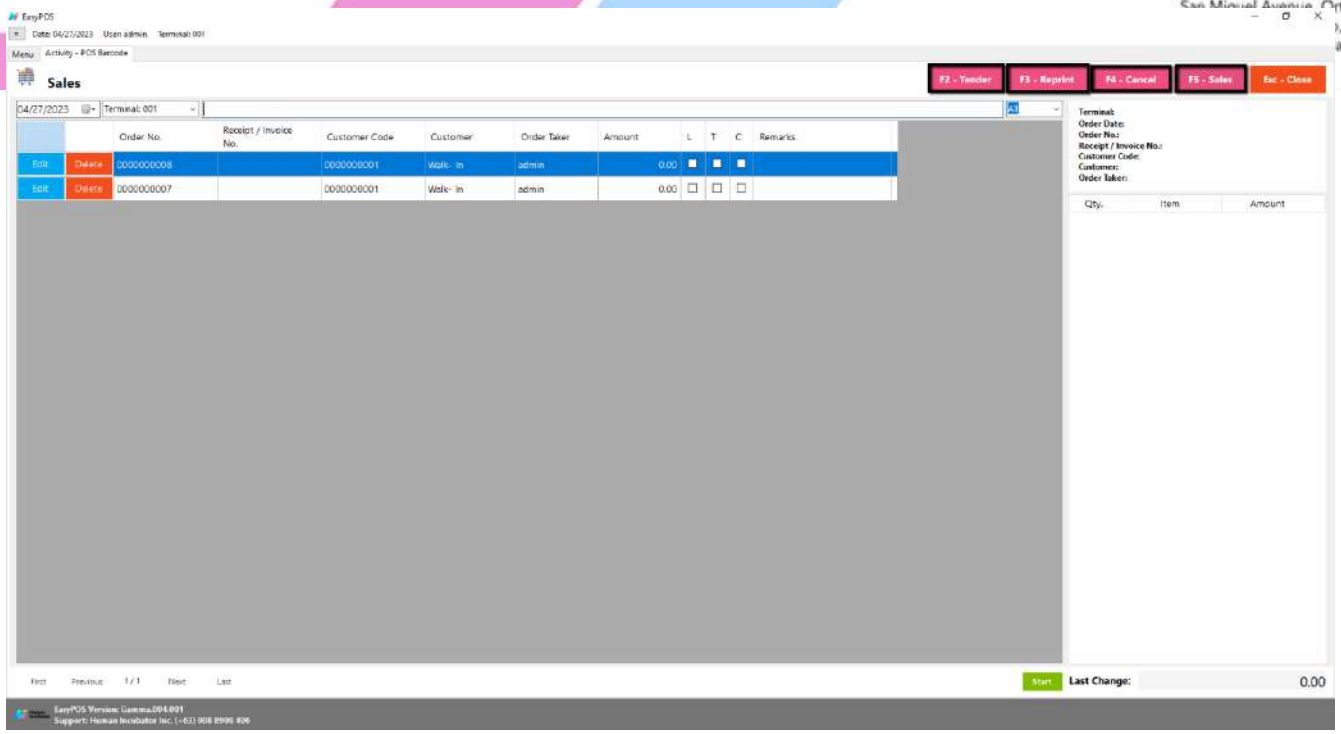
- POS Barcode is used mostly in the groceries and convenience stores.

User Interface



Barcode Sales List

- Shows the list of all barcode sales transaction lists.
- The **Tender** button will proceed to tender sales that are not yet tendered.
- The **Reprint** button will proceed to reprint the Official Receipt(OR) for tendered sales.
- The **Cancel** button will proceed to cancel the tender item.
- The **Sales** button will proceed to adding line items.
- The **Edit** button will proceed to editing sales.
- The **Delete** button will proceed to deleting sales. Make sure that the sale(s) is unlocked.



Barcode Sales Detail

- There are two ways on how to add sales line item(s),
    a. By inputting the barcode. Fill out the empty field with the correct item barcode then hit **Enter** from your keyboard. Matched item(s) will automatically be added to the sales line item.
        - After the item is successfully added to the sales line item, click the **Edit** button beside the item to edit the line item detail.
        - Provide the required information for line item detail such as:
            - Quantity
            - Discount
        - Save button will proceed to saving the line item.
        - Close button will proceed to closing the line item detail.
        - Users can add more items by repeating the same process via barcode.

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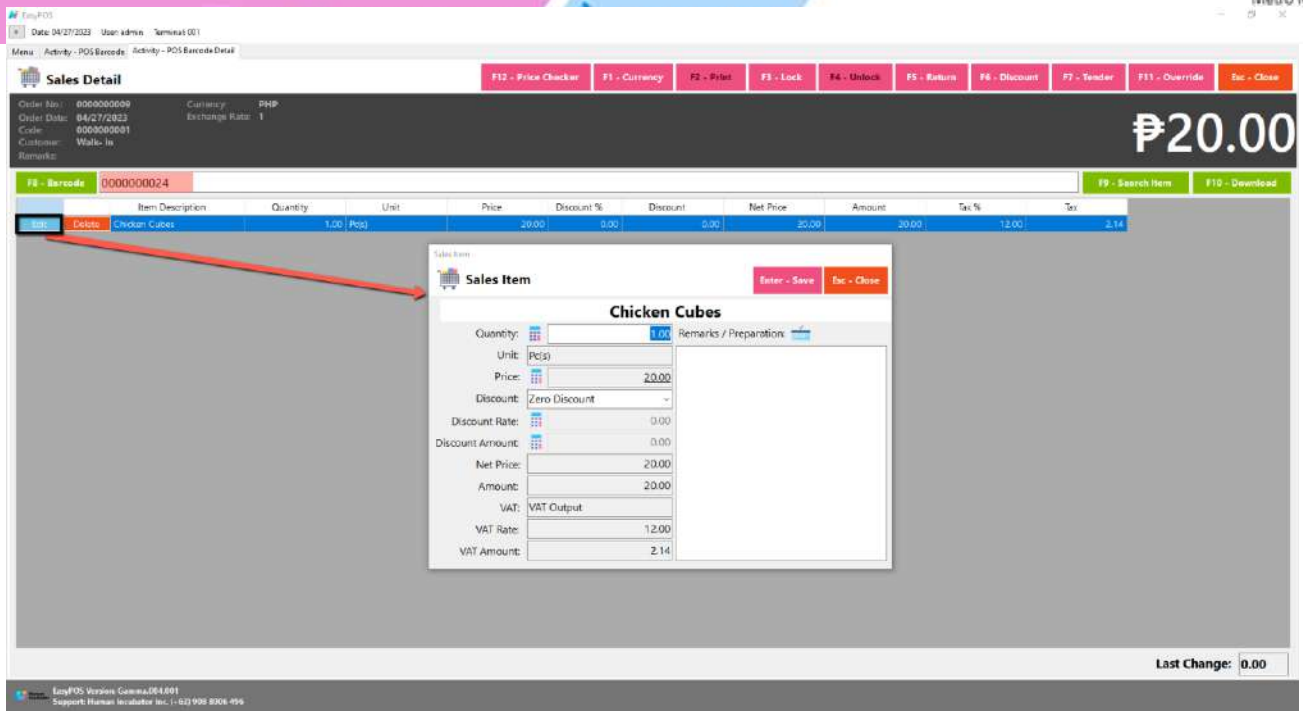
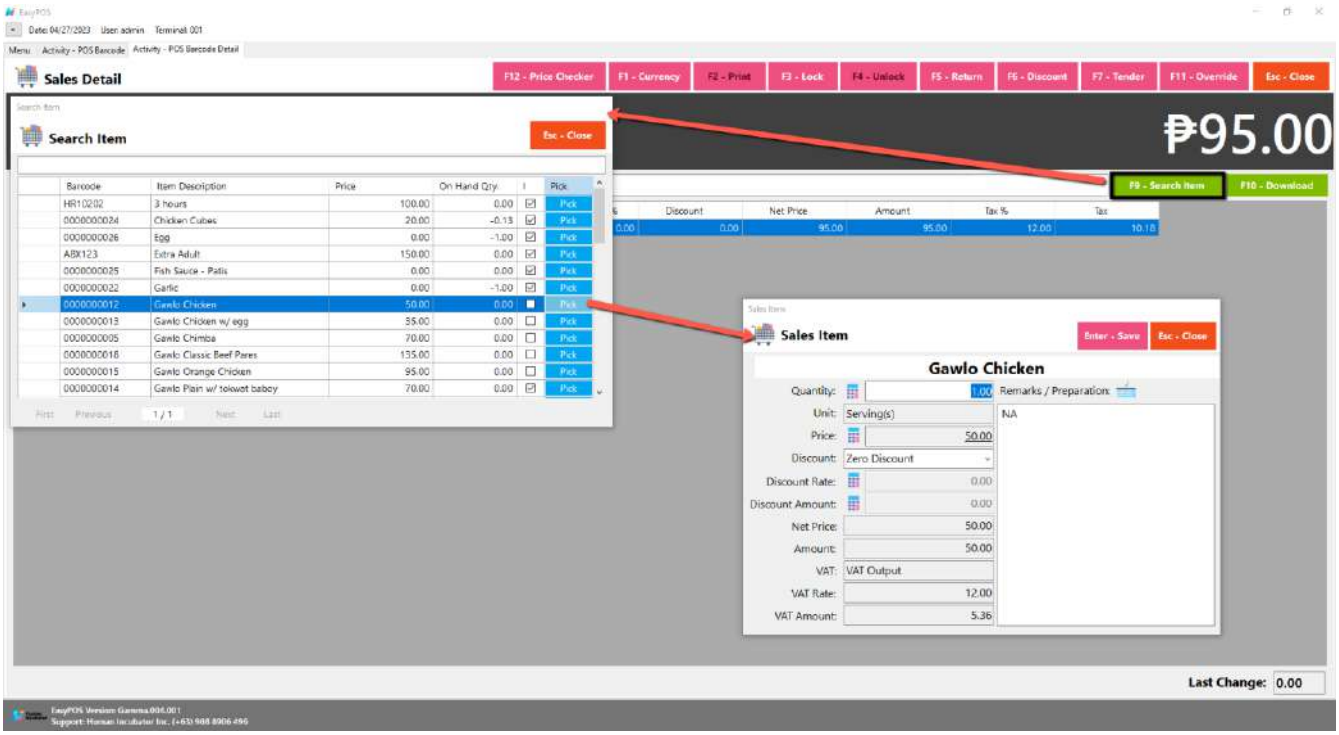
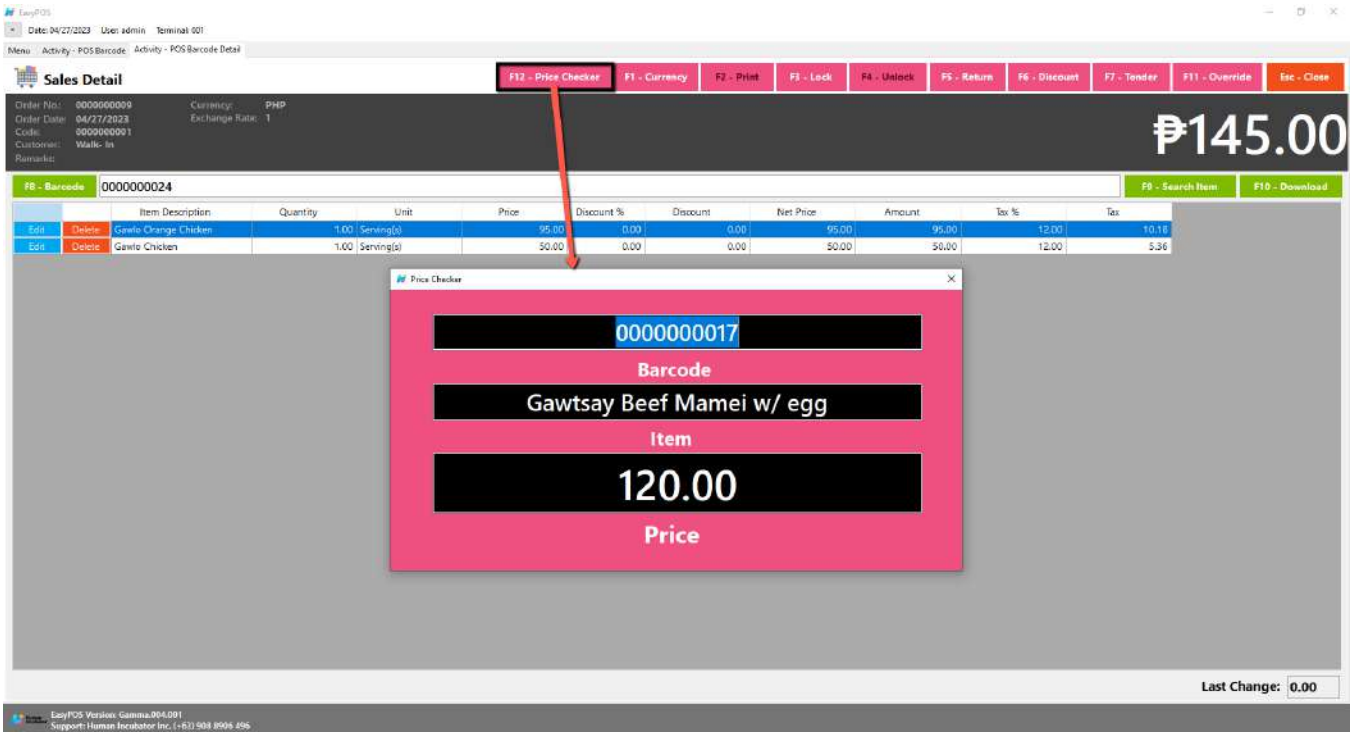


b. By the Search Item button, when clicked, a list of items is displayed. To add the item to the current sales, click the **Pick** button.
   - When the **Pick** button is clicked, the Sales Line Item will automatically display.
   - Sales Line item shows the details of the selected item and the current user must specify the quantity of the item, and then save. Once saved, it will be added to the current Sales and be redirected to Search Item form.
   - Users can add more items by repeating the same process. Just close the Search Item form when done adding line items.

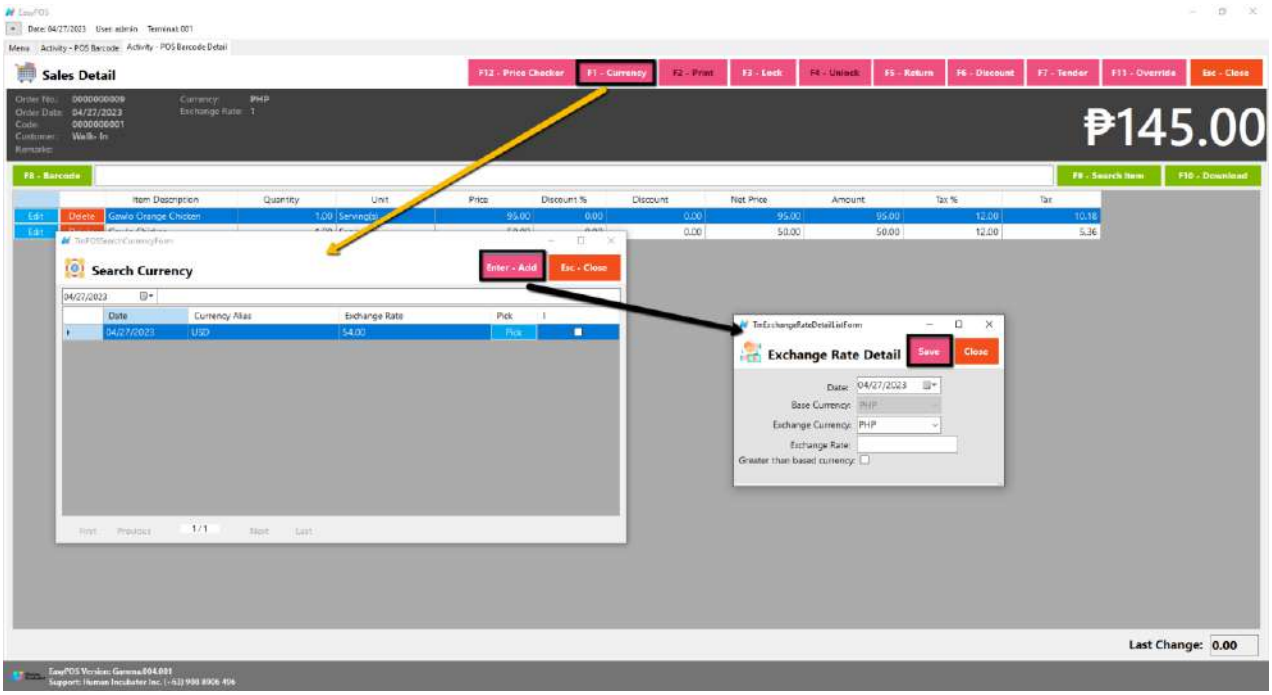


Barcode Sales Detail - Relevant Buttons

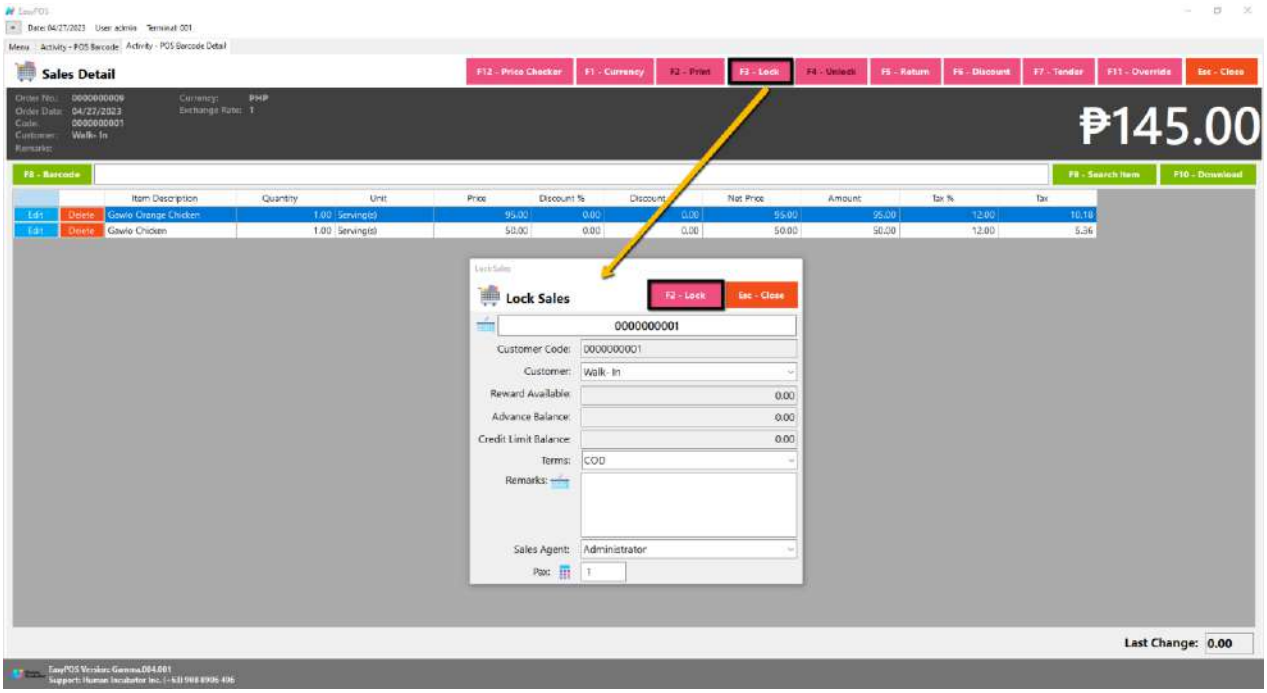
- **Price Checker**
  - Click the Price Checker button when you want to check the price for the item.
  - Once clicked, a Price Checker form will appear.
  - Provide the correct barcode, then hit Enter key from your keyboard. Another way is to scan the item's barcode then the item description with price will automatically display.



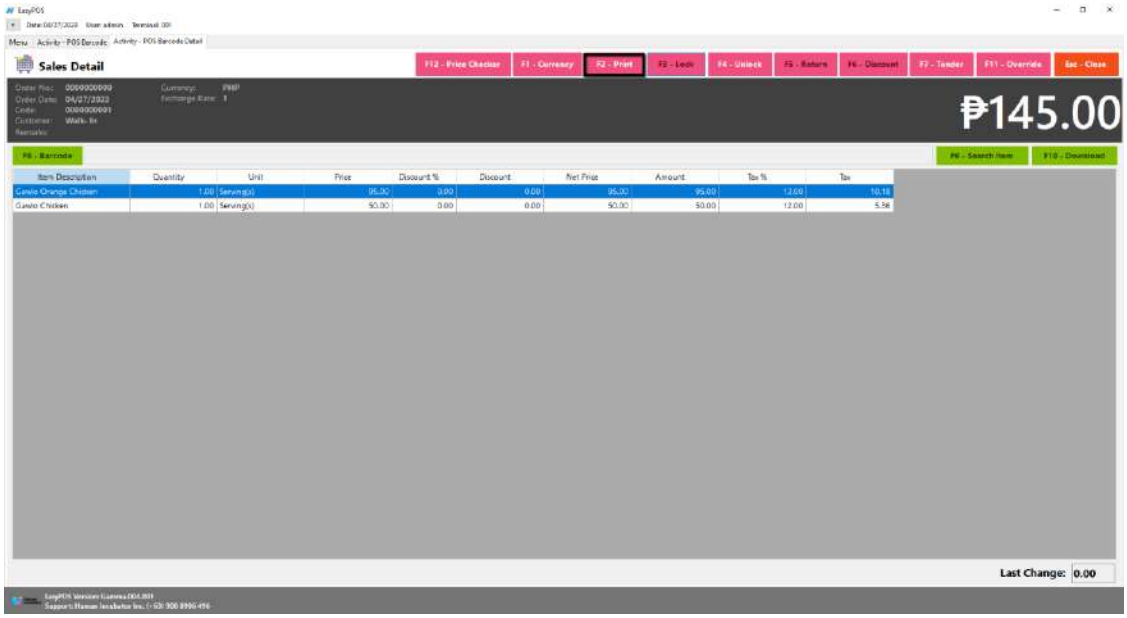
- **Currency**
  - Click the Currency button when you want to have the transaction with different currency.
  - Once clicked, a Currency form will appear.
  - Select a currency where you want to use by clicking the **Pick** button.
  - If NO currency is displayed or the currency you want to select is not available,
    - Click the **Add** button and provide the necessary informations such as:
      - Exchange Currency
      - Exchange Rate
    - Click the Save button then the form will automatically be closed.
    - Select the newly added currency by clicking the **Pick** button.

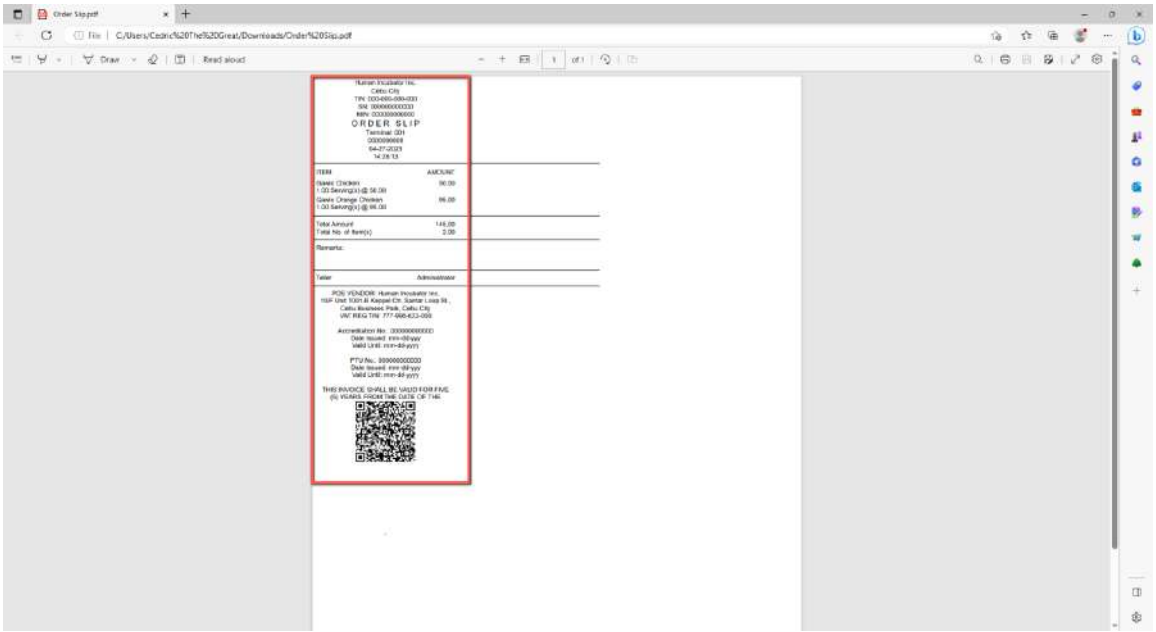


- **Lock**
  - Click the Lock button to save the sales information.
  - Provide the necessary information then click the Lock button to finish locking the sales information.

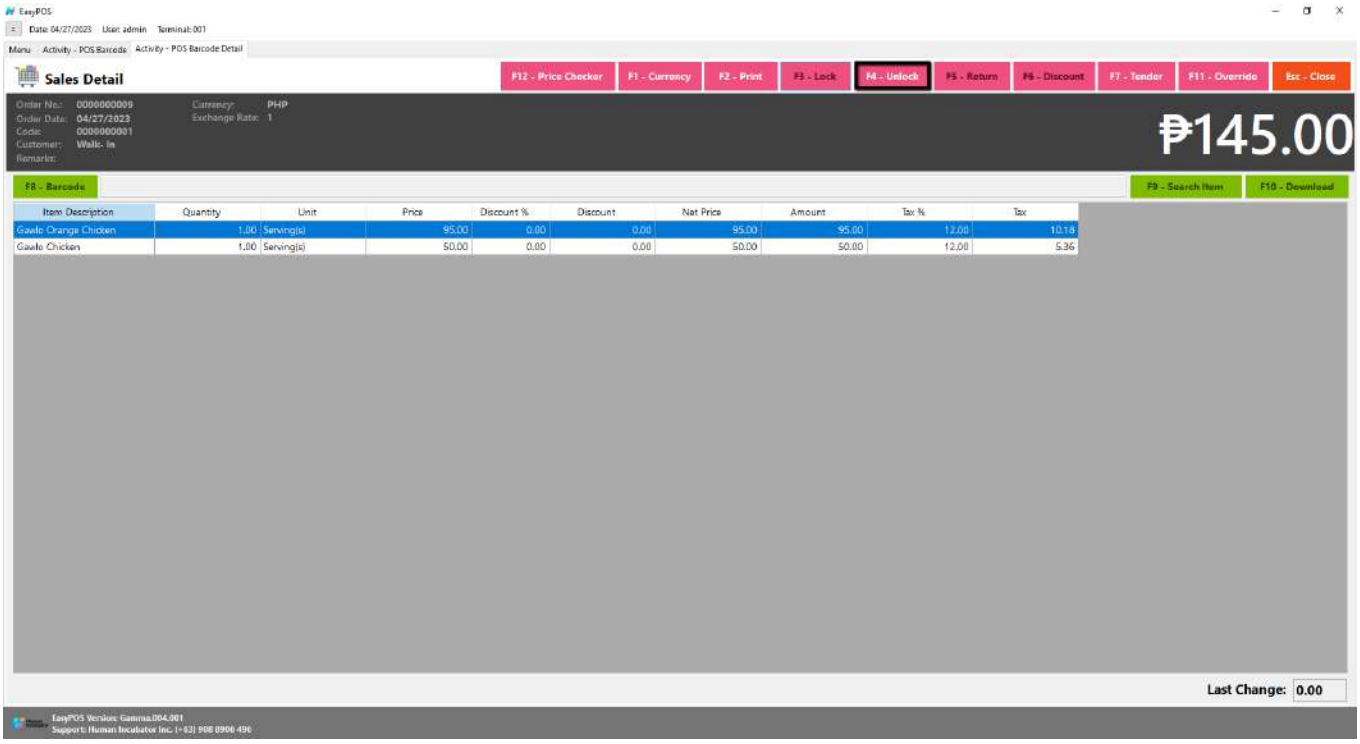


- **Print**
  - Click the Print button to download the Order Slip in PDF file, then print.
  - Take note, Print will only be enabled once the Sales detail is already locked.
  - Make sure to save the generated pdf file to a folder where you can easily locate it.

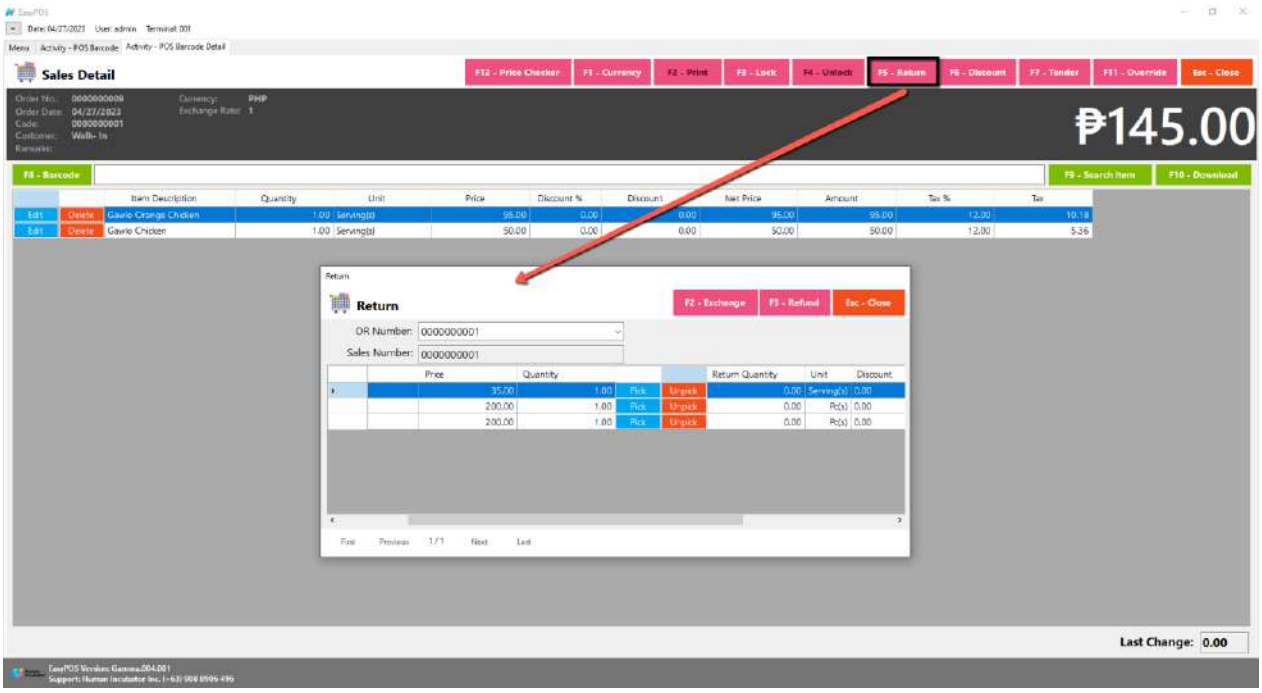




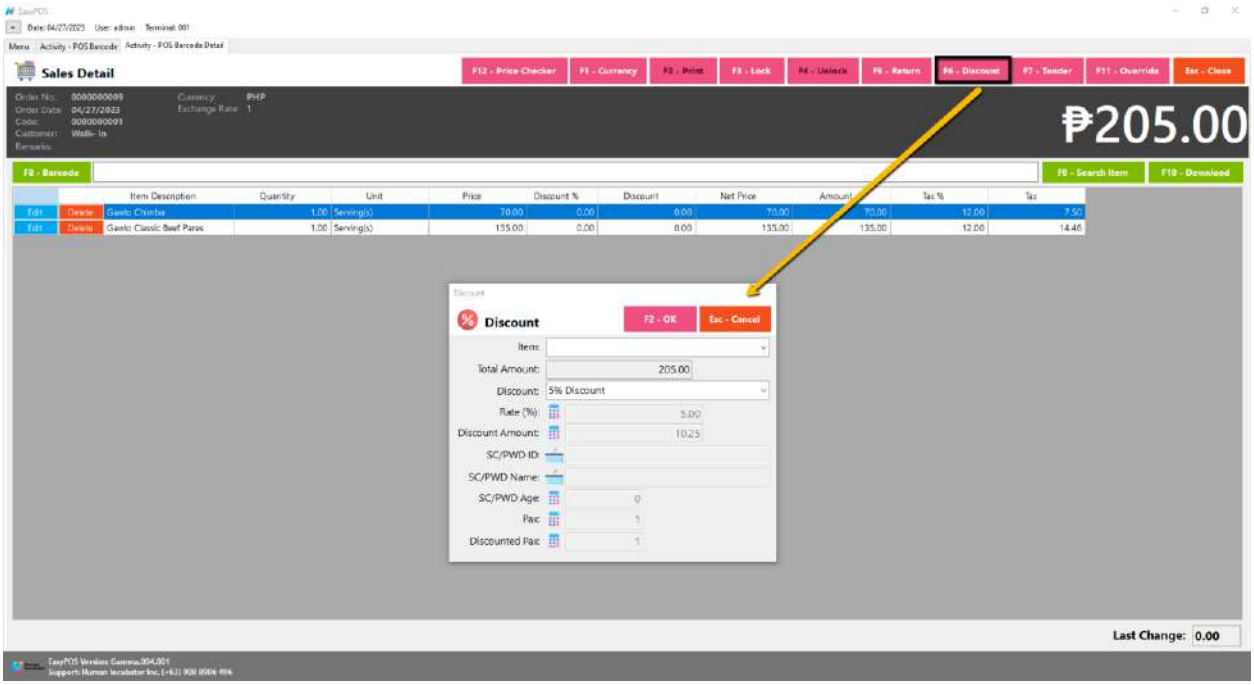
- **Unlock**
    - Click the Unlock button if you want to modify the sales detail or add sales line items.



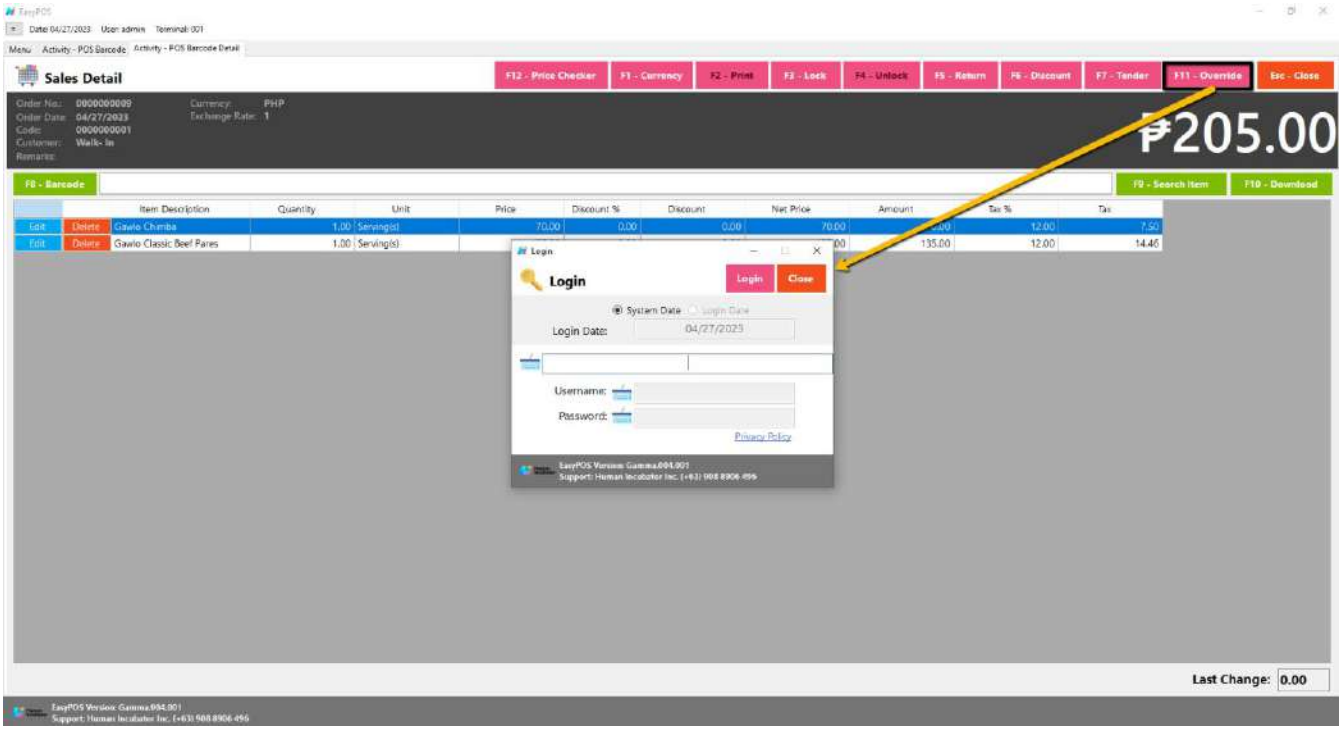
- **Return**
    - Click the Return button if the customer returned a product.
    - Provide the OR Number then list of items will be displayed automatically.
    - Click the **Pick** button if you want to add a return quantity.
    - Click the **Unpick** button if you want to reset the return quantity to zero(0).
    - Click the **Exchange** button, if you want to ONLY exchange an item to a customer.
    - Click the **Refund** button, if you want to return a money to a customer.



- **Discount**
  - Click the Discount button if you want to set up a discount for the sales line items. You can also set the discount per line item.

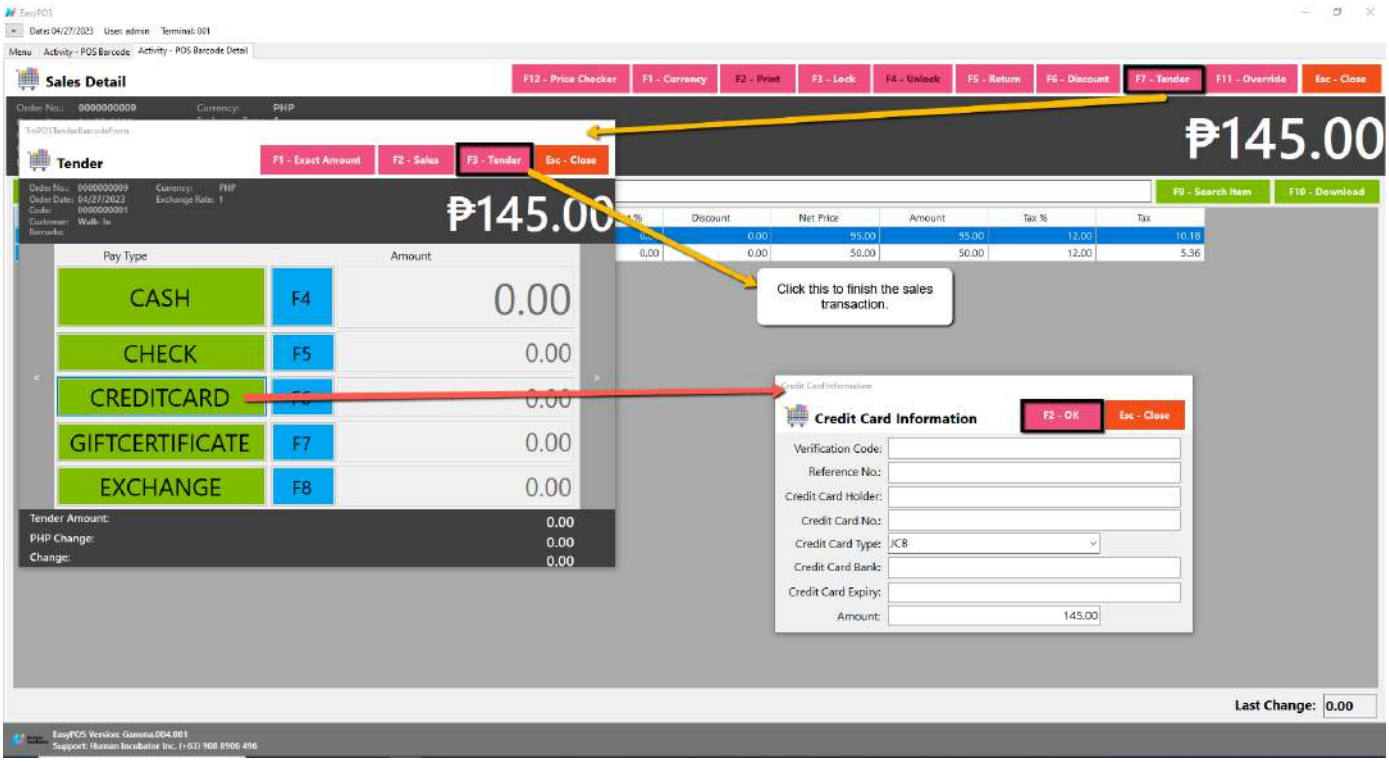


- **Override**
    - Click the Override button if you want to suspend, reject, or cancel a transaction.



Barcode Sales Detail - Tender

- Click the Tender button that can be seen on the Sales Detail form to tender transaction.
- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales transaction, just click the Tender button from the Tender form, the system will now print an Official Receipt, and recreate a new Sales detail.

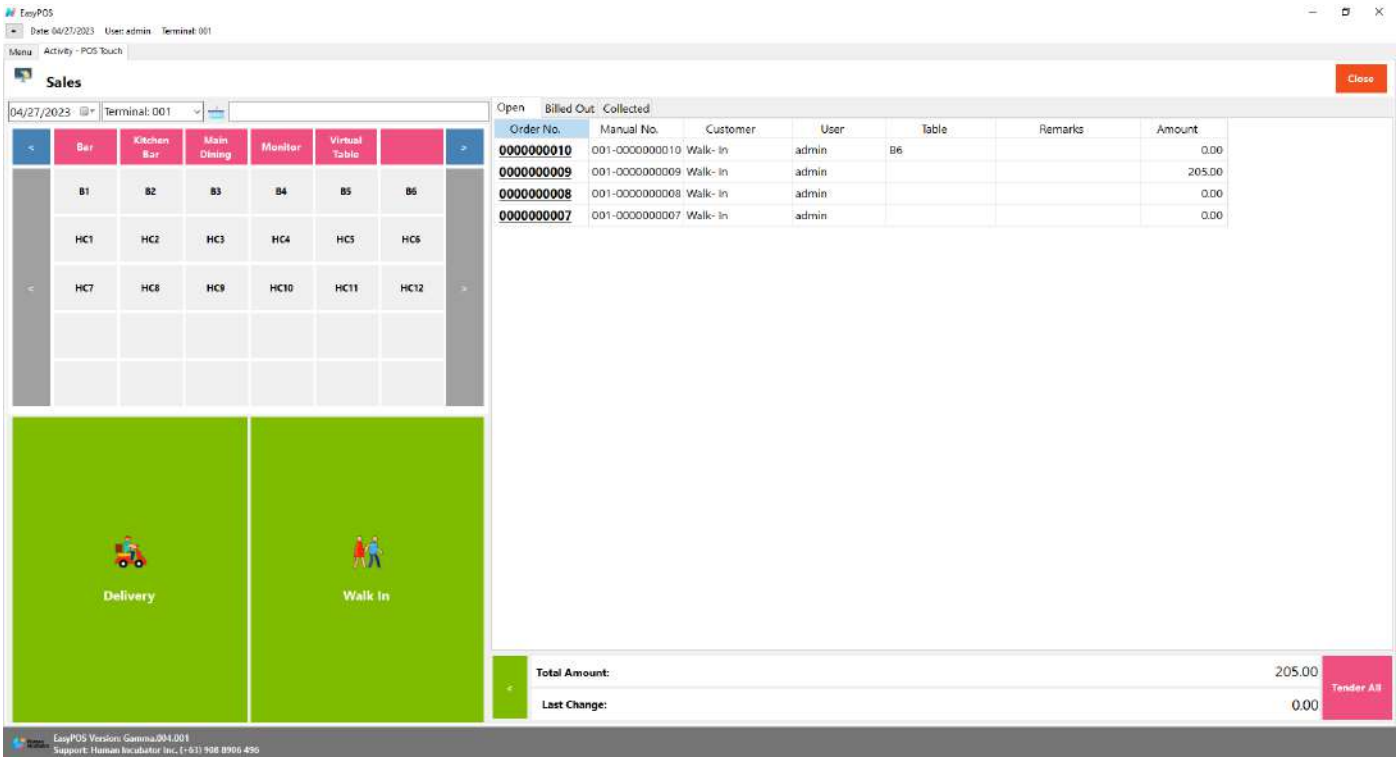


Activity - POS Touch

Overview

- POS Touch is good for restaurants, cafes, etc. as long as it caters Dine In.

User Interface



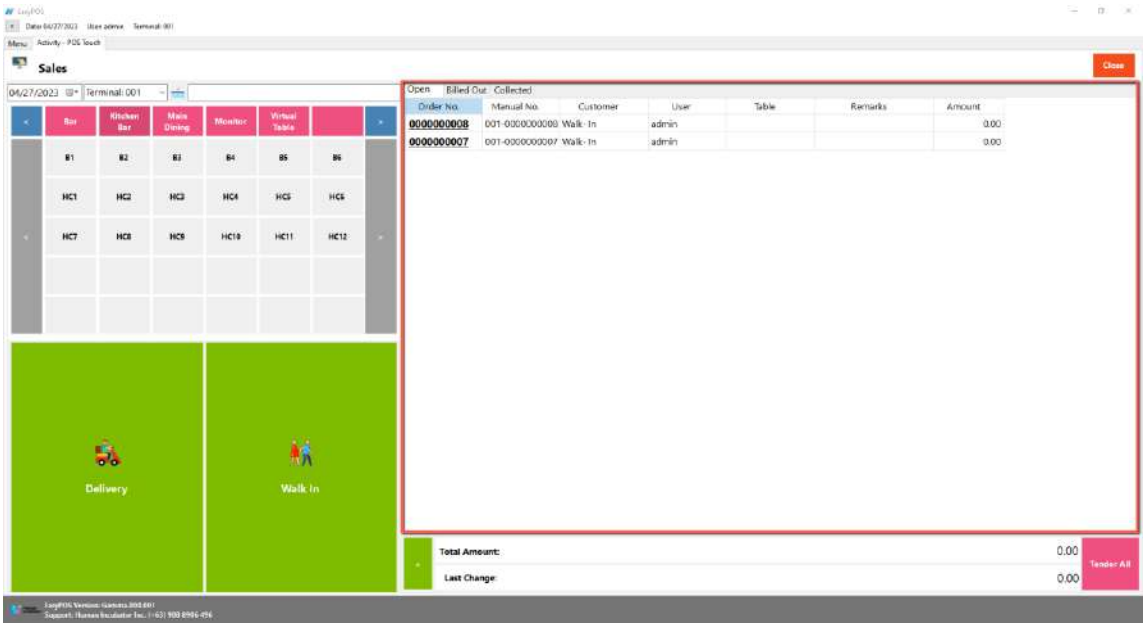
POS Touch Definition of Buttons

- **Red** button → represents the printer stations which will navigate the user to their respective table, when pressed, it will show table locations.
- **Gray** button → represents the location of the tables in which the dine-in customer(s) will sit in.
- Two **Green** large buttons → represents if the transaction is for Walk-In customers or for delivery.
- **Red** large button with “Tender All” label → represents tendering all sales.

- **Blue** button → navigating the table groups to left and right.

POS Touch Sales List

- Sales list for POS Touch consists of three(3) tabs:
    - Open → display list of Touch sales that are still open which means, not yet billed or collected. Also, system users can still delete the created sales detail here.



    - Billed Out → display list of sales that are already locked but not yet collected. Here, the user can Bill Out print and Print Partial Bill.

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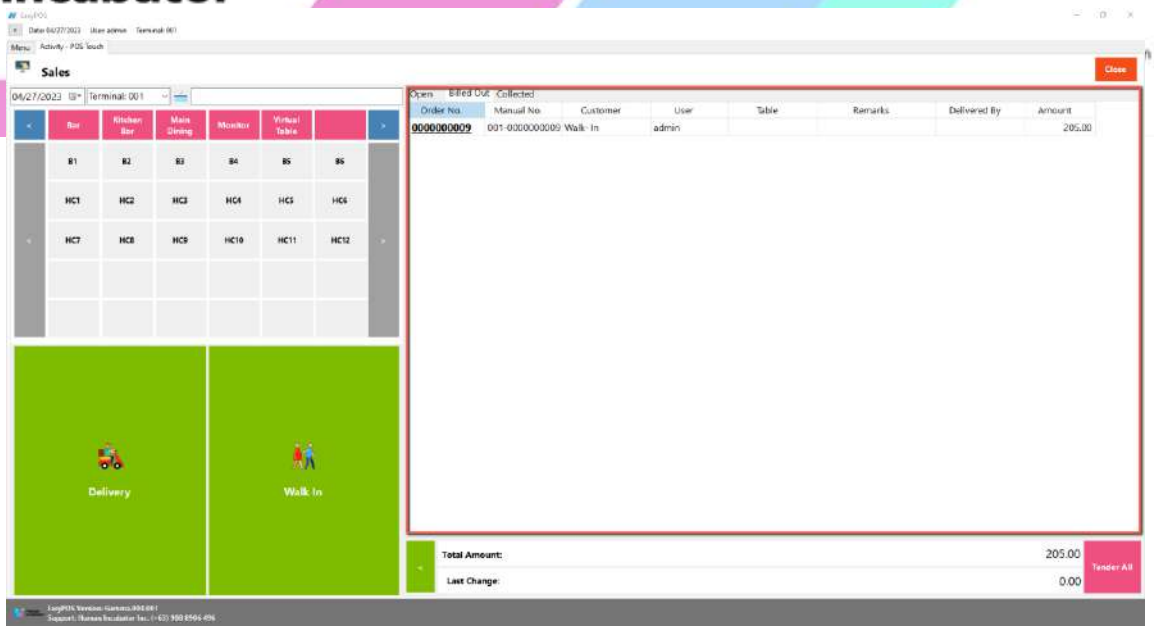
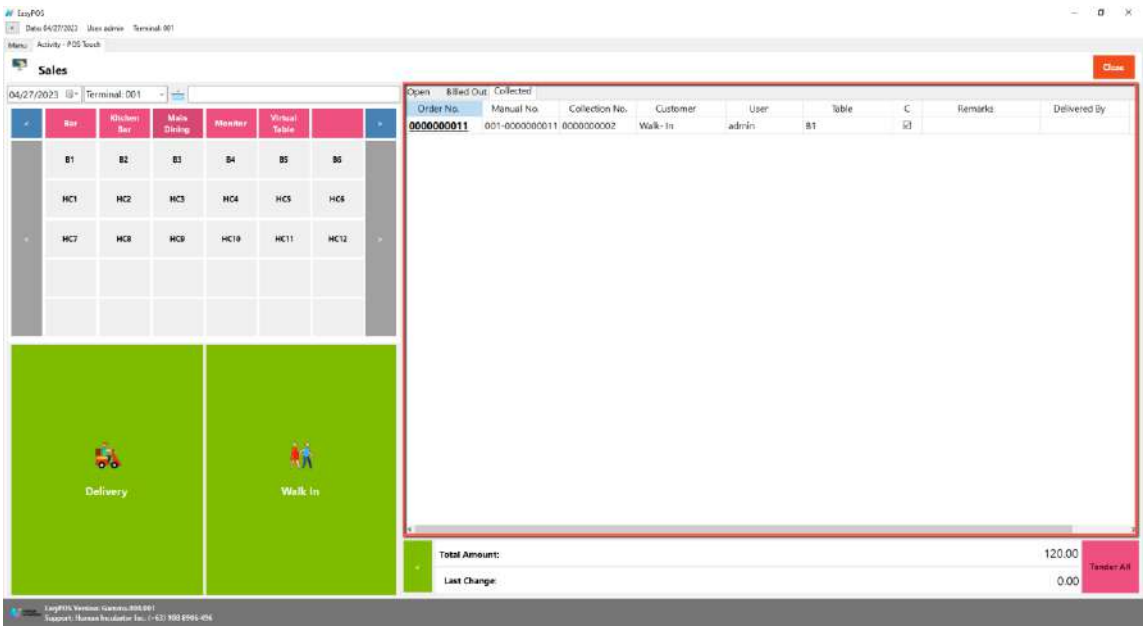


- Collected → display list of sales that are already tendered.



POS Touch Sales Detail

- There are 3 ways on how to navigate the sales detail:
    a. Via Dine In table
        - Select a table group, under it, select a table code or number where the customer wants to sit in.

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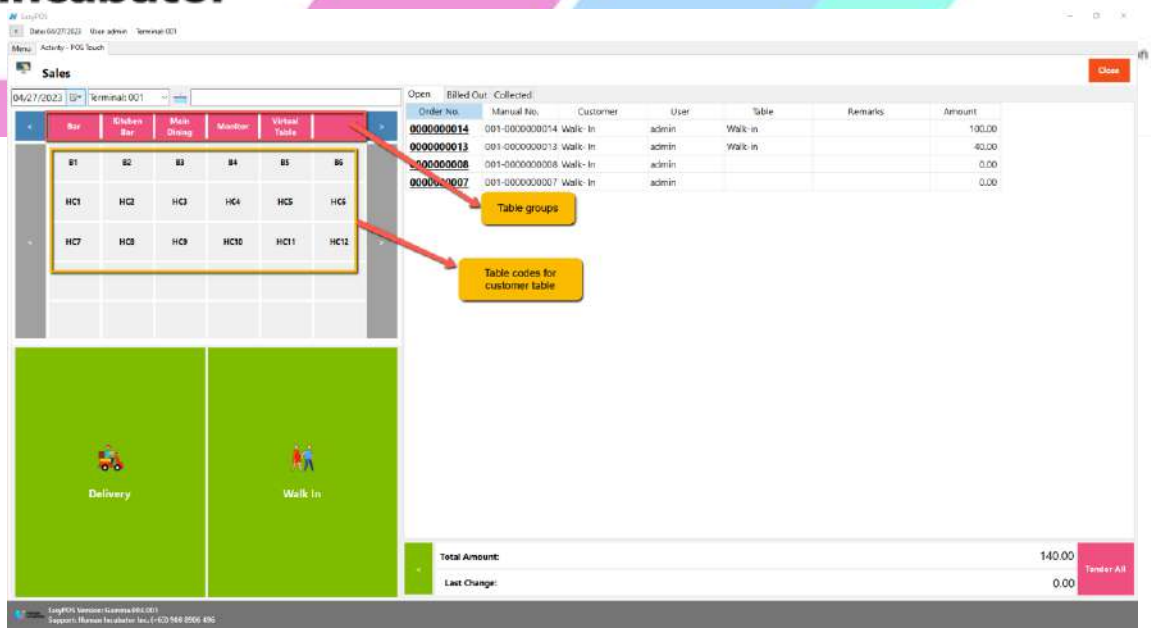
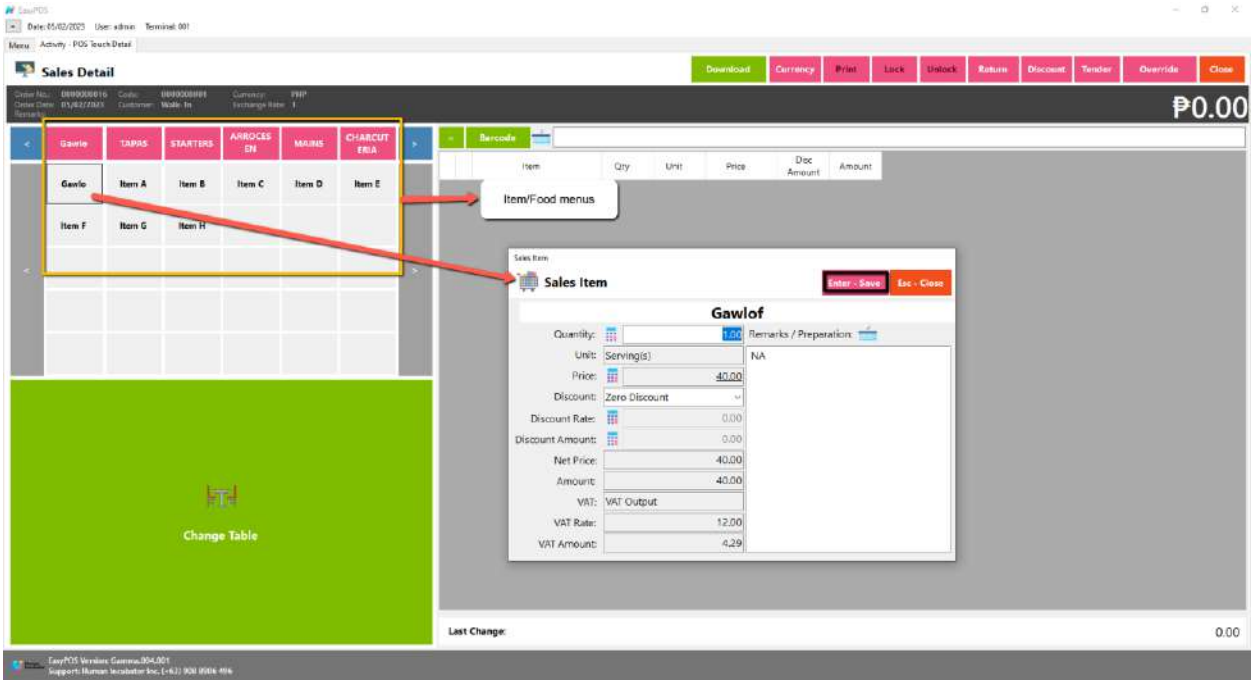
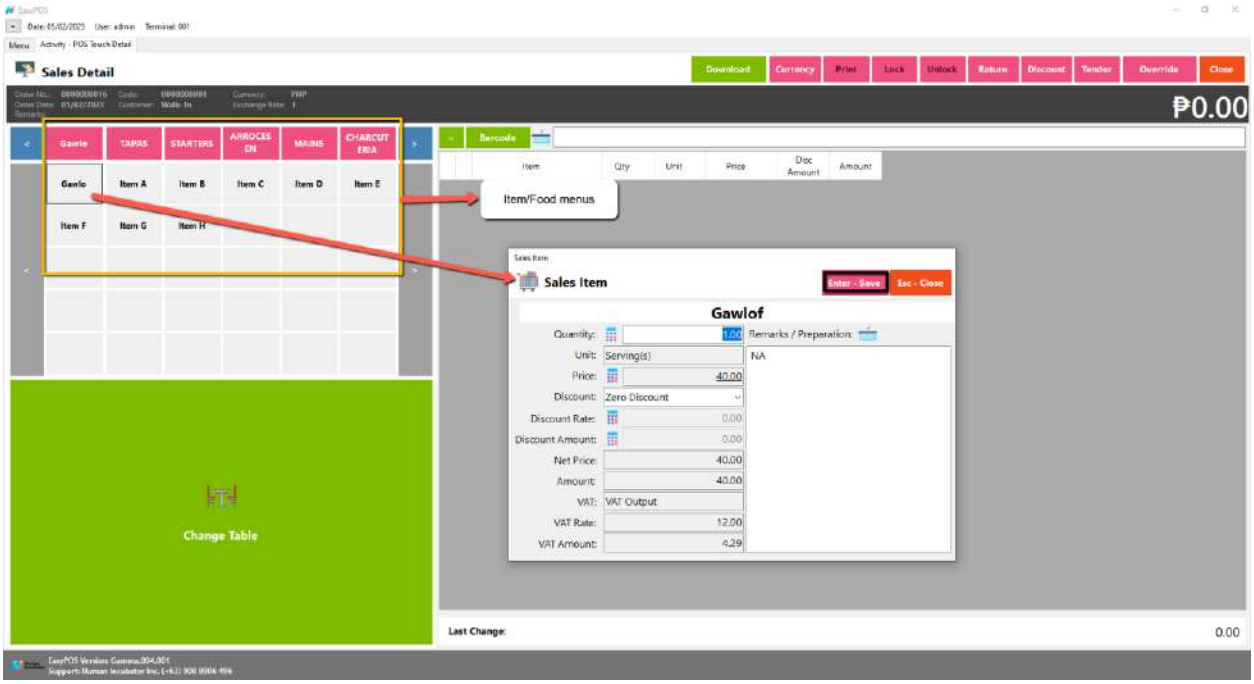


- After selecting, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your keyboard or click the Save button.

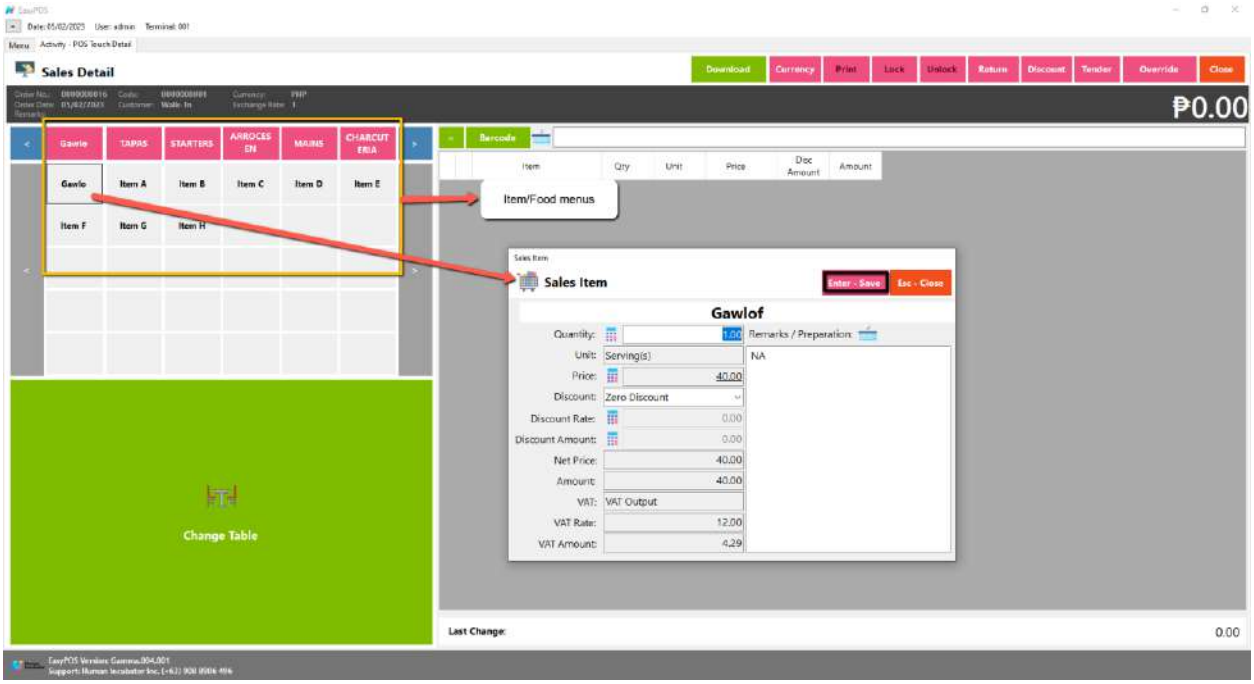


b. Walk-In button
   - Click the green button with the Walk In label.
   - The same process with the Dine In table, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your keyboard or click the Save button.



c. Delivery button
   - Click the green button with the Delivery label.
   - A Delivery Customer Information will popup, provide the necessary information then click the Ok button.
   - The same process with the Dine In table, you will be redirected to the Sales Detail. To add a Sales line item, select an item

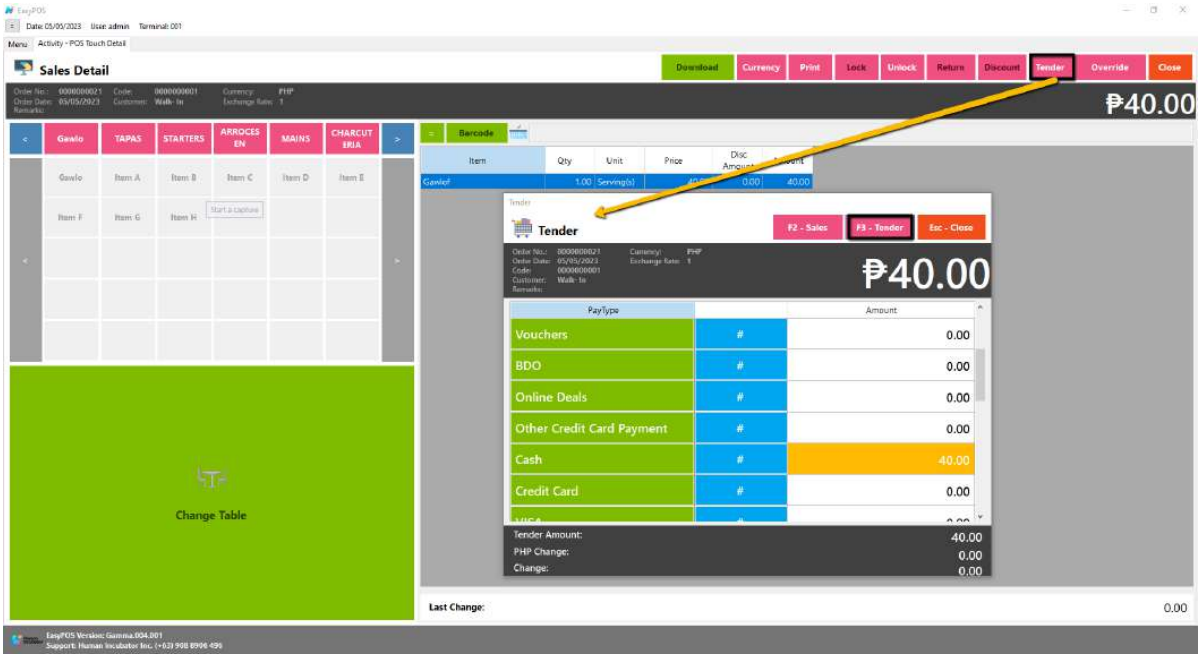
from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your keyboard or click the Save button.



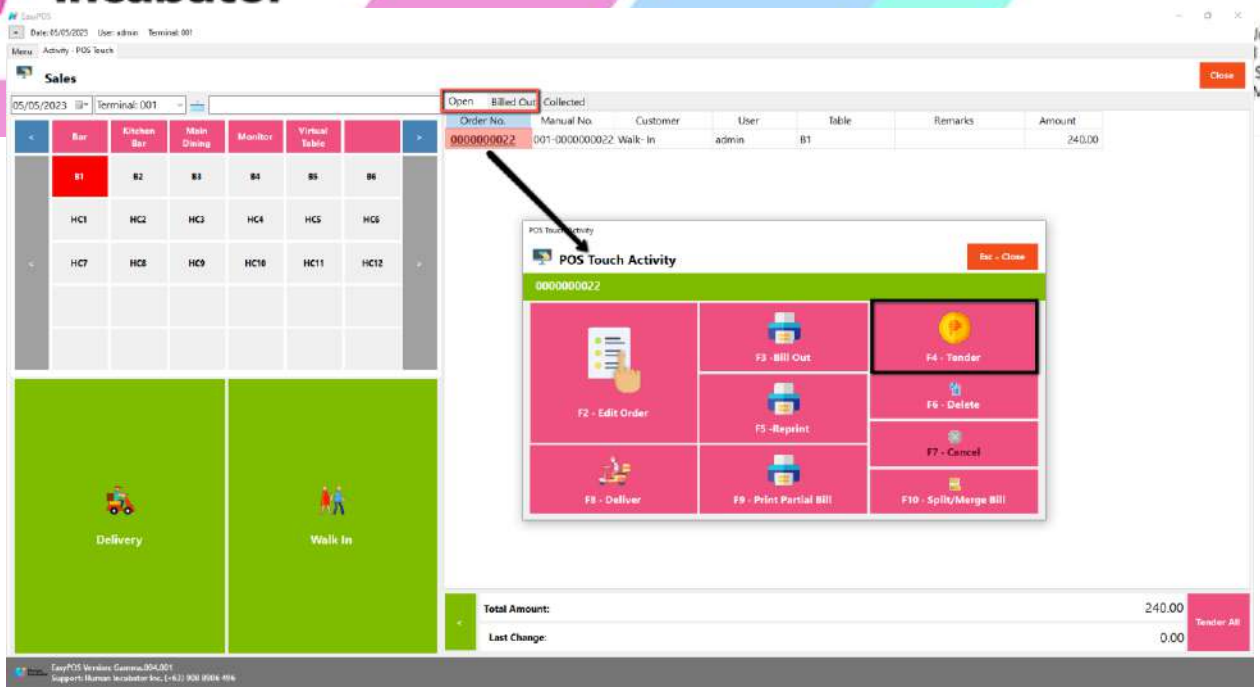
POS Touch Sales - Tender

- There are 3 ways on how to tender sales:
    - Via Sales Detail page

- Assuming that you are in the Sales Detail page, click the Tender button that can be seen on the Sales Detail form to tender transaction.
- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales transaction, just click the Tender button from the Tender form, the system will now print an Official Receipt, and the sales detail will be moved to the Collected tab.



  - Via Open and Billed Out tab
    - From the Open or Billed Out tab, select a sales order number that you want to tender.
    - A POS Touch window will display, then select Tender or simply press F4.



- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales transaction, just click the Tender button from the Tender form, the system will now print an Official Receipt, and the sales detail will be moved to the Collected tab.

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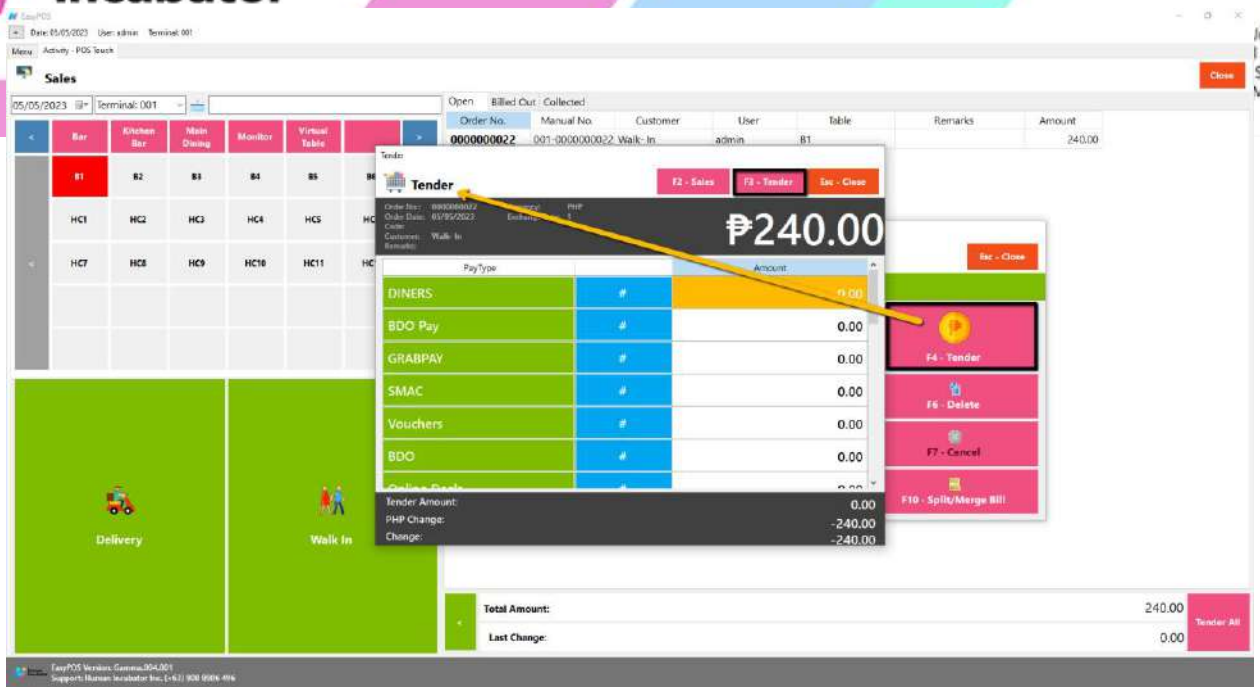

- Via Tender All button
  - From the Open or Billed Out tab, look for the Tender All red button.
  - A confirmation message will popup, then click Yes.

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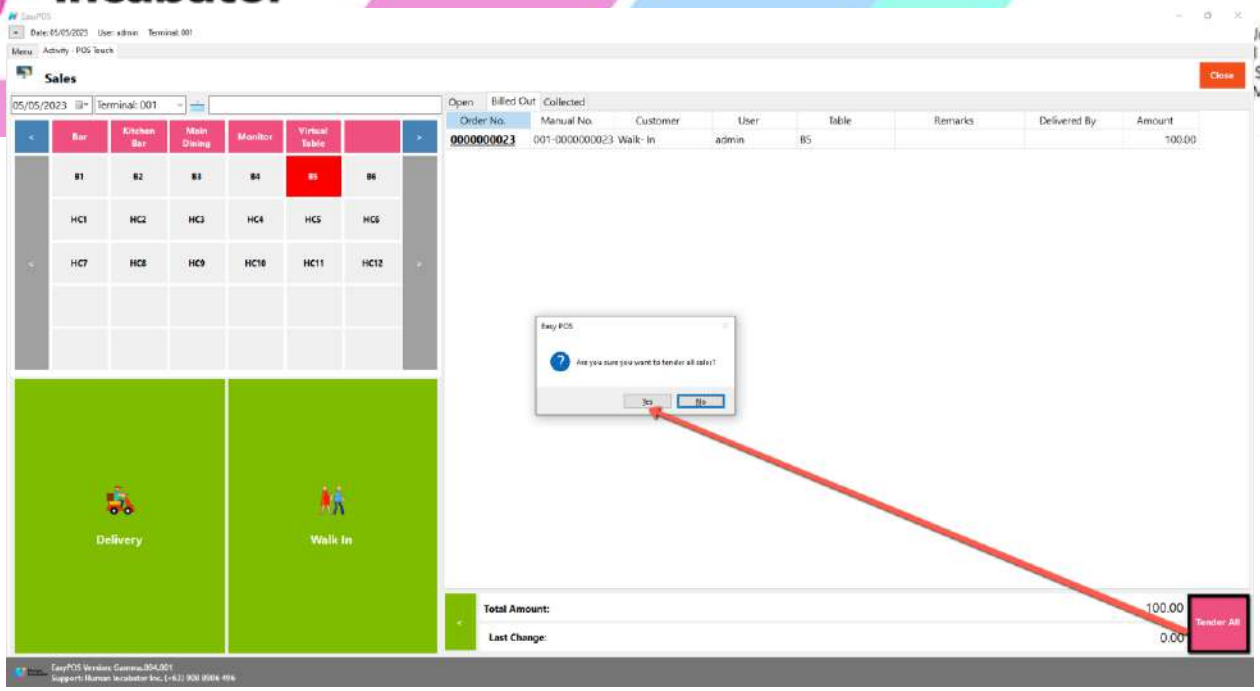
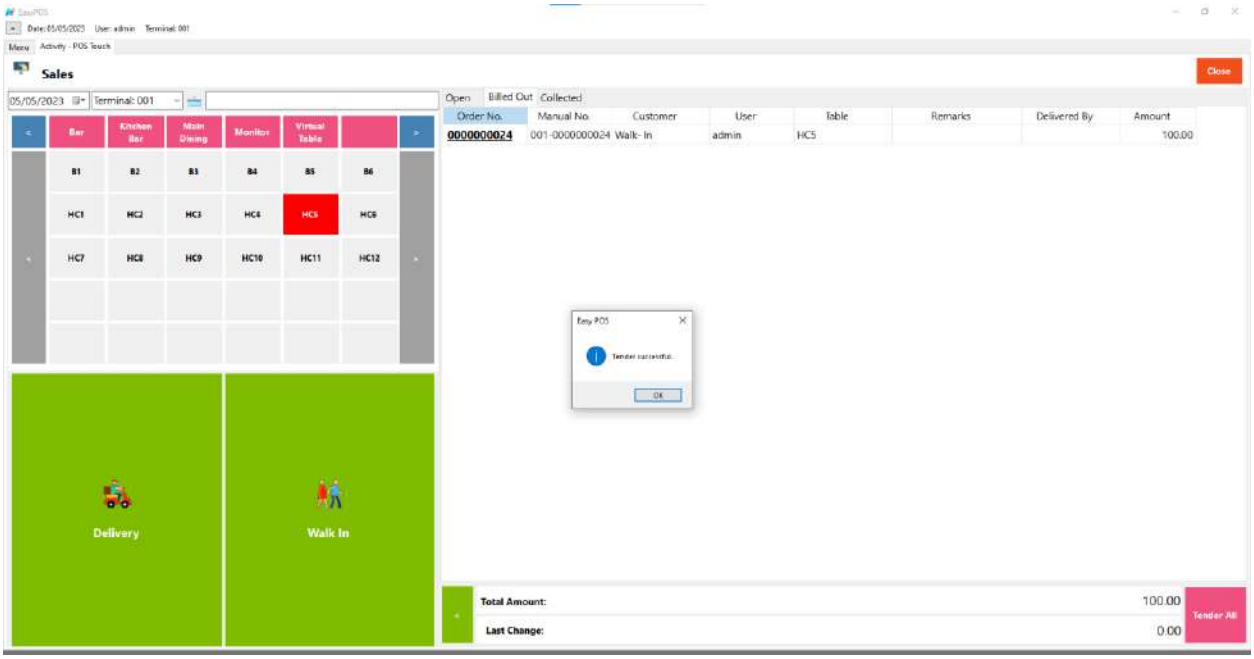
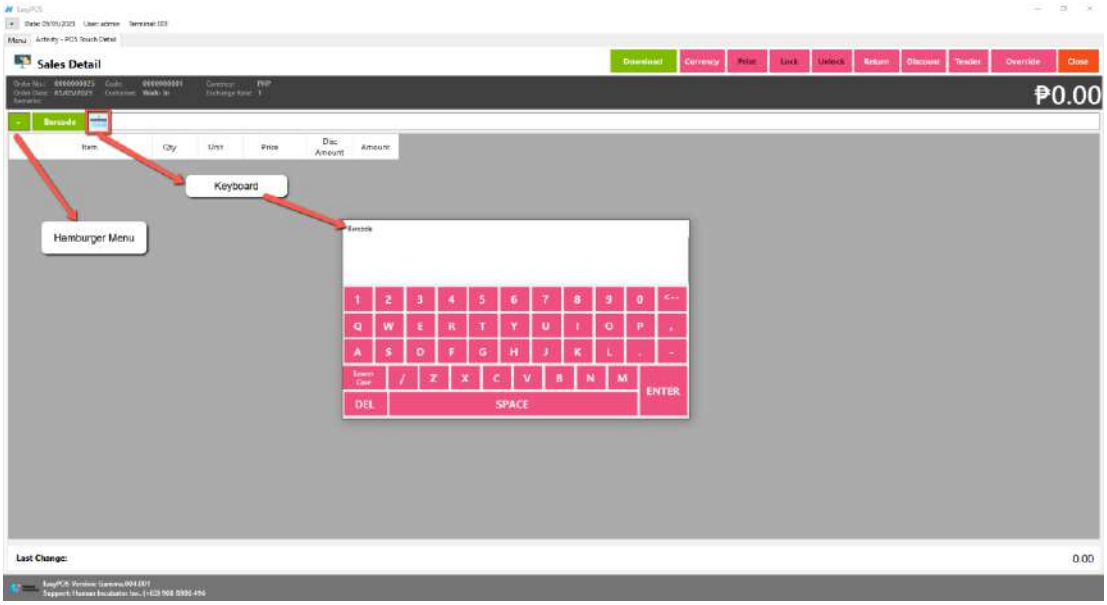


- A tender successful message will display then all the Sales Order from the tab will be moved to the Collected tab.

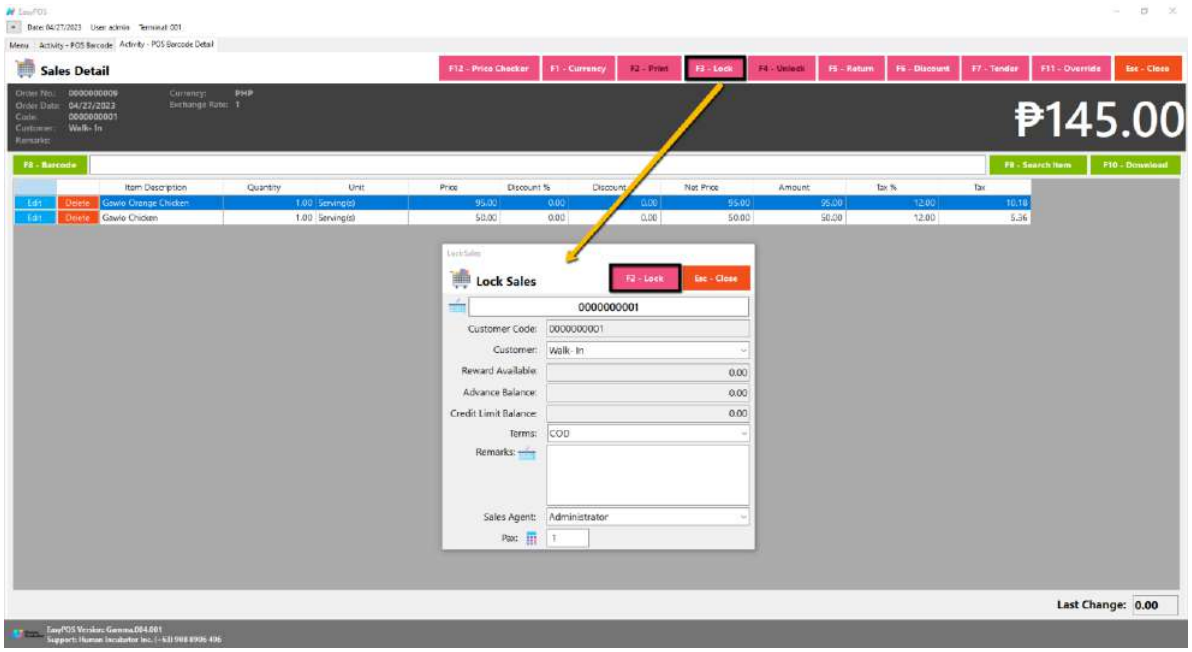


Barcode Touch - Relevant Buttons

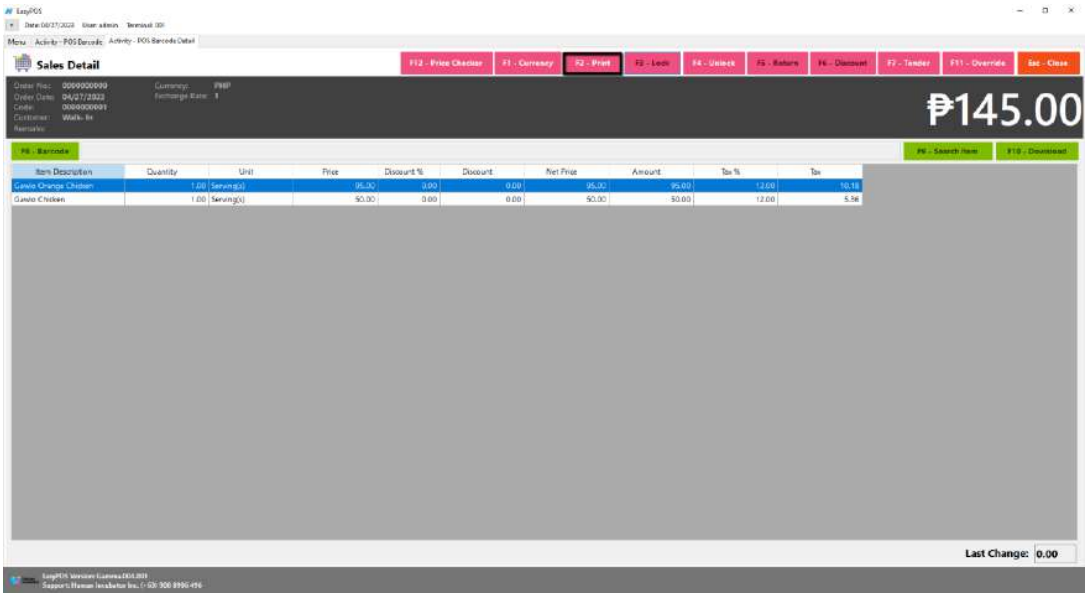
- **POS Hamburger Menu and Keyboard**
  - By clicking the hamburger menu or the small dotted line, it will maximize the space above and the barcode for the product. Last is the small icon of the keyboard for inputting.

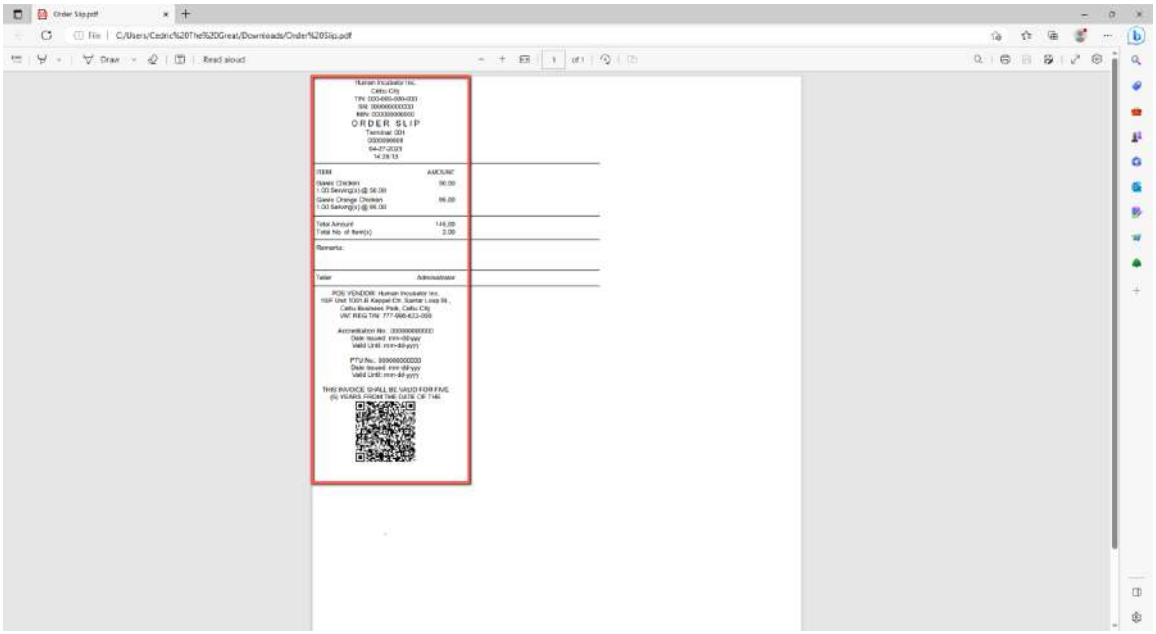


- **Lock**
  - Click the Lock button to save the sales information.
  - Provide the necessary information then click the Lock button to finish locking the sales information.

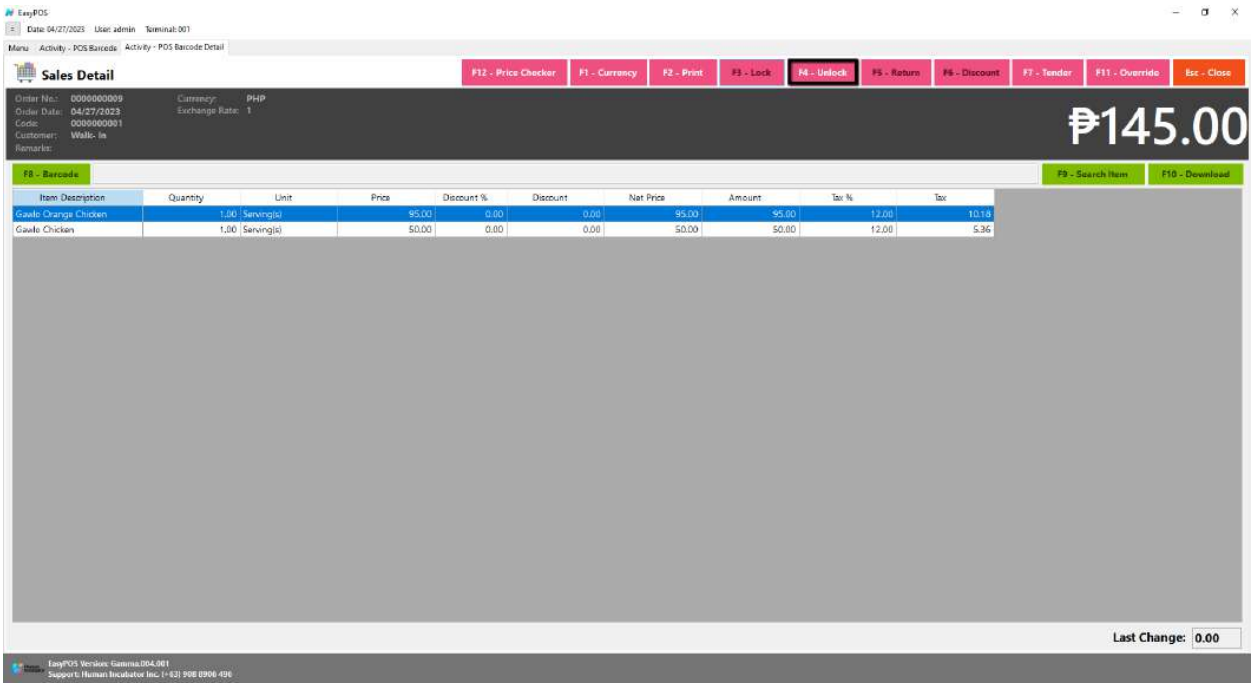


- **Print**
  - Click the Print button to download the Order Slip in PDF file, then print.
  - Take note, Print will only be enabled once the Sales detail is already locked.
  - Make sure to save the generated pdf file to a folder where you can easily locate it.

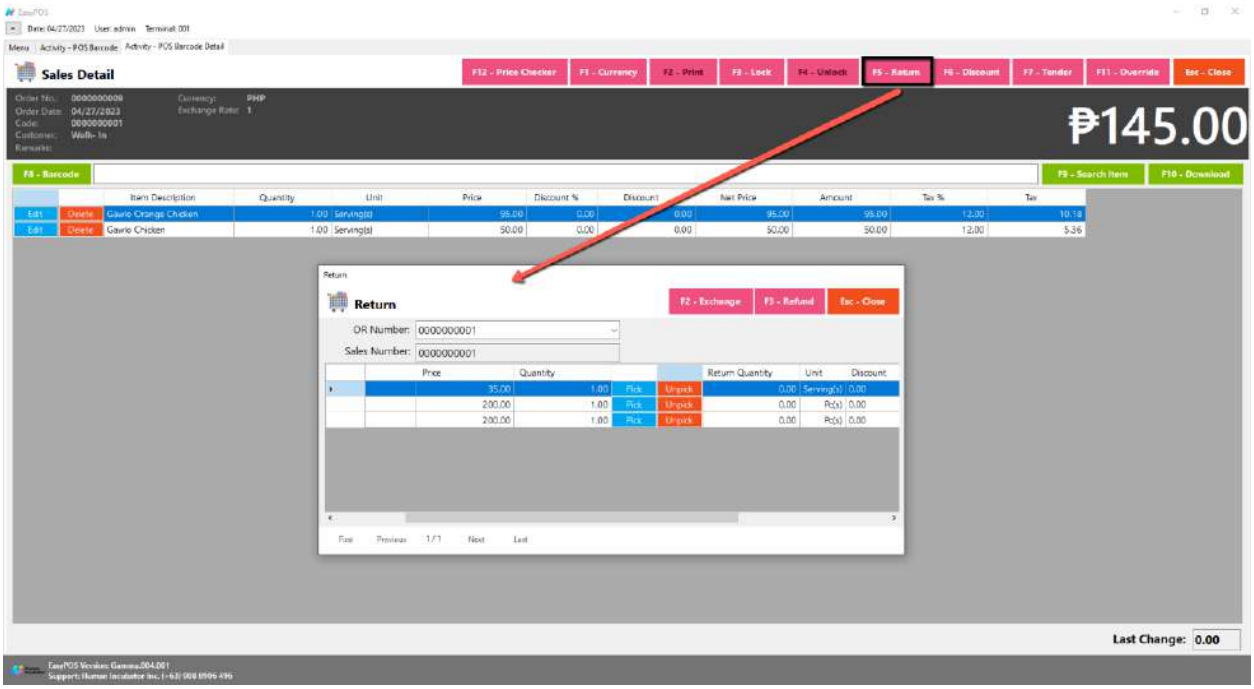




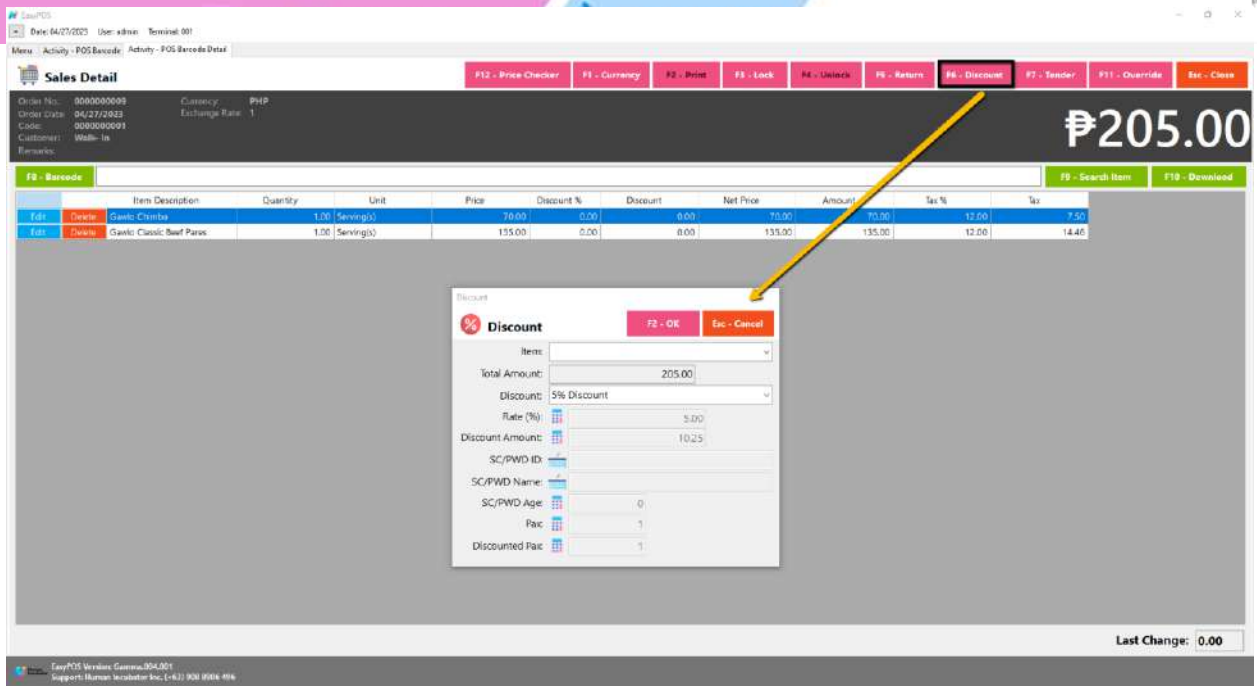
- **Unlock**
    - Click the Unlock button if you want to modify the sales detail or add sales line items.



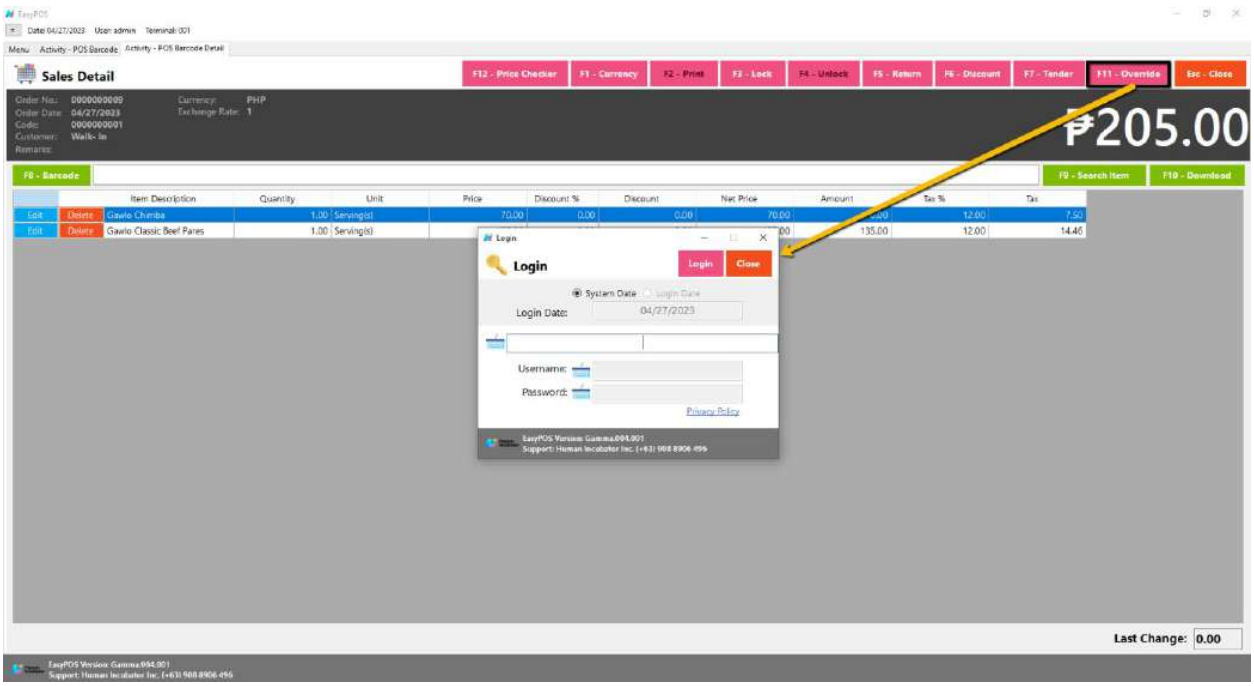
- **Return**
  - Click the Return button if the customer returned a product.
  - Provide the OR Number then list of items will be displayed automatically.
  - Click the **Pick** button if you want to add a return quantity.
  - Click the **Unpick** button if you want to reset the return quantity to zero(0).
  - Click the **Exchange** button, if you want to ONLY exchange an item to a customer.
  - Click the **Refund** button, if you want to return a money to a customer.



- **Discount**
  - Click the Discount button if you want to set up a discount for the sales line items. You can also set the discount per line item.



- **Override**
  - Click the Override button if you want to suspend, reject, or cancel a transaction.

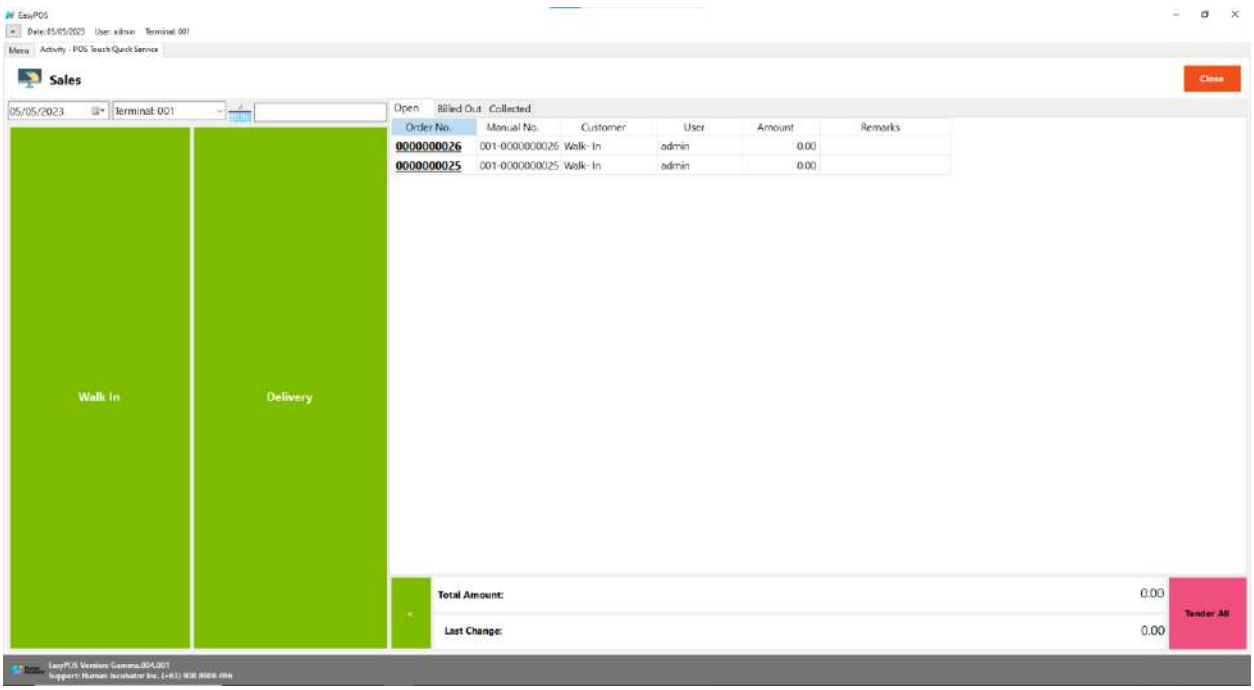


Activity - POS Quick Service

Overview

- POS Touch is good for stalls or any shops that only cater take outs.

User Interface

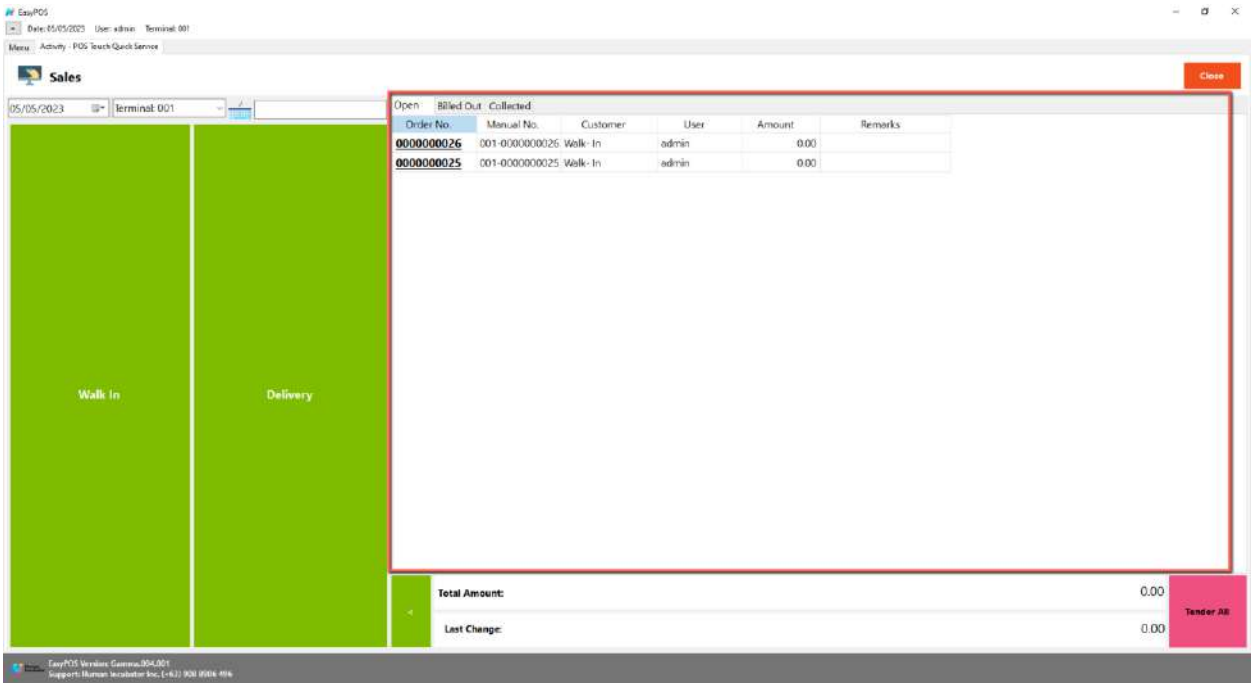


POS Quick Service Definition of Buttons

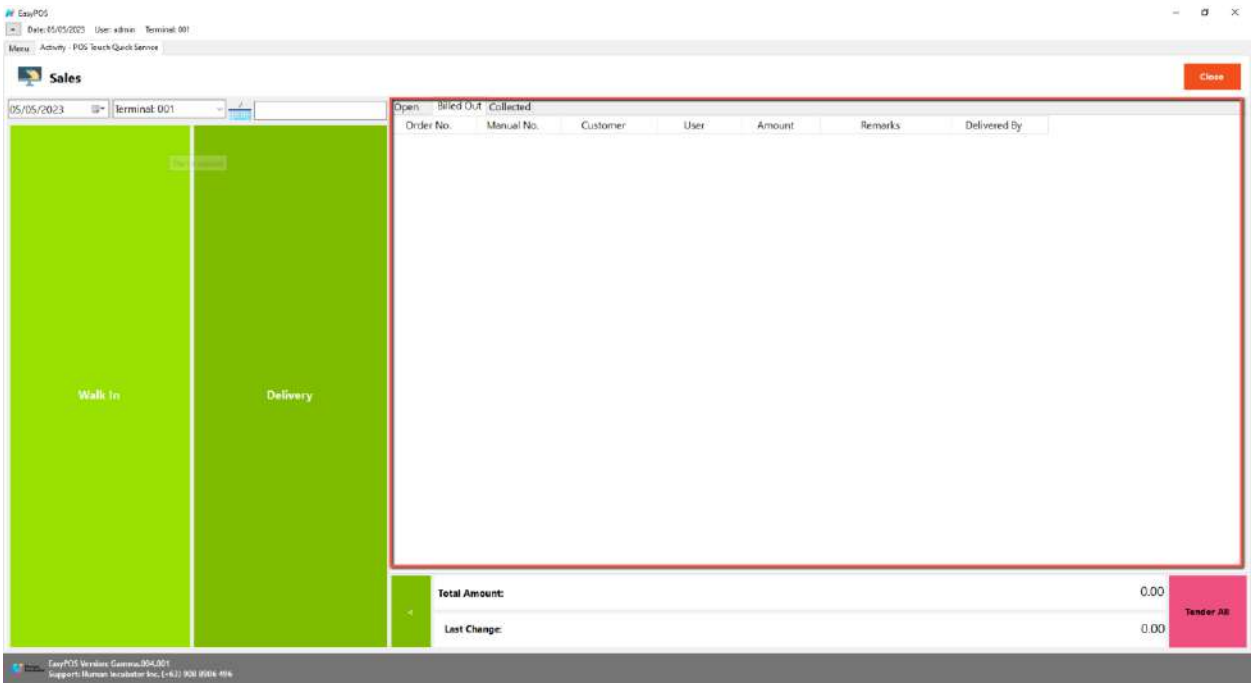
- Two **Green** large buttons → represents if the transaction is for Walk-In customers or for delivery.

POS Touch Sales List

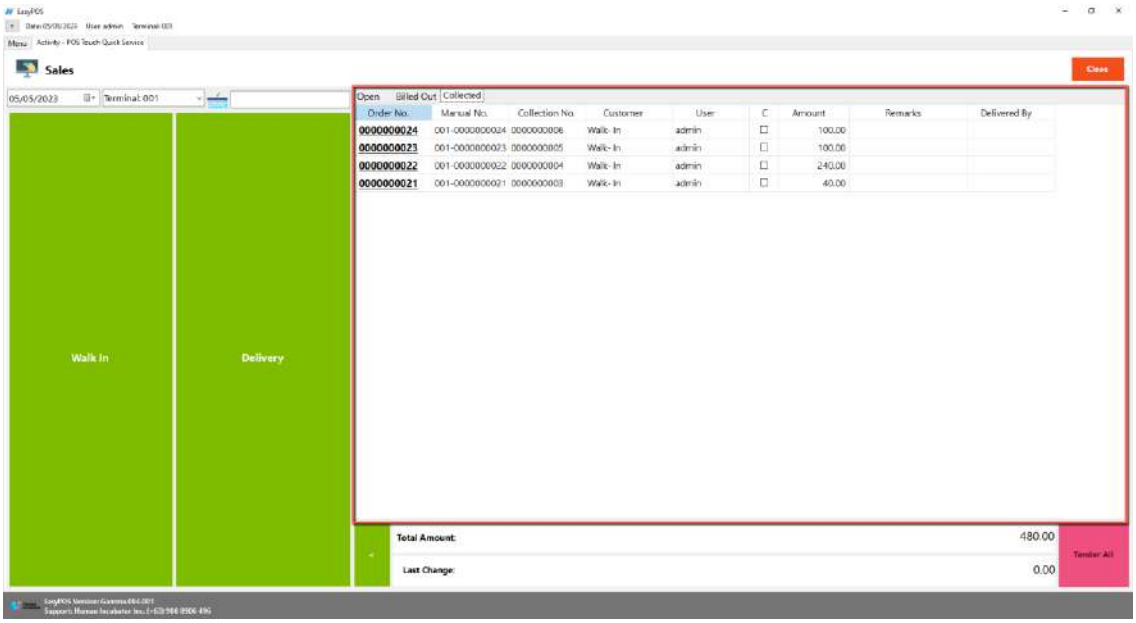
- Sales list for POS Quick Service consists of three(3) tabs:
    - Open → display list of Quick Service sales that are still open which means, not yet billed or collected. Also, system users can still delete the created sales detail here.



- Billed Out → display list of sales that are already locked but not yet collected. Here, the user can Bill Out print and Print Partial Bill.

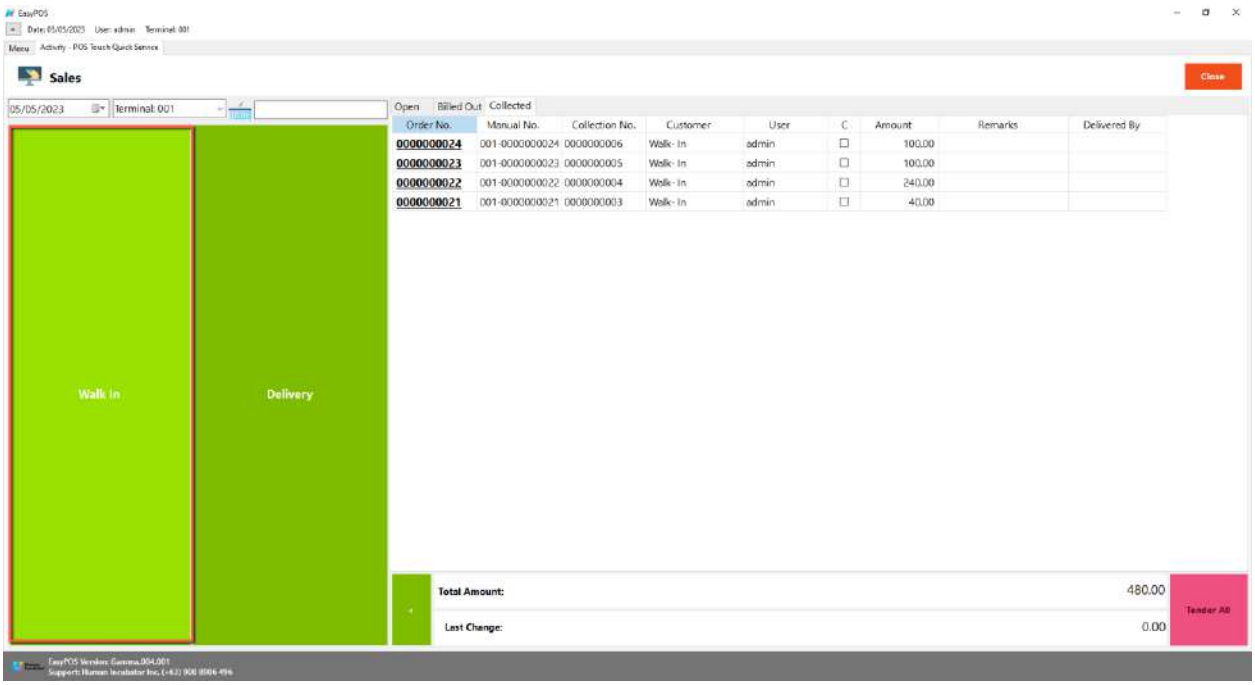


- Collected → display list of sales that are already tendered.

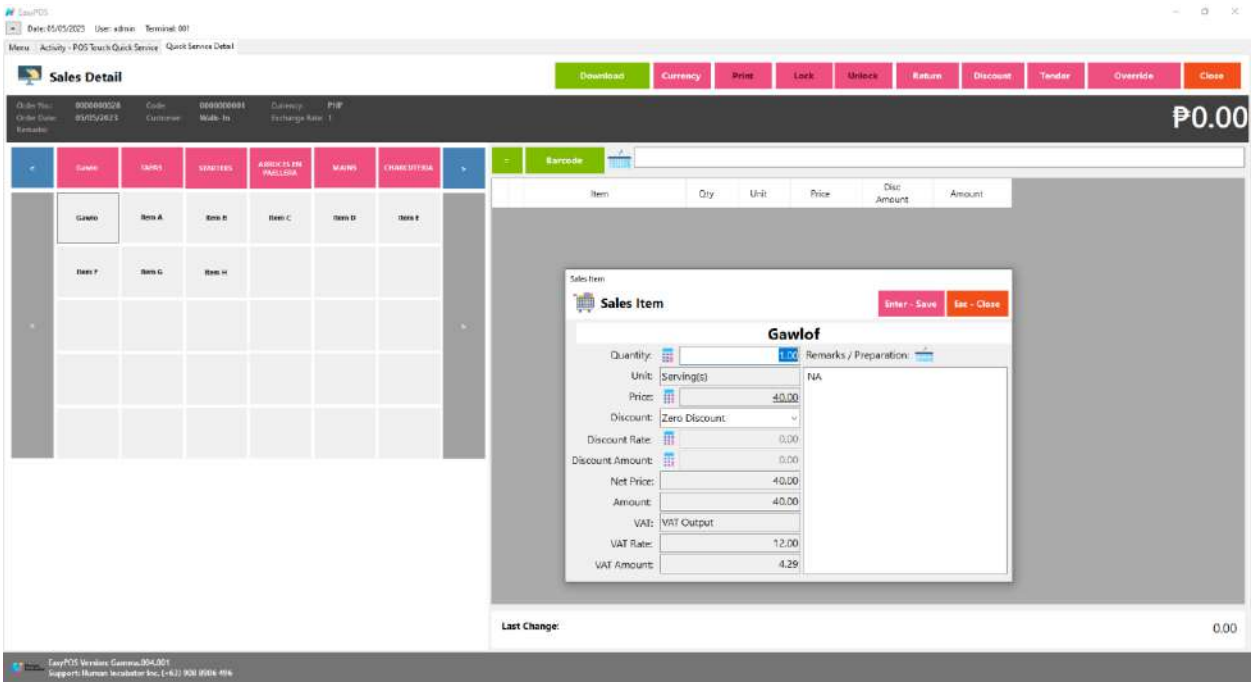


POS Touch Sales Detail

- There are 2 ways on how to navigate the sales detail:
  a. Walk-In button
     - Click the green button with the Walk In label.

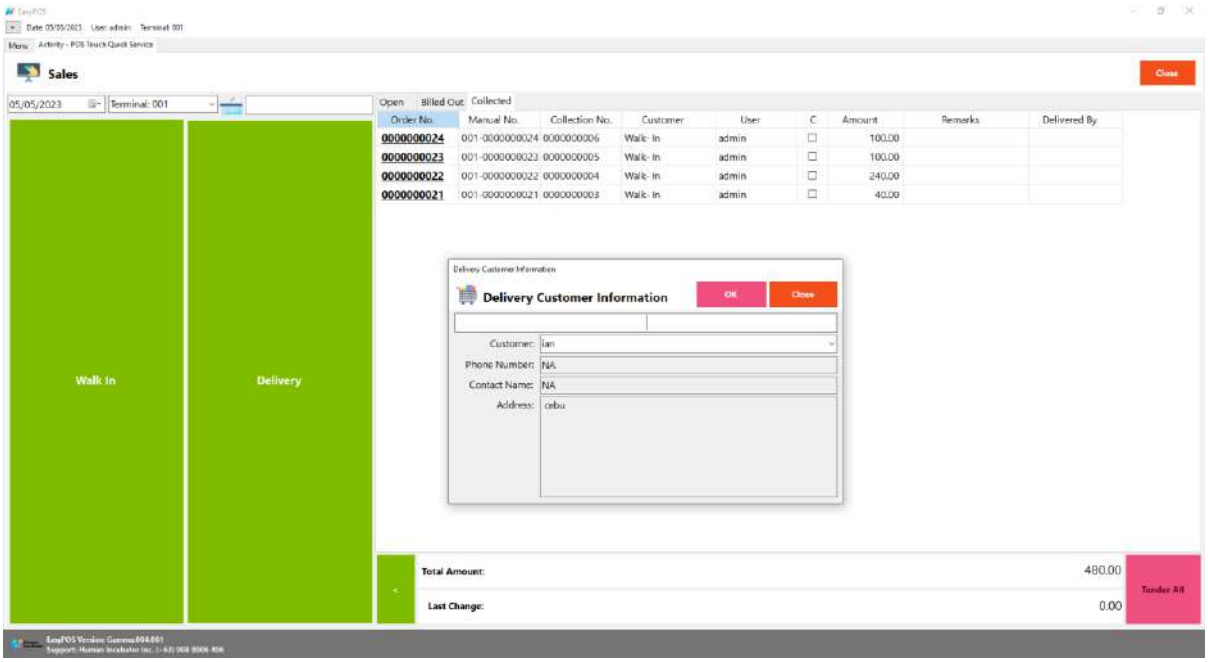


- You will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your keyboard or click the Save button.

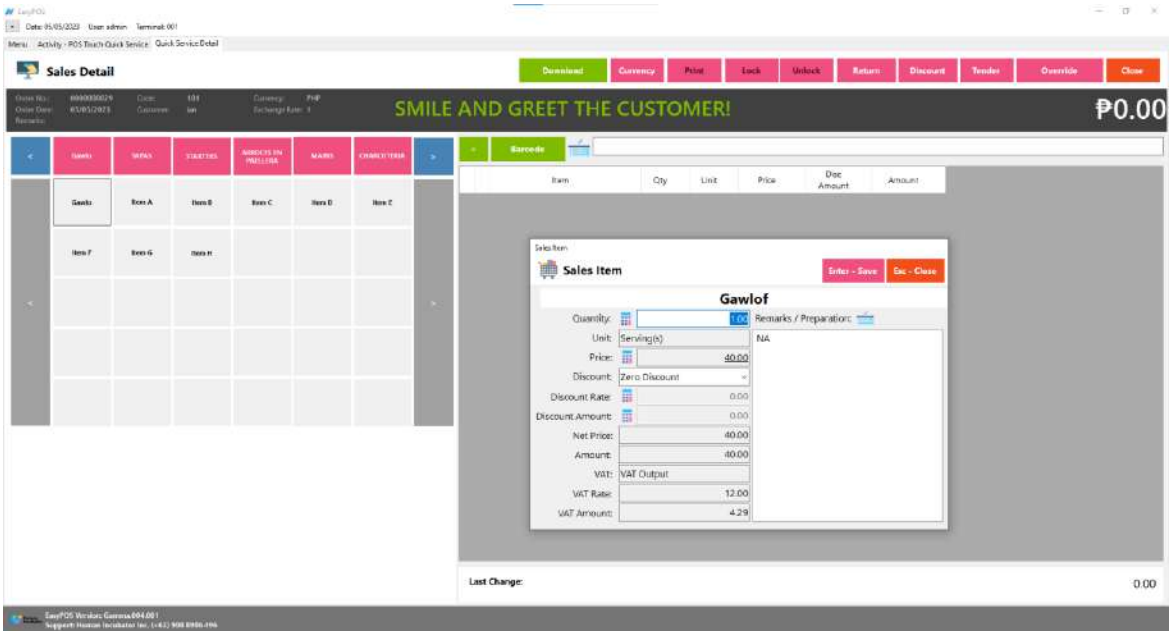


b. Delivery button

- Click the green button with the Delivery label.
- A Delivery Customer Information will popup, provide the necessary information then click the Ok button.

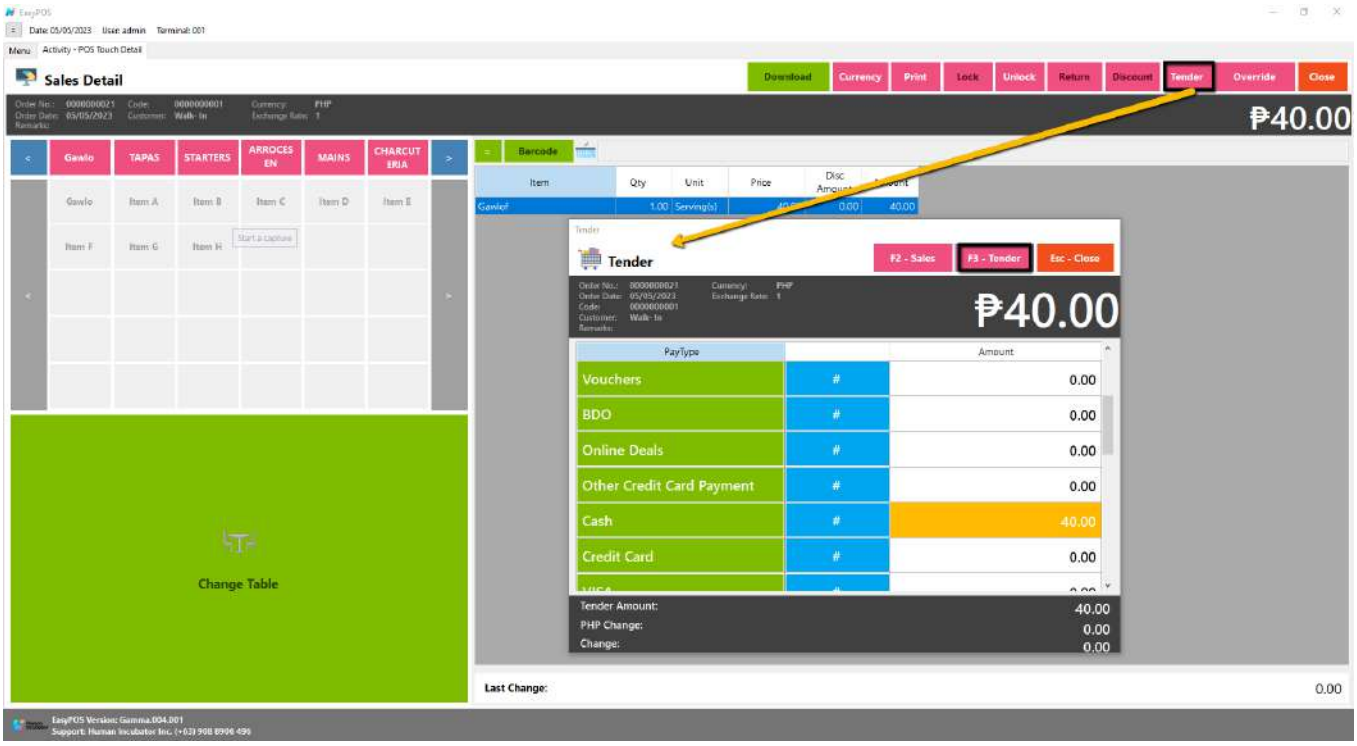


- The same process with the Dine In table, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your keyboard or click the Save button.



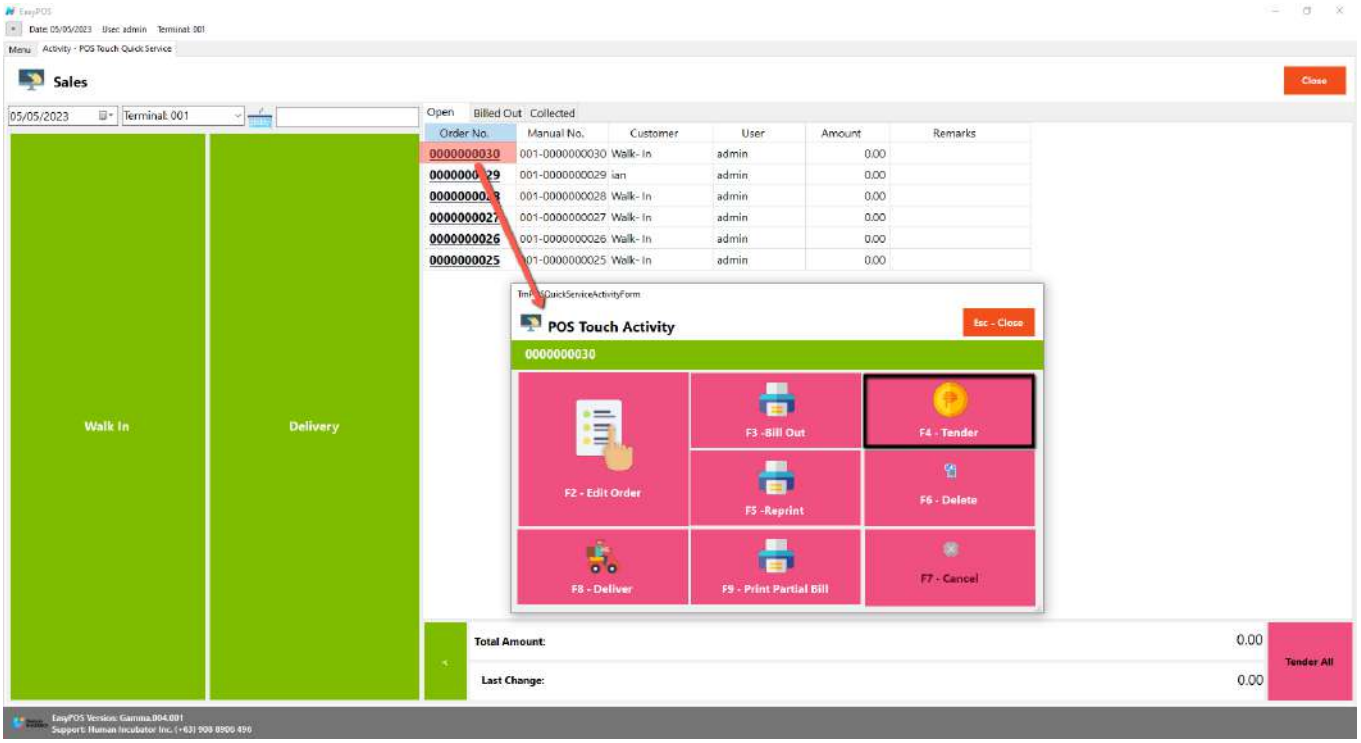
POS Quick Service - Tender

- There are 3 ways on how to tender sales:
    - Via Sales Detail page
        - Assuming that you are in the Sales Detail page, click the Tender button that can be seen on the Sales Detail form to tender transaction.
        - When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
        - To finish the sales transaction, just click the Tender button from the Tender form, the system will now print an Official Receipt, and the sales detail will be moved to the Collected tab.

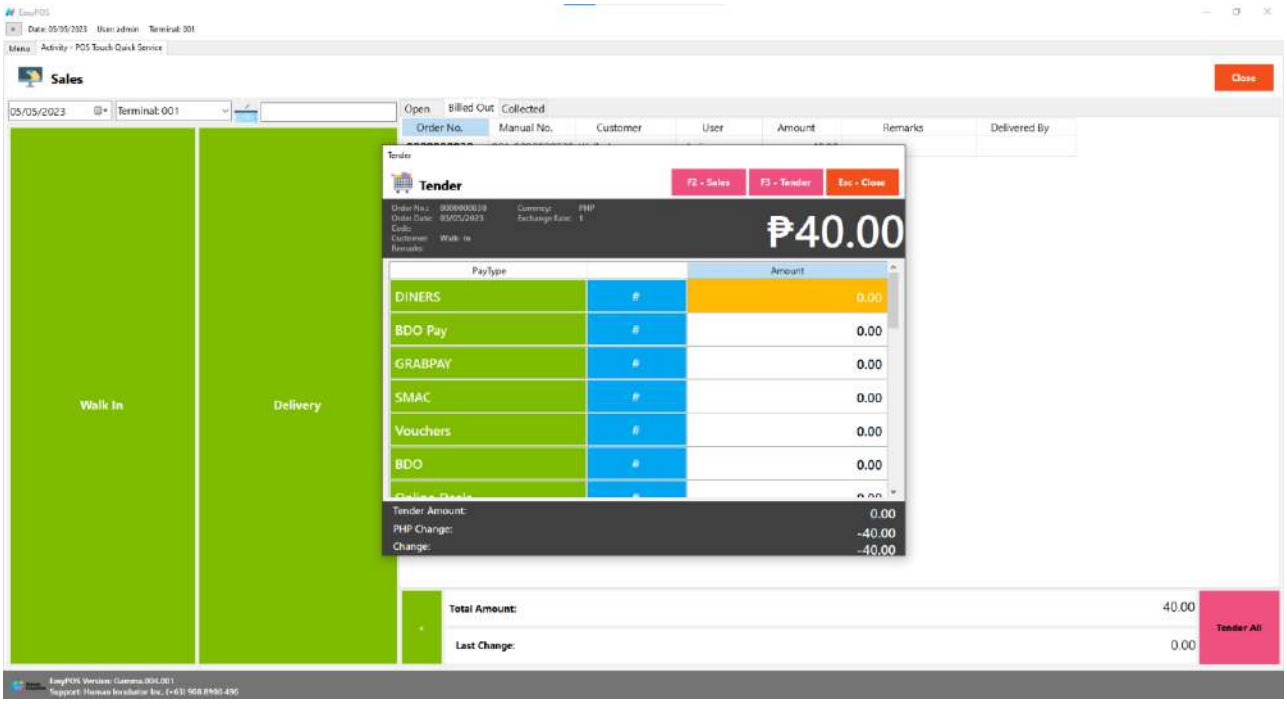


    - Via Open and Billed Out tab
        - From the Open or Billed Out tab, select a sales order number that you want to tender.

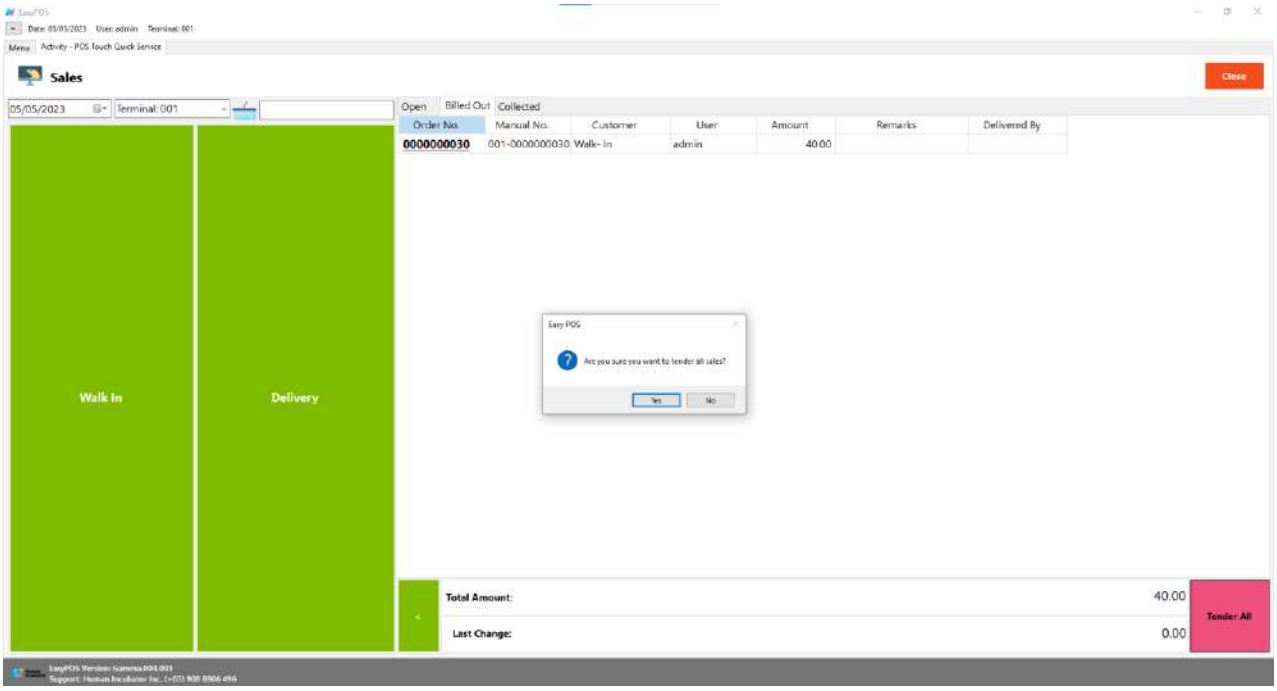
- A POS Touch window will display, then select Tender or simply press F4.



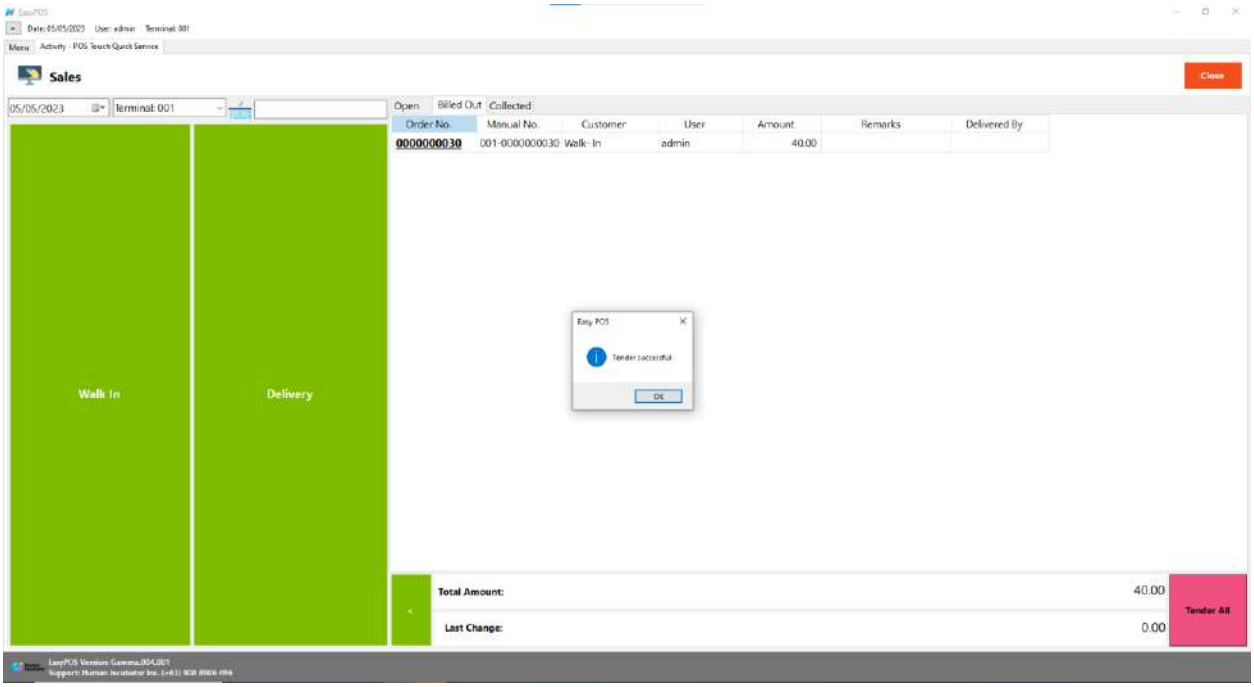
- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales transaction, just click the Tender button from the Tender form, the system will now print an Official Receipt, and the sales detail will be moved to the Collected tab.



- Via Tender All button
  - From the Open or Billed Out tab, look for the Tender All red button.
  - A confirmation message will popup, then click Yes.



- A tender successful message will display then all the Sales Order from the tab will be moved to the Collected tab.



Section V: Cash In/Out

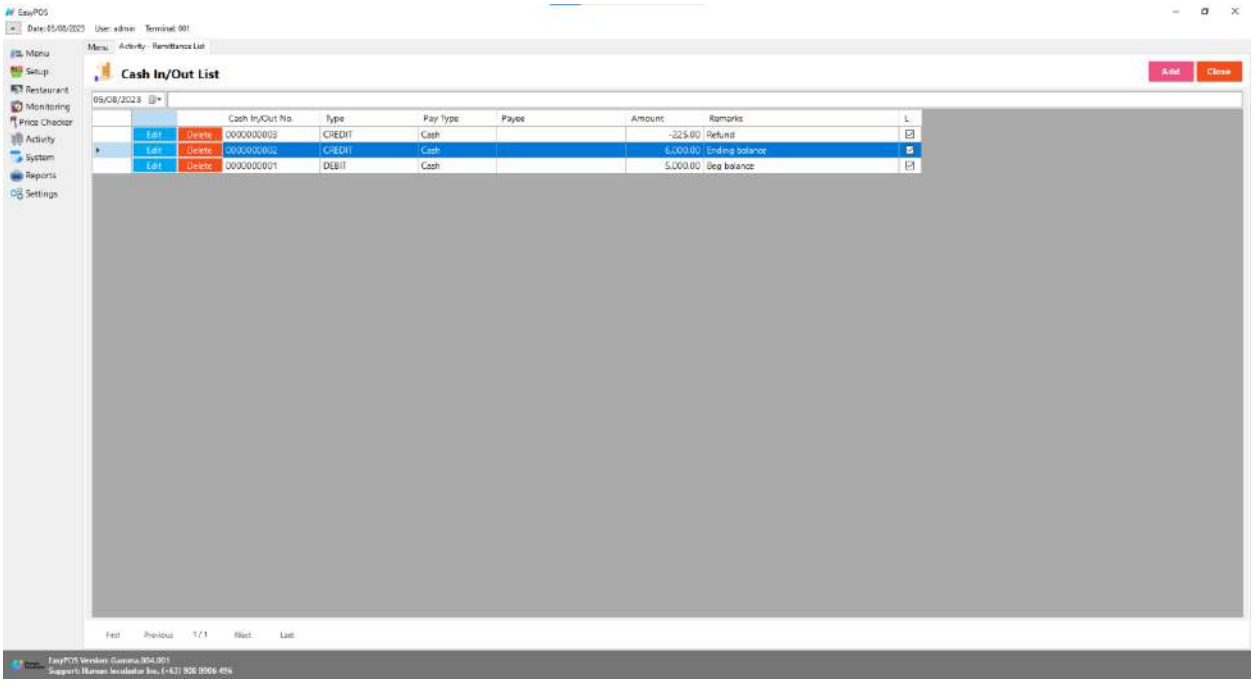
Cash In/OutPage

Overview

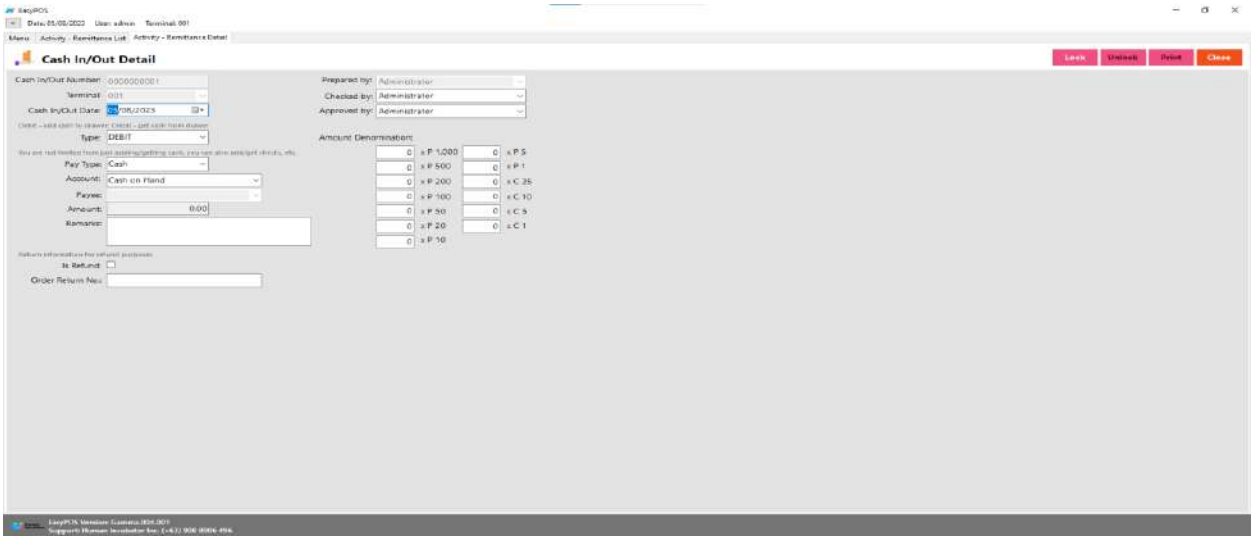
- Cash in/out allows to keep track of incoming and outgoing payments.

Cash In/Out Page

- Shows the list of added cash in and cash out.
- It also shows the list of Return transactions.
- It can also be filtered by date.
- Delete button will proceed to deleting unlocked cash in/out record detail.
- Edit button will proceed to updating cash in/out detail.
- Close button will proceed to closing the cash in/out list page.



Cash In/Out Detail



- **Assumption**: **Add** button is already clicked on the upper right corner in the cash in/out list.
- Fill up all the necessary information like:
    - Type, Remarks, Amount denomination, Account, Checked by, Approved by
- Click the Lock button to save new Cash In/Out details.
- **Print** button can print cash in/out details when it's already locked.

Section VI: Inventory

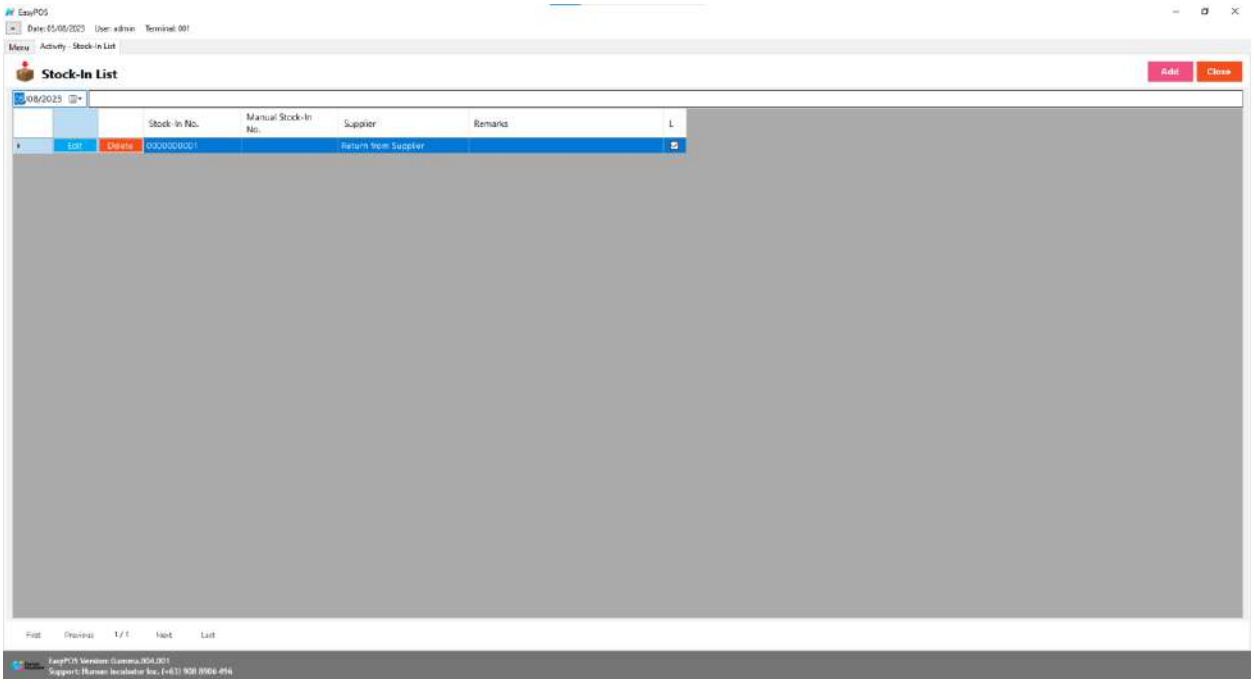
Stock In

Overview

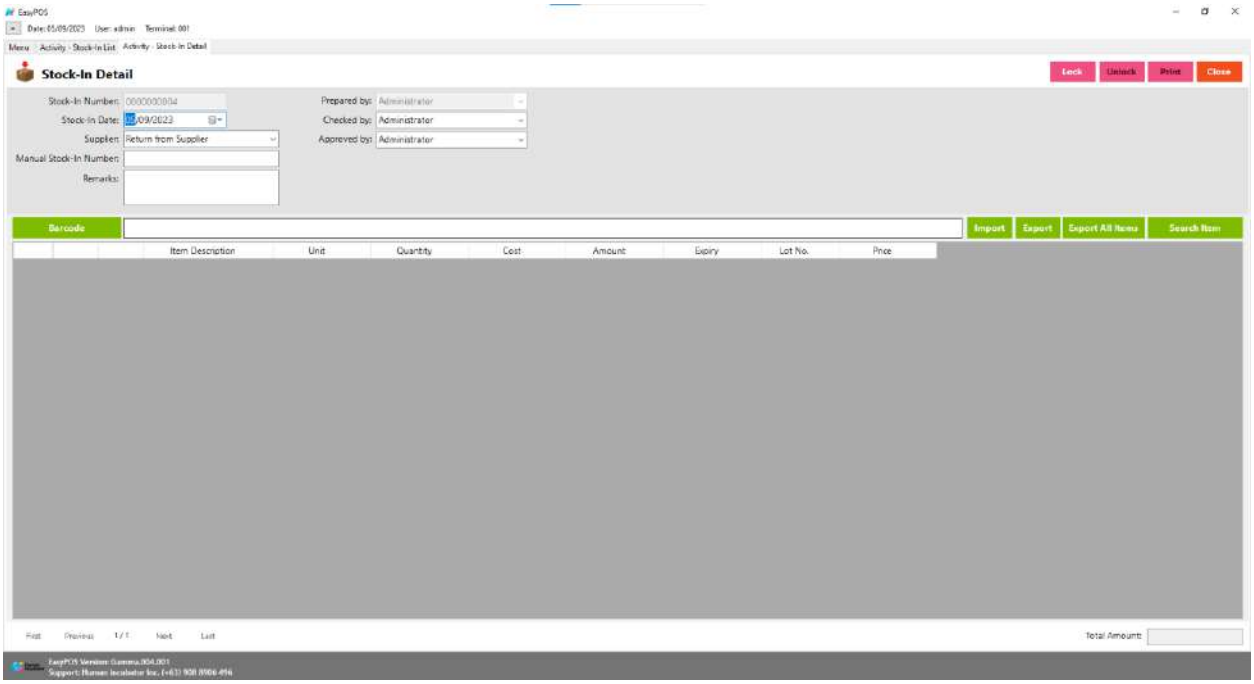
- Stock in is where to set up items that are onhand or available.

Stock In List

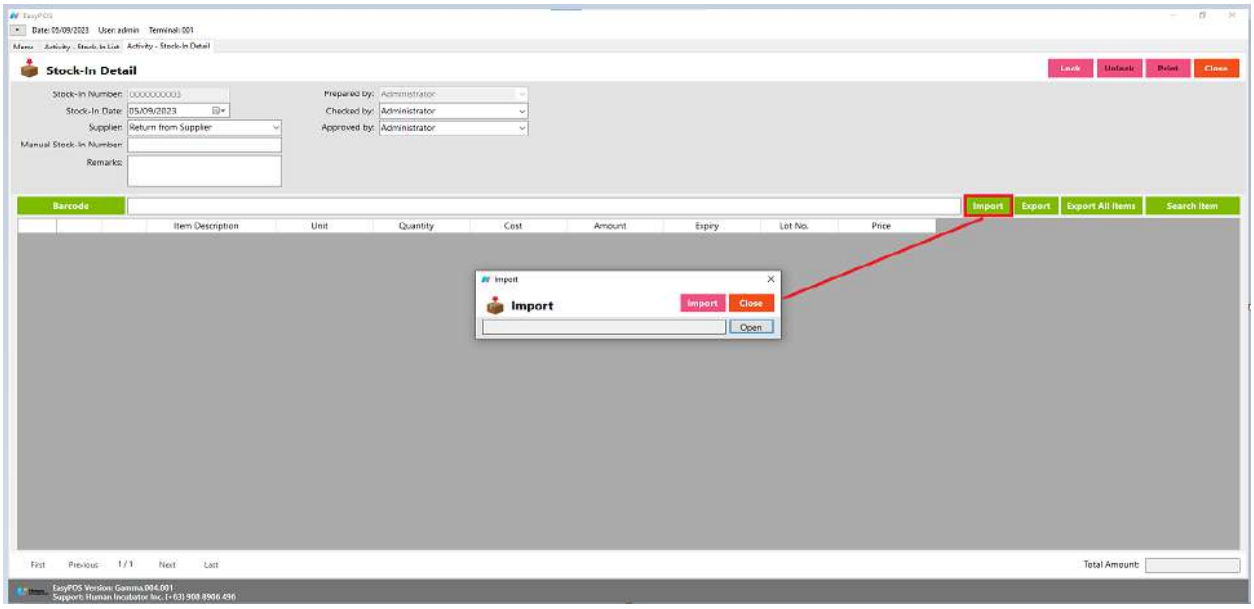
- Shows the list of added stock in items.
- It can also filtered by date
- Delete button will proceed to deleting unlocked stock in record detail.
- Edit button will proceed to updating stock-in detail.
- Close button will proceed to closing the stock-in list page.

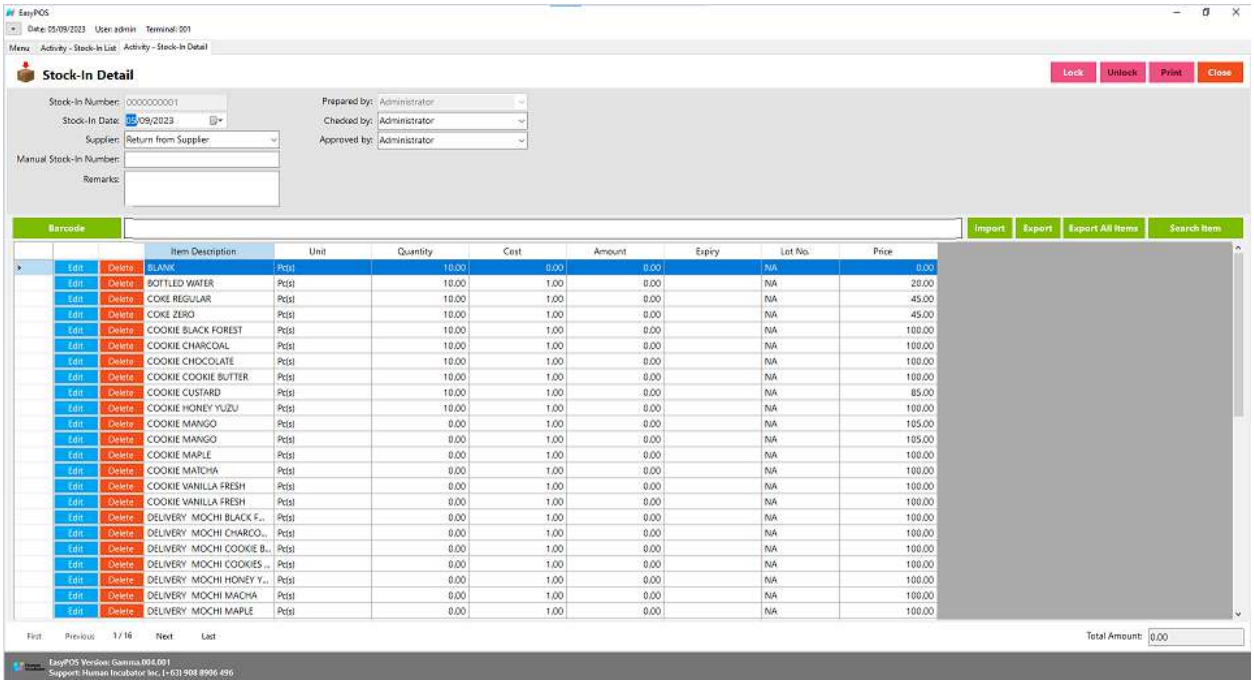


Stock In Detail



- **Assumption**: **Add** button is already clicked on the upper right corner in the stock-in list.
- It can add a stock-in line through the barcode or search item button.
- Click **Export All Item** button to generate csv file of all items
- Click **Export** button to generate csv file for stock-in line of an item
- When clicking the **Import** button, the import form will pop-up. Press open to select file to import. After selecting the file, click the import button in the form to import the file.





- Click **Lock** to save the stock-in items.
- **Print** button can print stock-in items when it is already locked.

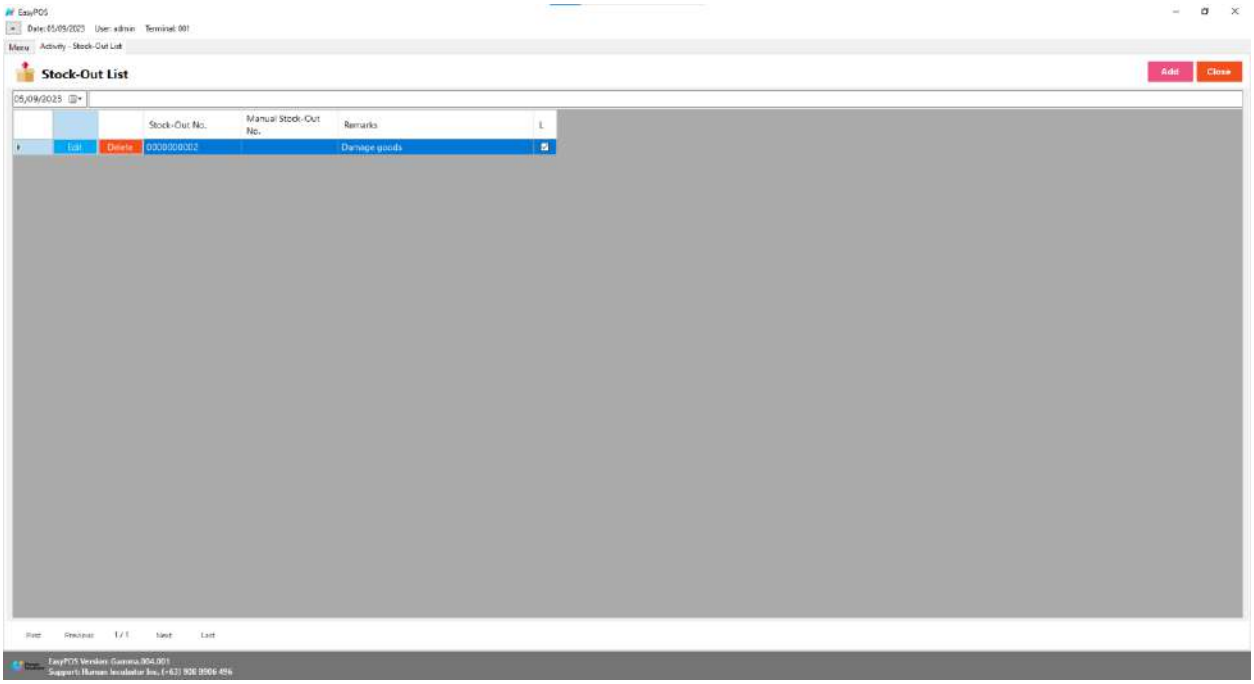
Stock Out

Overview

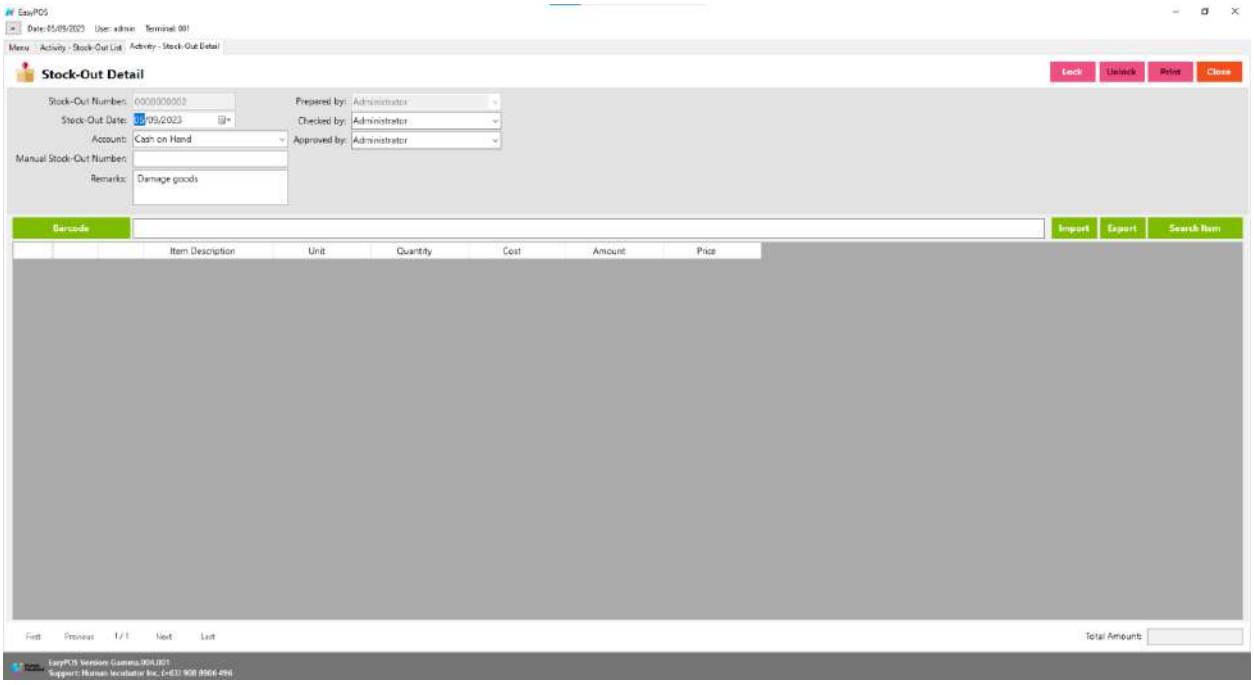
- Stock-out is where you can input damaged goods and stock-out items.

Stock Out List

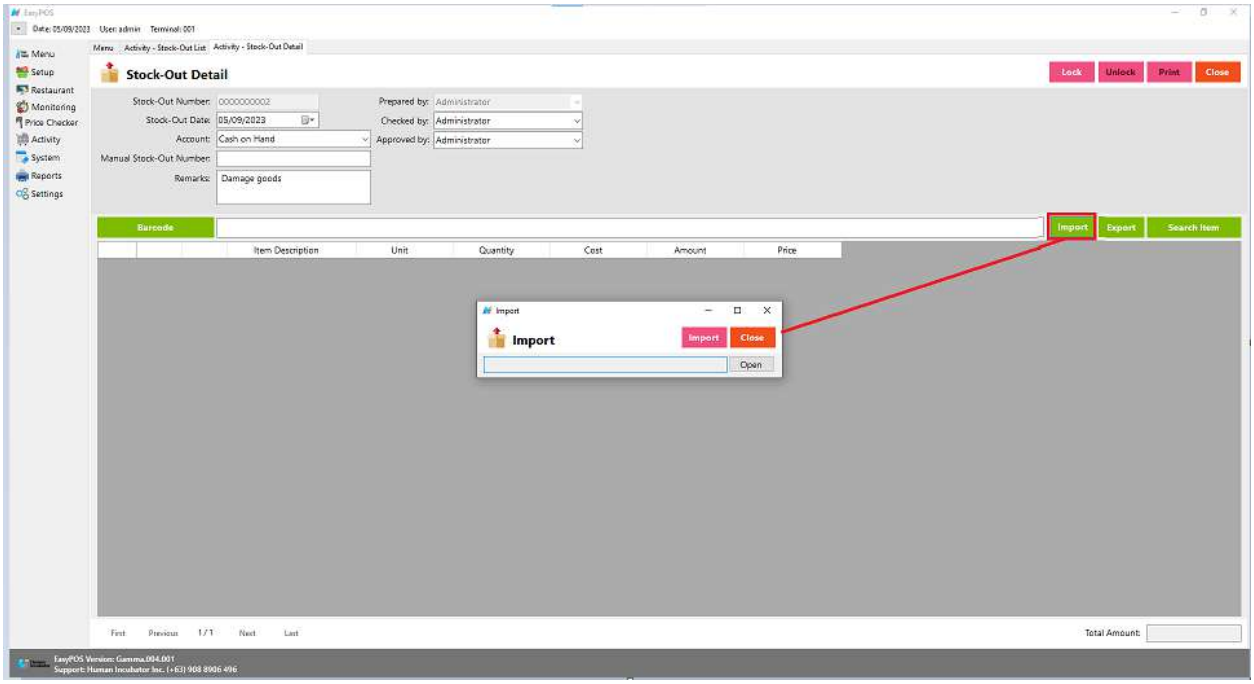
- Shows the list of added stock out items.
- It can also filtered by date
- Delete button will proceed to deleting unlocked stock out record detail.
- Edit button will proceed to updating stock-out detail.
- Close button will proceed to closing the stock-out list page.



Stock Out Detail



- **Assumption**: **Add** button is already clicked on the upper right corner in the stock-out list.
- It can add a stock-out line through the barcode or search item button.
- Click **Export** button to generate csv file for stock-out line of an item
- When clicking the **Import** button, the import form will pop-up. Press open to select file to import. After selecting the file, click the import button in the form to import the file.



- Click **Lock** to save the stock-out items.
- **Print** button can print stock-out items when it is already locked.

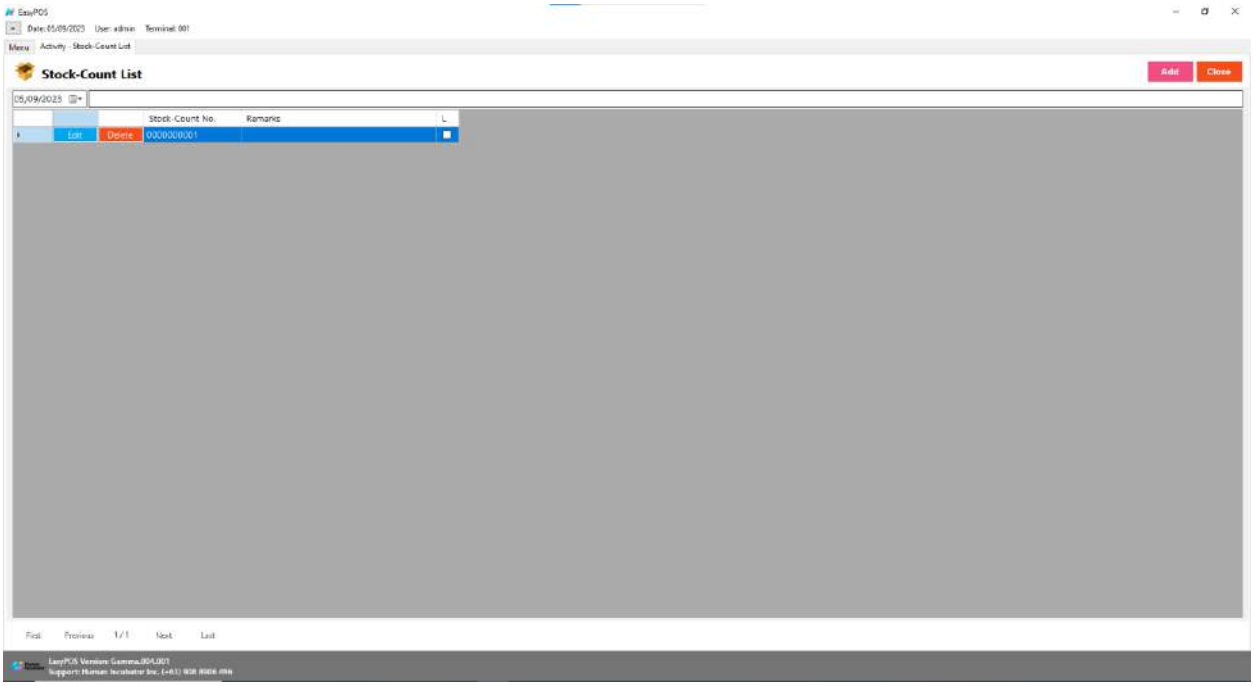
Stock Count

Overview

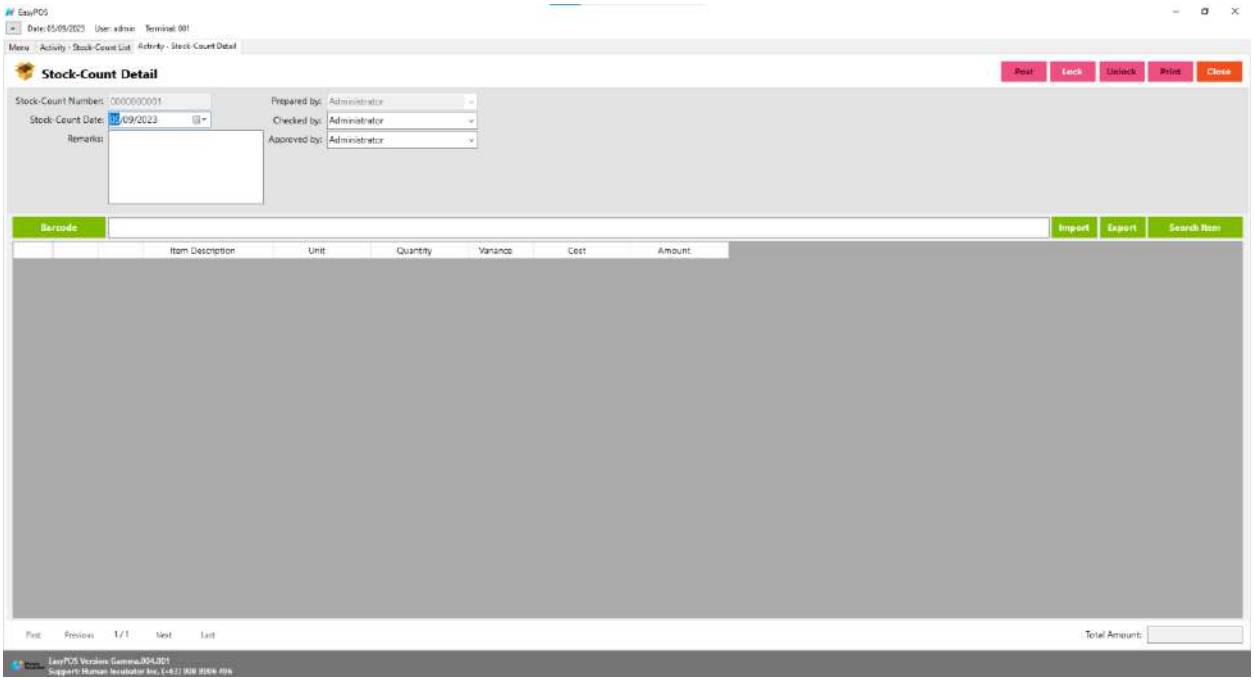
- Stock count is checking the quantity of the stock item. It can identify if there are discrepancies between physical and system inventory.

Stock Count List

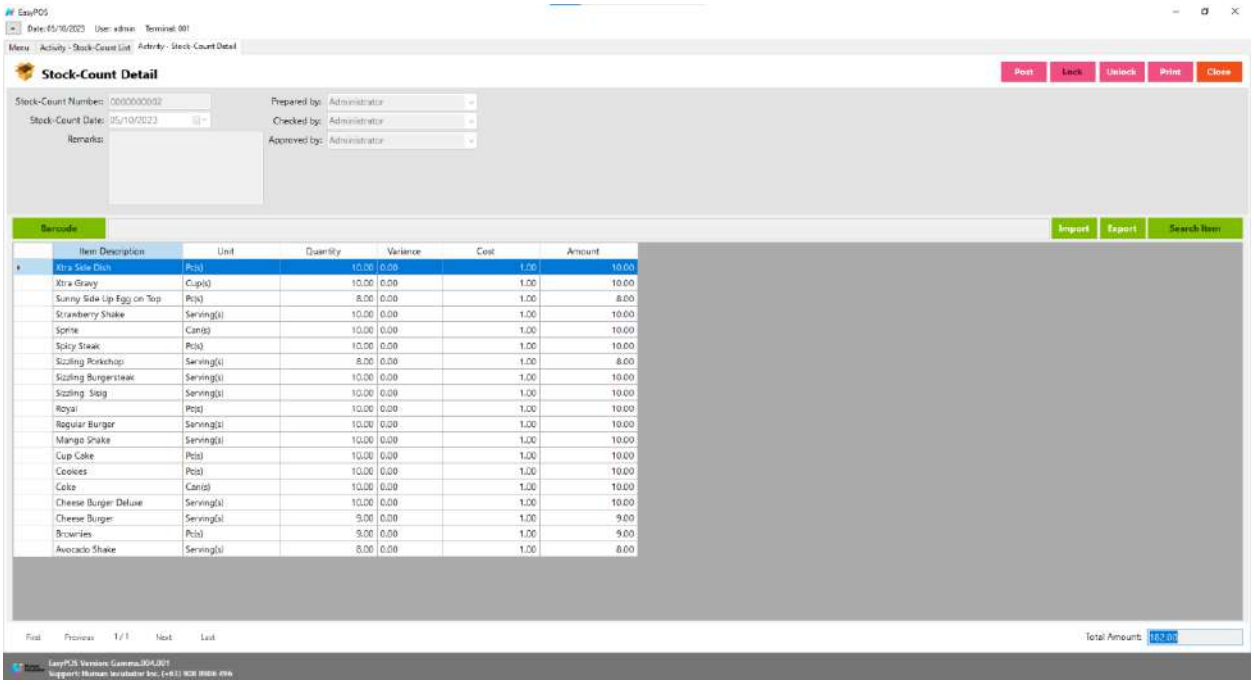
- Shows the list of added stock count items.
- It can also filtered by date
- Delete button will proceed to deleting unlocked stock count record detail.
- Edit button will proceed to updating stock count detail.
- Close button will proceed to closing the stock count list page.



Stock Count Detail



- **Assumption**: **Add** button is already clicked on the upper right corner in the stock-out list.
- It can add a stock count line through the barcode or search item button.
- Click **Export** button to generate csv file for stock count line of an item
- When clicking the **Import** button, the import form will pop-up. Press open to select file to import. After selecting the file, click the import button in the form to import the file.



- Click **Lock** to save stock count items.
- Click **Post** to display inventory in the Stock Out.
- **Print** button can print stock count items when it is already locked.

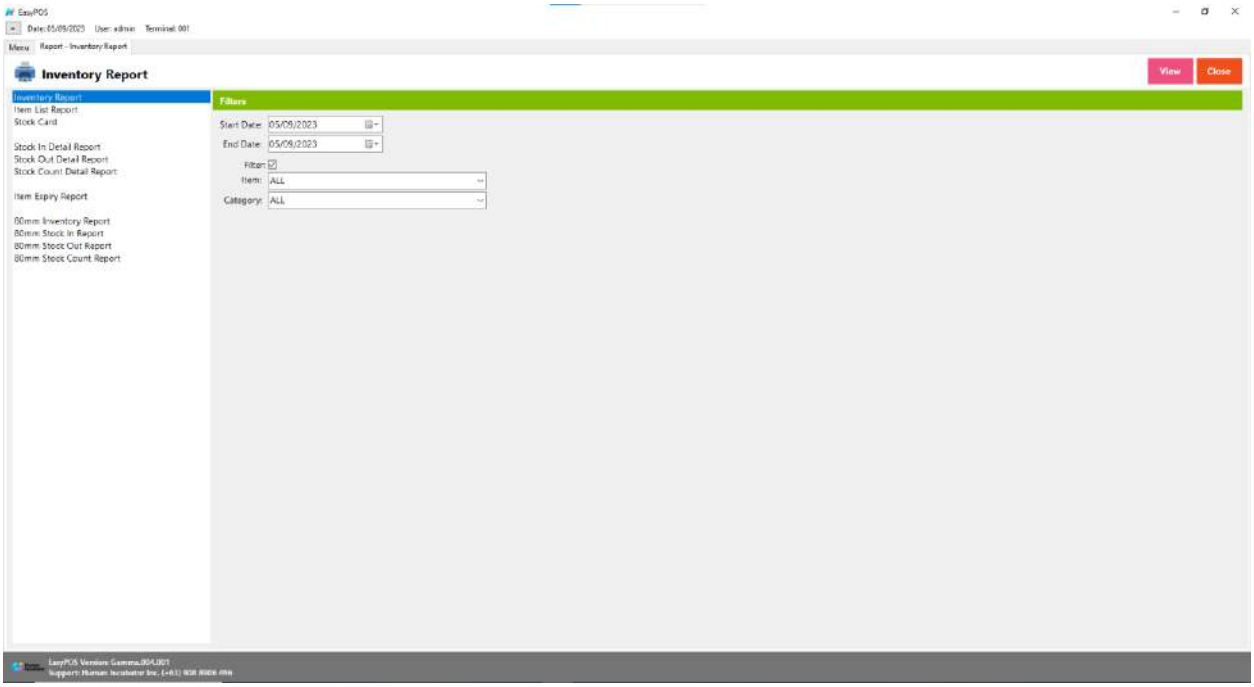
Section VII: Reports

Inventory Report

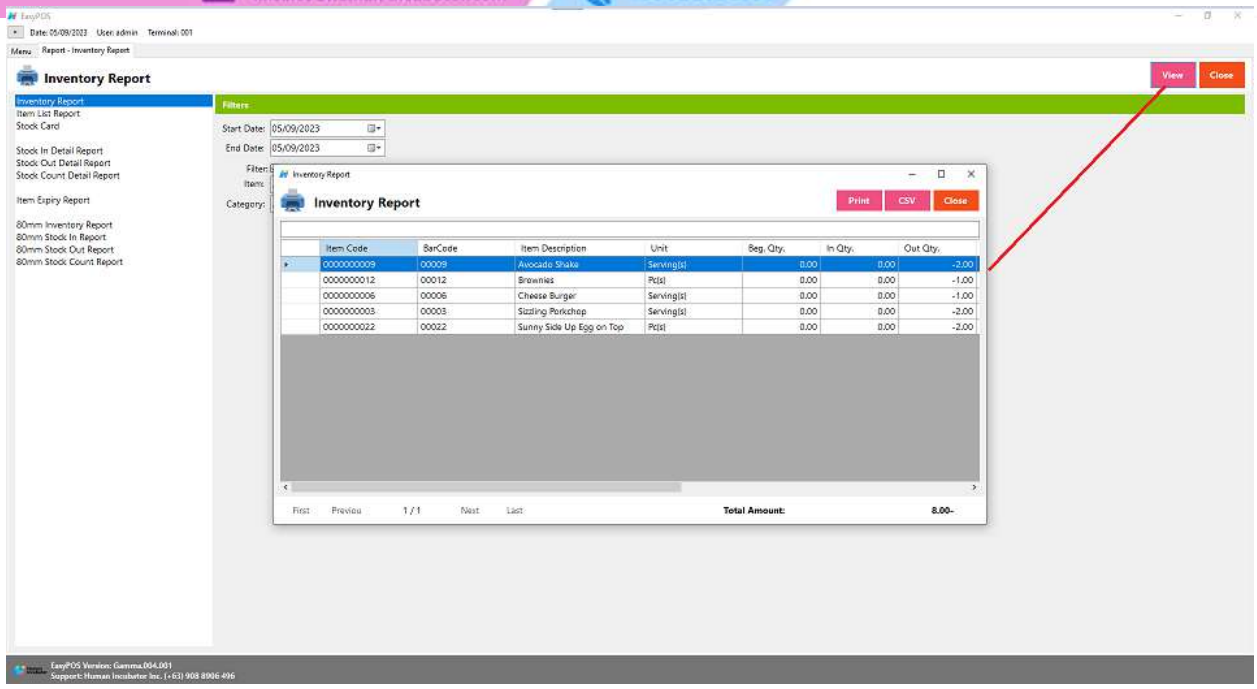
Overview

- In the Inventory Report, it can print different kinds of reports.

Inventory Report

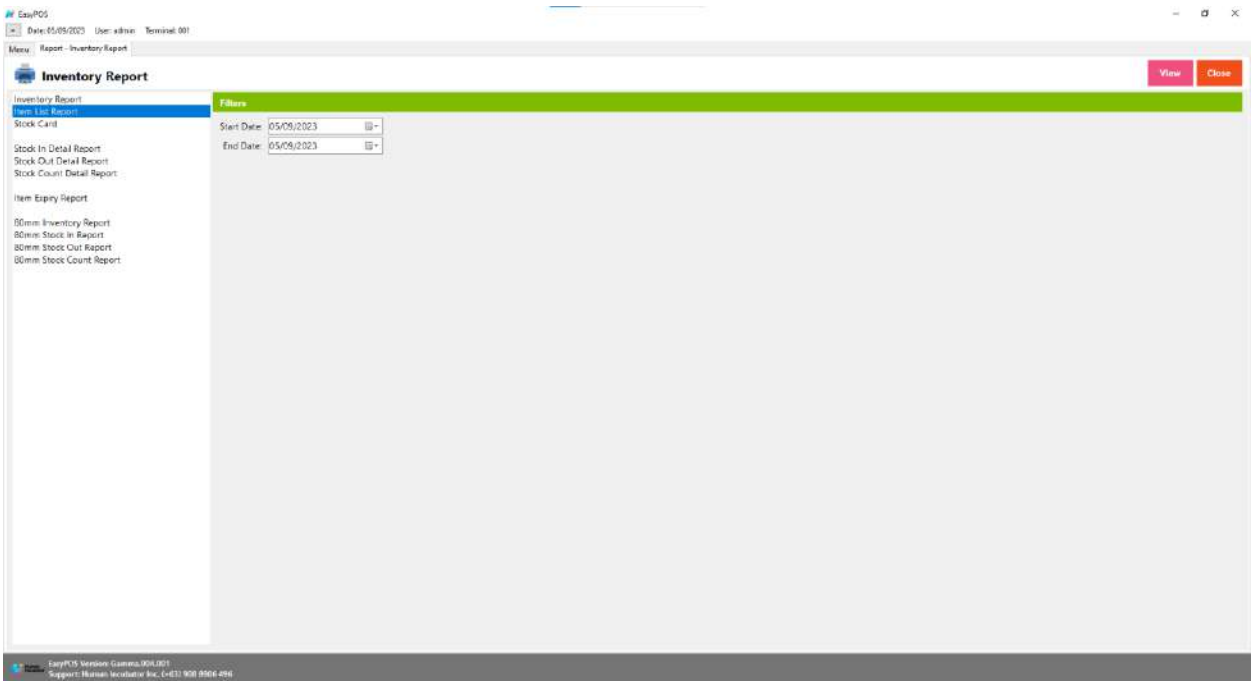


- It can select the start date and end date.
- Check the filter checkbox to display the Item and Category field.
- Click the **view** button to view the report.

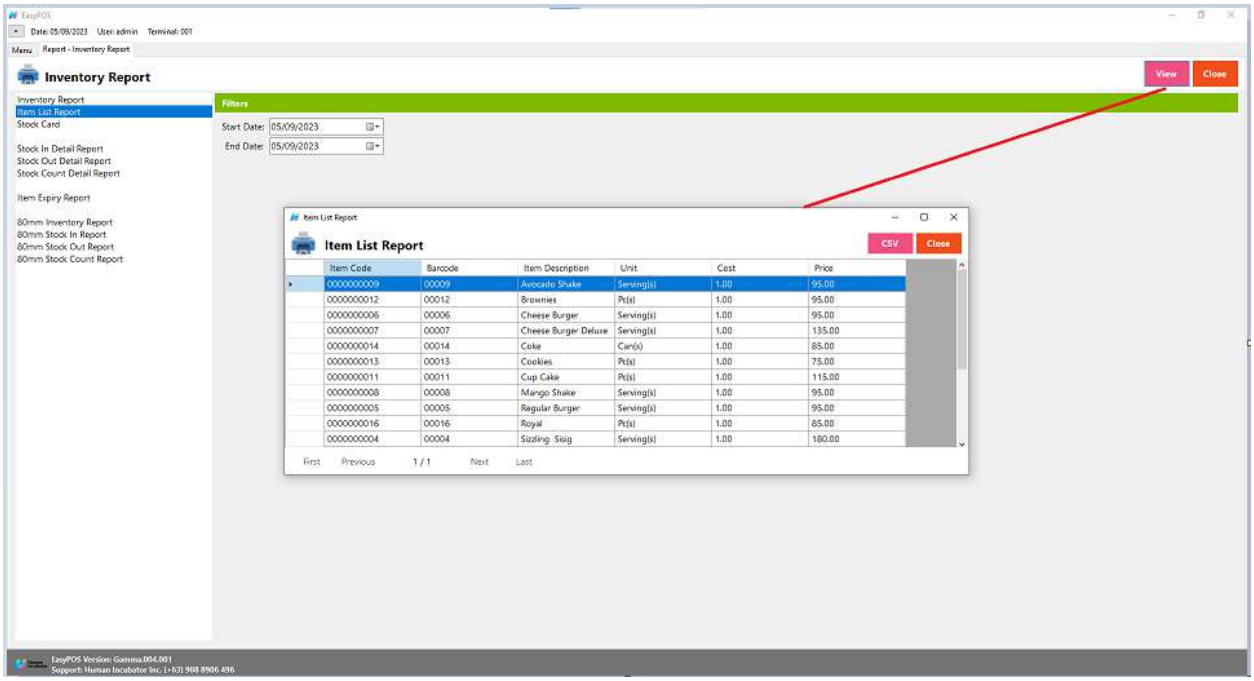


- The report can be printed as PDF form or CSV file format.

Item List Report

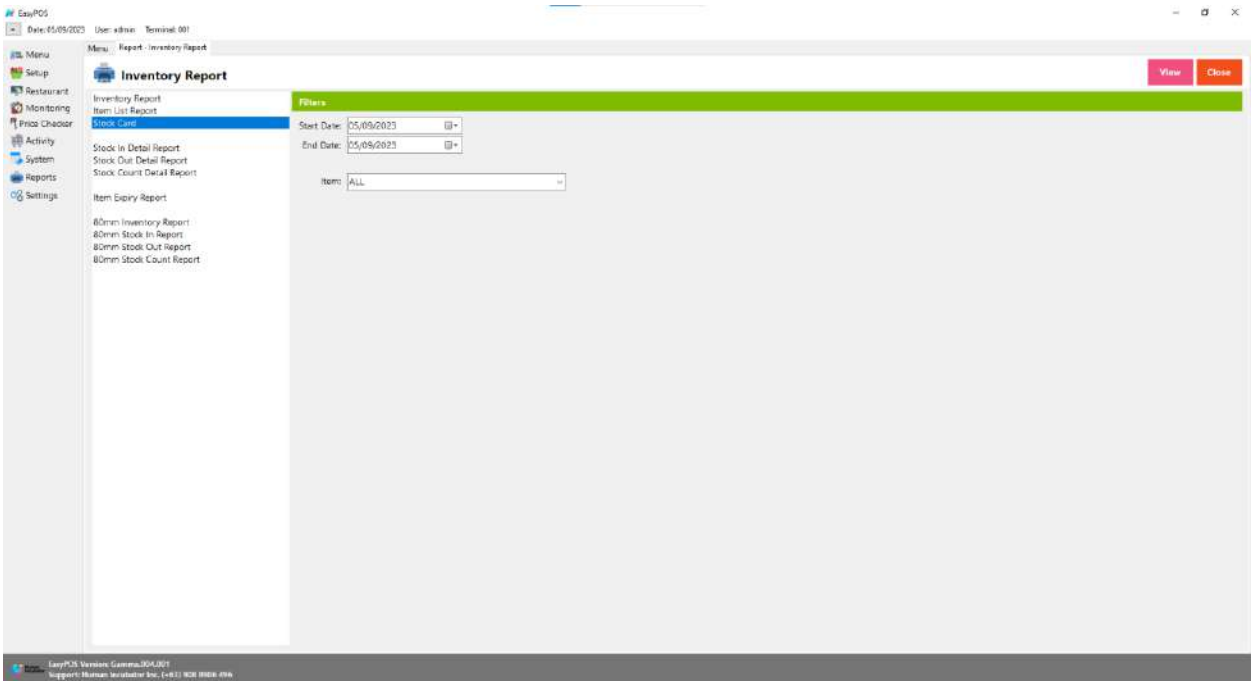


- It can select the start date and end date.
- Click the **view** button to view the item report.

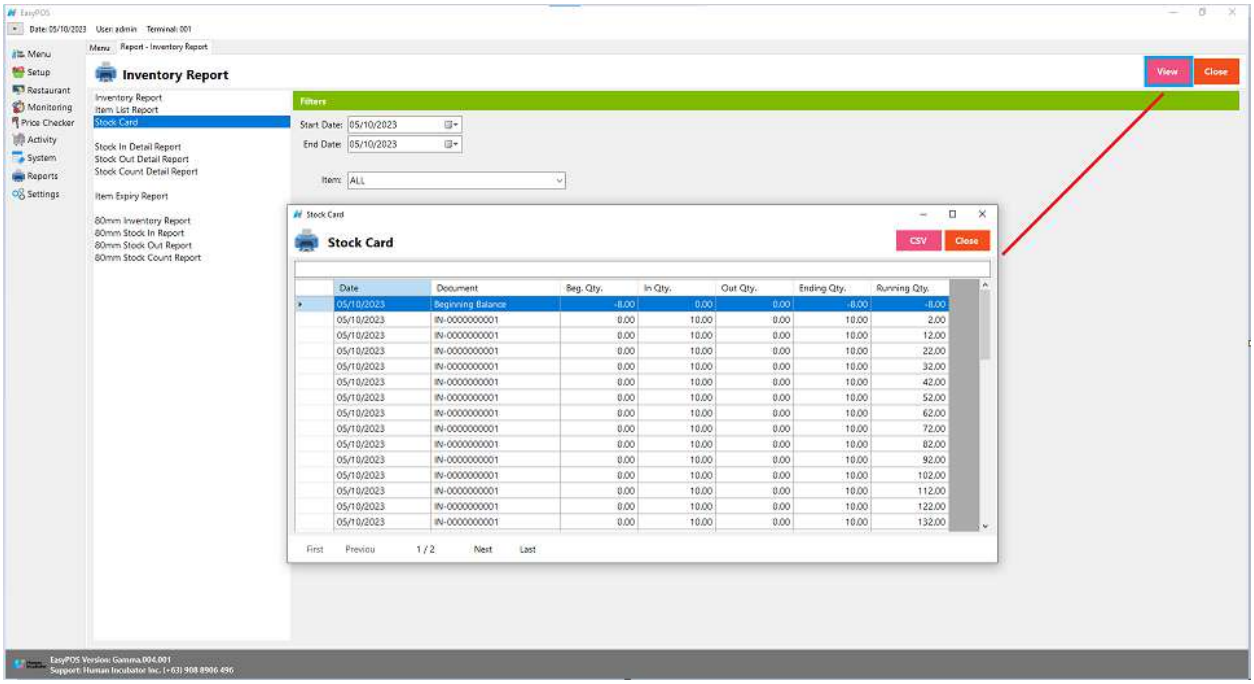


- The report can be generated as CSV file format.

Stock Card

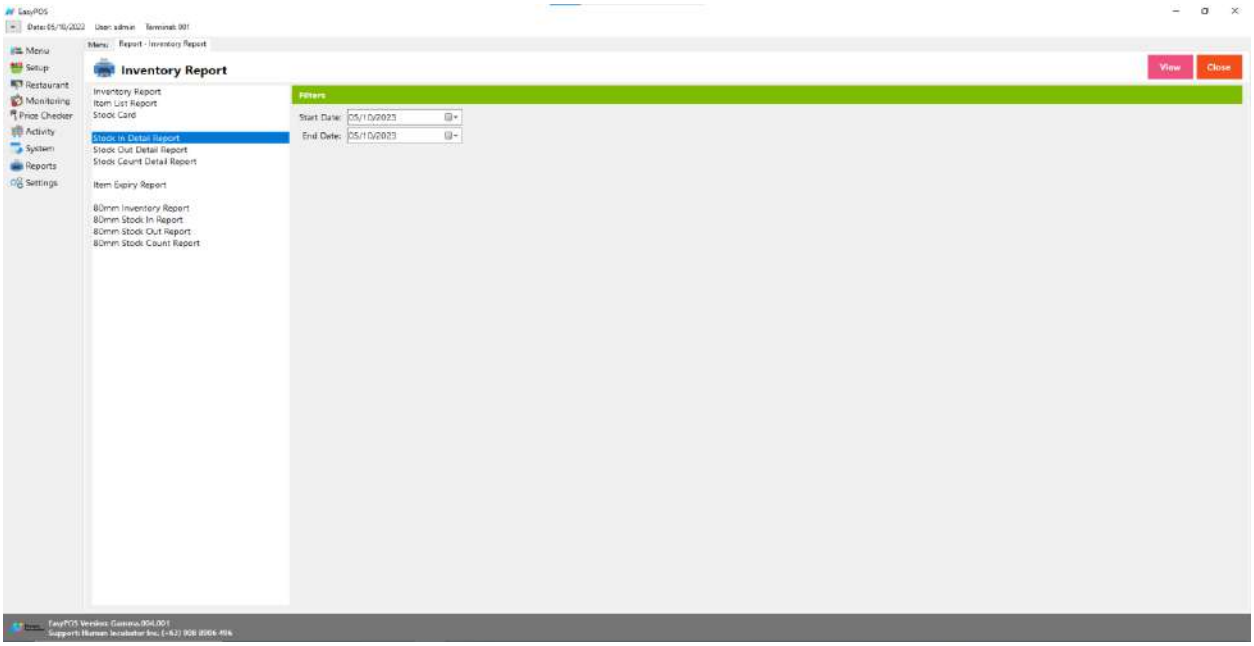


- Select start date and end date
- It can filtered by Item
- Click **View** button to view the report

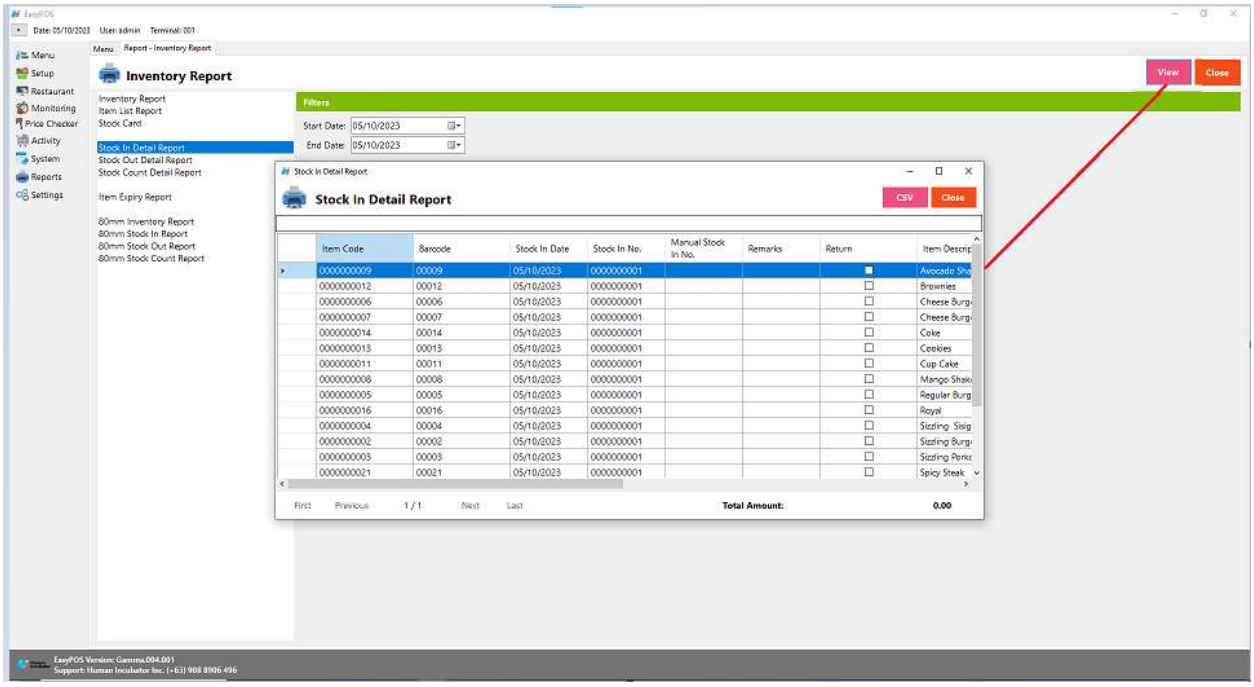


- Click **CSV** button to generate csv file format report

Stock In Detail Report



- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



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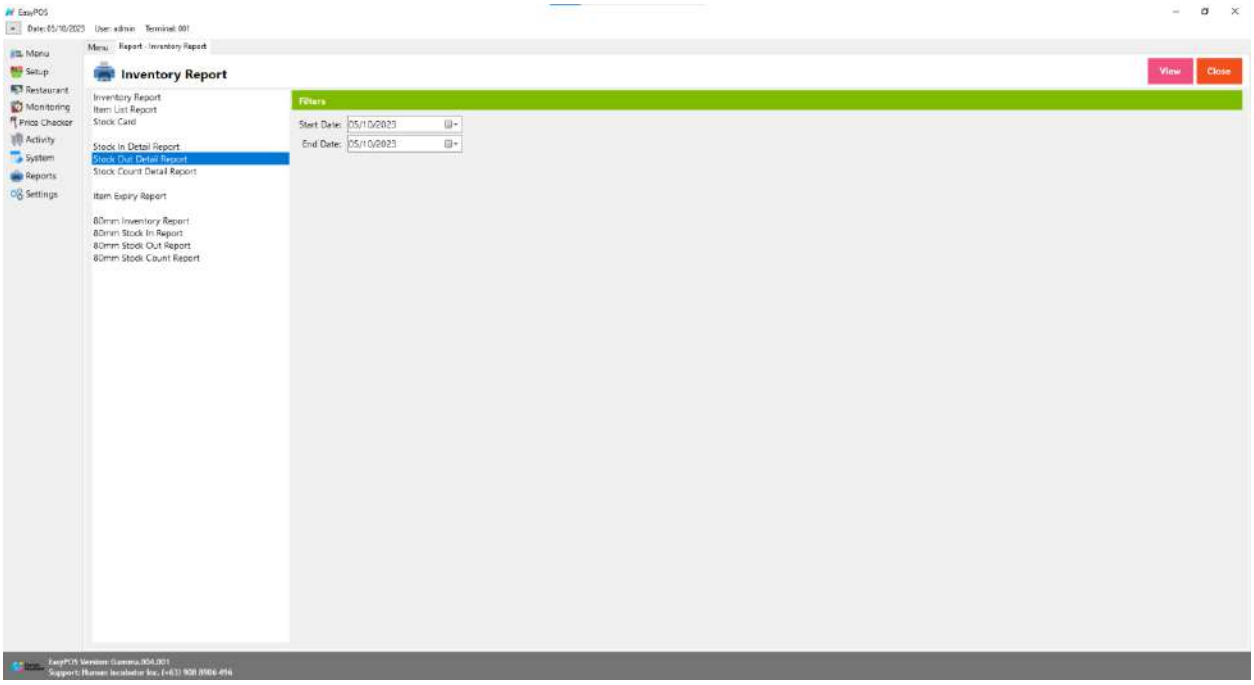
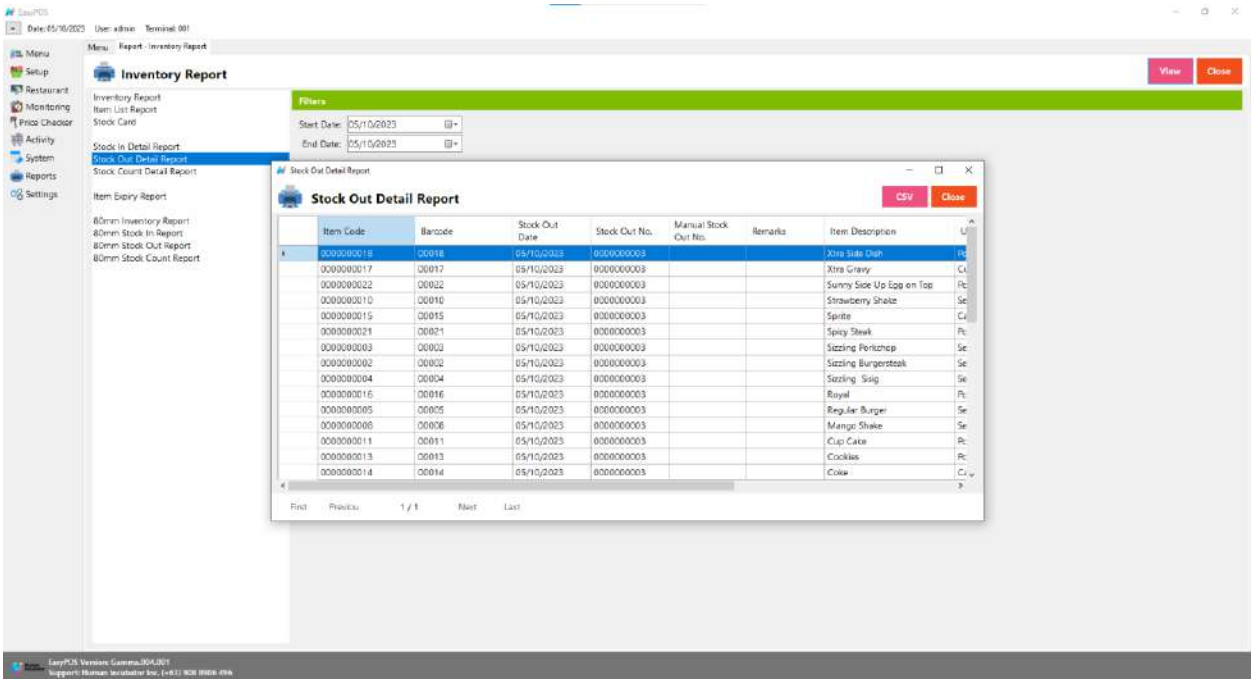
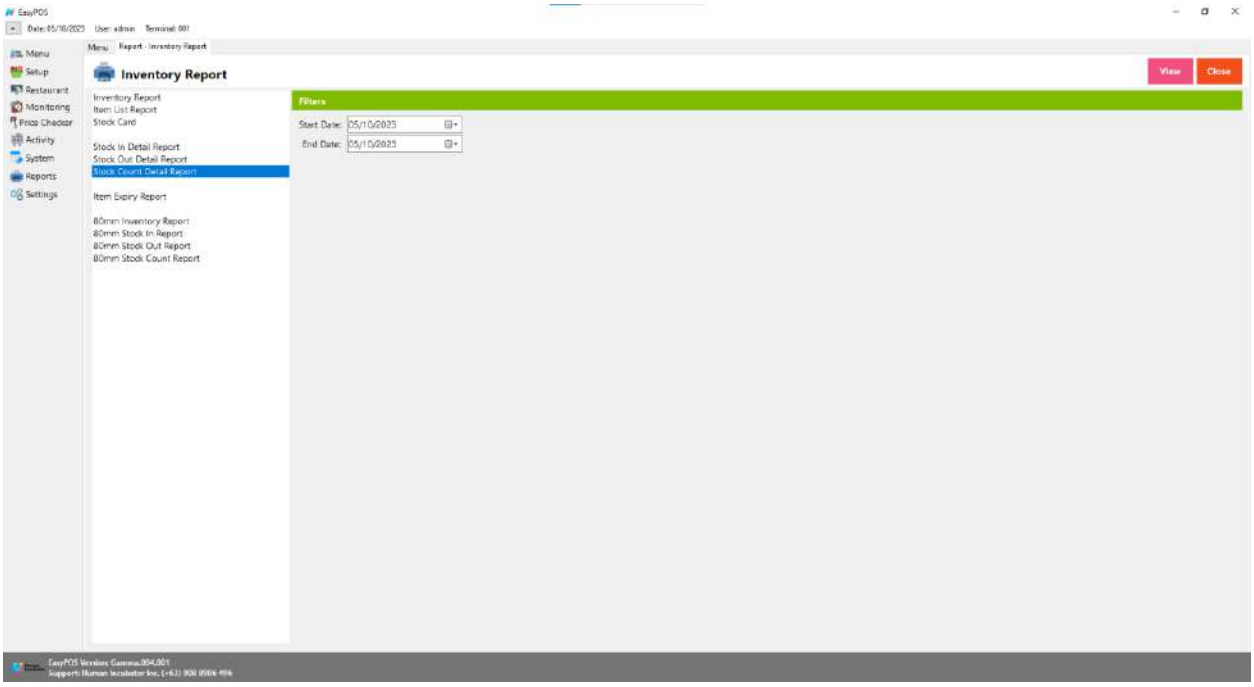
Stock Out Detail Report



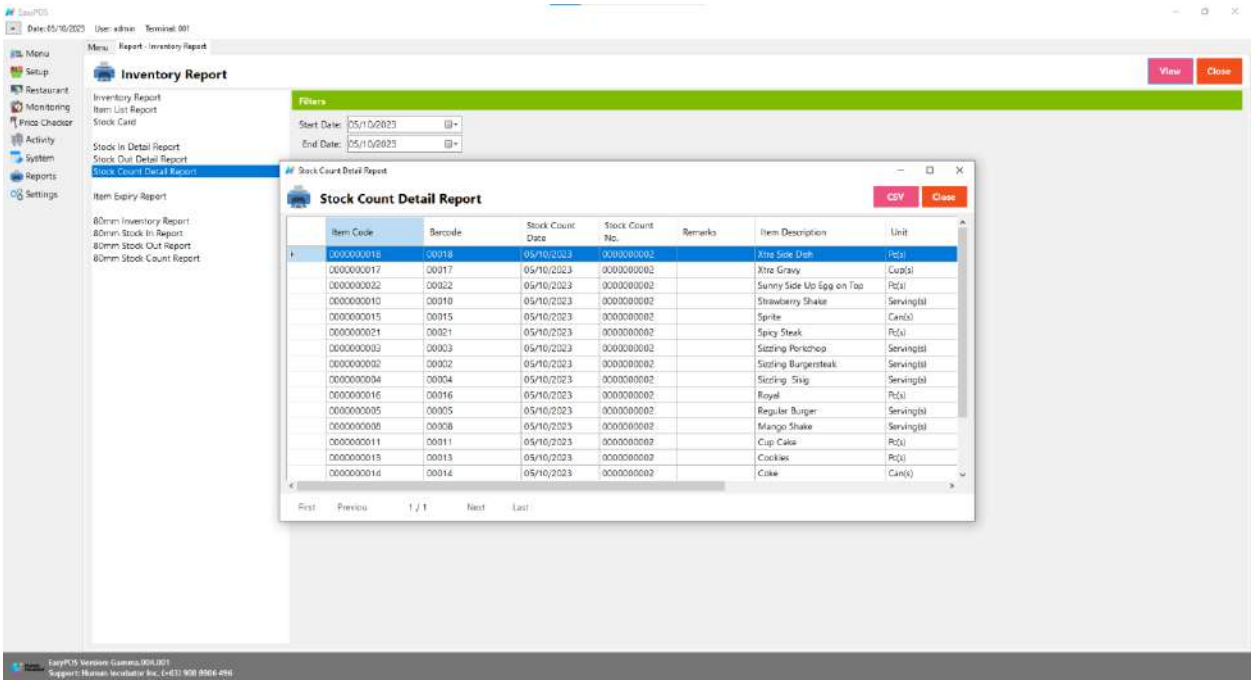
- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



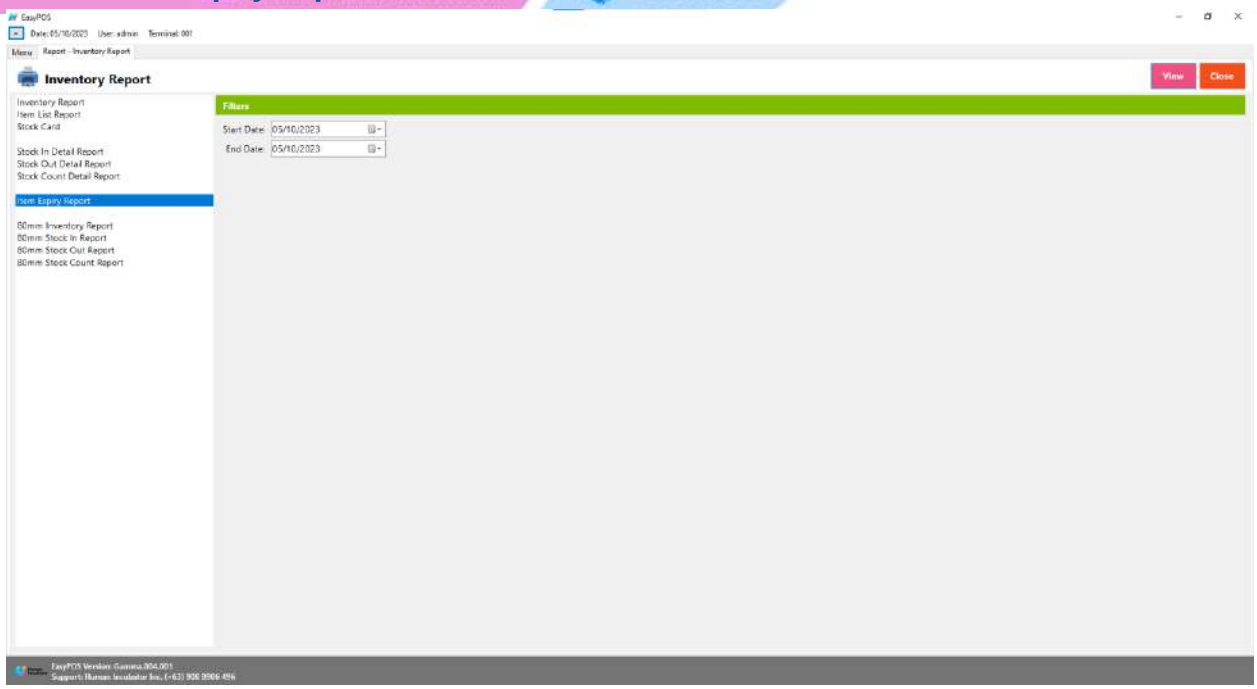
Stock Count Detail Report



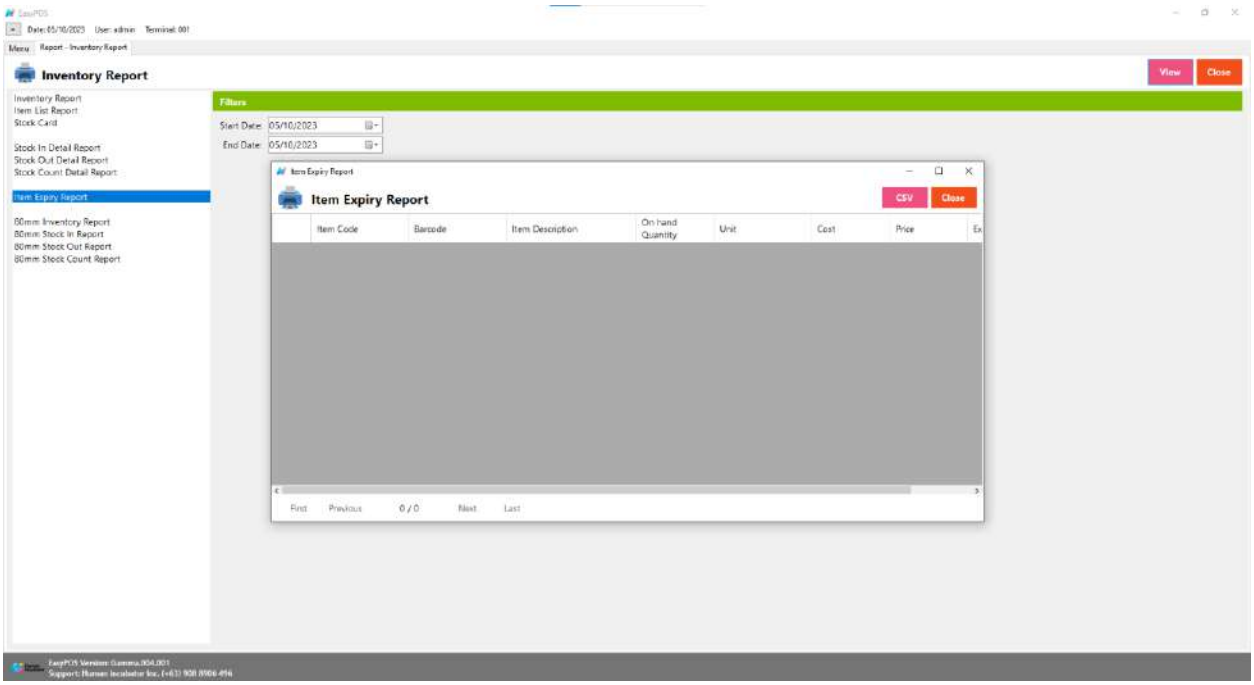
- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



Item Expiry Report



- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



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Metro Manila, Philippines

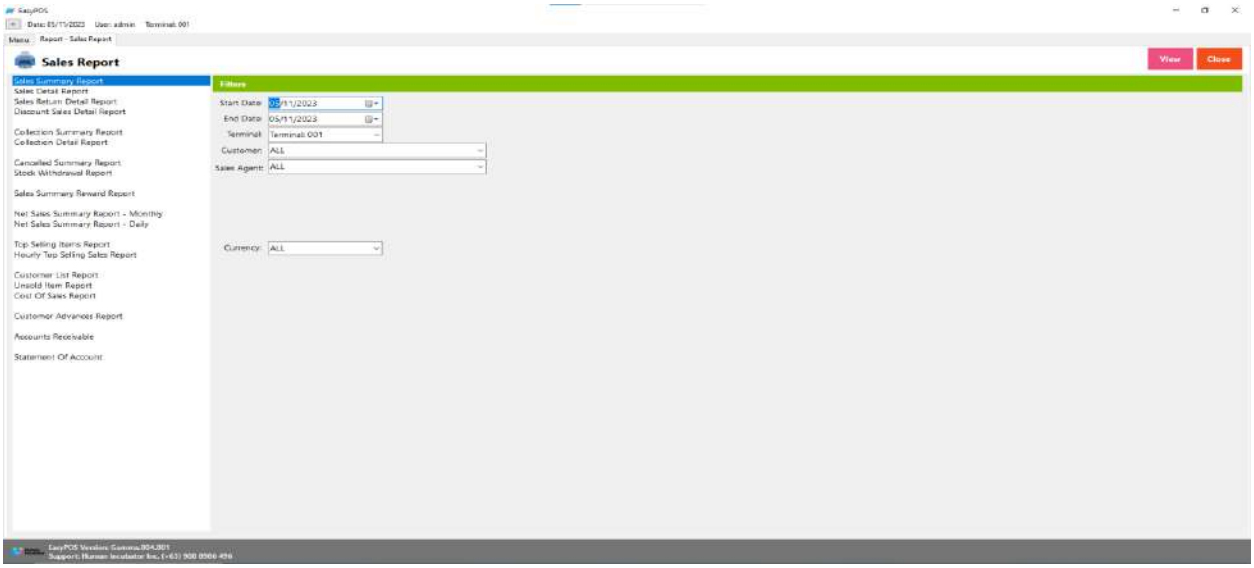
hisales@human-incubator.com
+63-32-256-2904

Sales Report

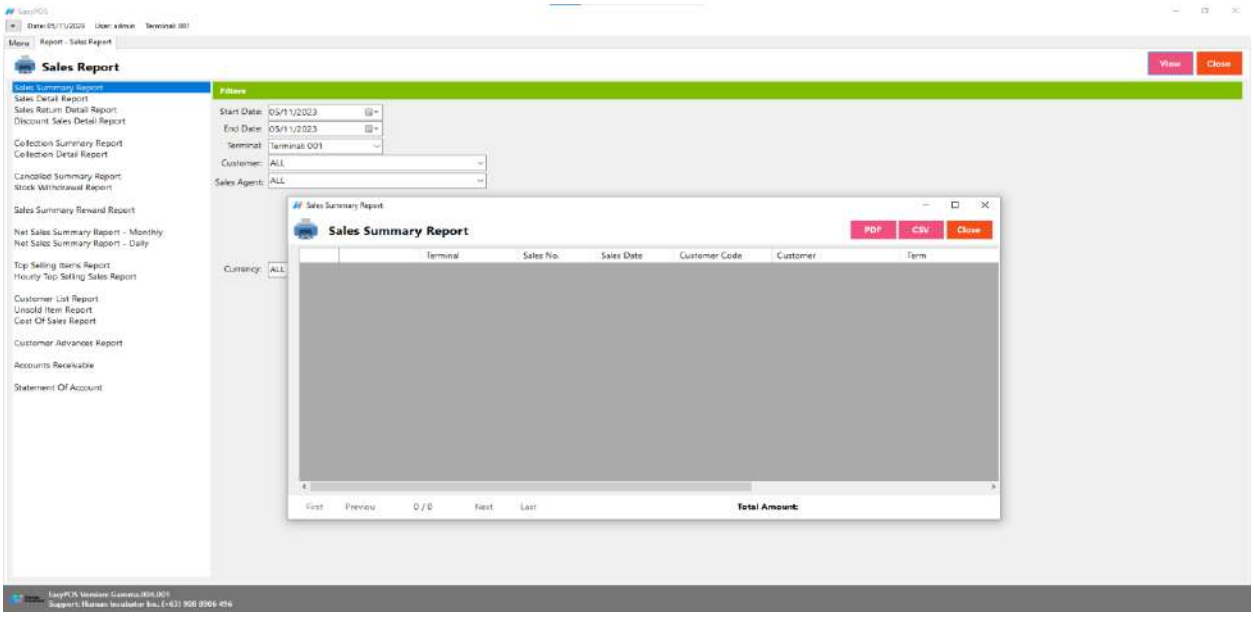
Overview

- Sales Report is where users can see the sales reports.

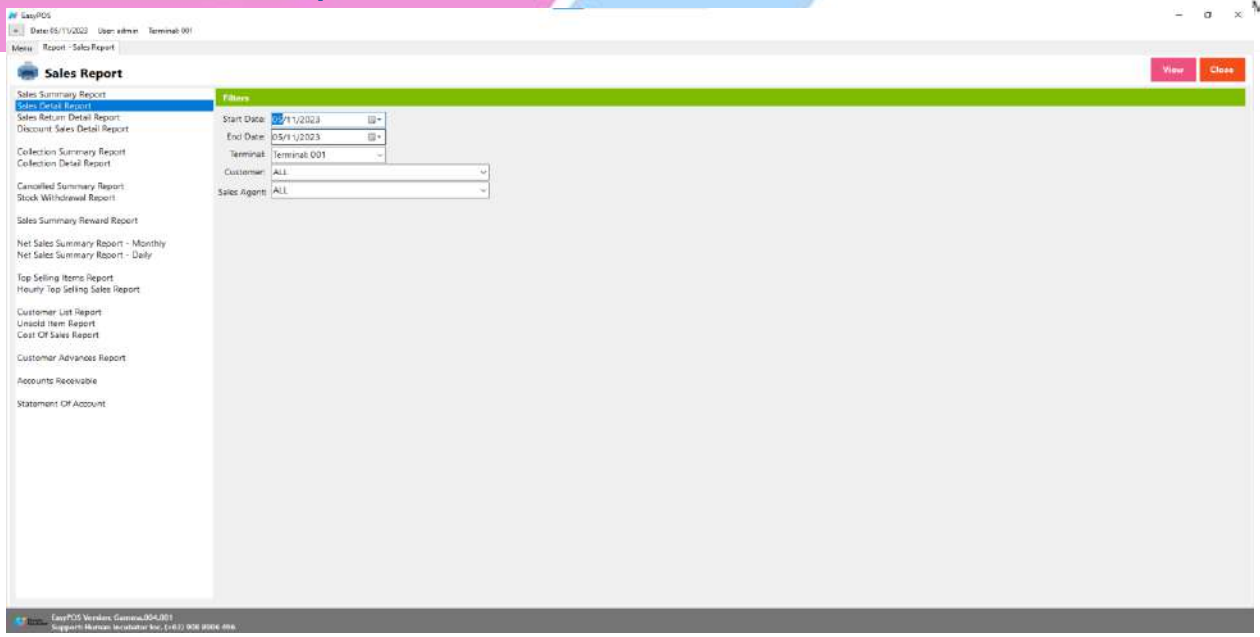
Sales Summary Report



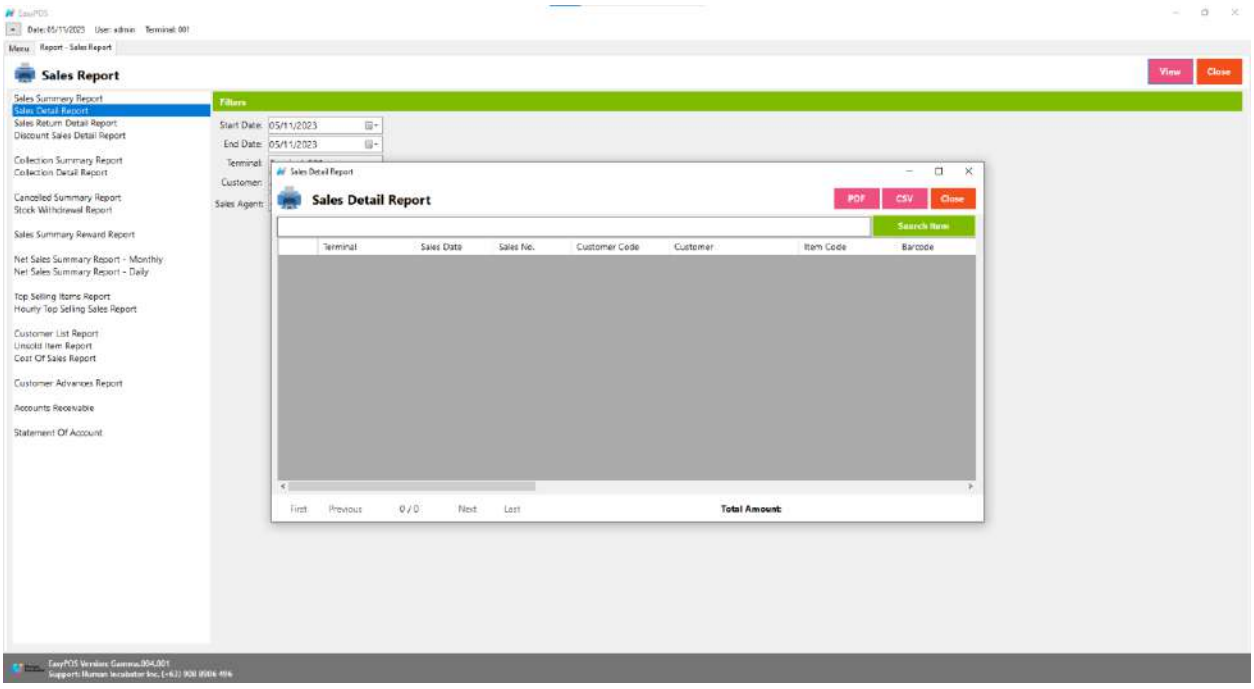
- Select start date and end date.
- It can also filtered by Terminal, Customer, Sales Agent and Currency
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



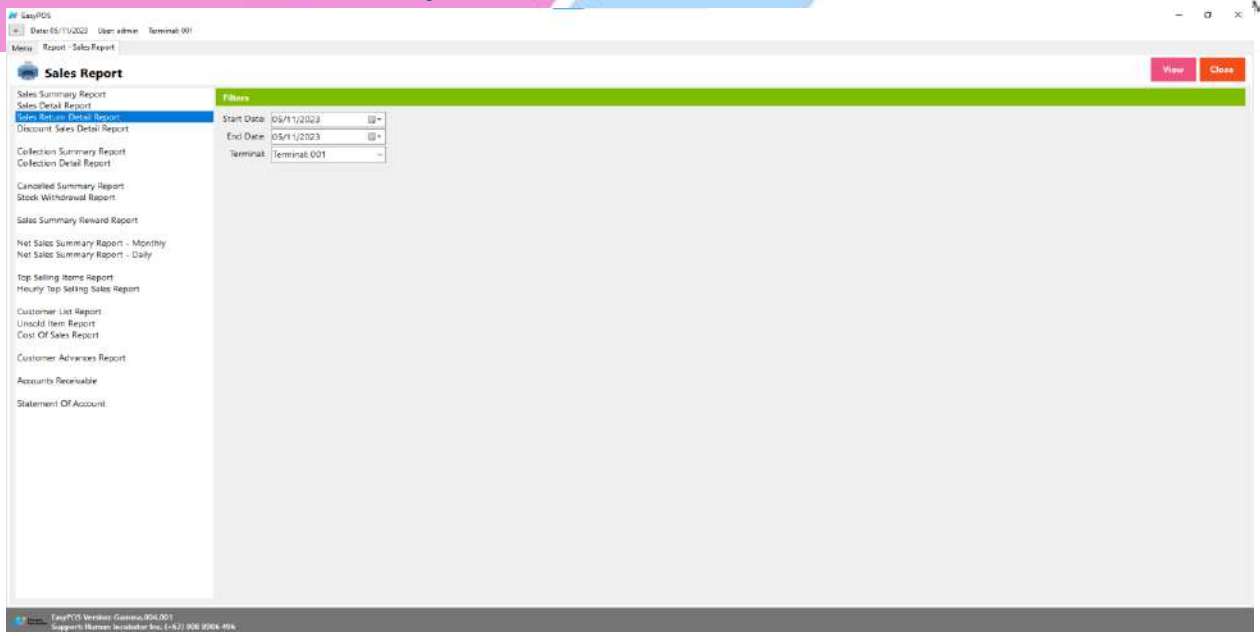
Sales Detail Report



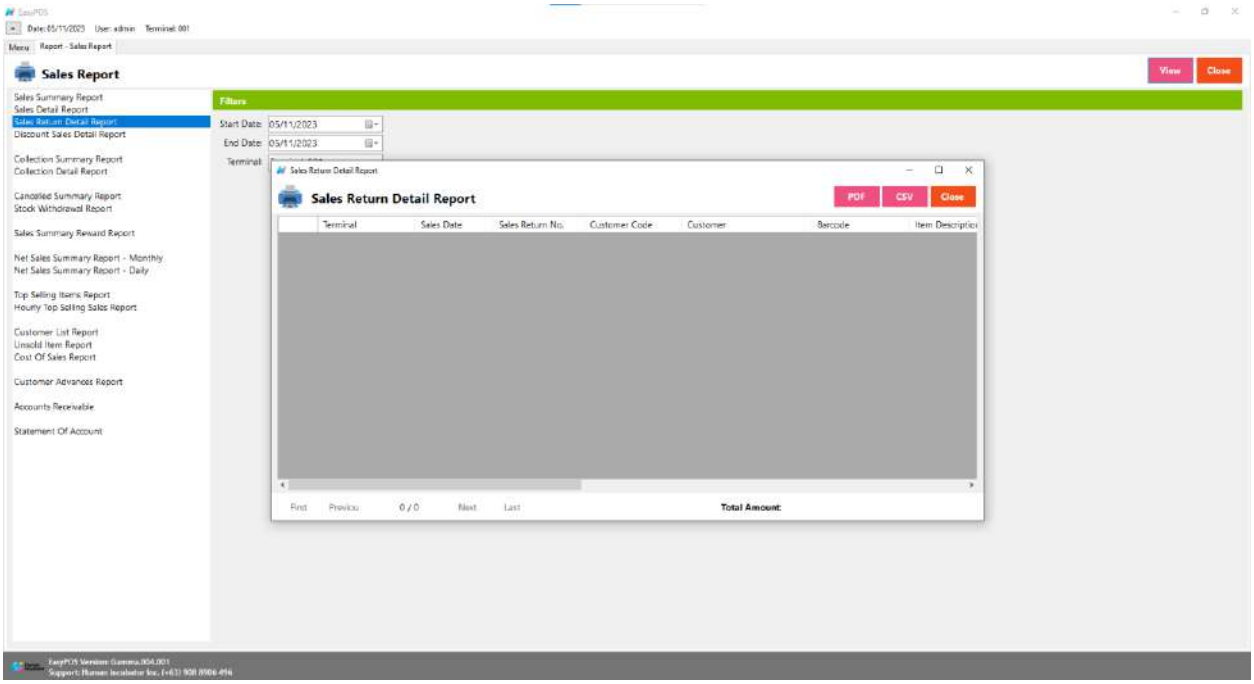
- Select start date and end date.
- It can also filtered by Terminal, Customer, Sales Agent
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



Sales Return Detail Report



- Select start date and end date.
- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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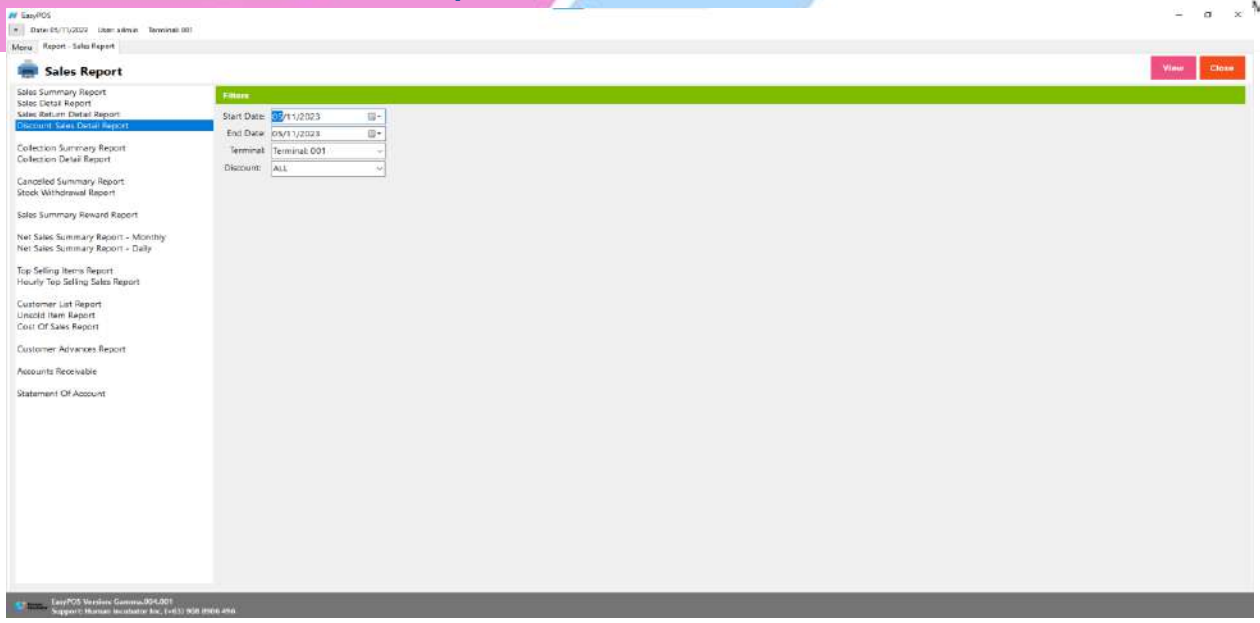
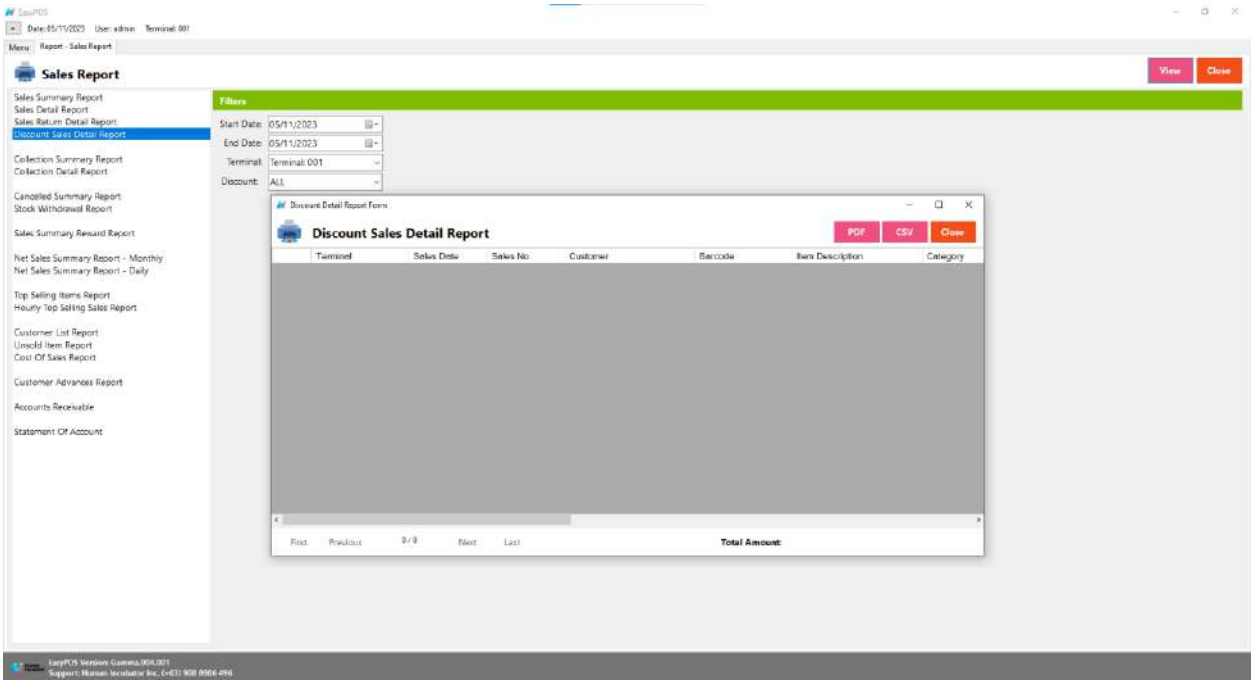
Discount Sales Detail Report



- Select start date and end date.
- It can also filtered by Terminal and Discount
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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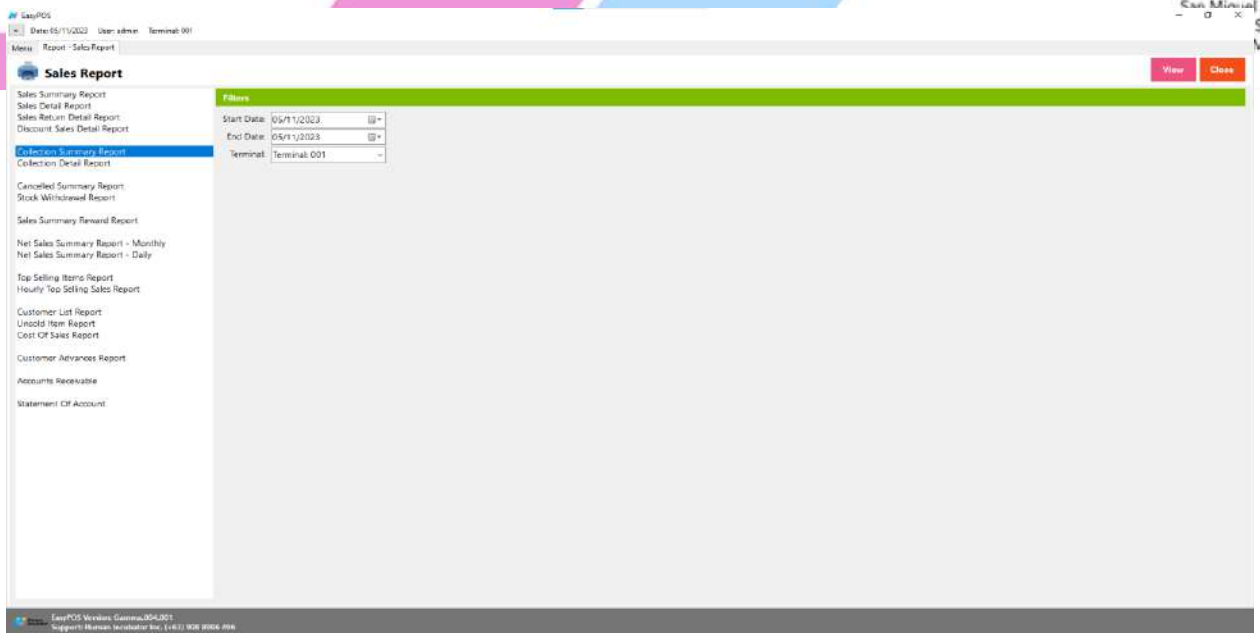
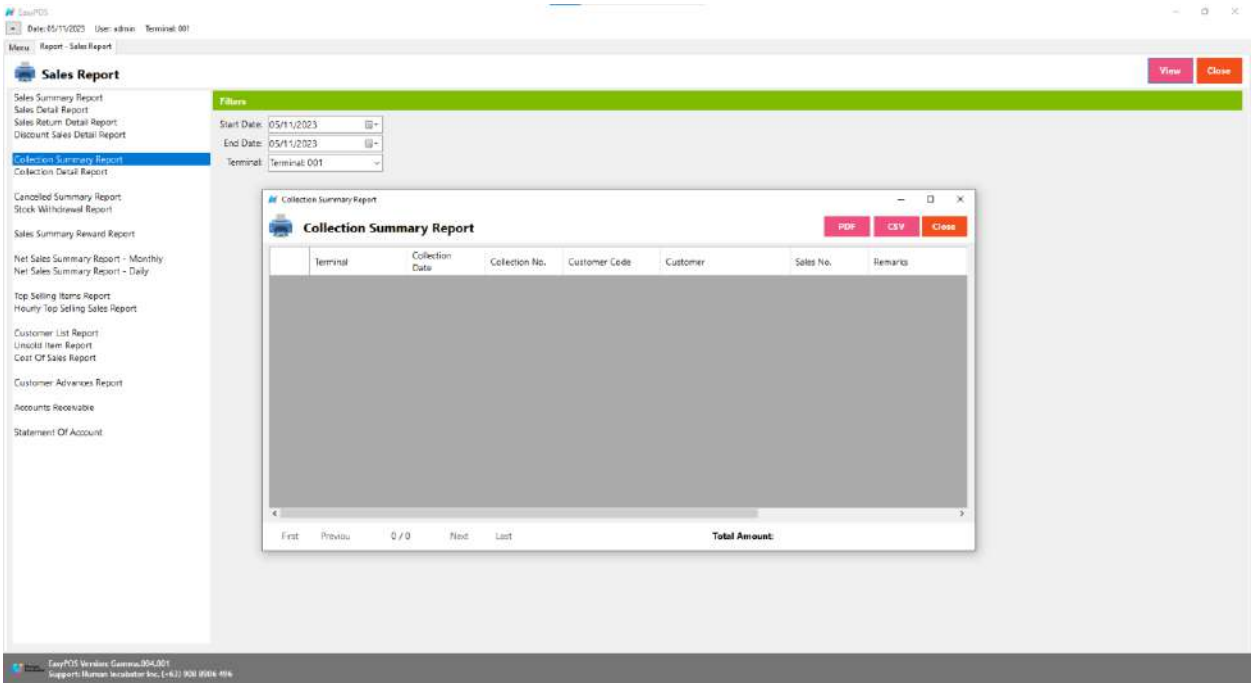
Collection Summary Report



- Select start date and end date.
- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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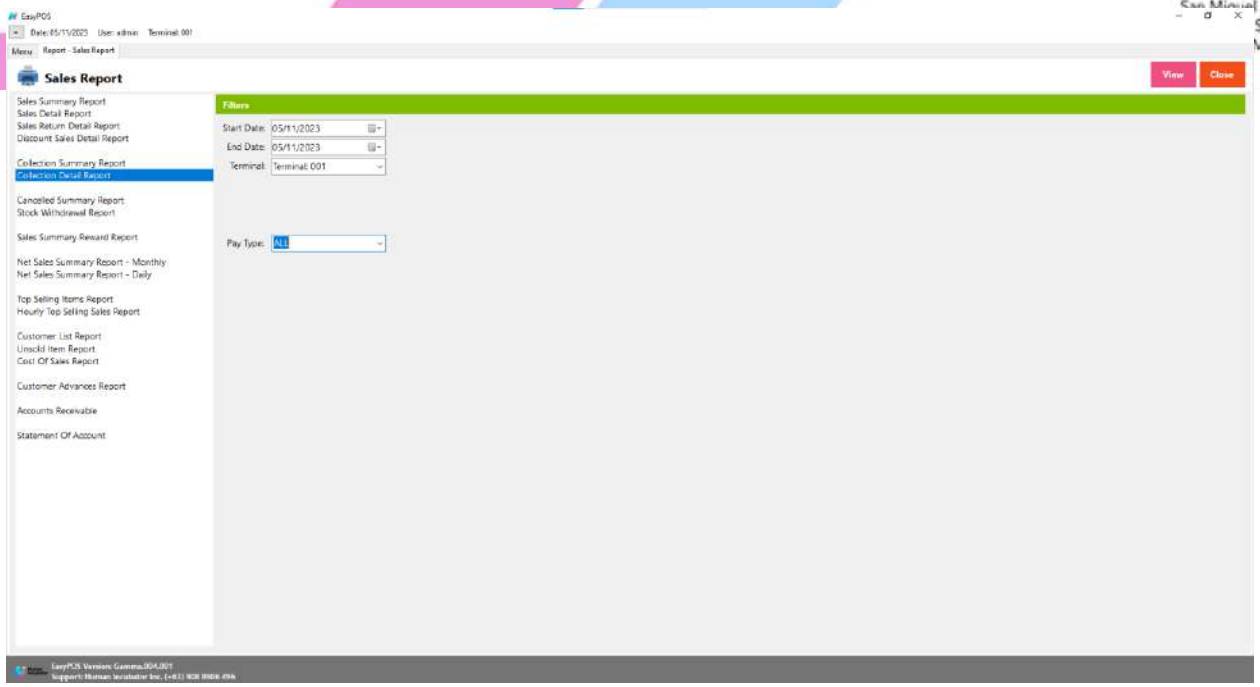
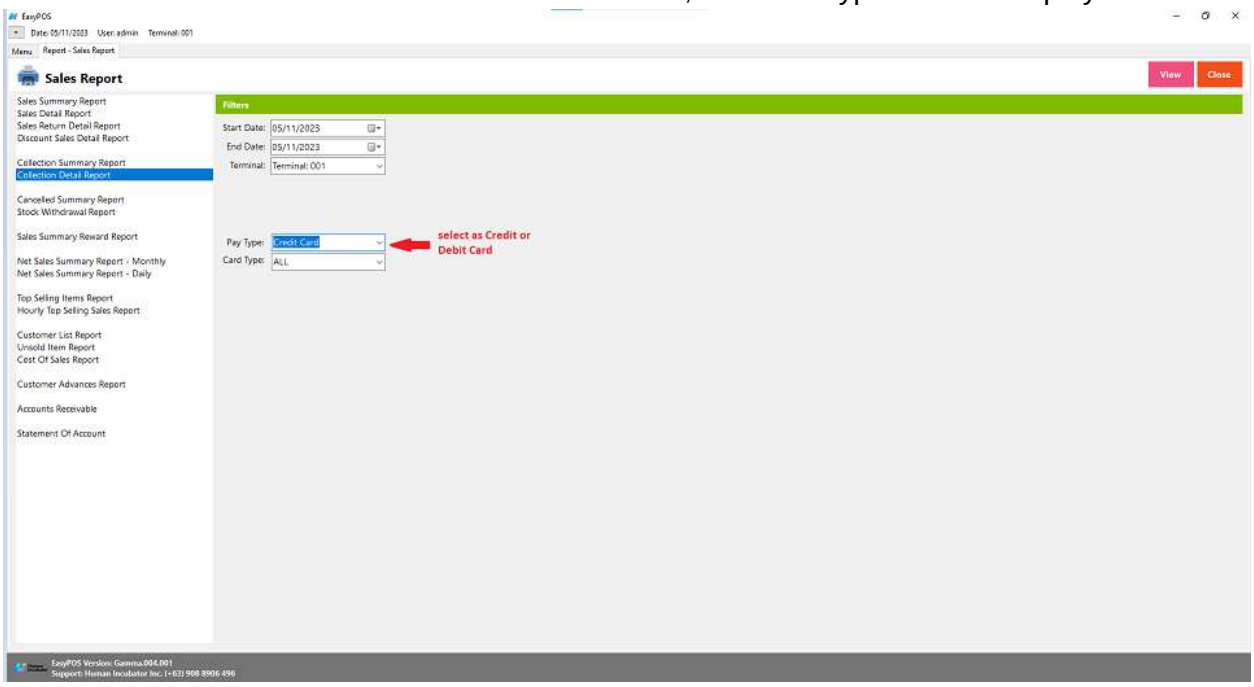
Collection Detail Report



- Select start date and end date.
- It can also be filtered by Terminal and Pay Type. When the Pay Type filter is selected as Credit Card or Debit Card, the Card Type filter will display.



- Click the **View** button to view the report

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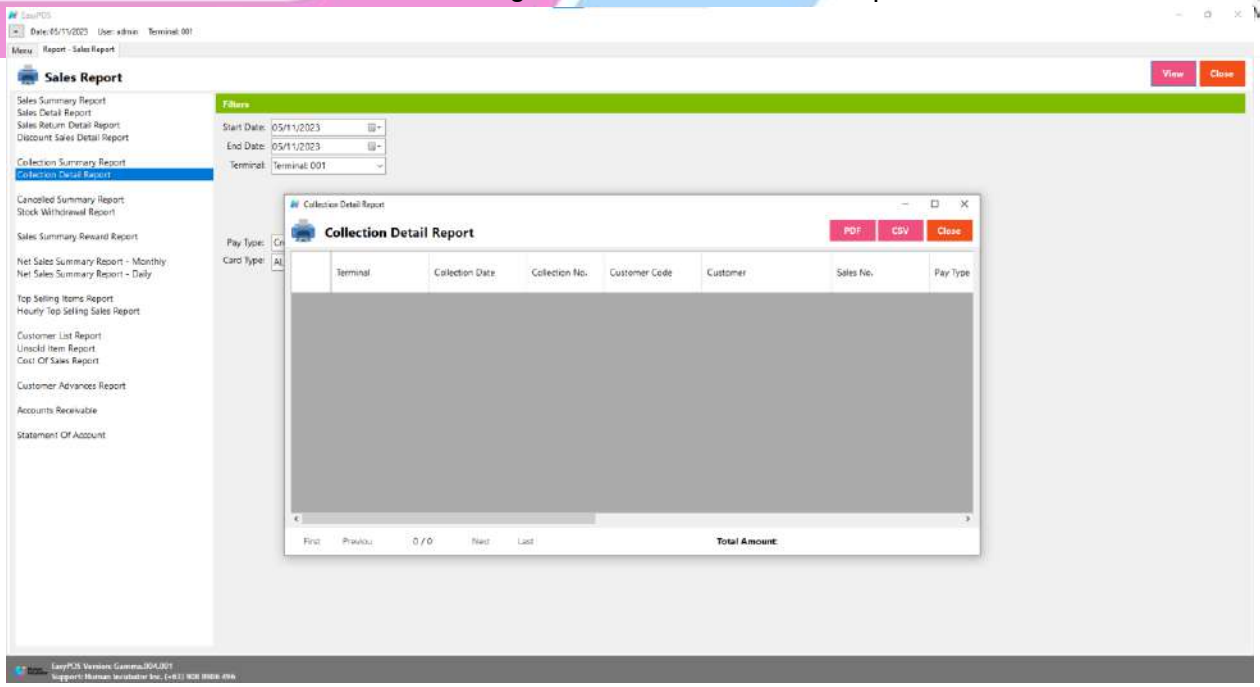
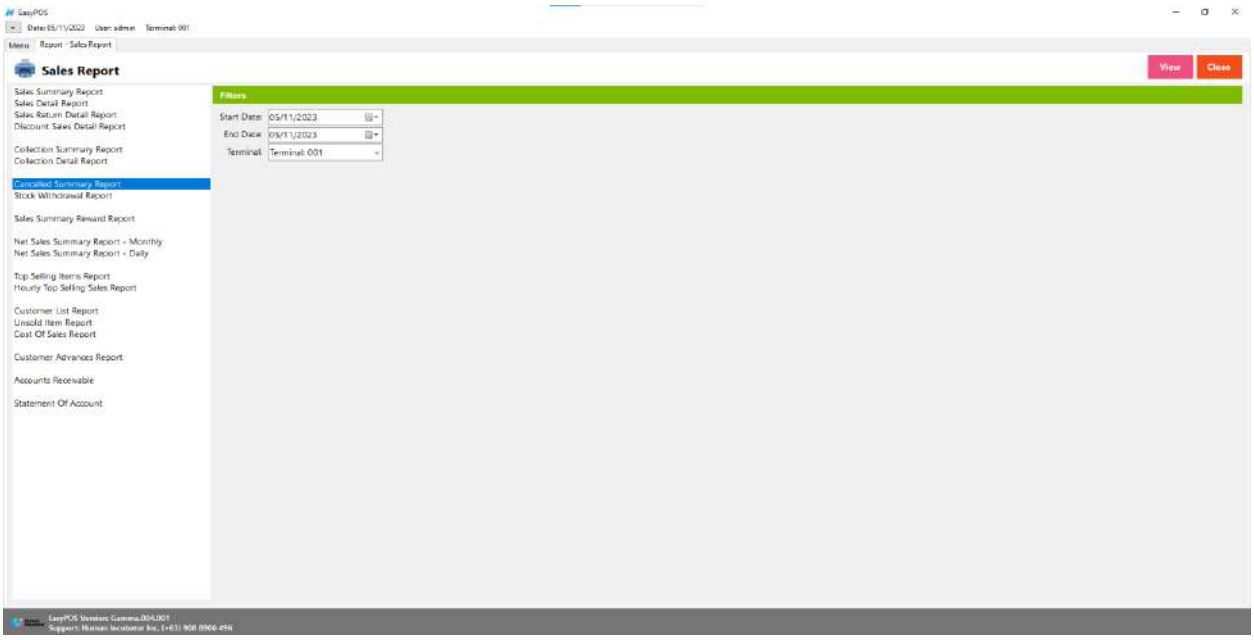
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



Canceled Summary Report



- Select start date and end date.

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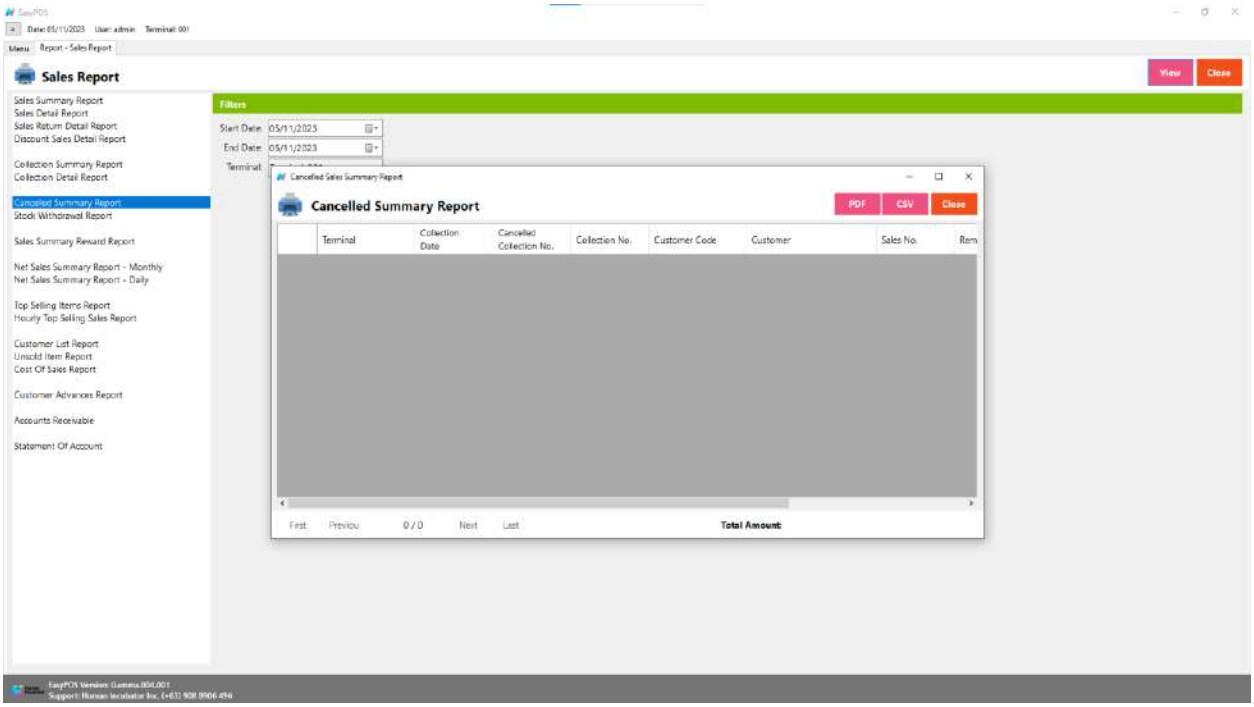
Metro Manila, Philippines

- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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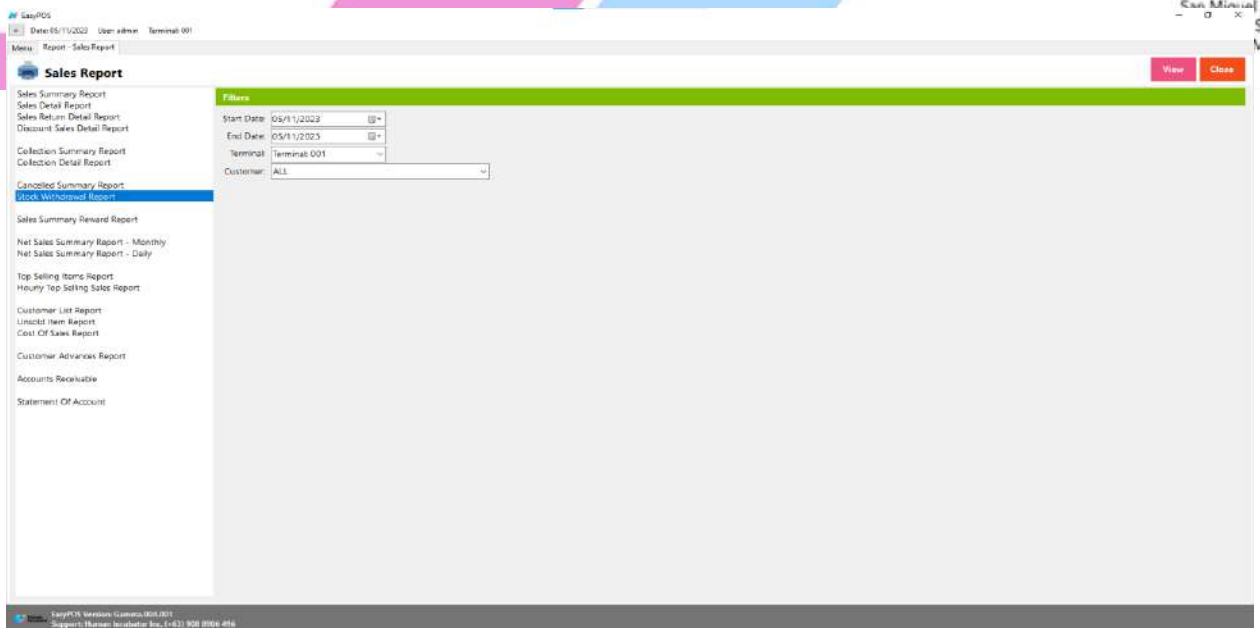
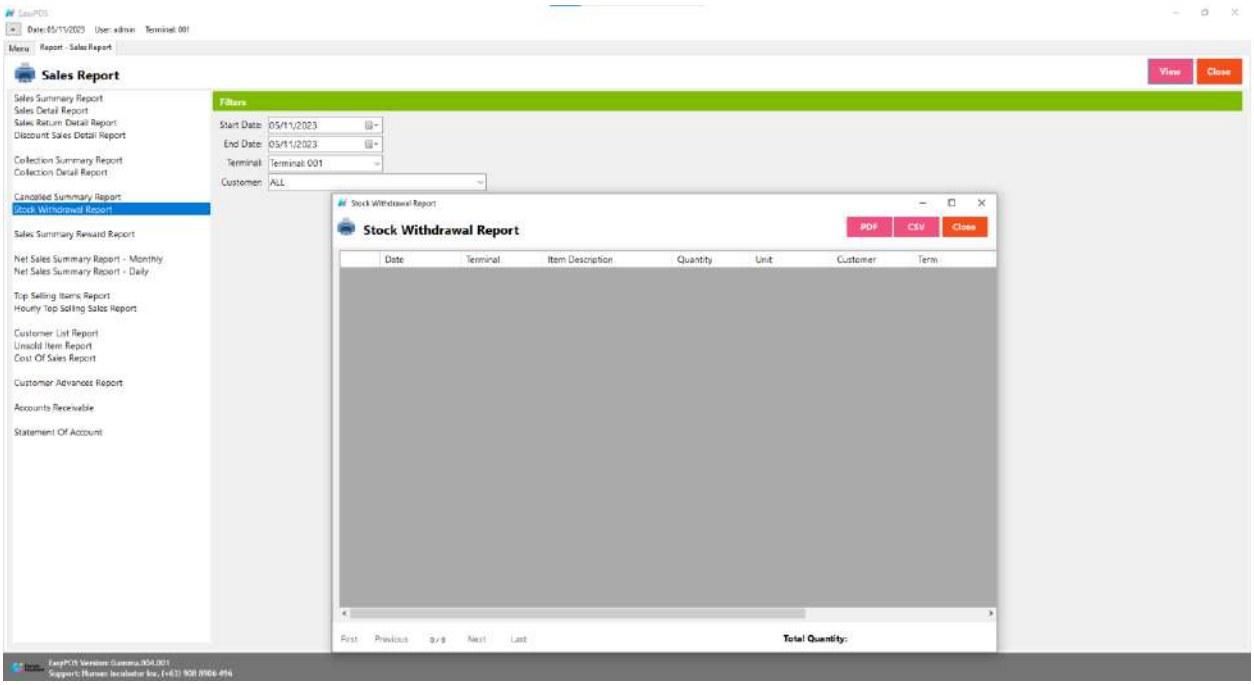
Stock Withdrawal Report



- Select start date and end date.
- It can also filtered by Terminal and Customer
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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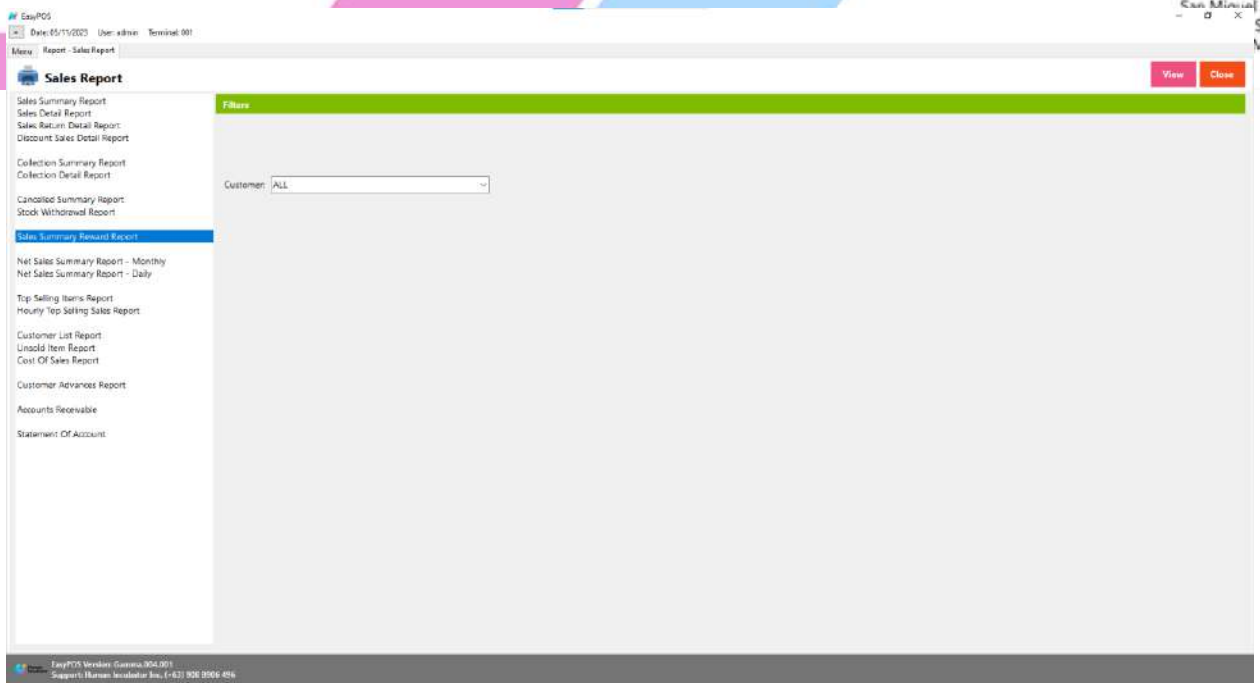
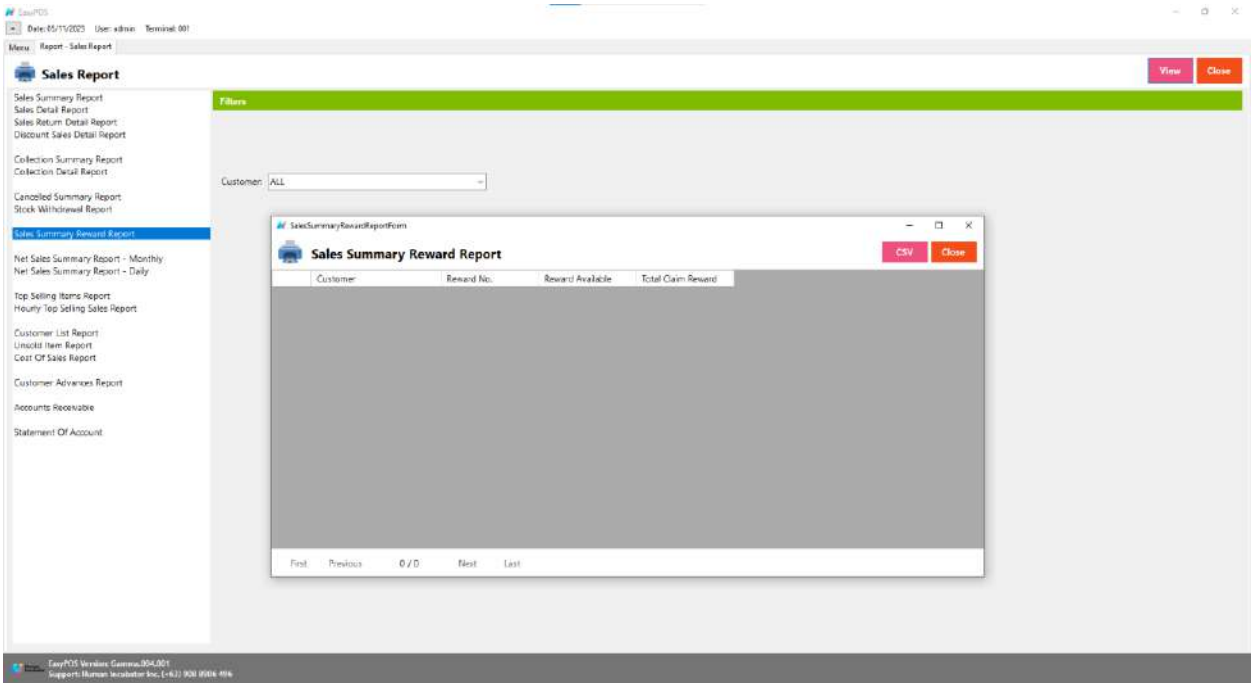
Sales Summary Reward Report



- Select a Customer
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



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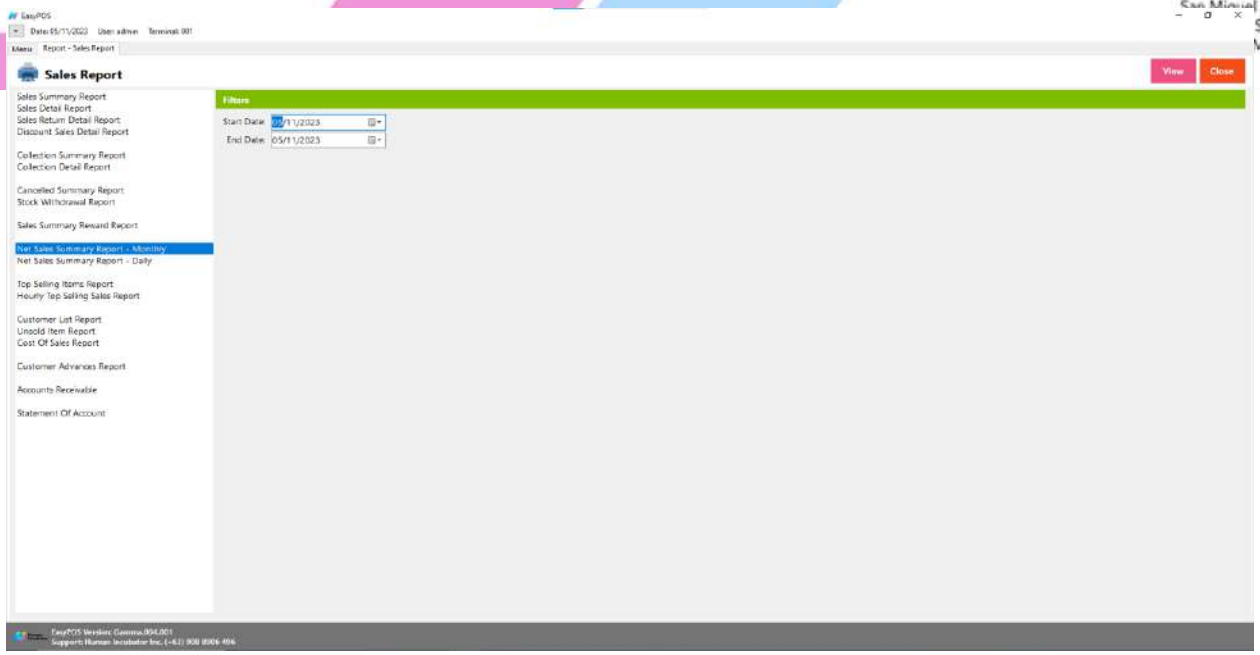
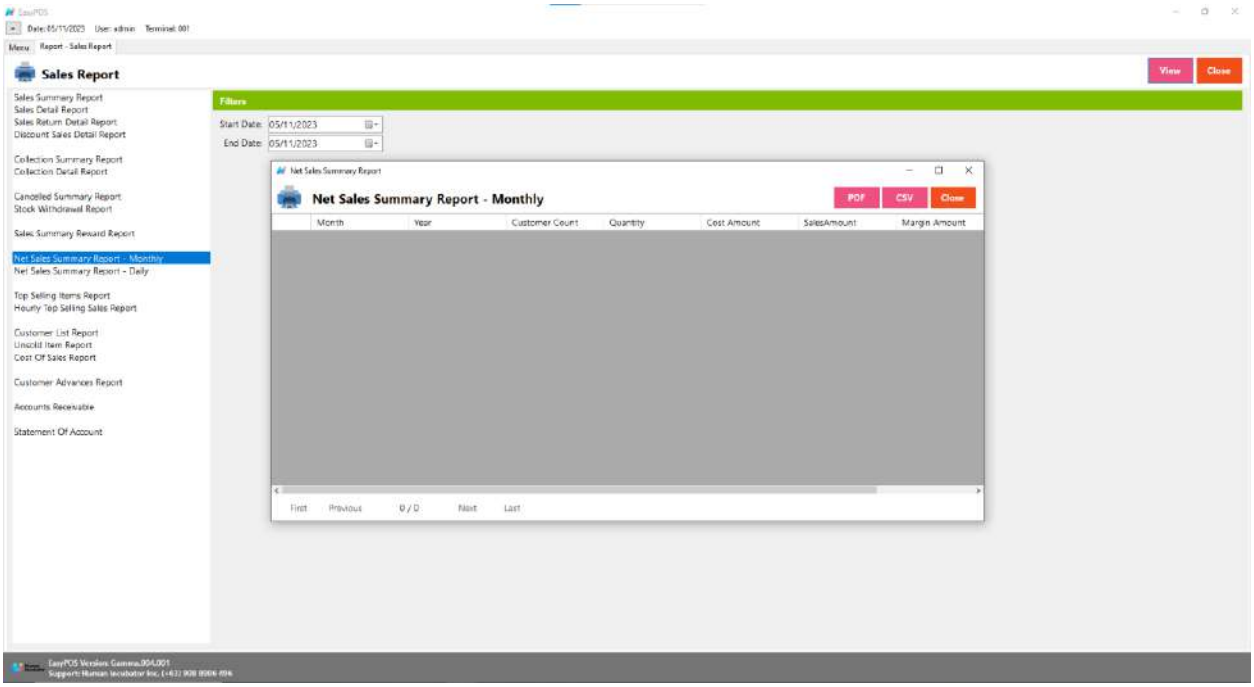
Net Sales Summary Report - Monthly



- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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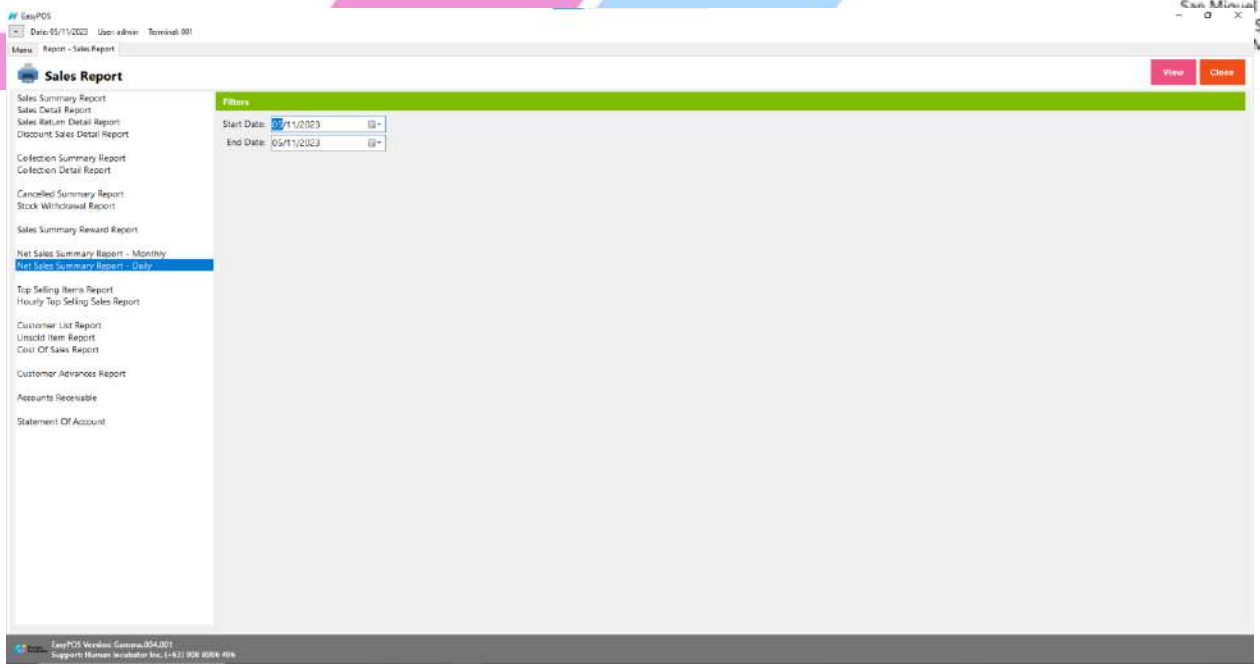
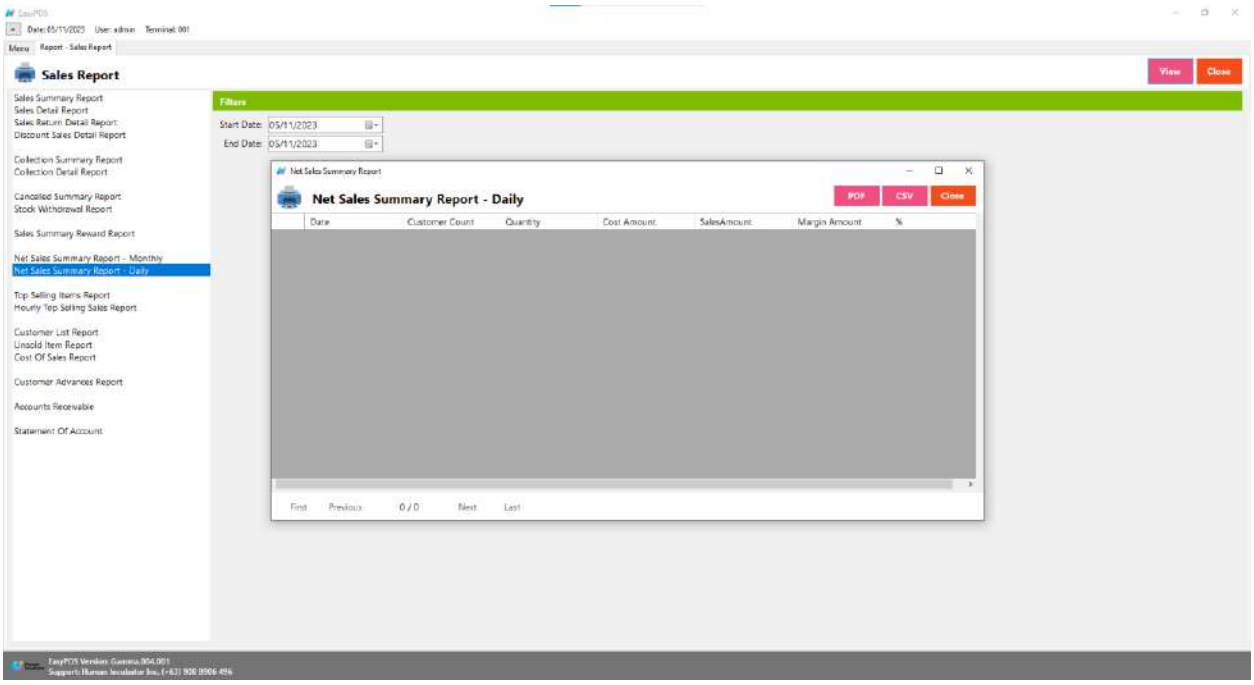
Net Sales Summary Report - Daily



- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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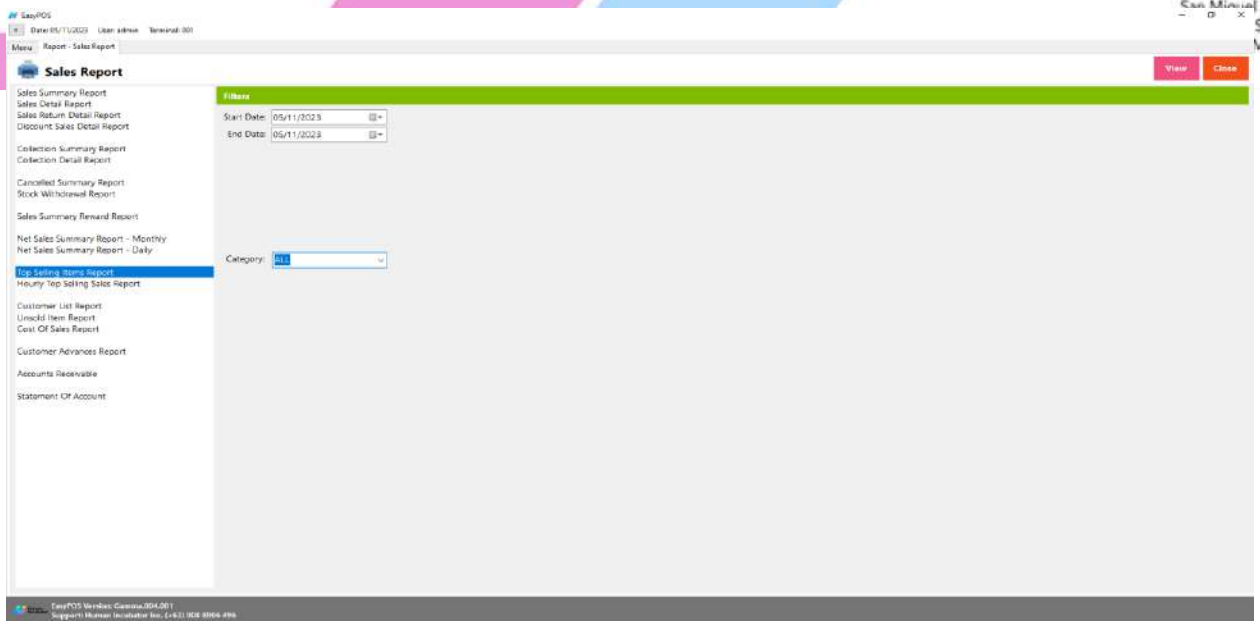
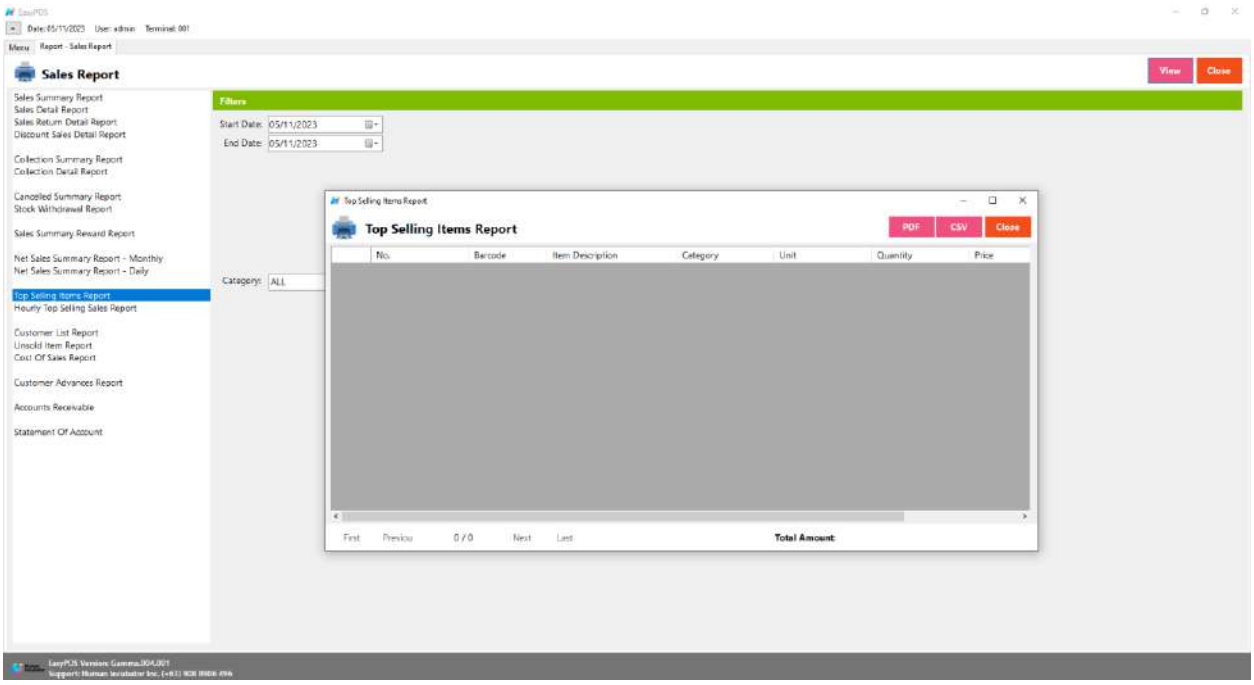
Top Selling Item Report



- Select start date and end date.
- It is filtered by Category
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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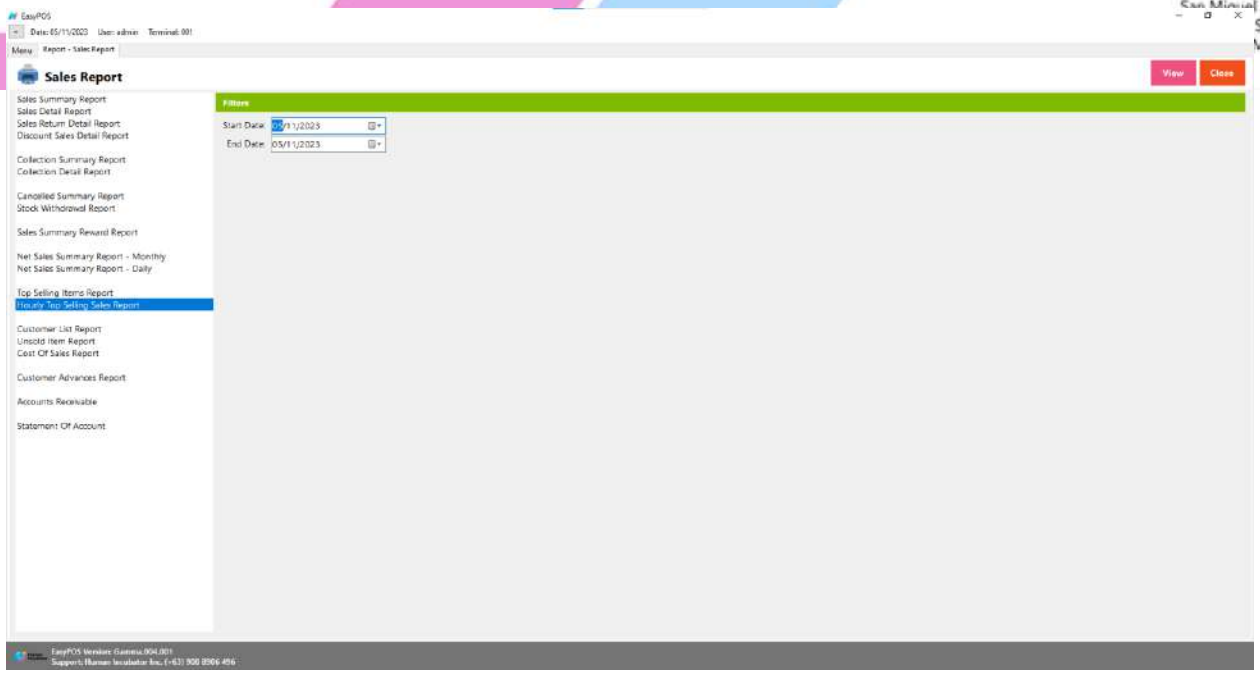
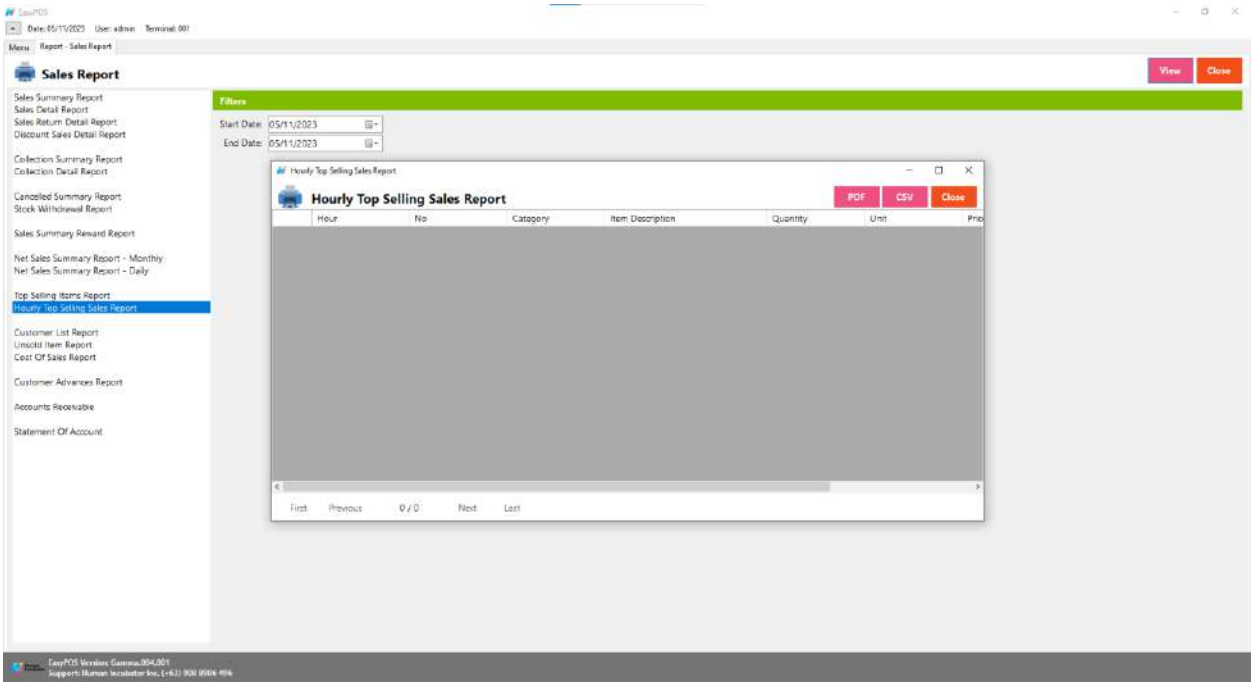
Hourly Top Selling Sales Report



- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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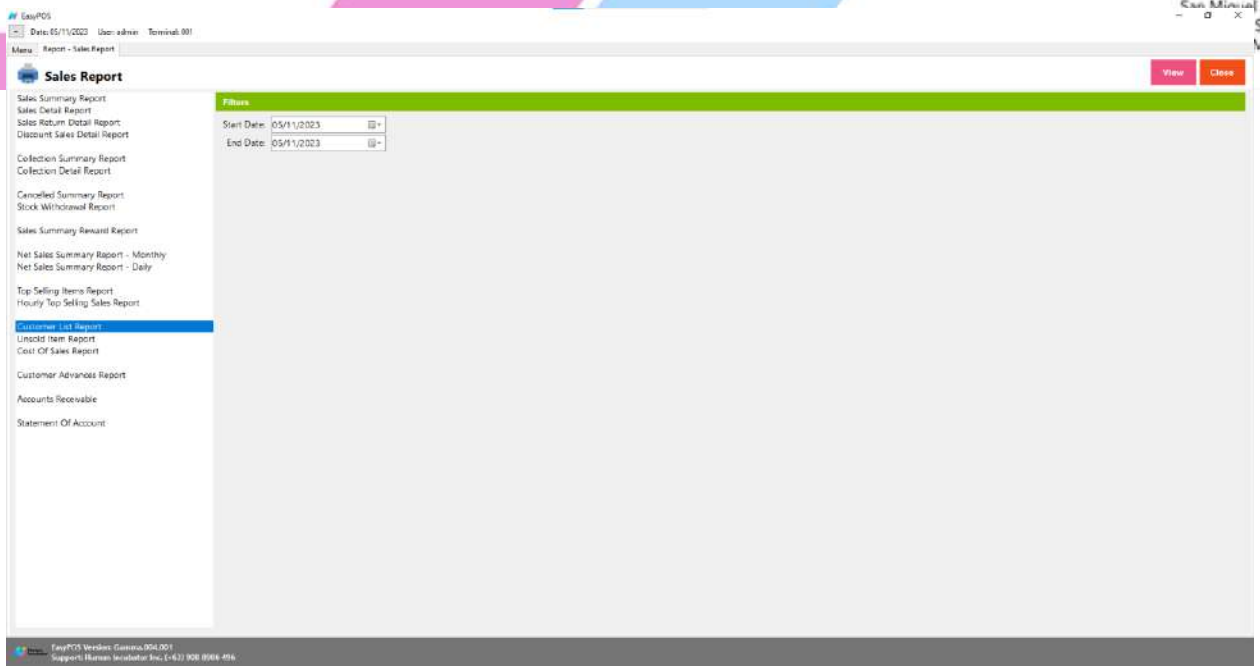
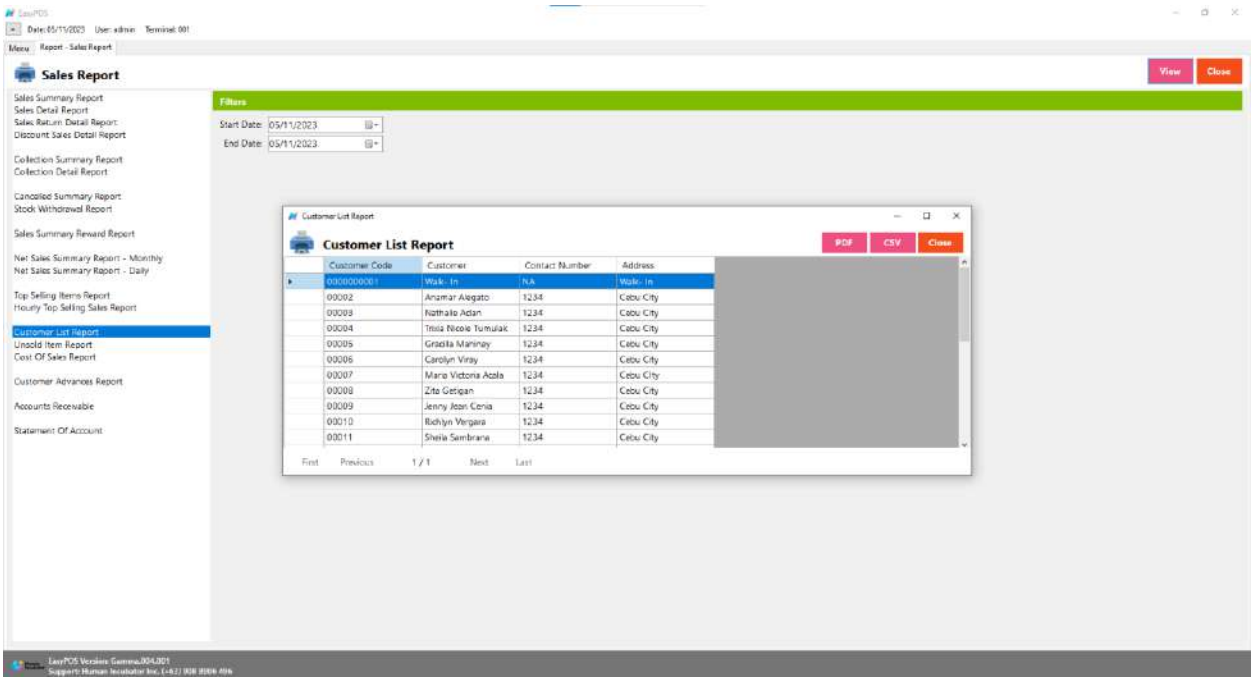
Customer List Report



- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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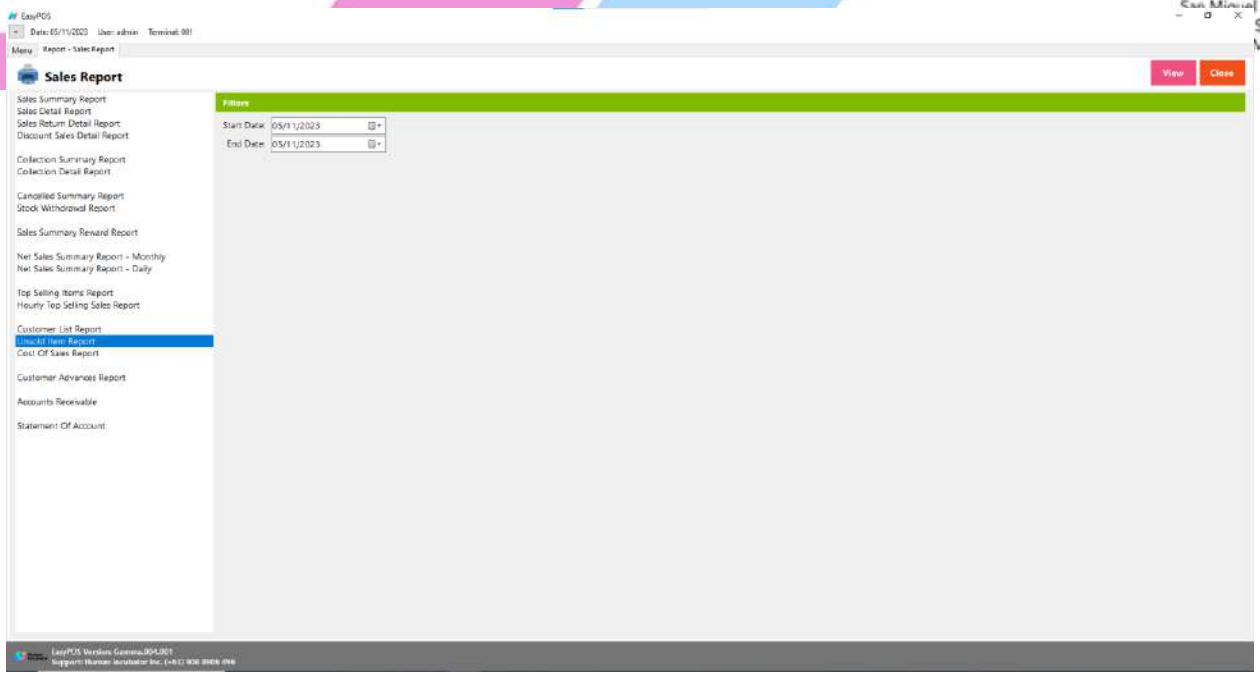
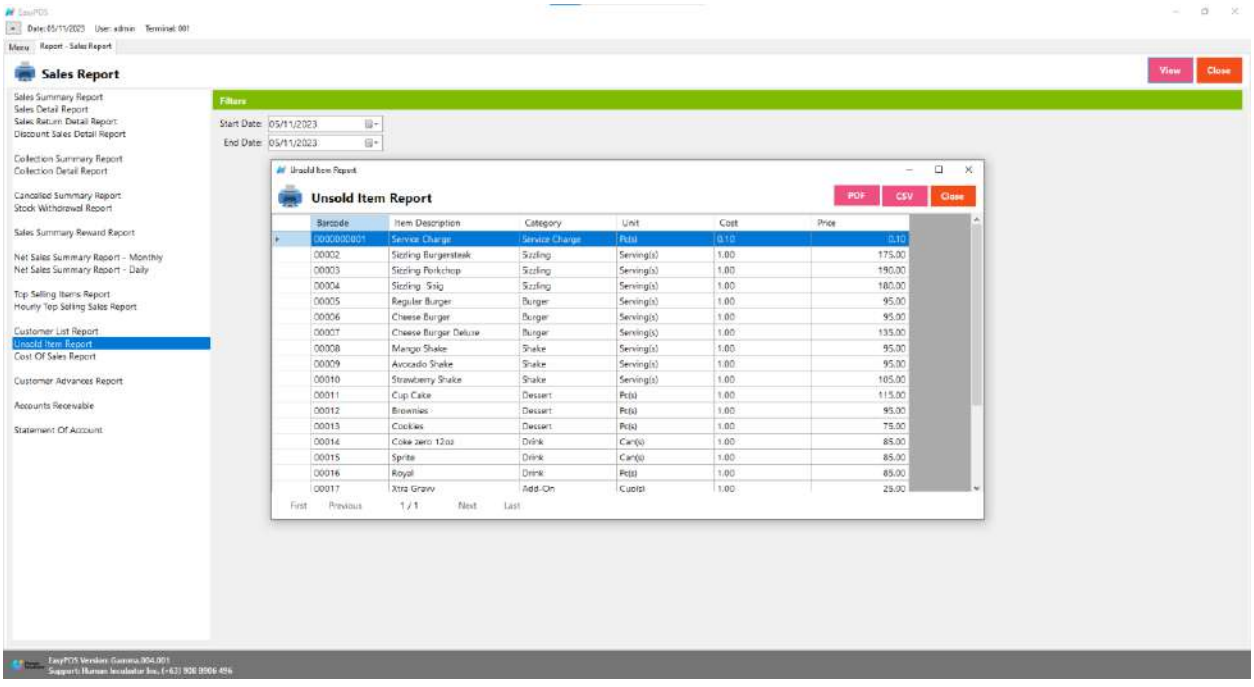
Unsold Item Report



- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



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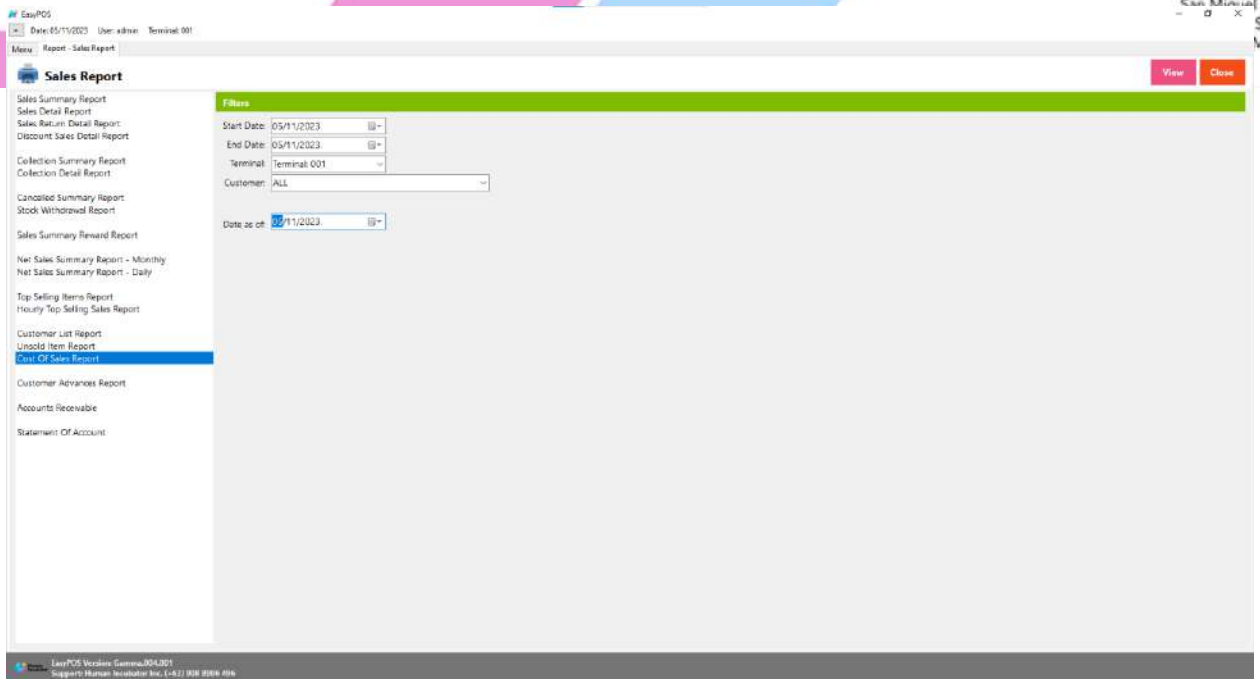
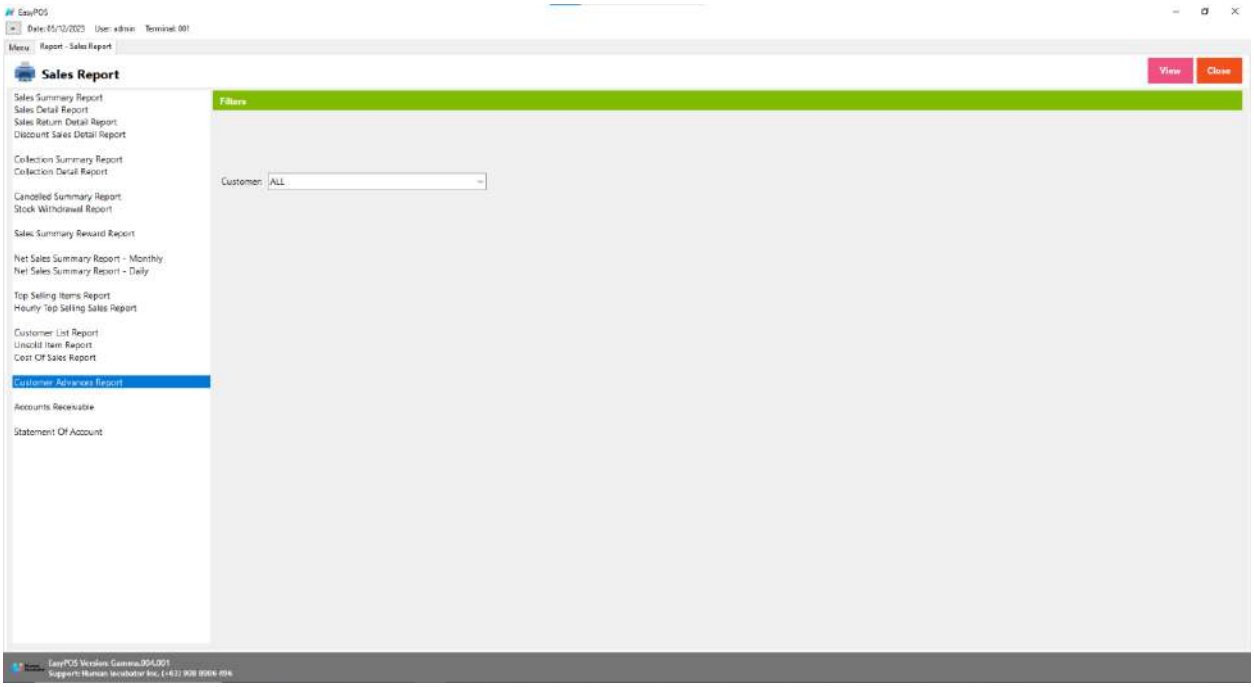
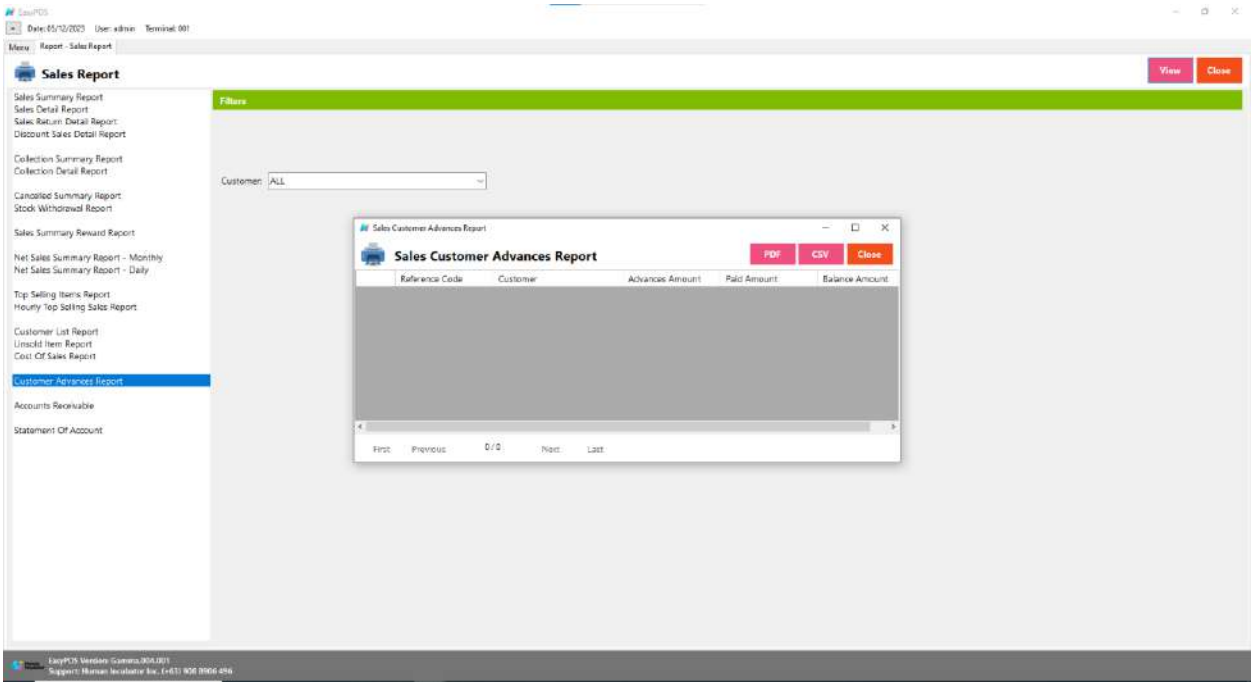
Cost of Sales Report



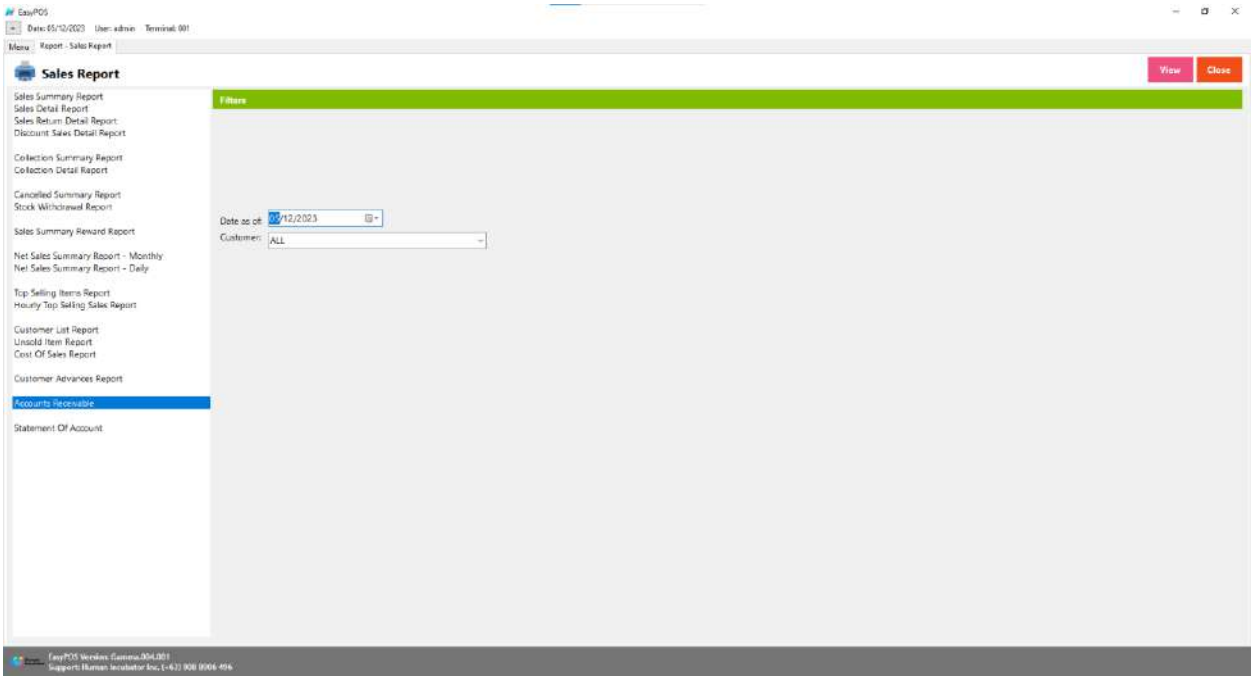
Customer Advances Report



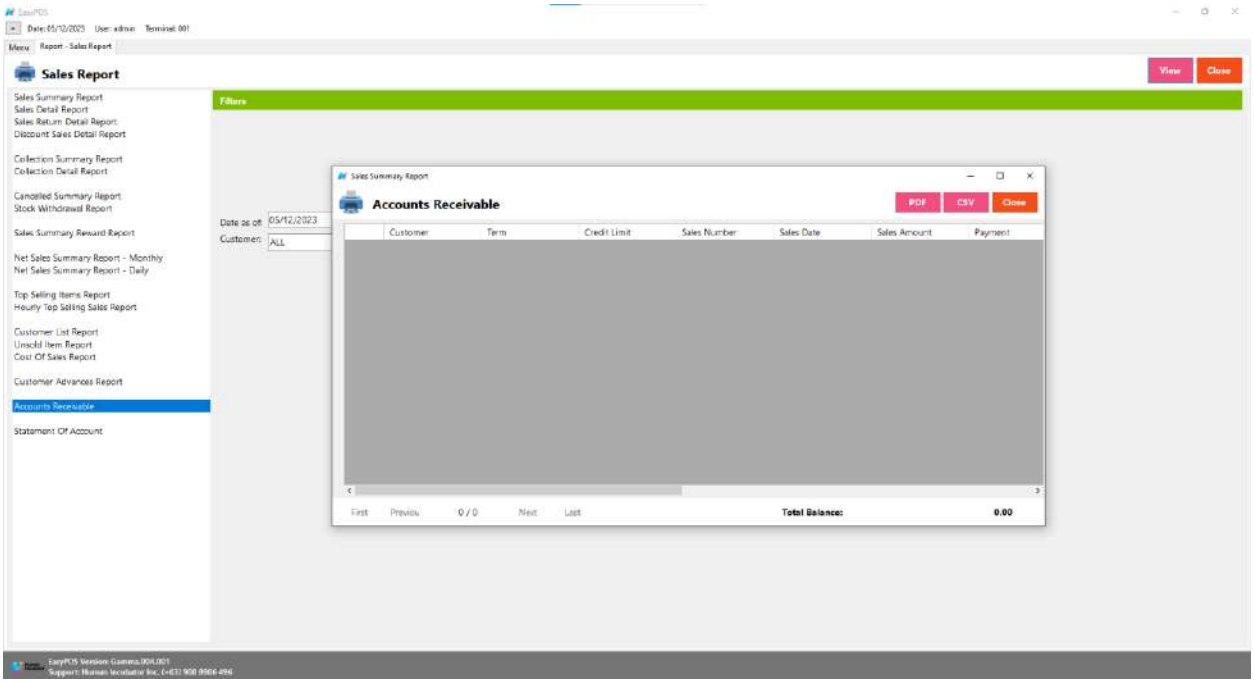
- It is filtered by Customer
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



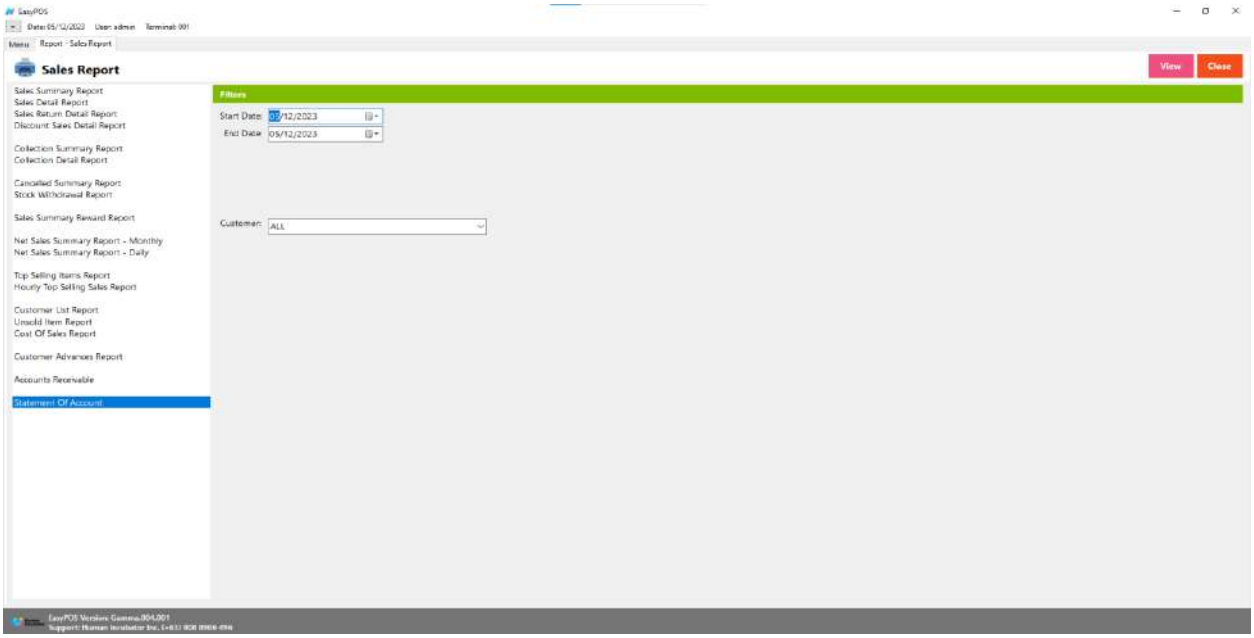
Accounts Receivable



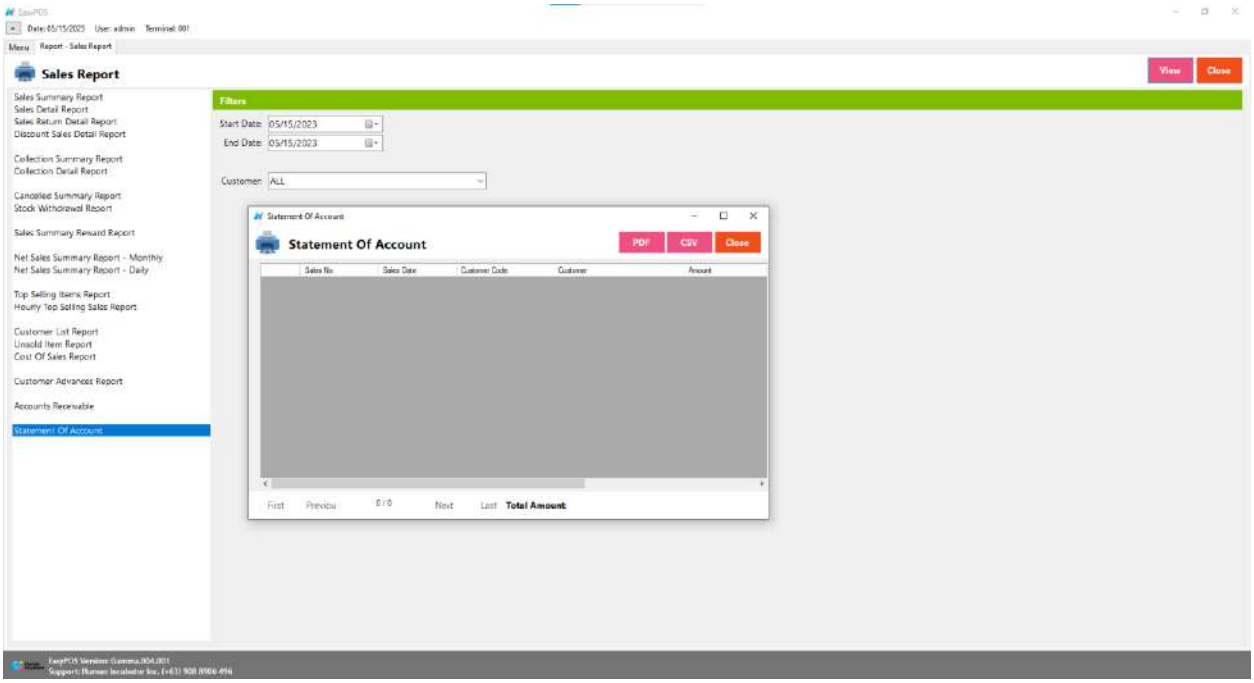
- Select Date as of and Customer
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



Statement of Account



- Select start date and end date.
- It can also be filtered by Customer
- Click the **View** button to view the report



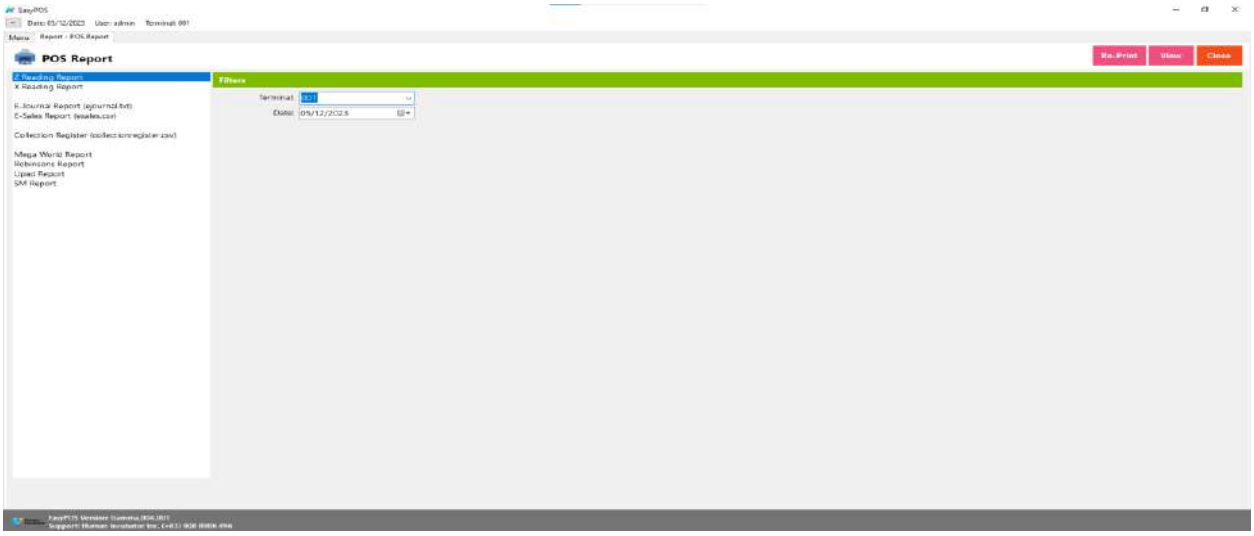
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.

POS Report

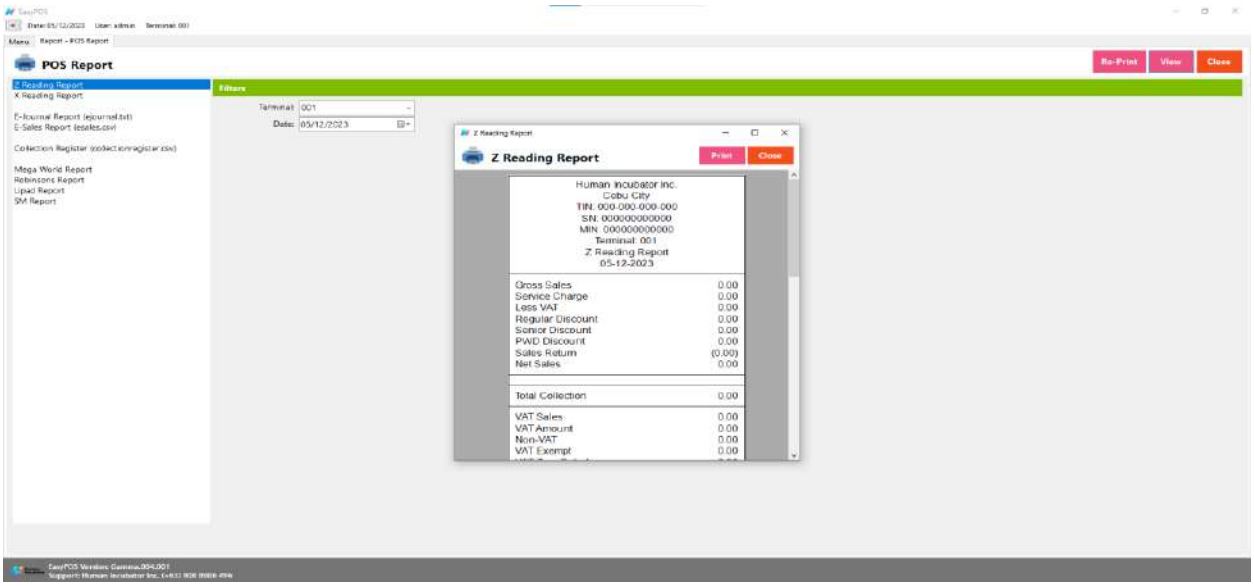
Overview

- **POS Report** is where users can see the final sales report within the day. Also, this is where users can generate reports that are needed for BIR such as Z-Reading.

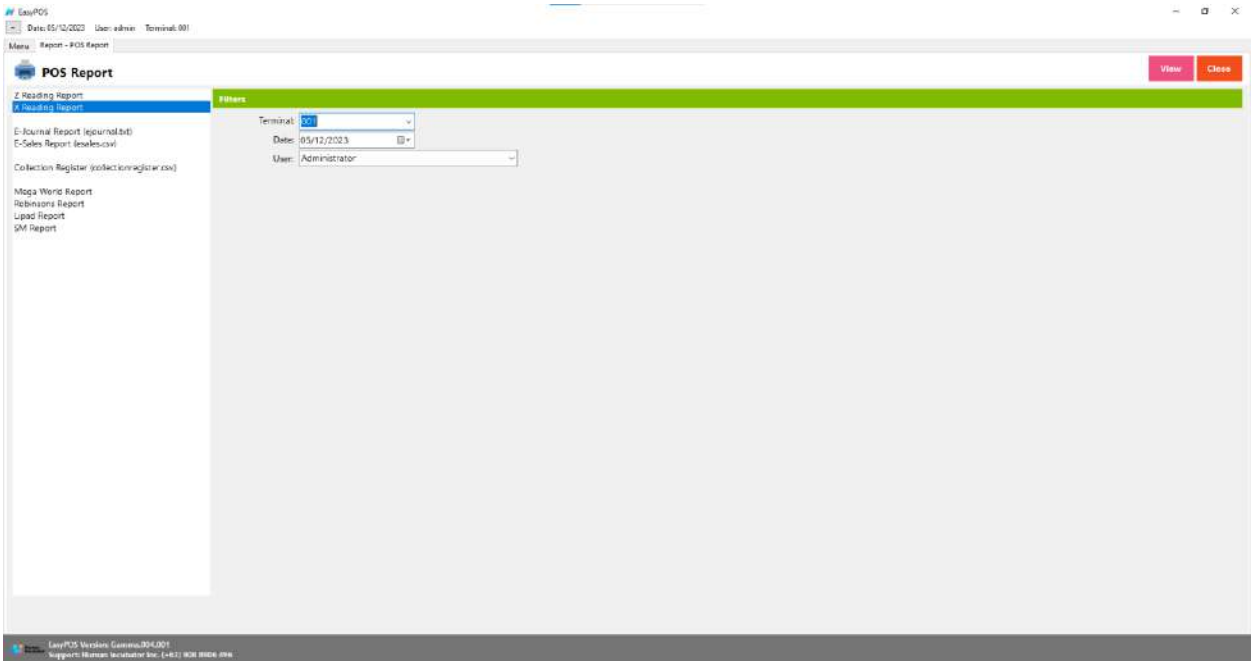
Z Reading Report



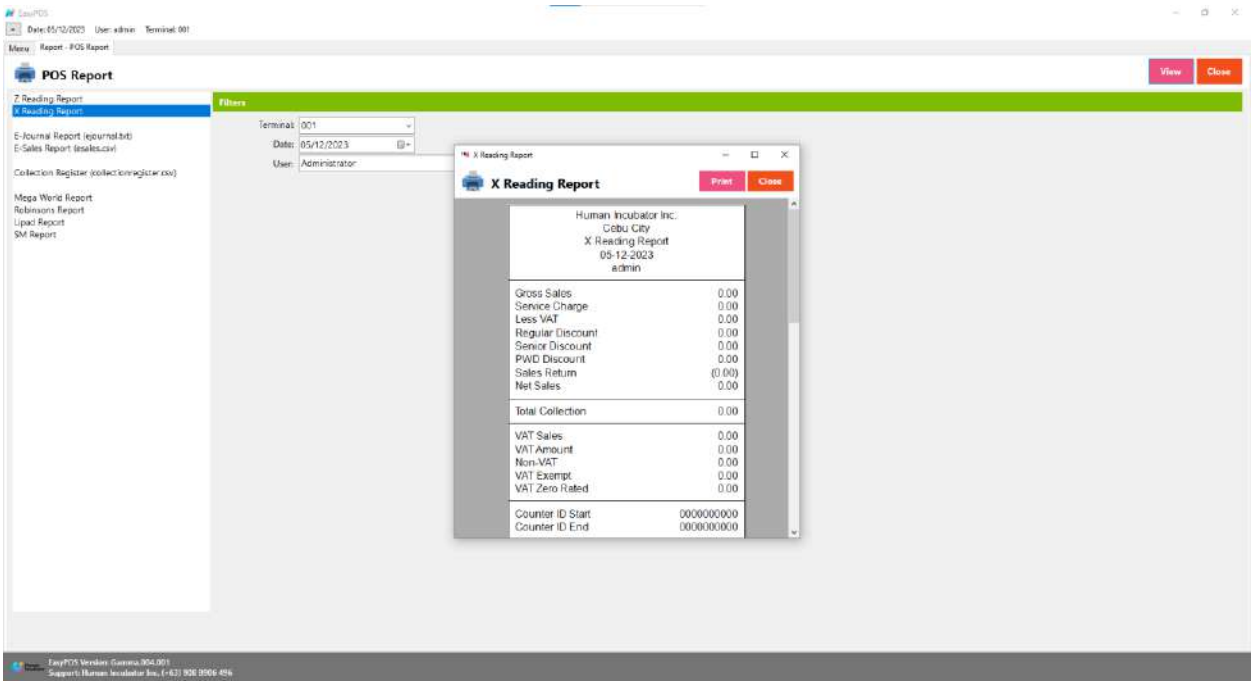
- Select start date and end date.
- Click the **Re-Print** button to automatically print the end of day report
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



X Reading Report



- Select start date and end date.
- It can also be filtered by User
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report

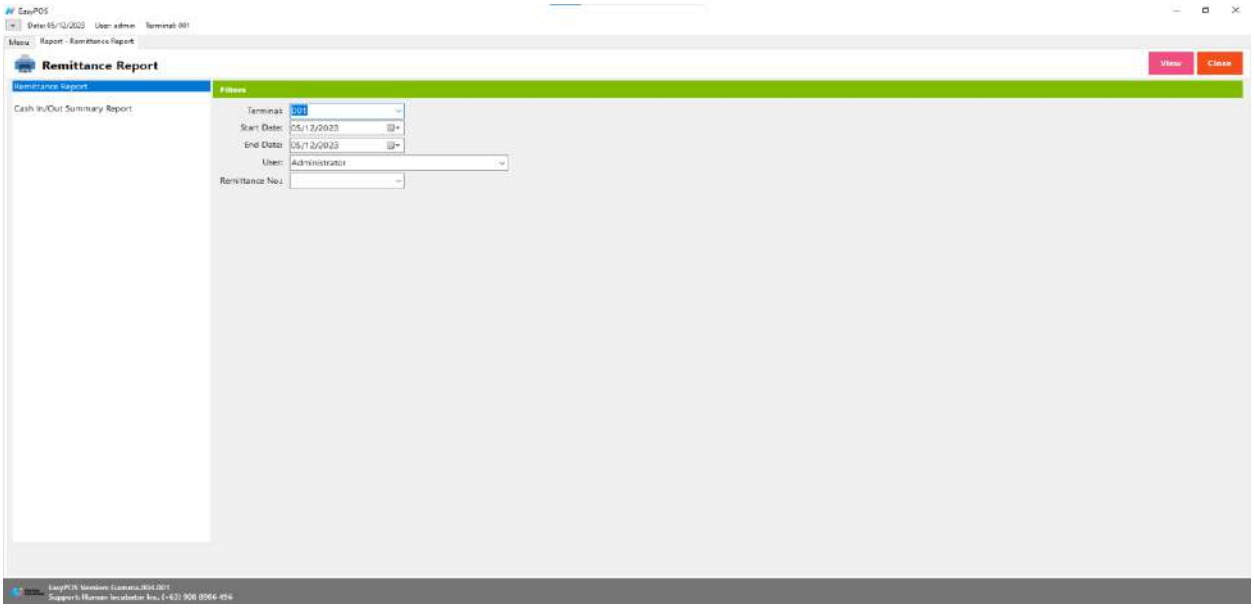


Remittance Report

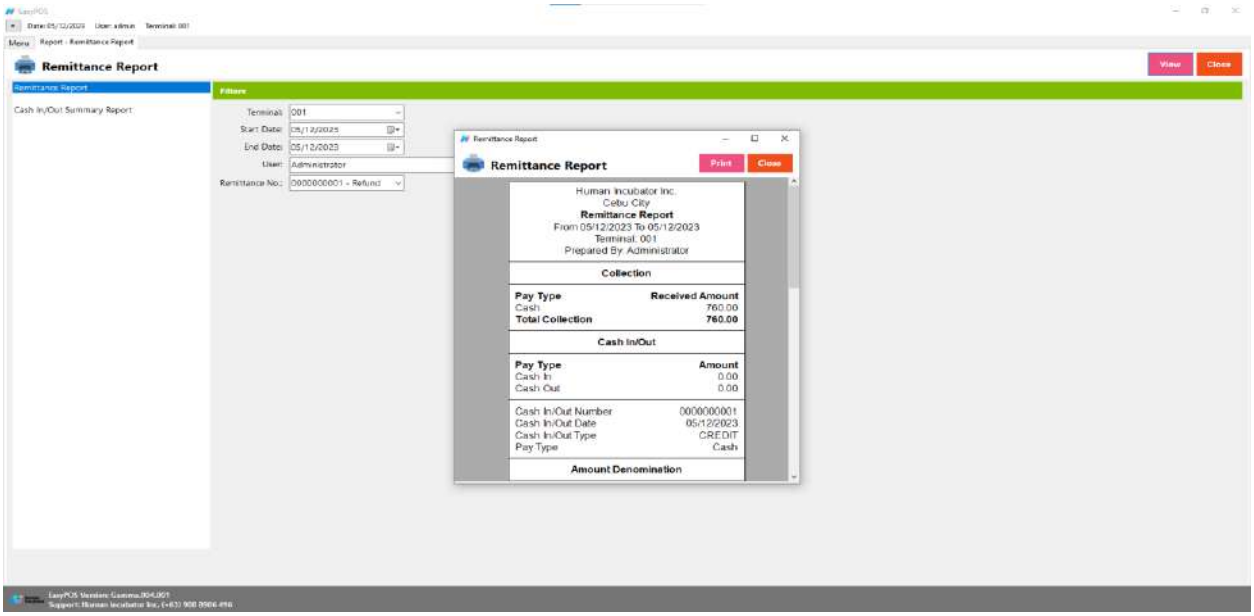
Overview

- **Remittance Report** is where users can see the reports for Cash/In Out with the Remittance report.

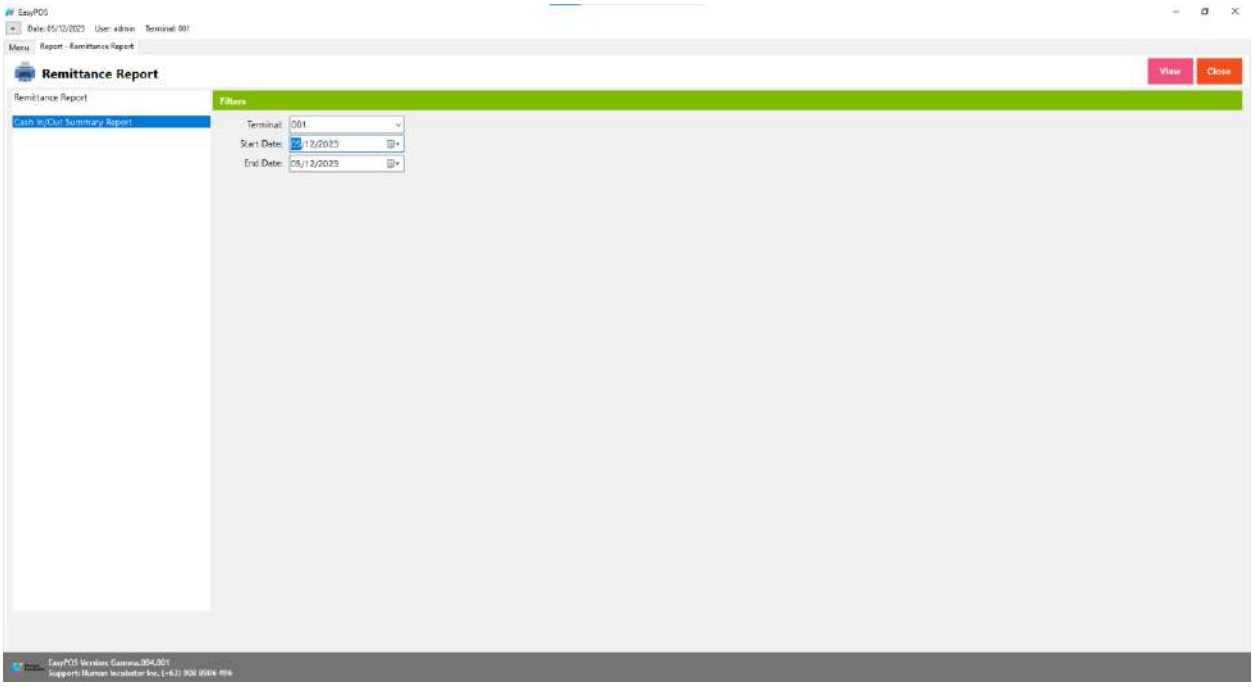
Remittance Report



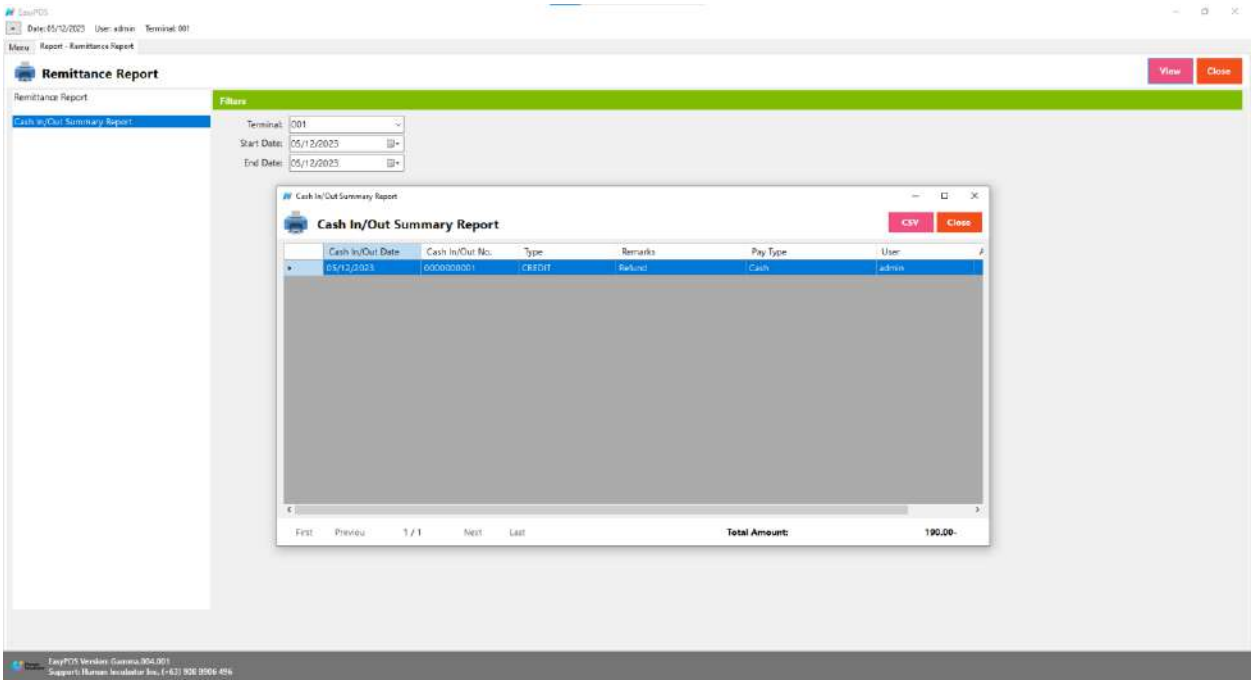
- Select Terminal, start date, end date, User and Remittance No..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



Cash In/Out Summary Report



- Select Terminal, start date and end date..
- Click the **View** button to view the report
- Click **CSV** button to print csv file format report

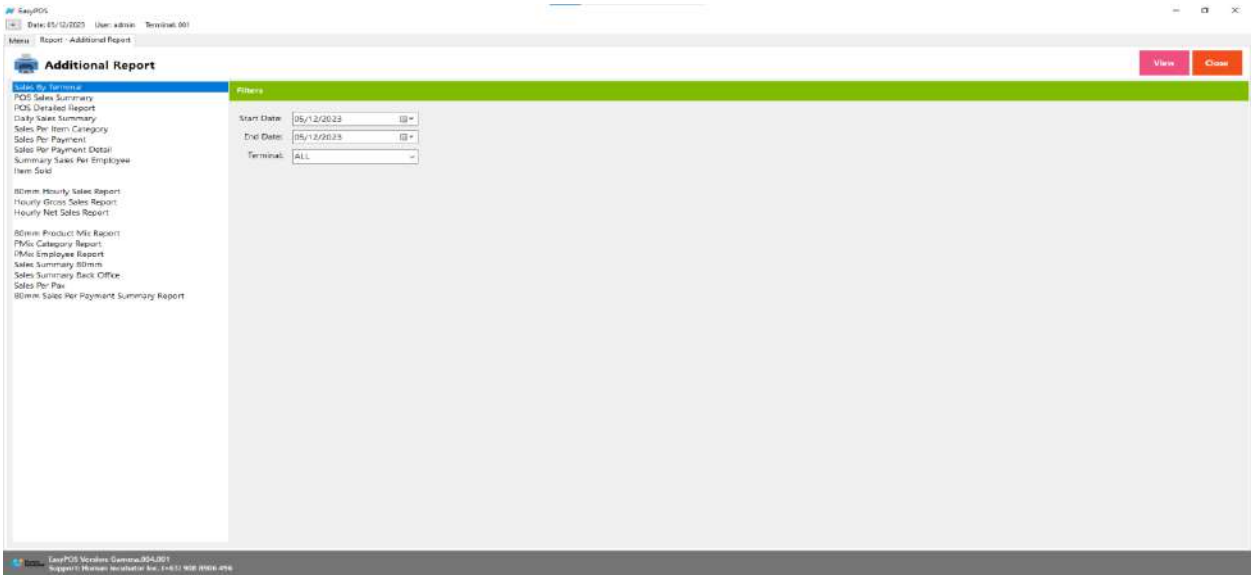


Additional Report

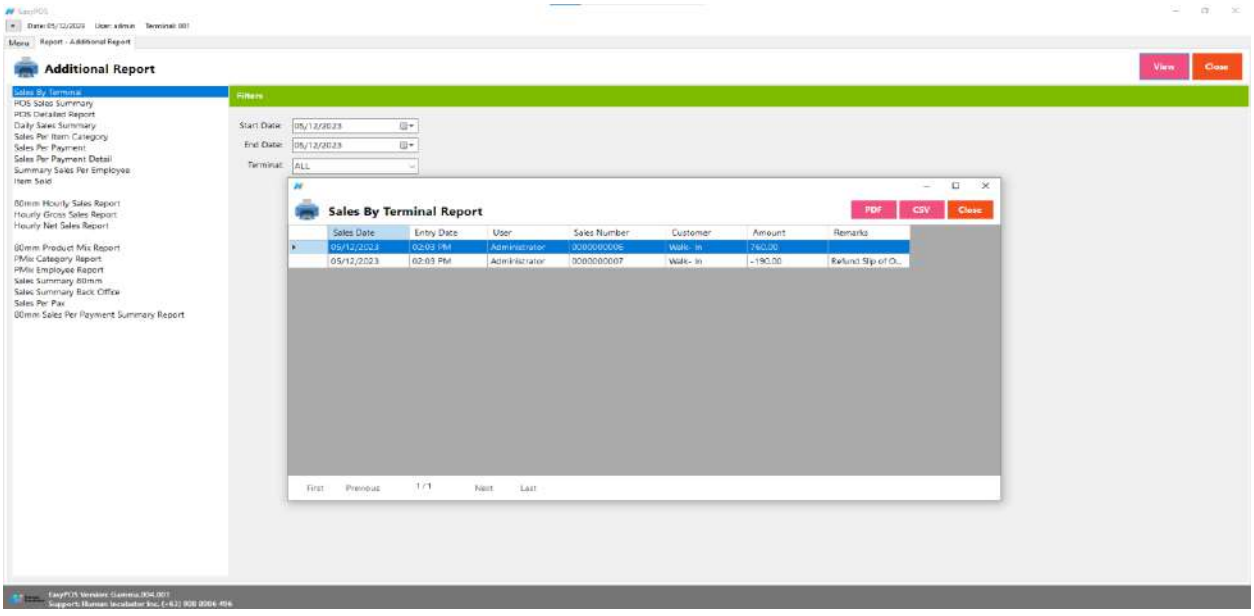
Overview

- **Additional Report** is the newly added reports.

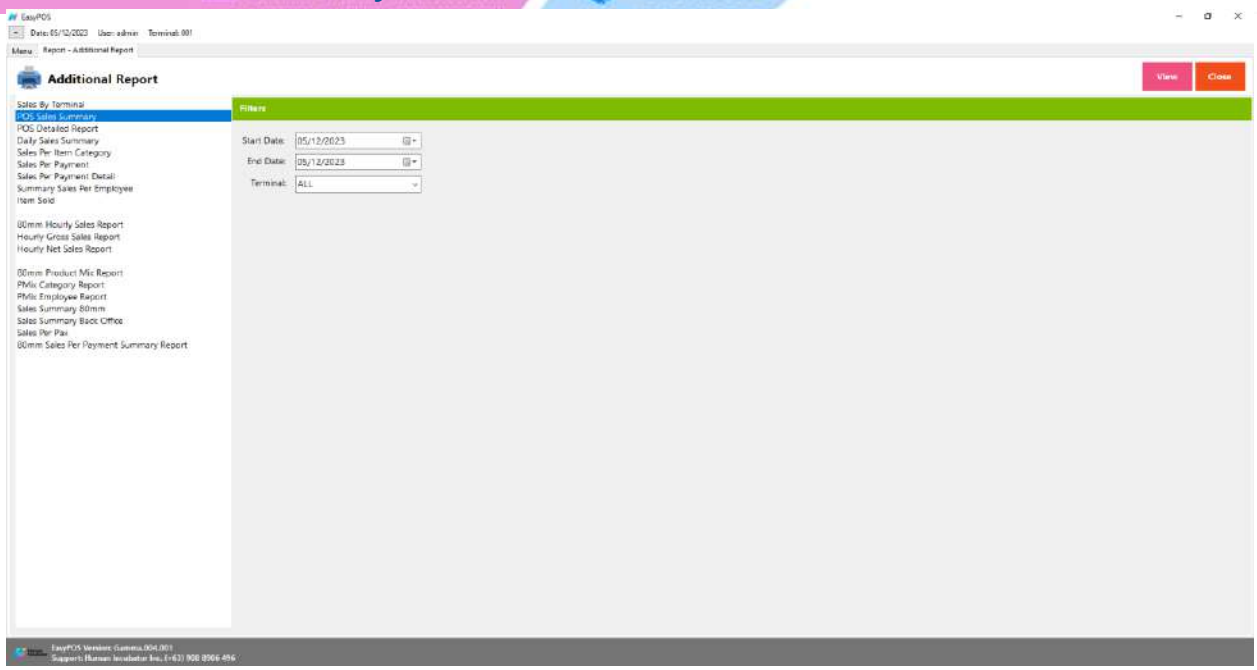
Sales By Terminal



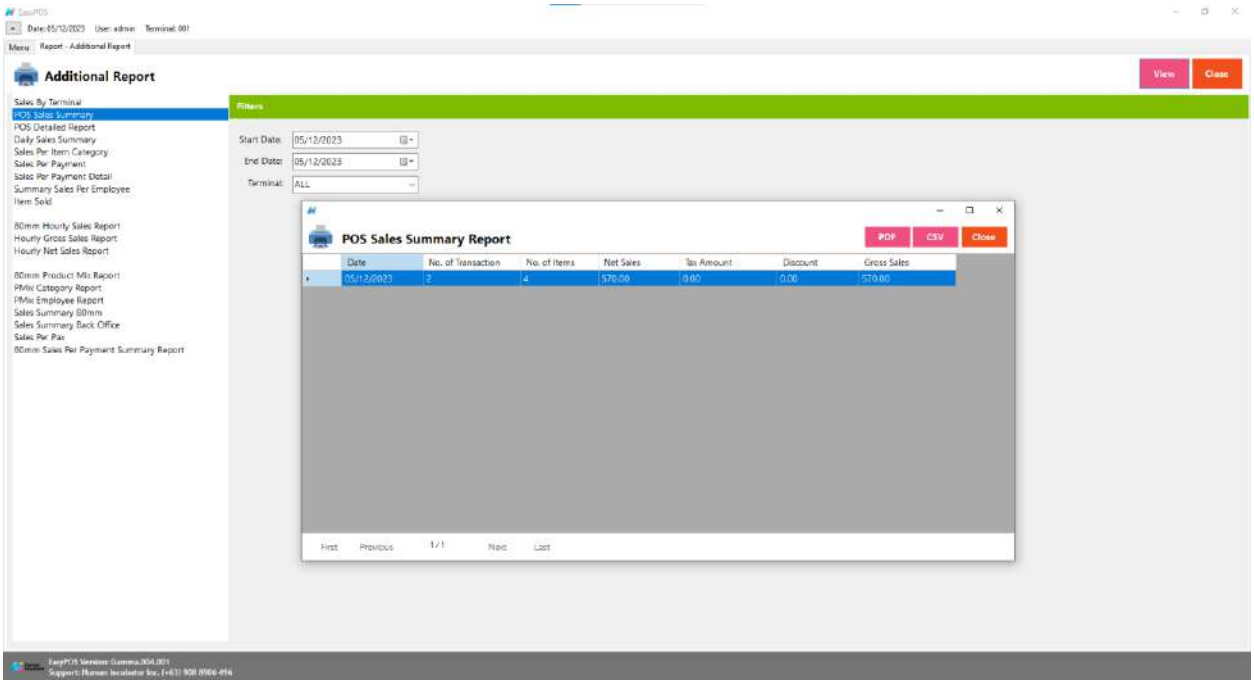
- Select Terminal, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



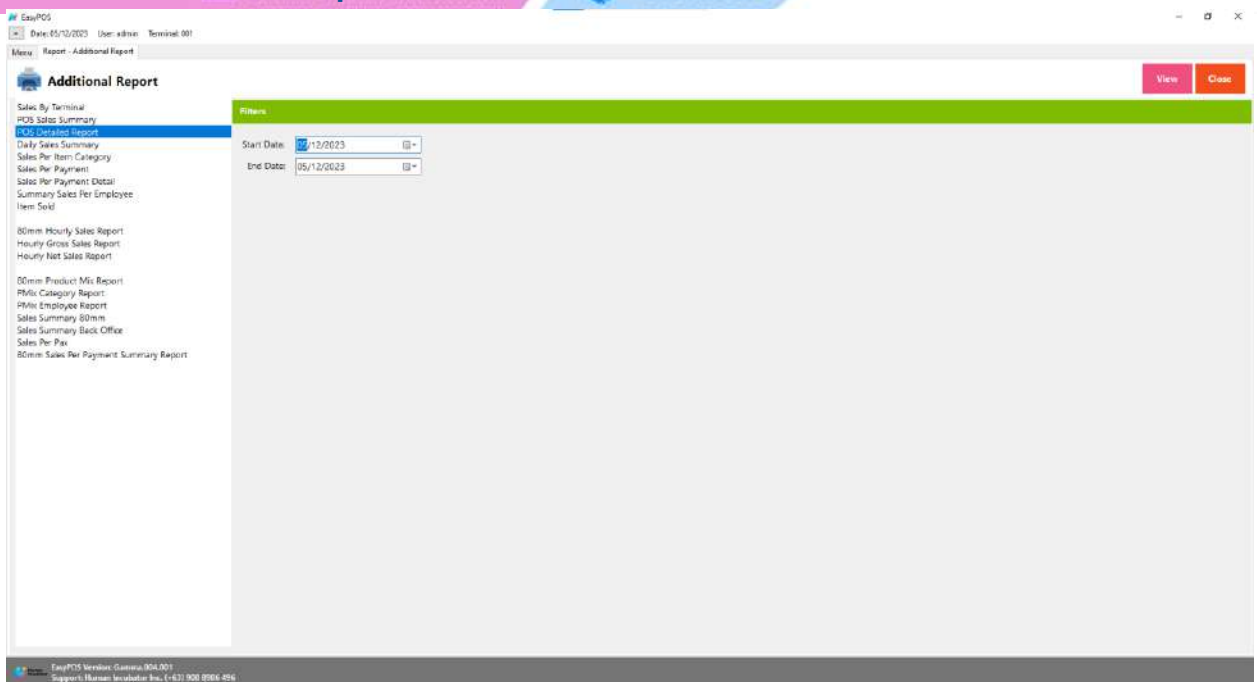
POS Sales Summary



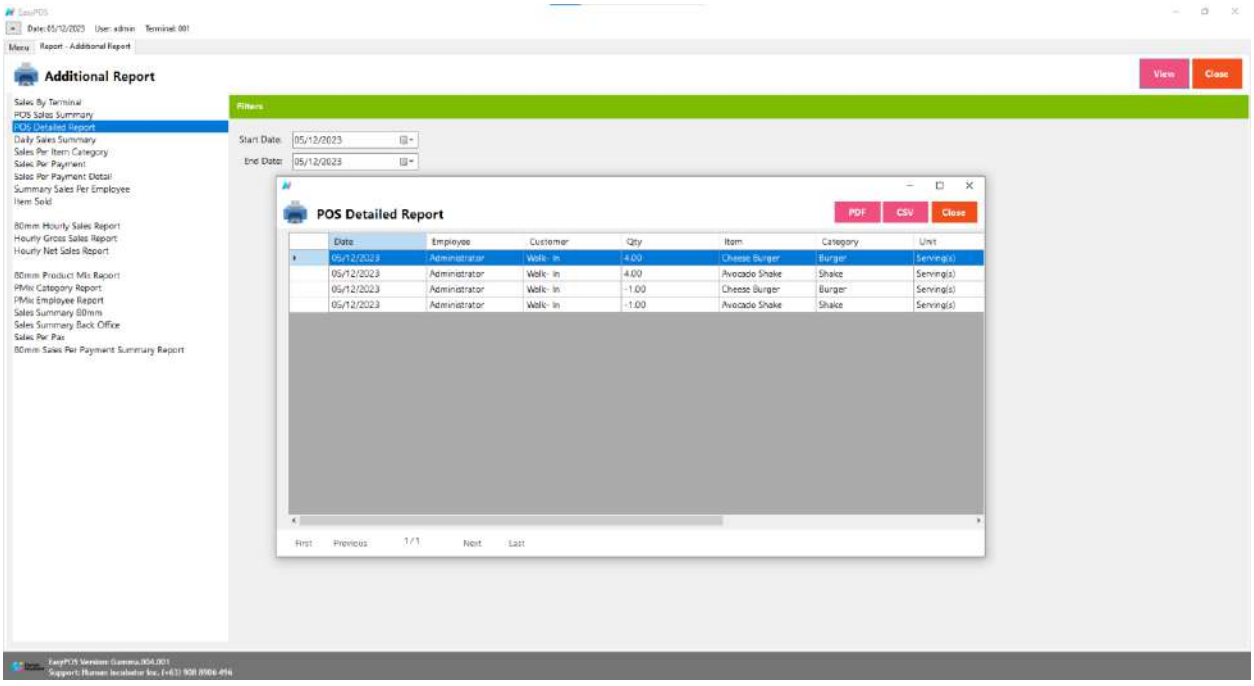
- Select Terminal, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



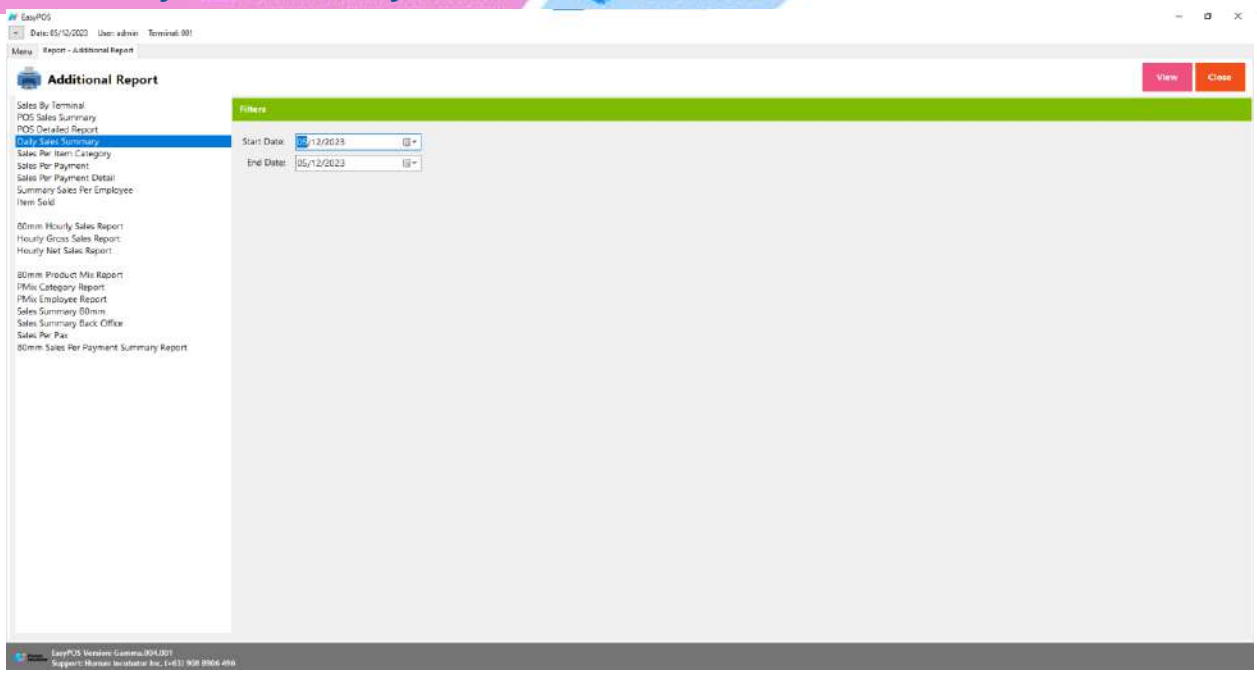
POS Detailed Report



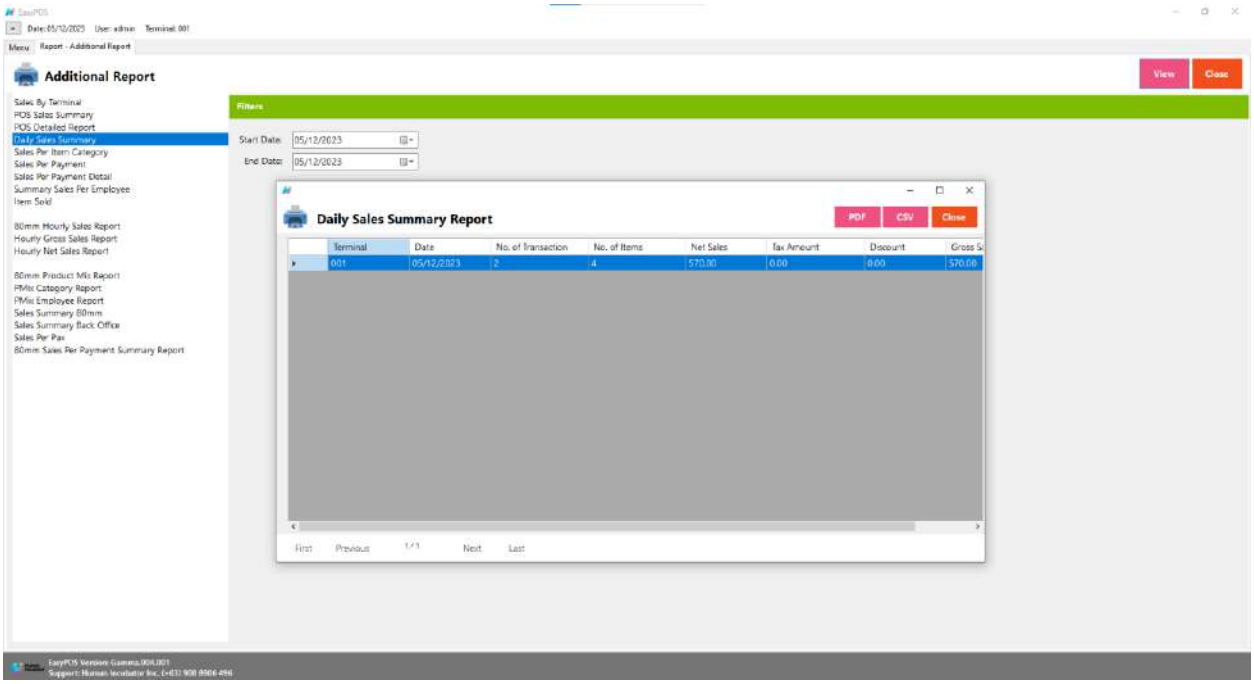
- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



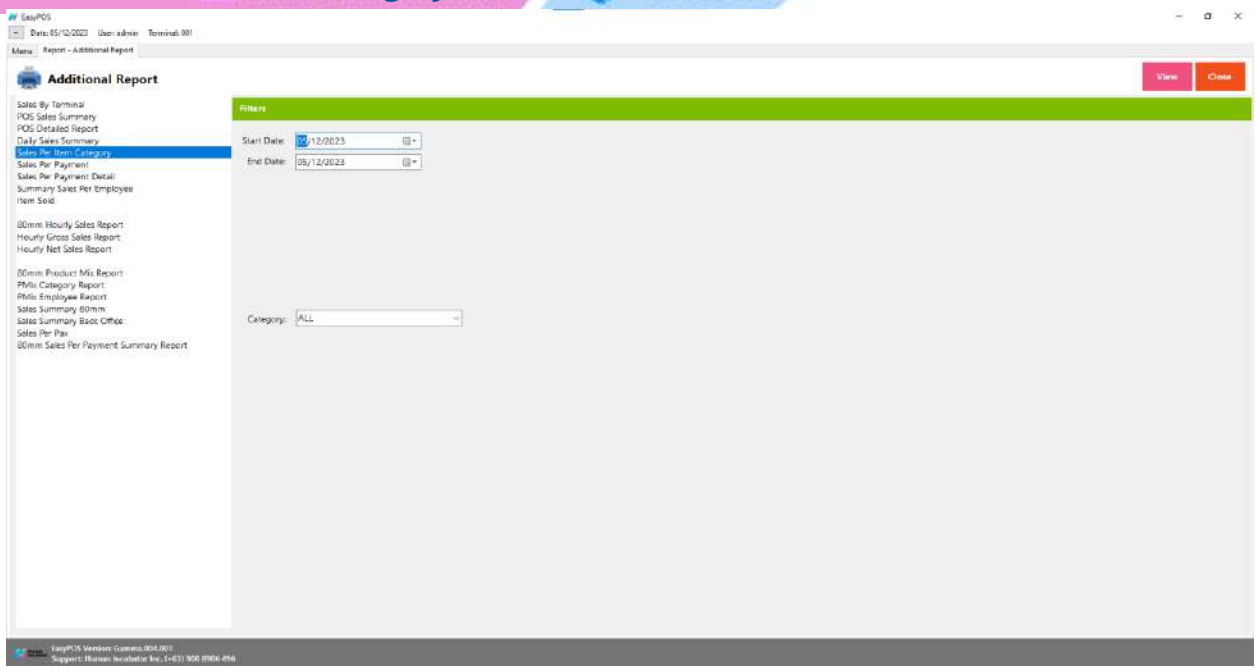
Daily Sales Summary



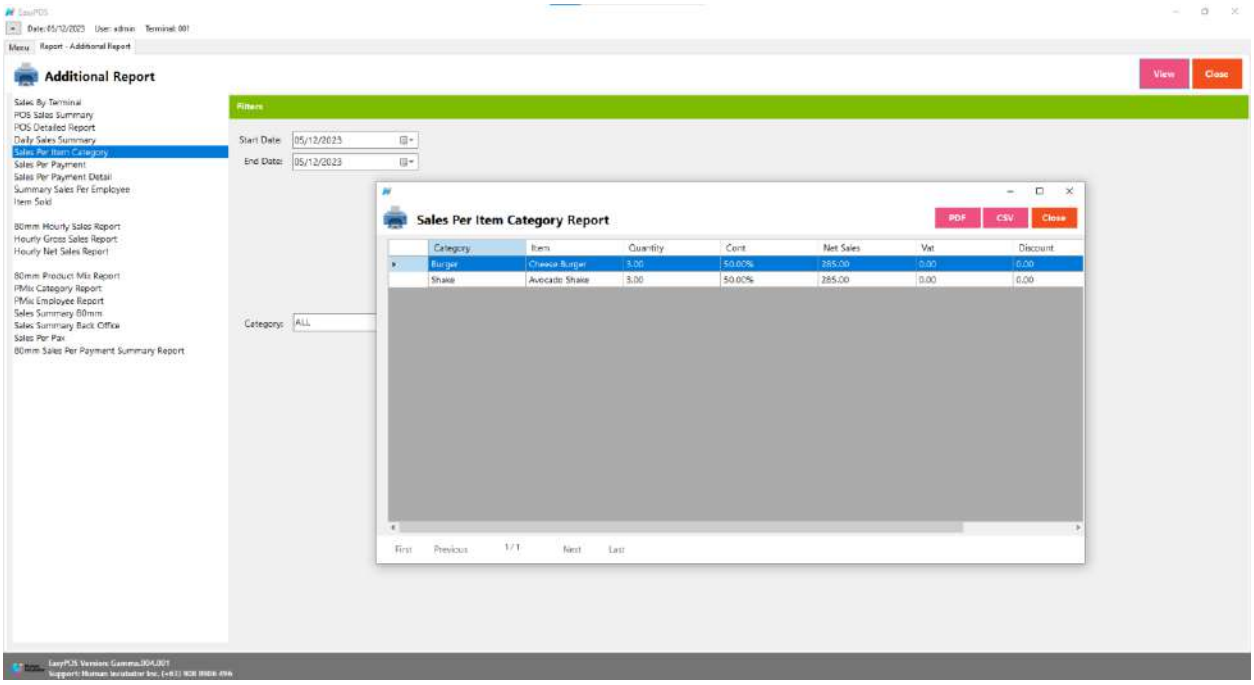
- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



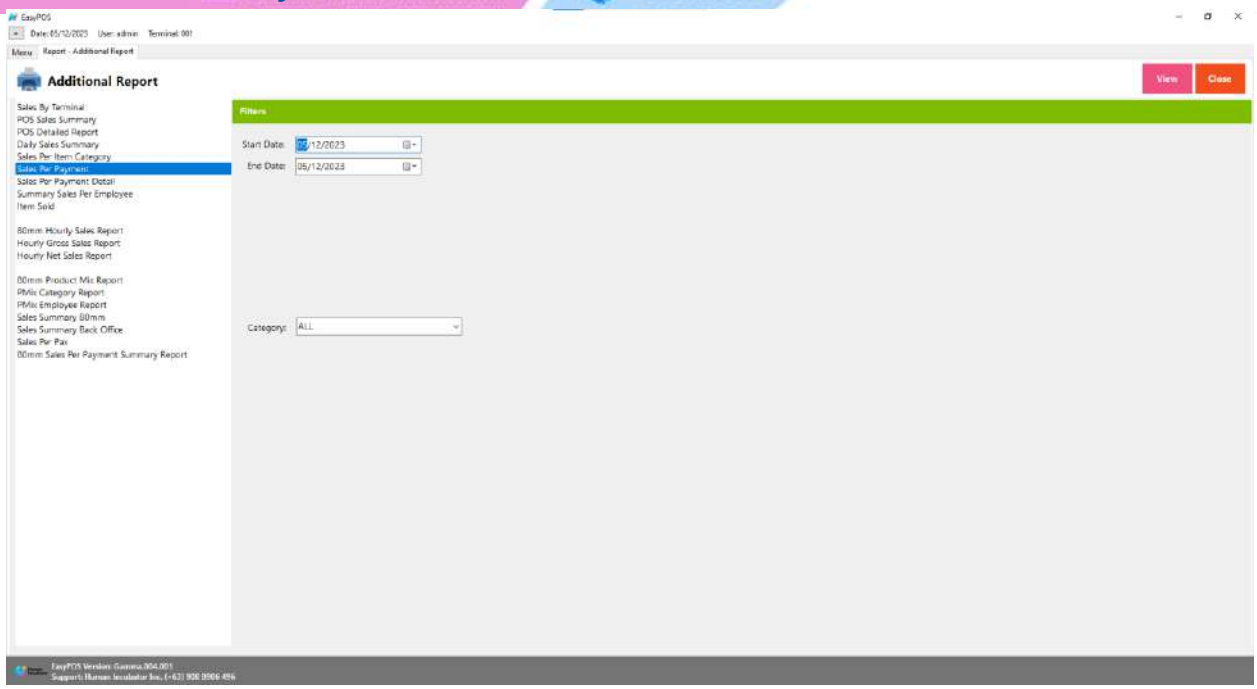
Sales Per Item Category



- Select Category, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



Sales Per Payment



- Select Category, Start Date and End Date.
- Click the **View** button to view the report
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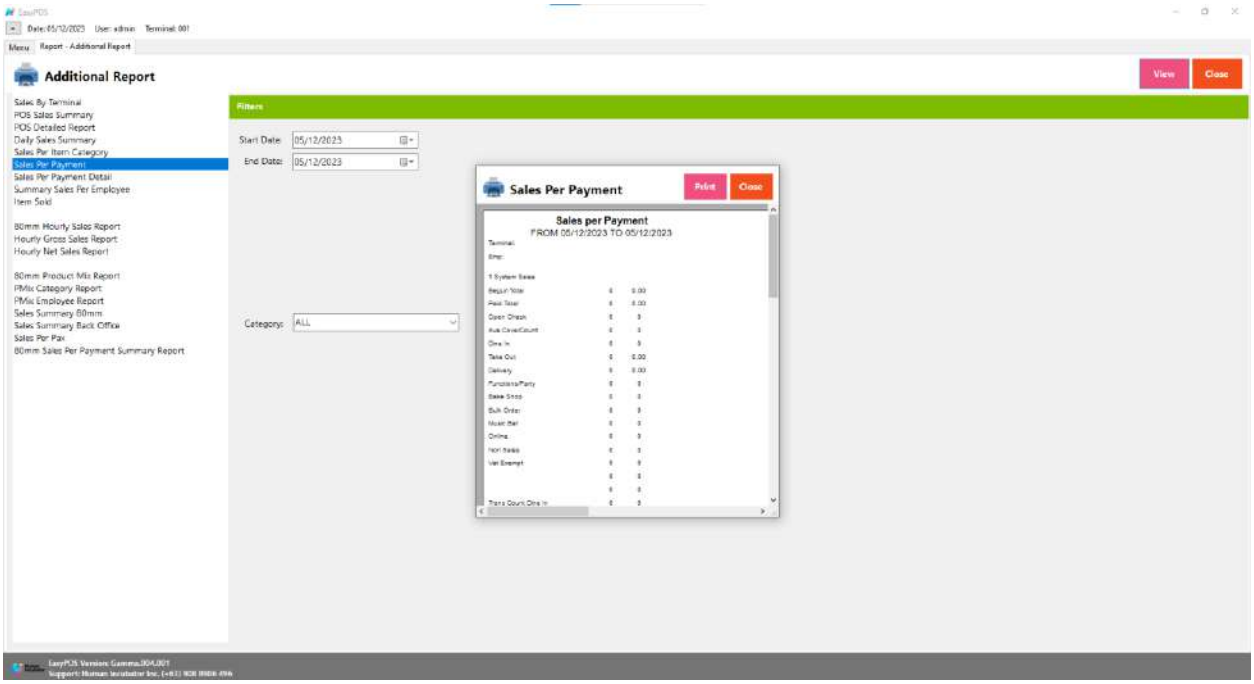

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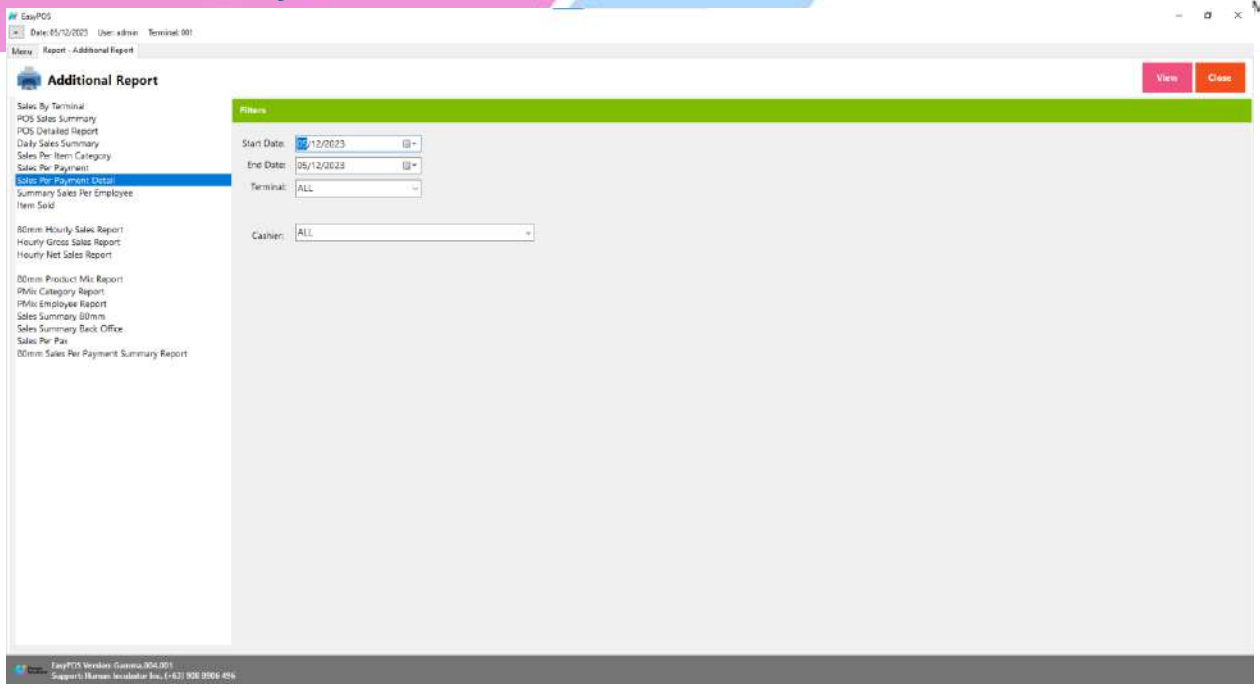
Sales Per Payment Detail



- Select Cashier, Terminal, Start Date and End Date.
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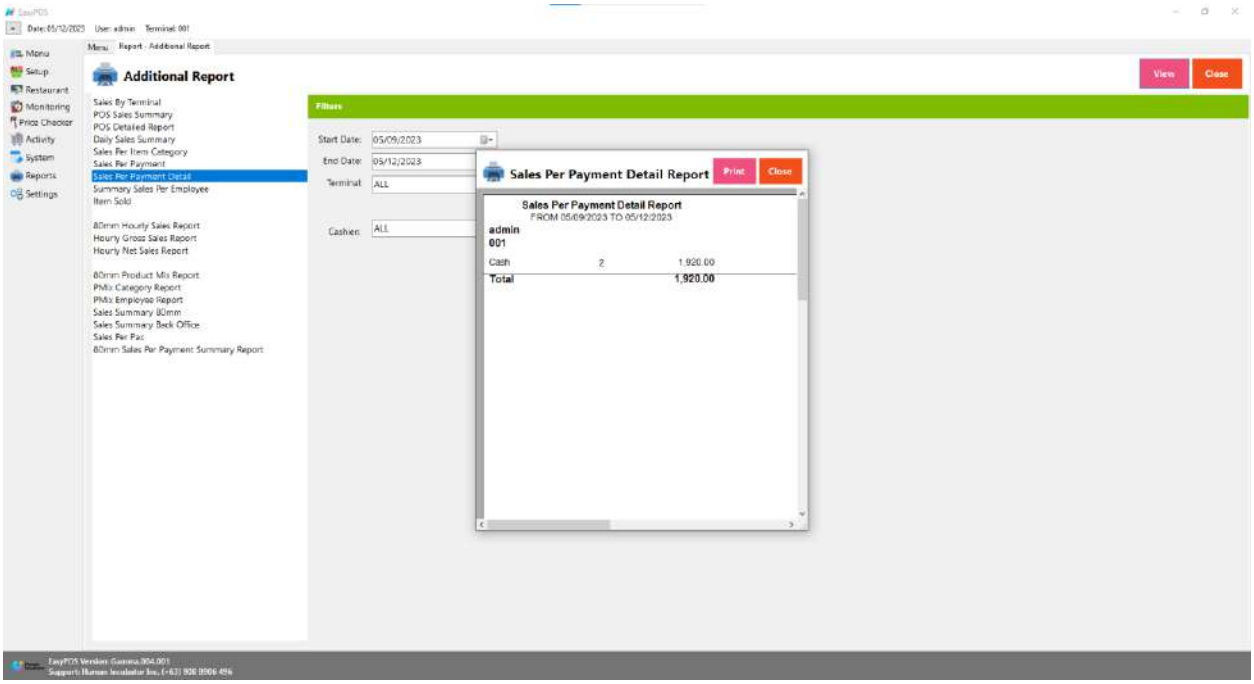

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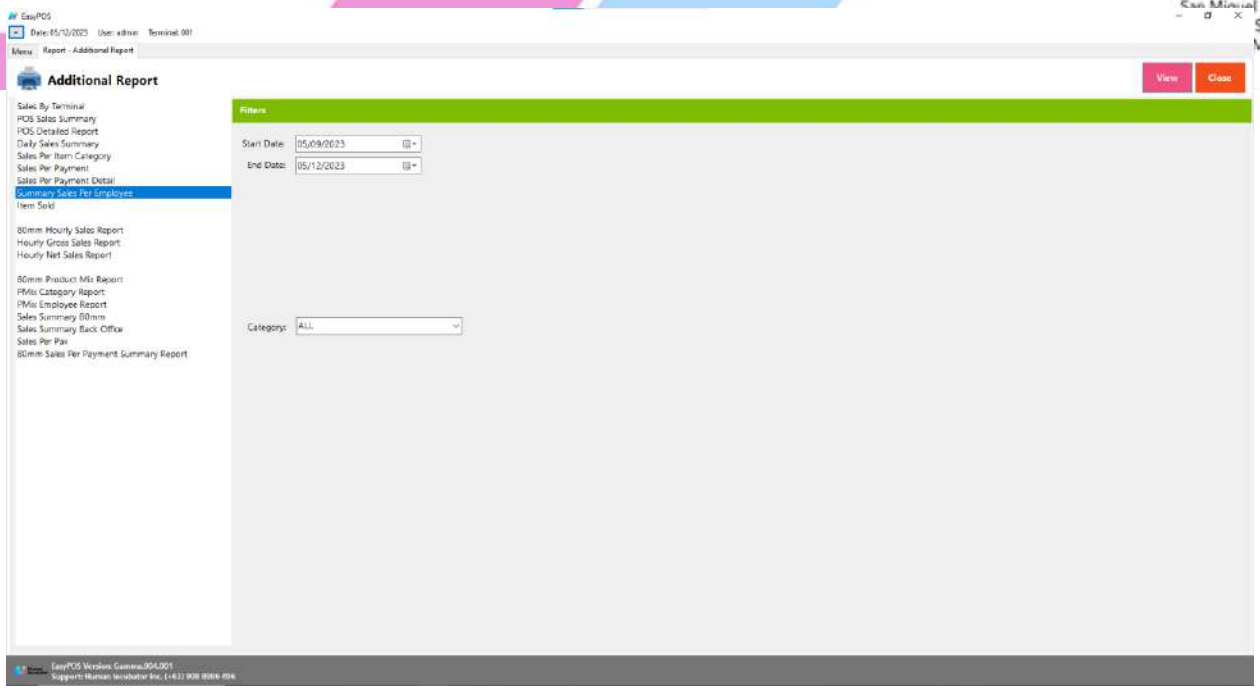
Summary Sales Per Employee



- Select Category, Start Date and End Date.
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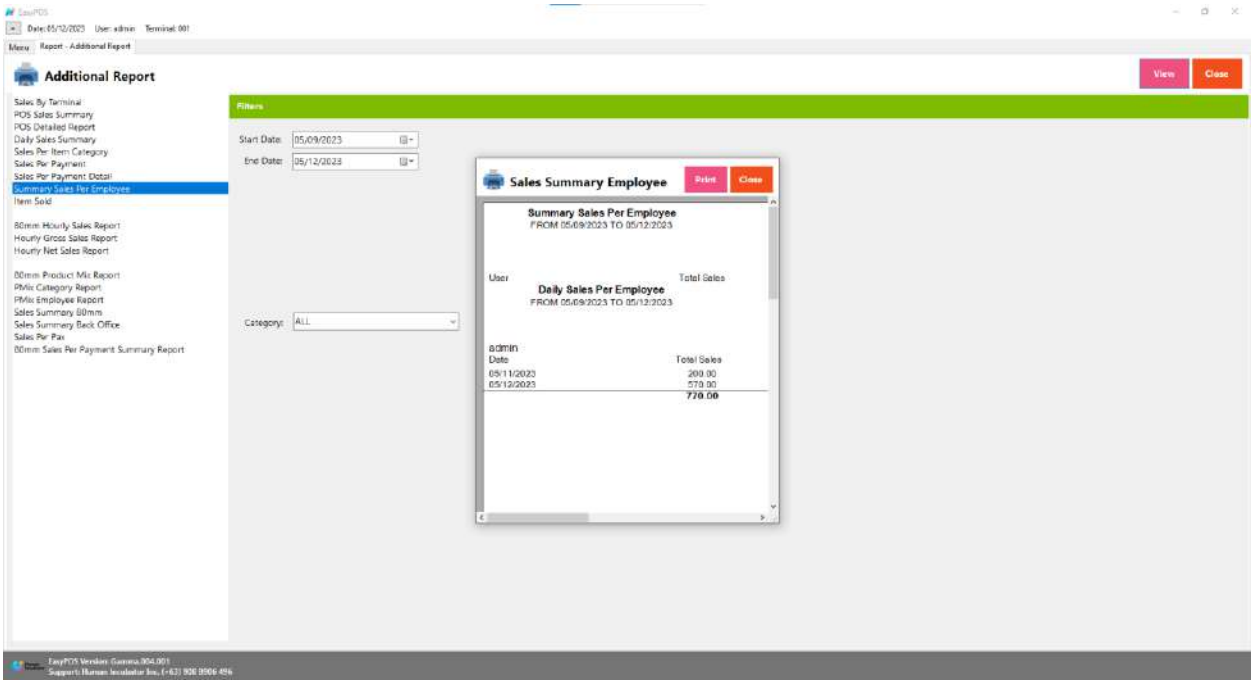

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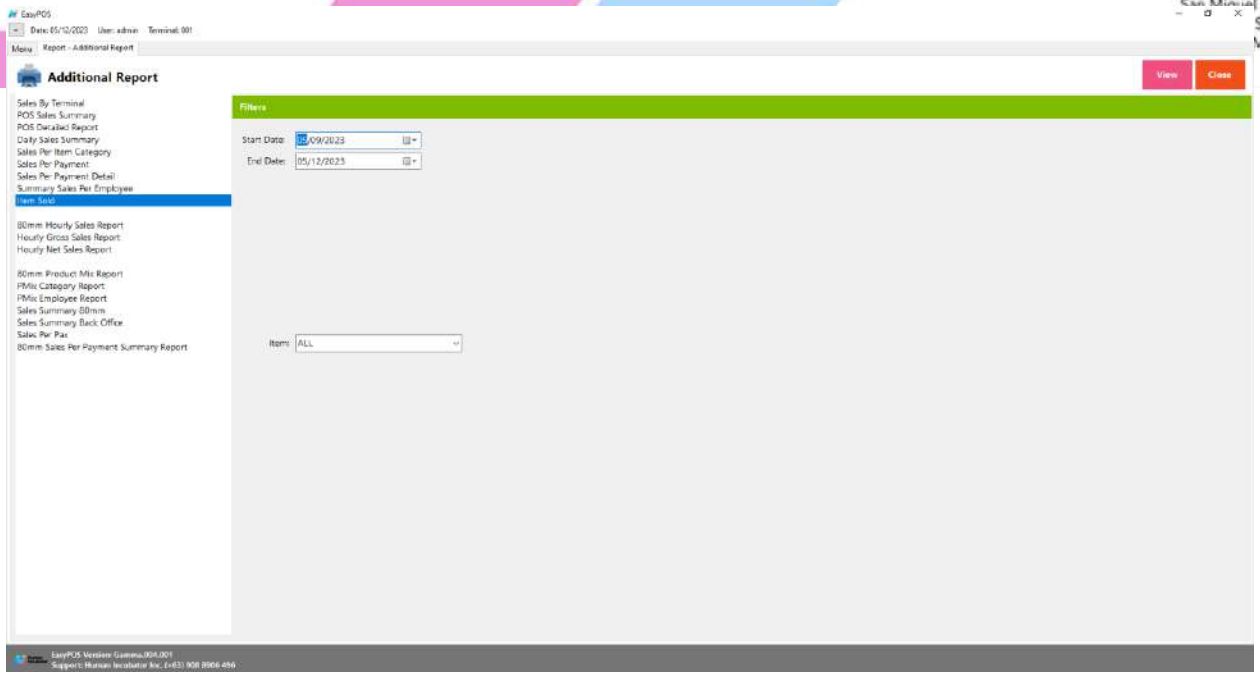
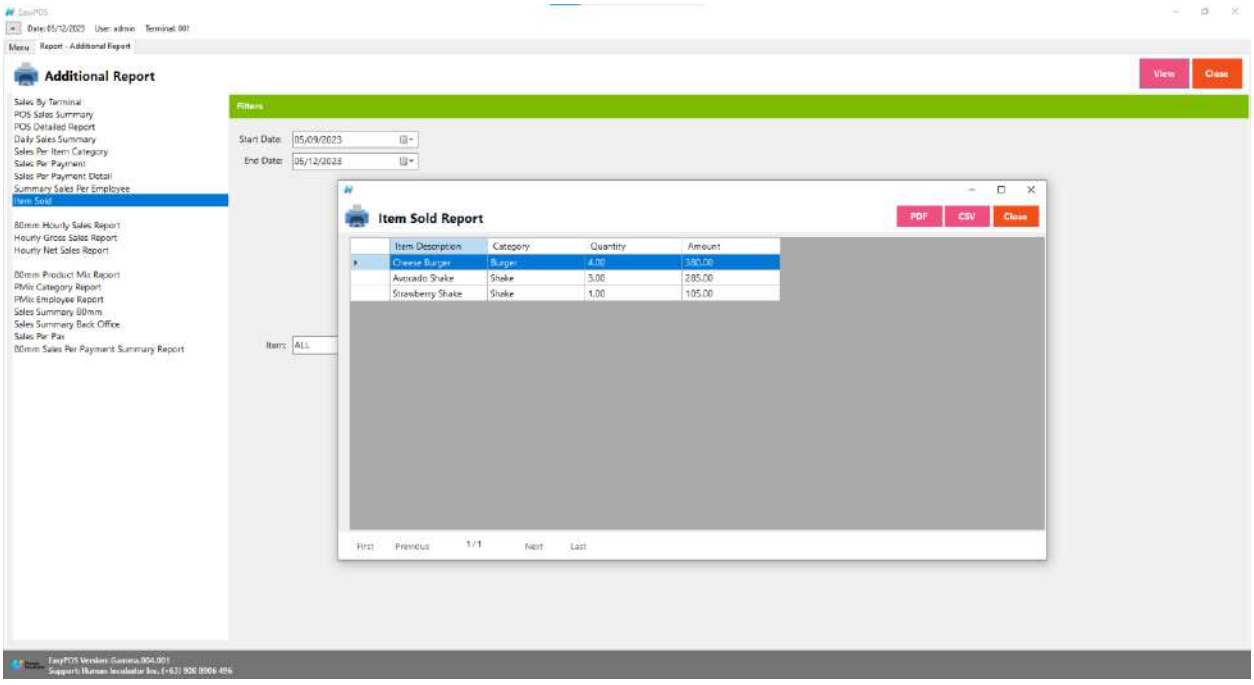
Item Sold



- Select Item, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



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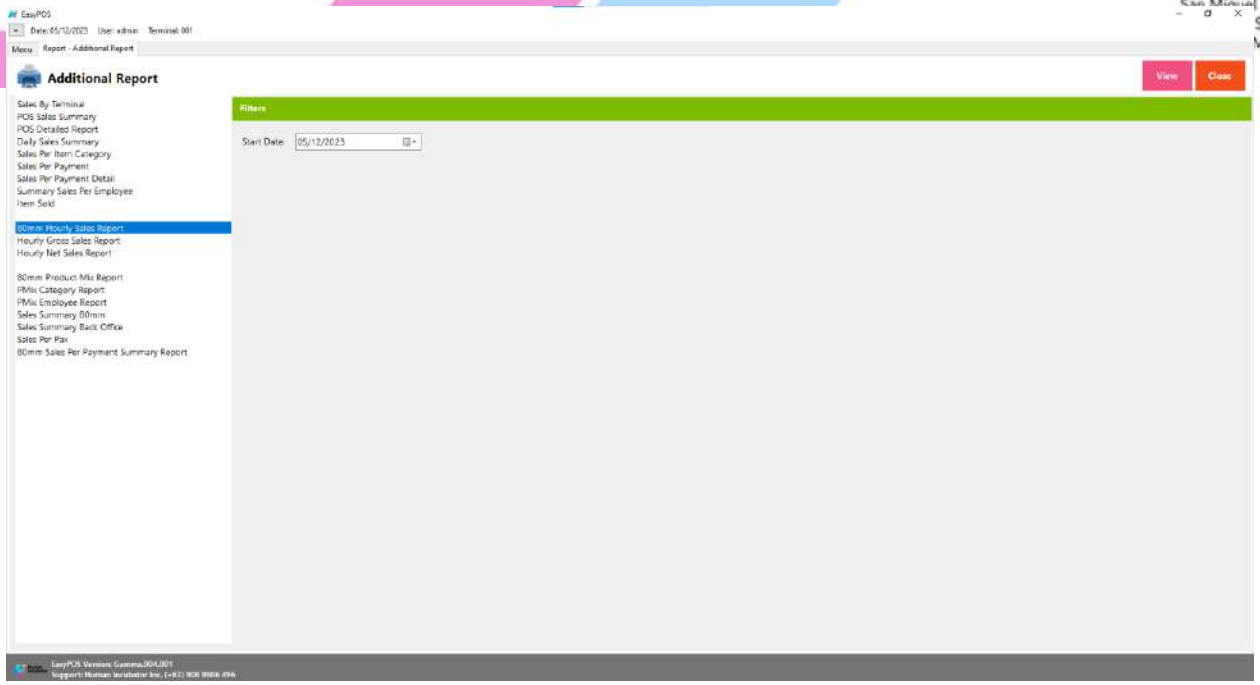
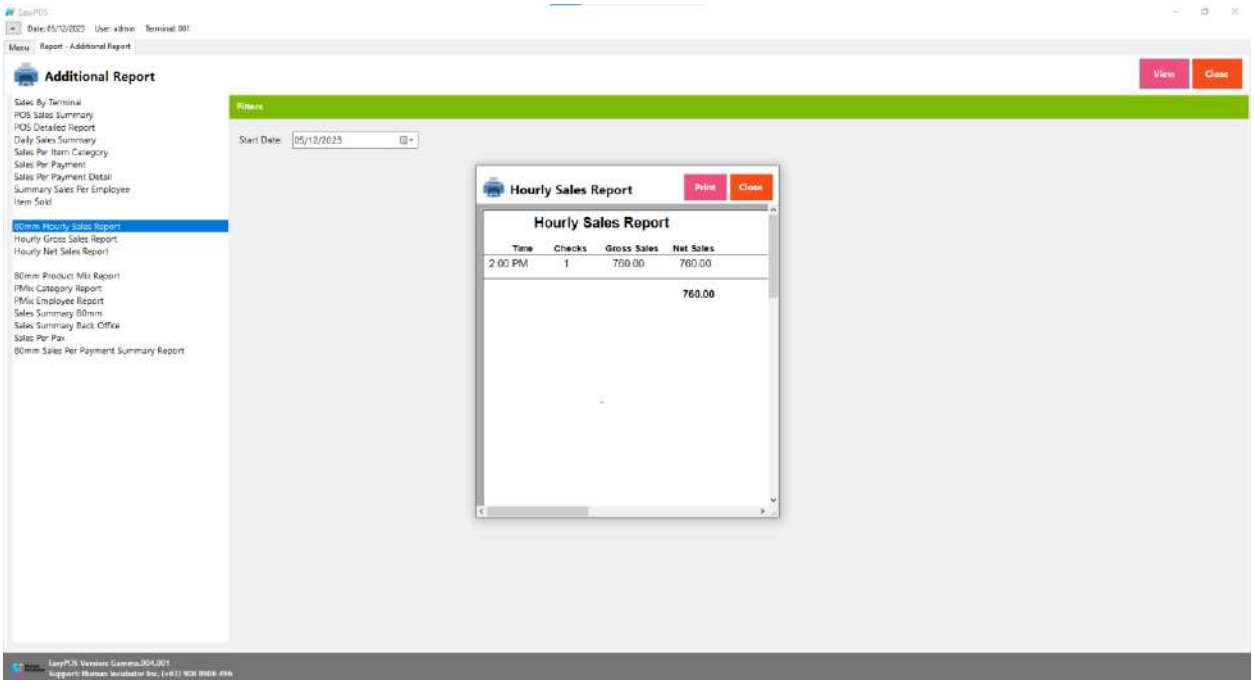
80mm Hourly Sales Report



- Select Start Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



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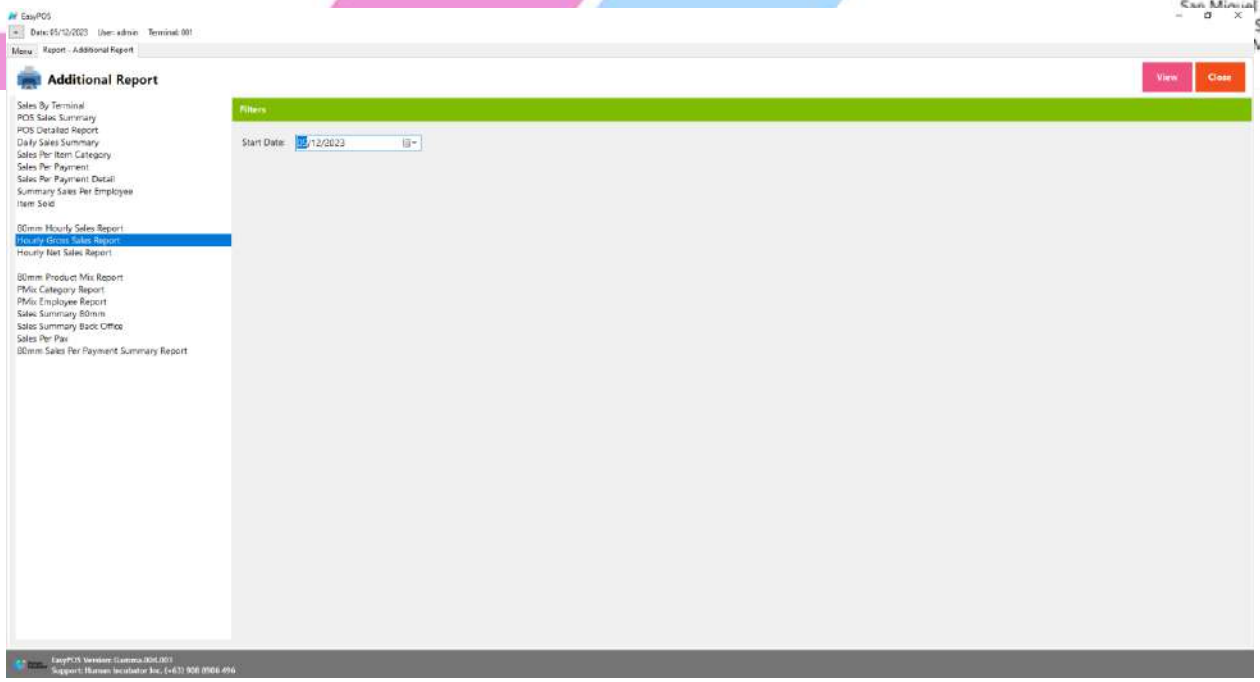
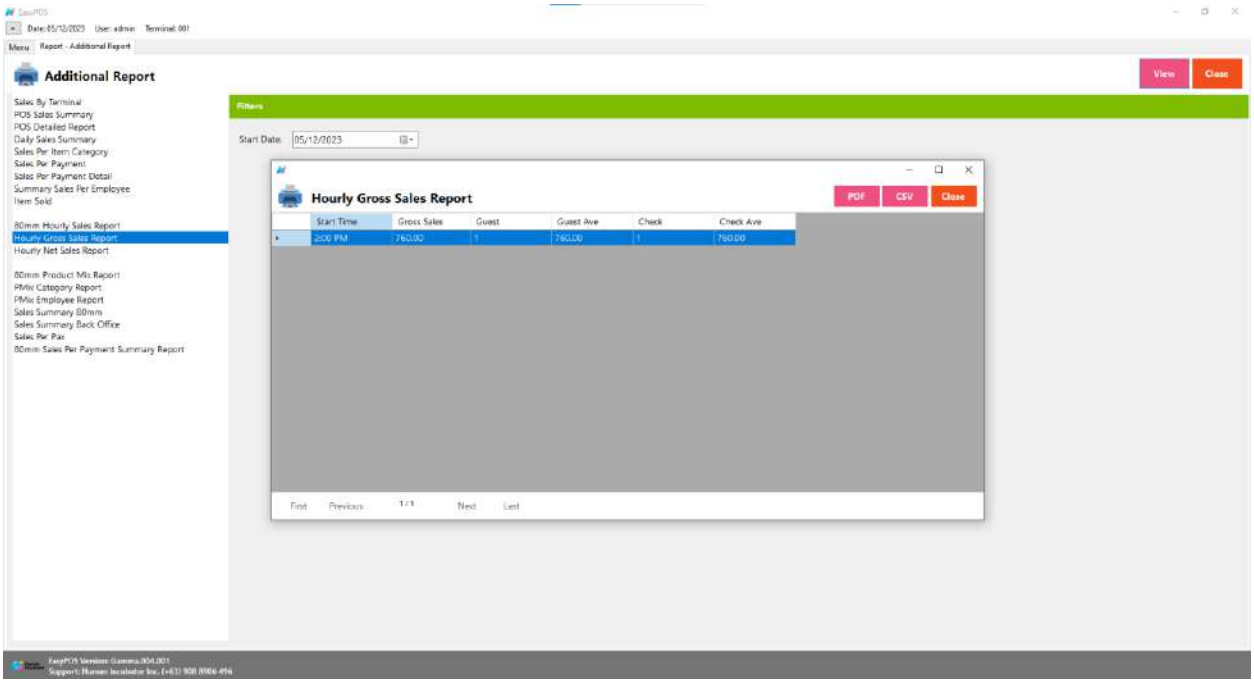
Hourly Gross Sales Report



- Select Start Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



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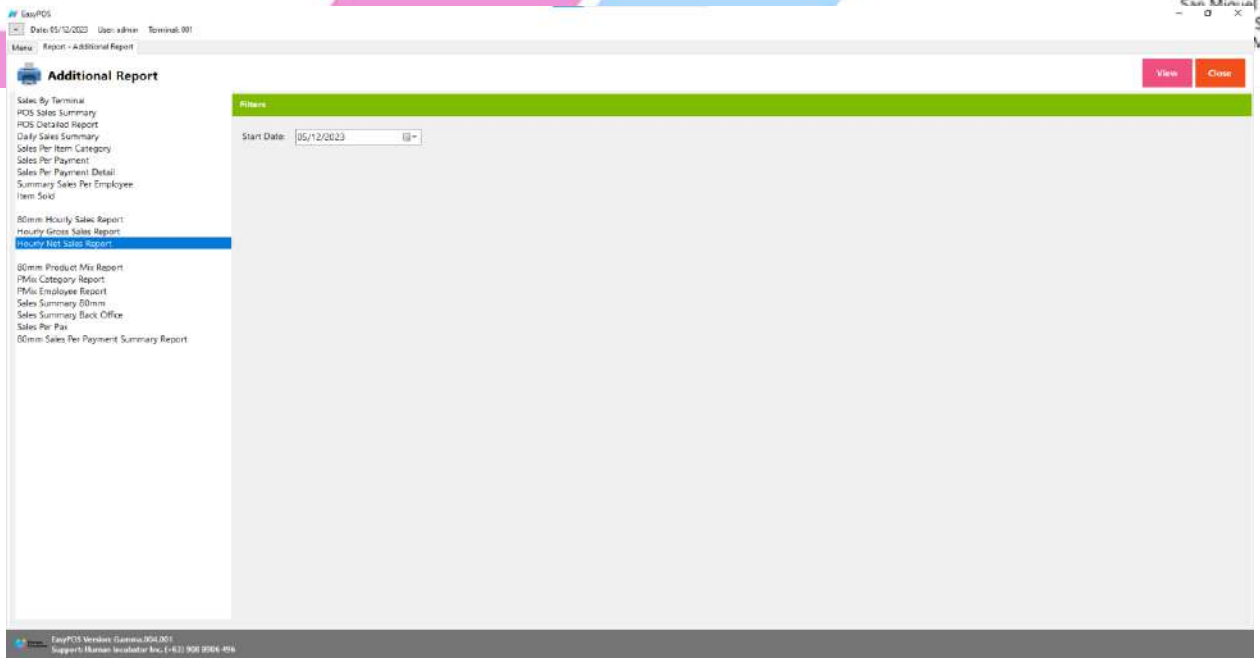
Hourly Net Sales Report



- Select Start Date.
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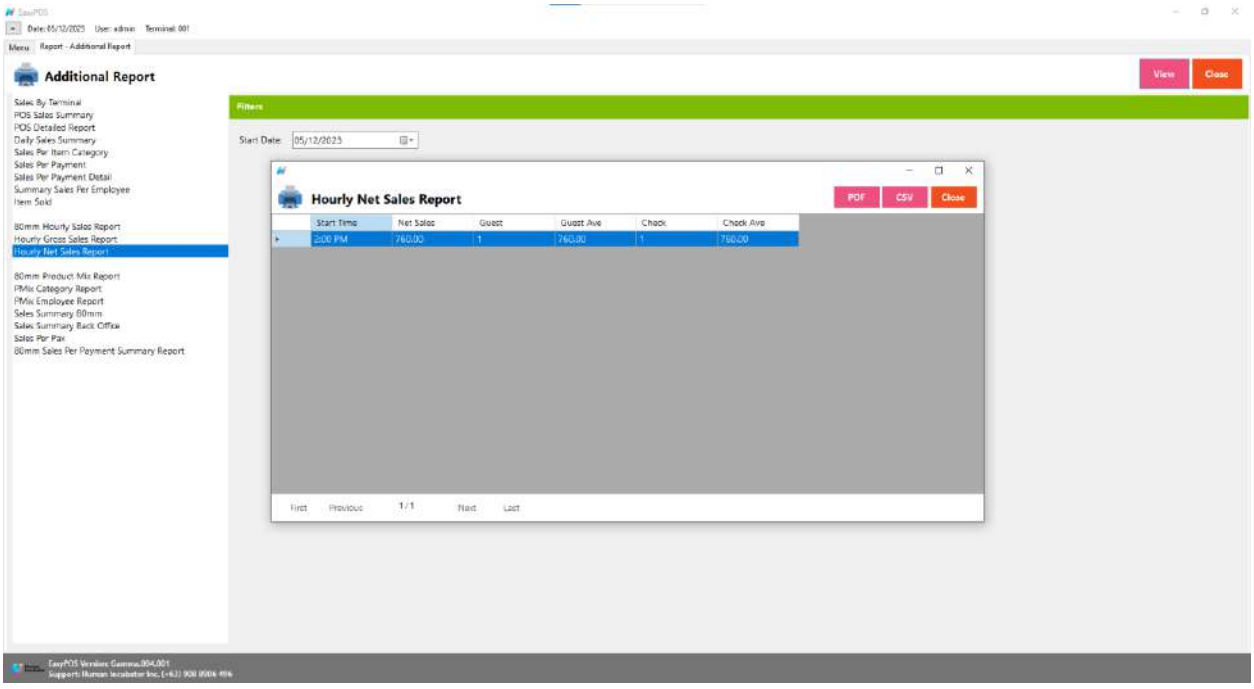
- Click **CSV** button to generate csv file format report



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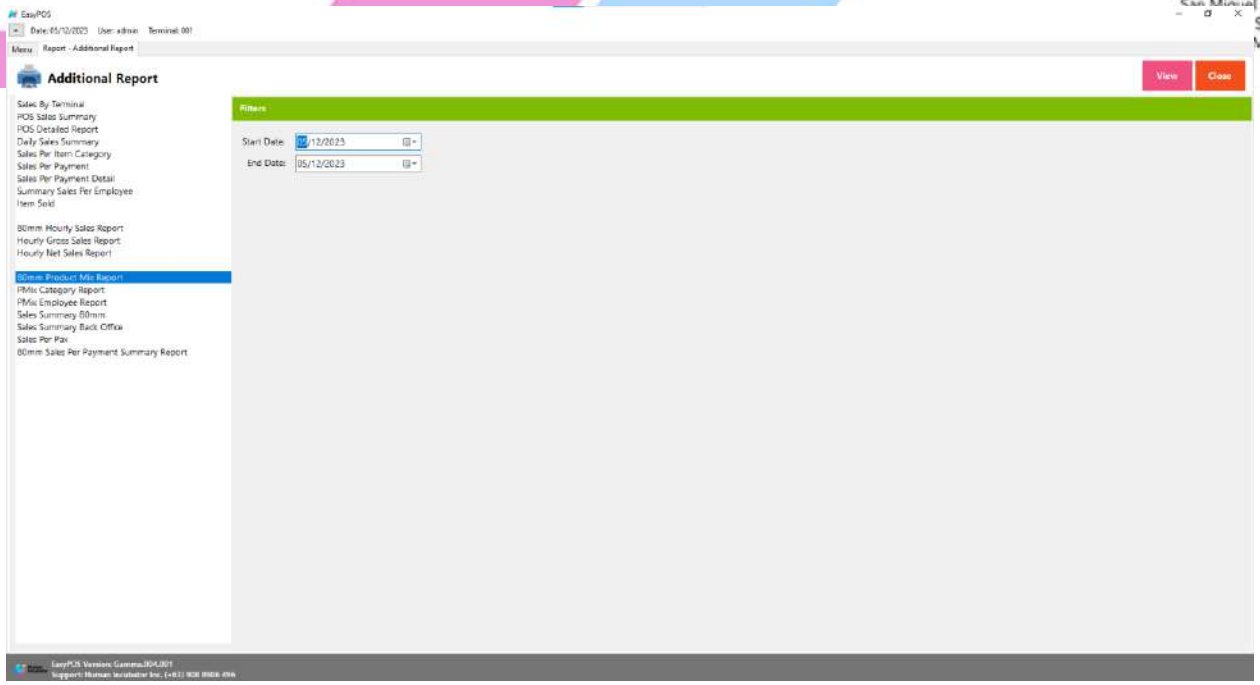
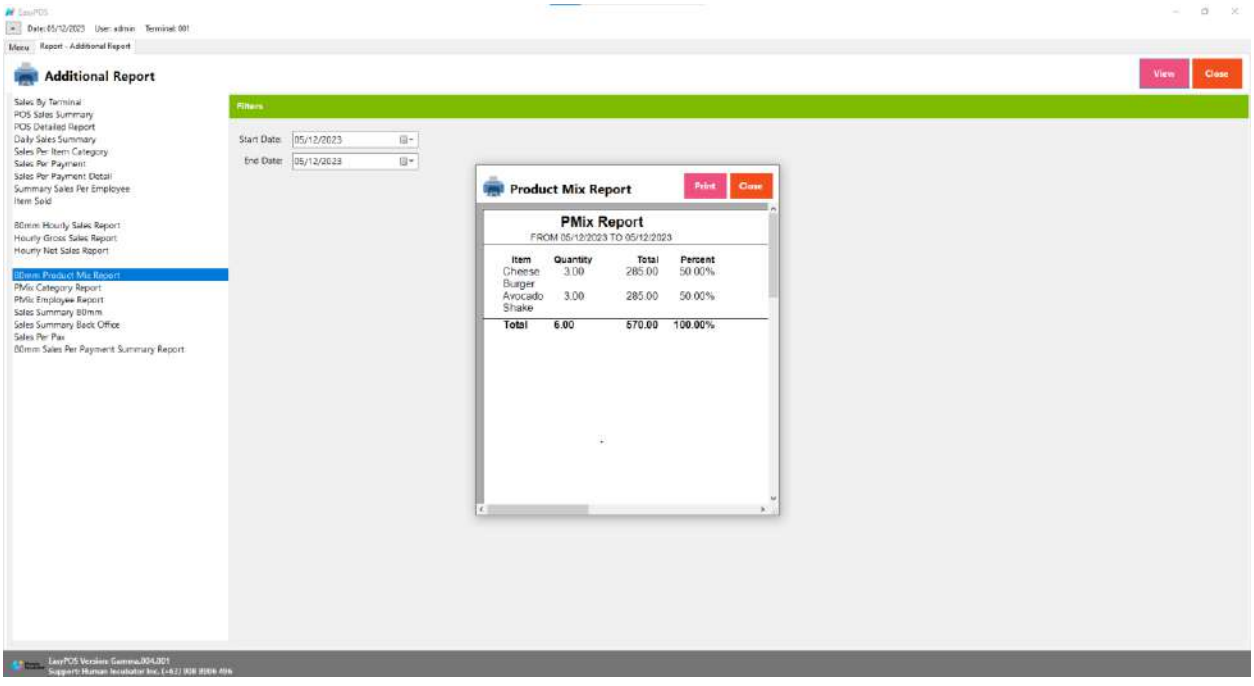
80mm Product Mix Report



- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



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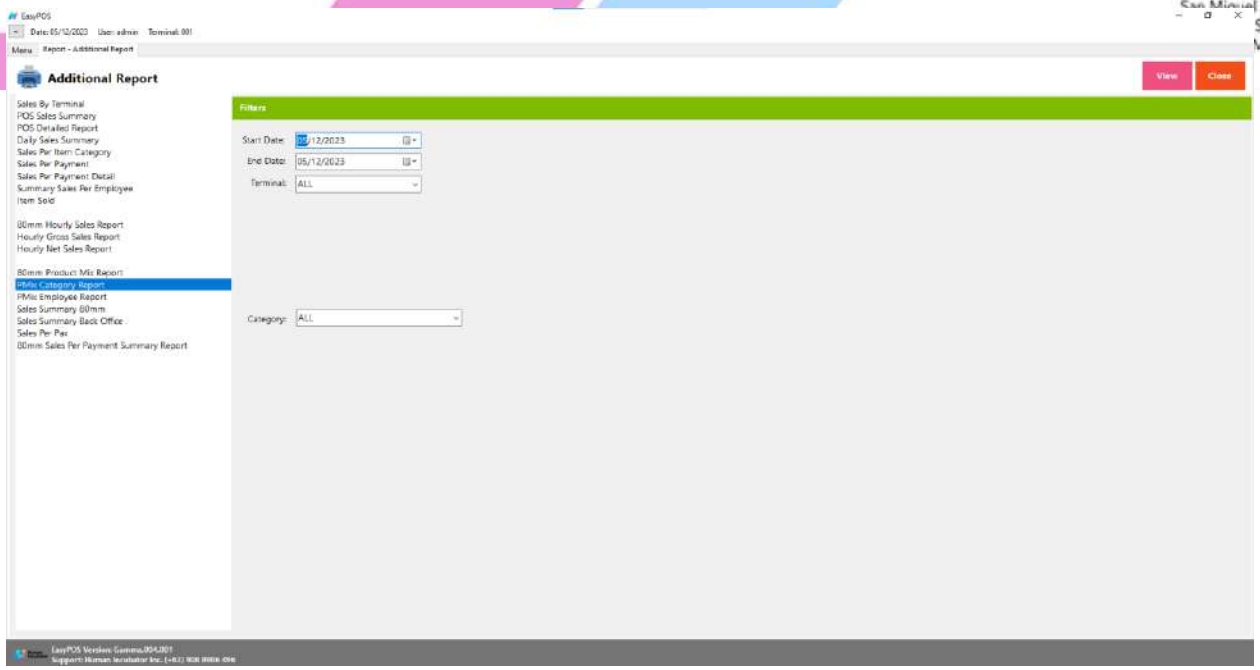
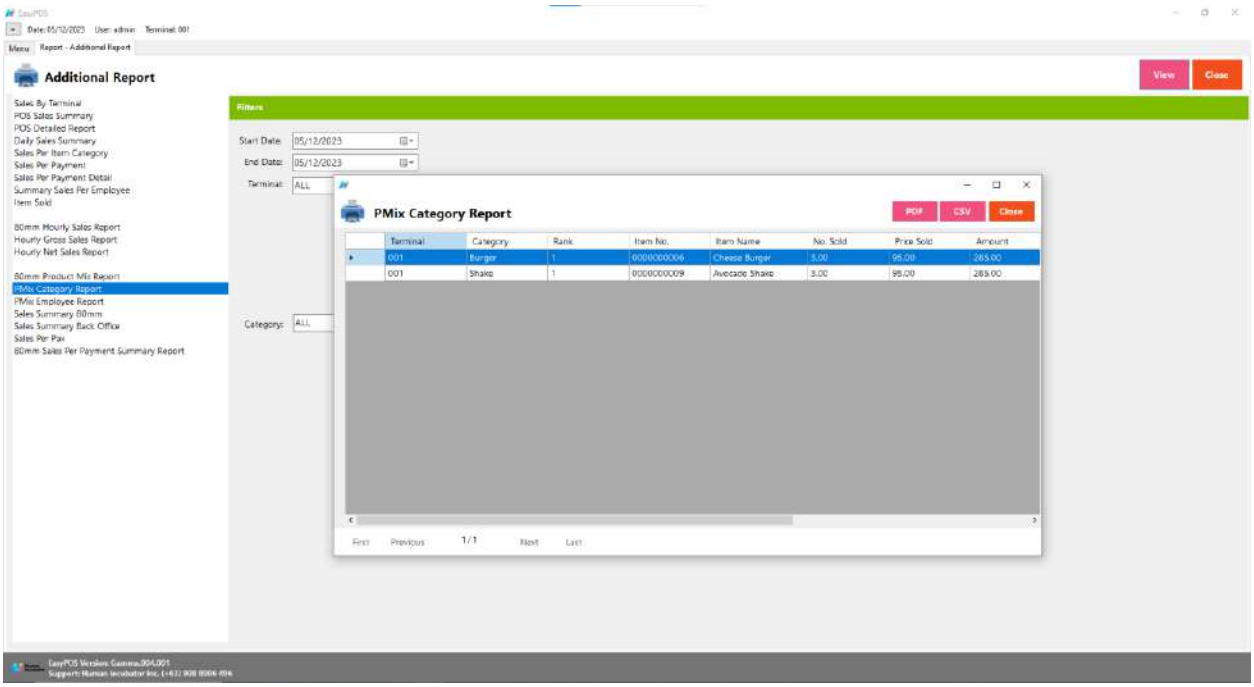
PMix Category Report



- Select Start Date, End Date, Terminal, and Category..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



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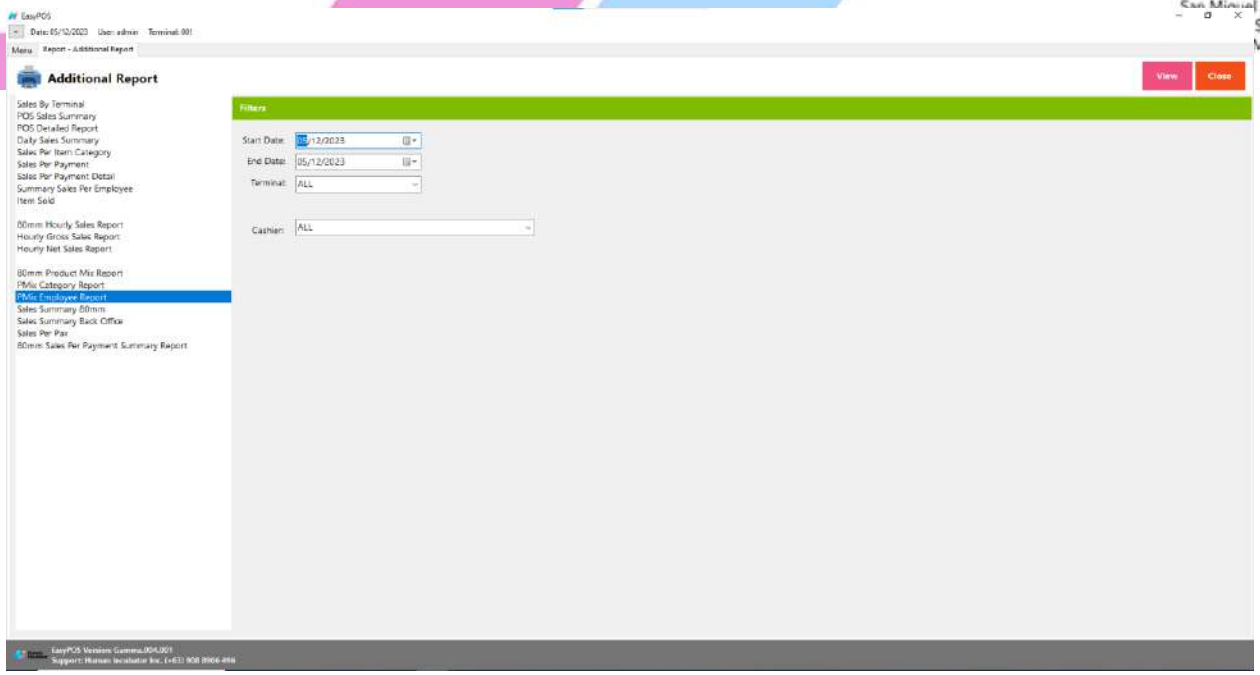
PMix Employee Report



- Select Start Date, End Date, Terminal, and Cashier..
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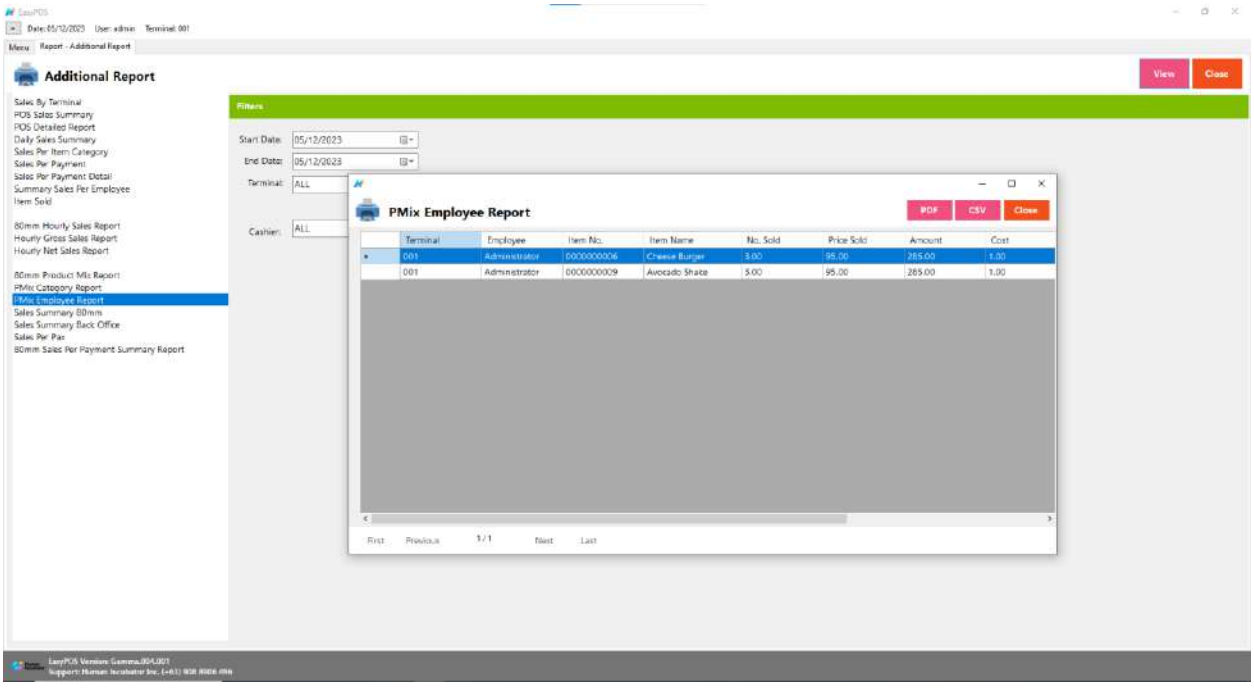

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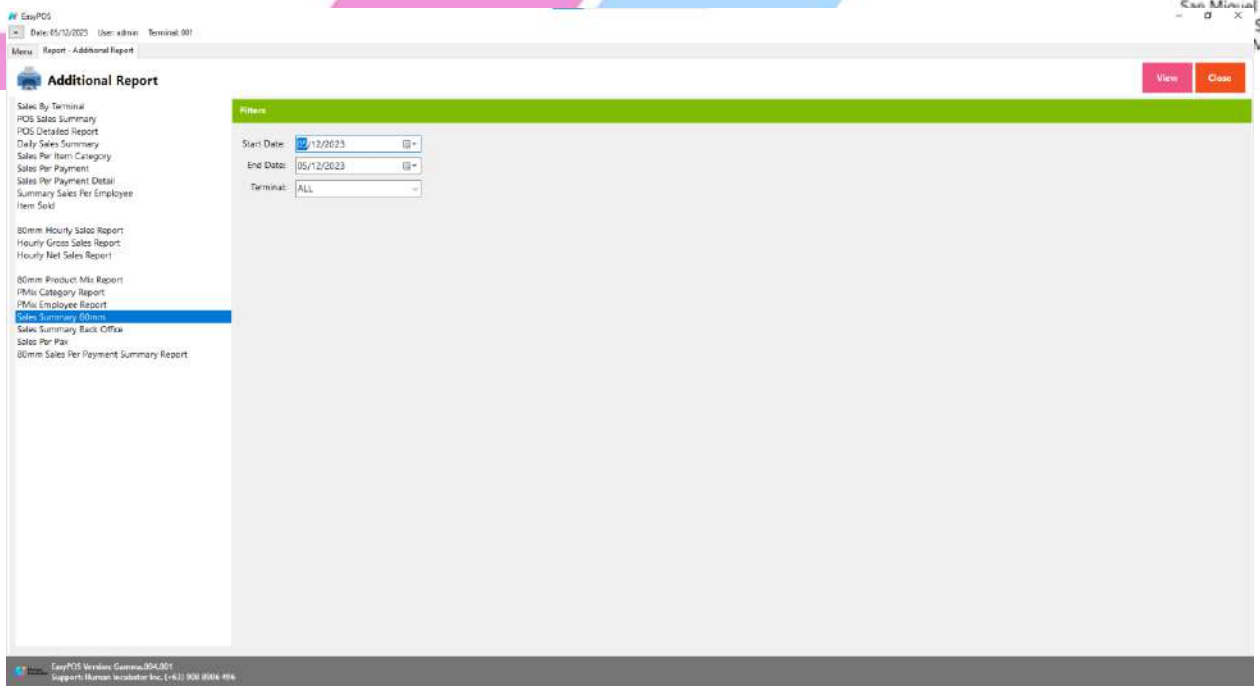
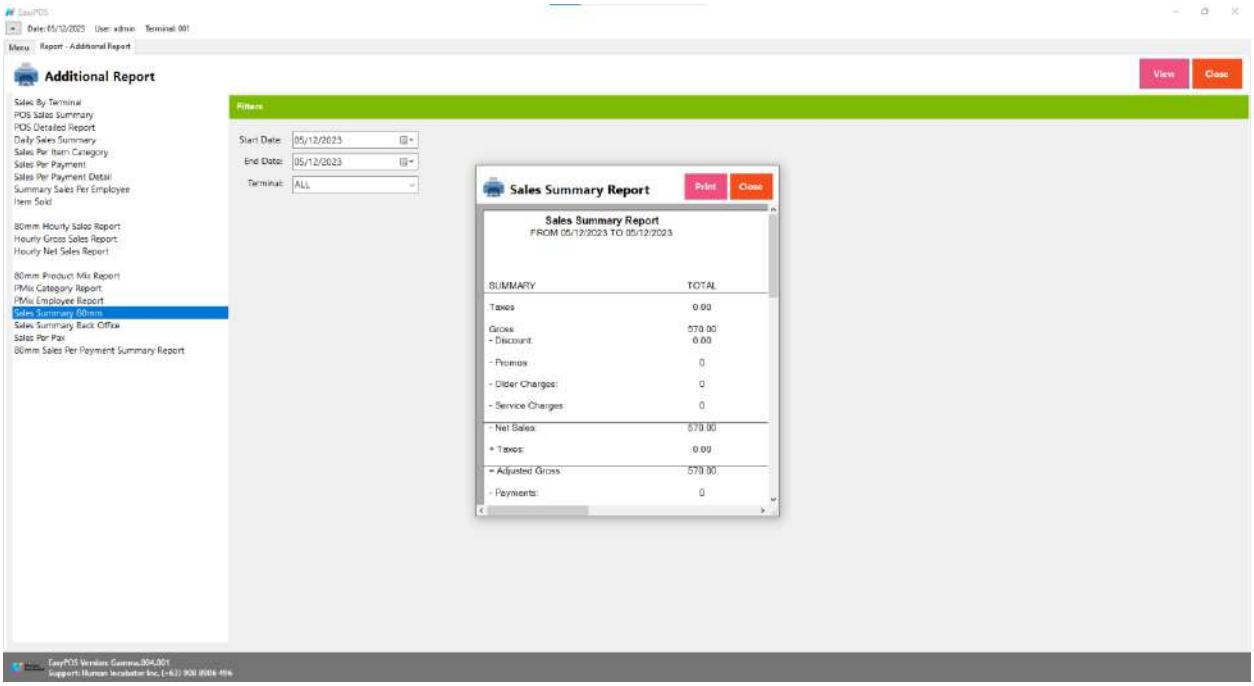
Metro Manila, Philippines

Sales Summary 80mm



- Select Start Date, End Date, Terminal..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



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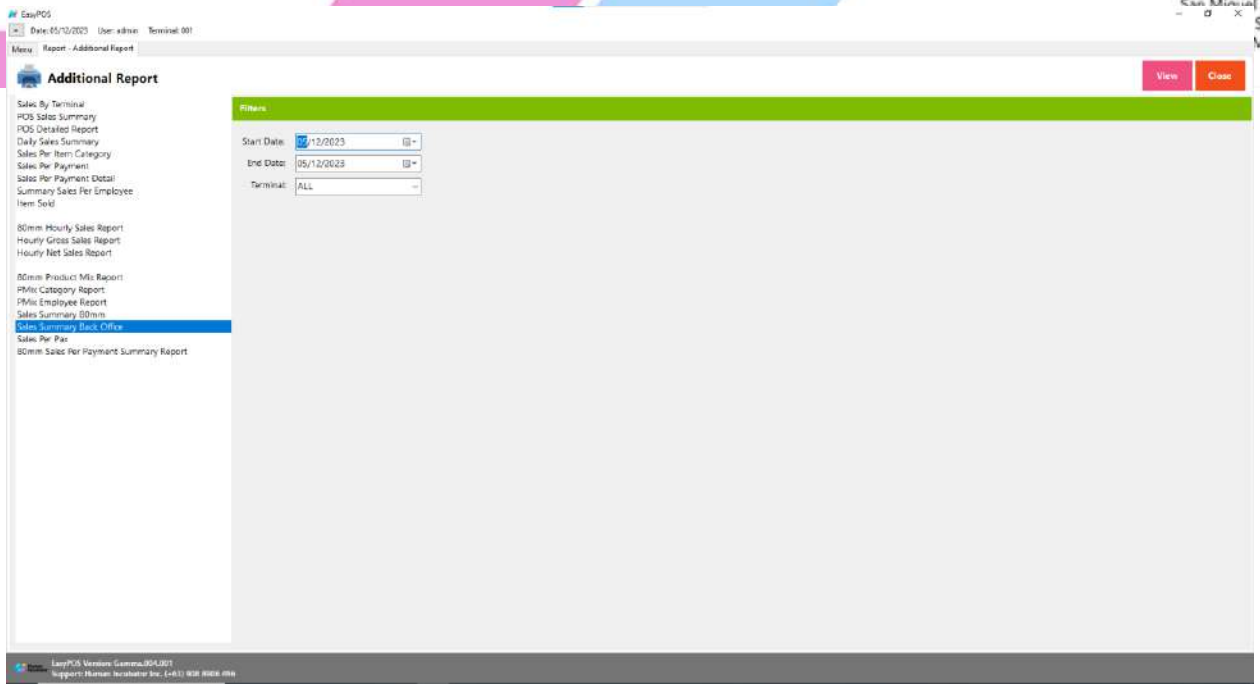
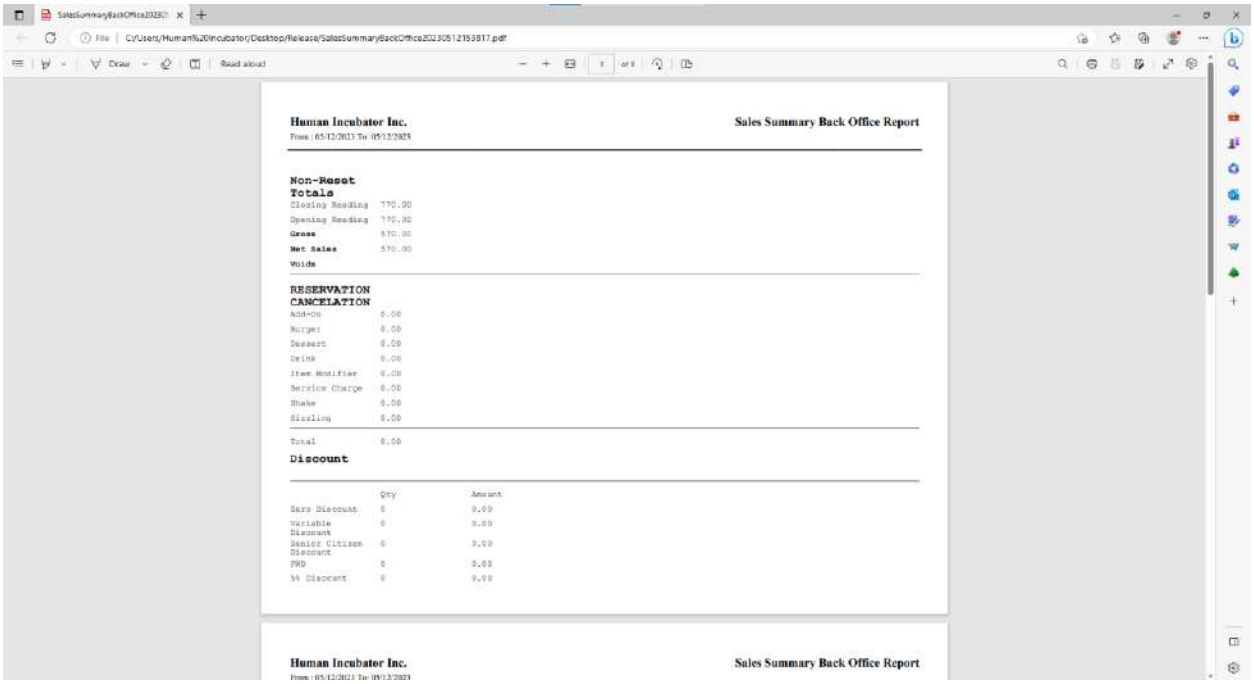
Metro Manila, Philippines

Sales Summary Back Office



- Select Start Date, End Date, Terminal.
- Click the **View** button to generate pdf file report



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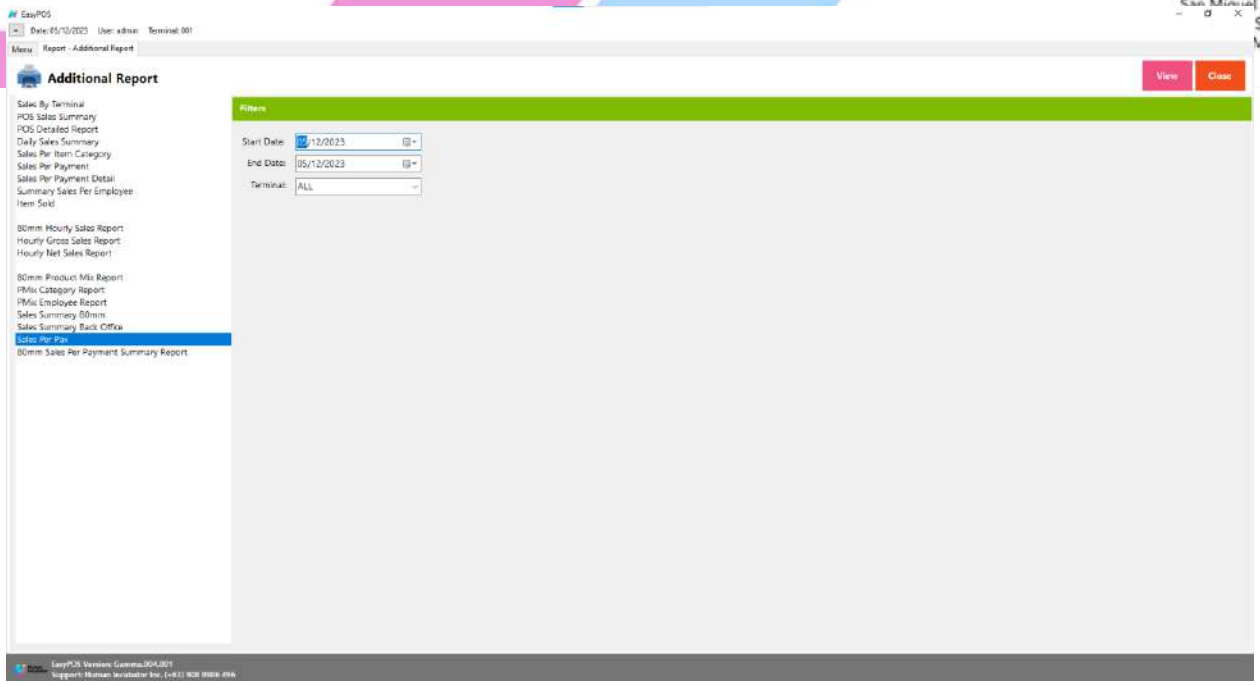

- Select Start Date, End Date, Terminal.
- Click the **View** button to view the report
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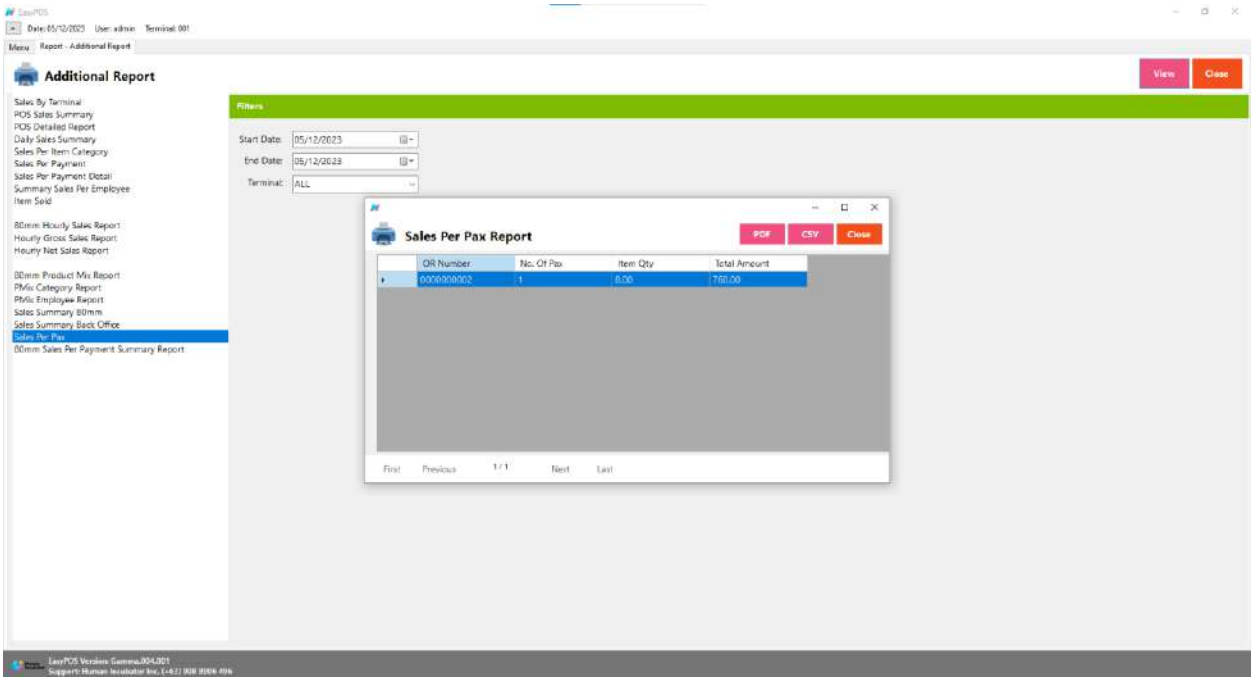
- Click **CSV** button to generate csv file format report



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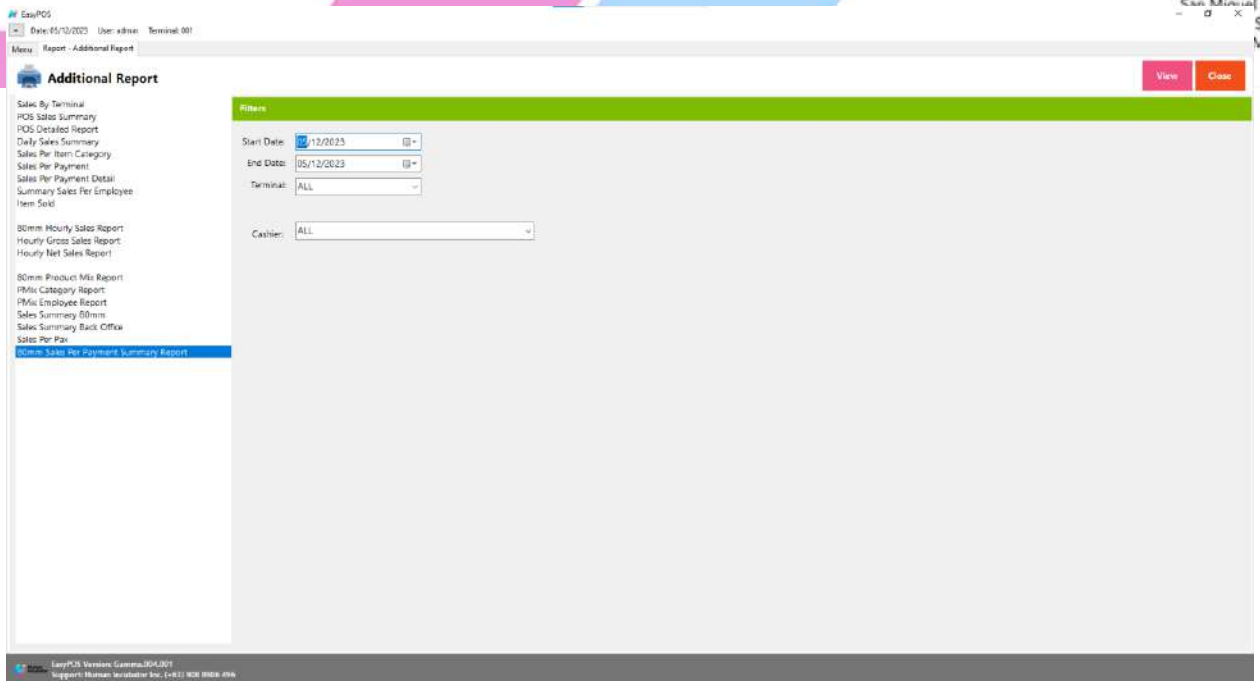
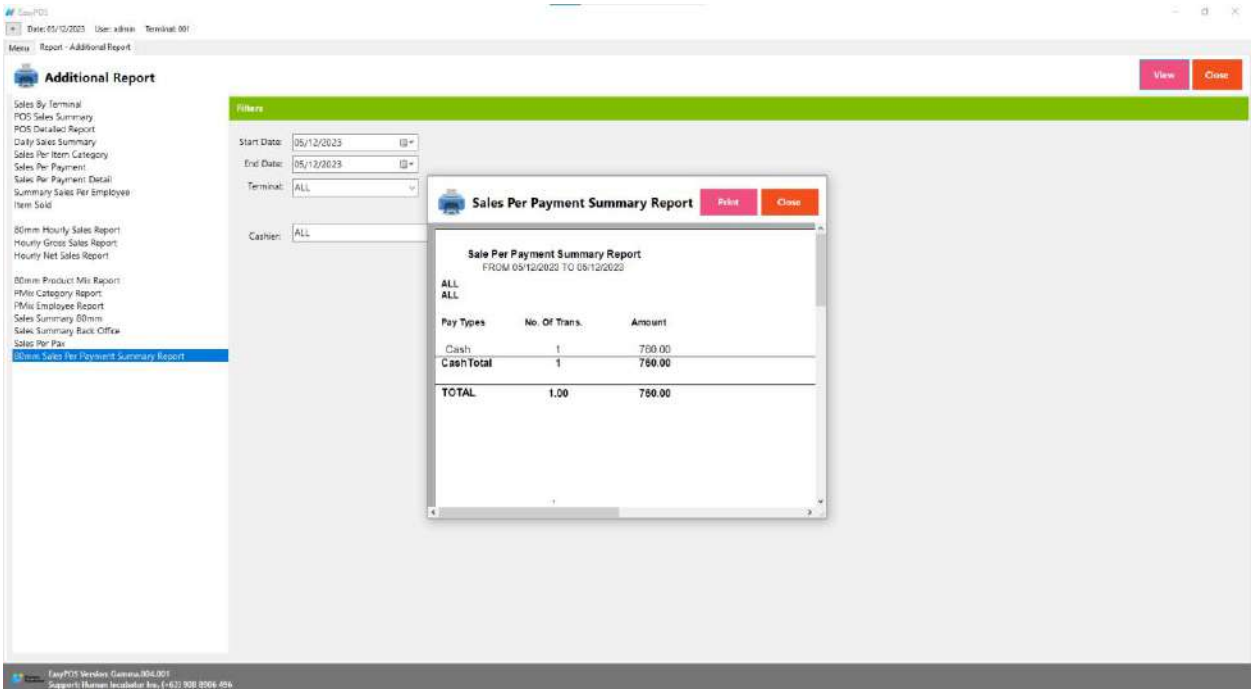
80mm Sales Per Payment Summary Report



- Select Start Date, End Date, Terminal and Cashier.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



Attendance Report

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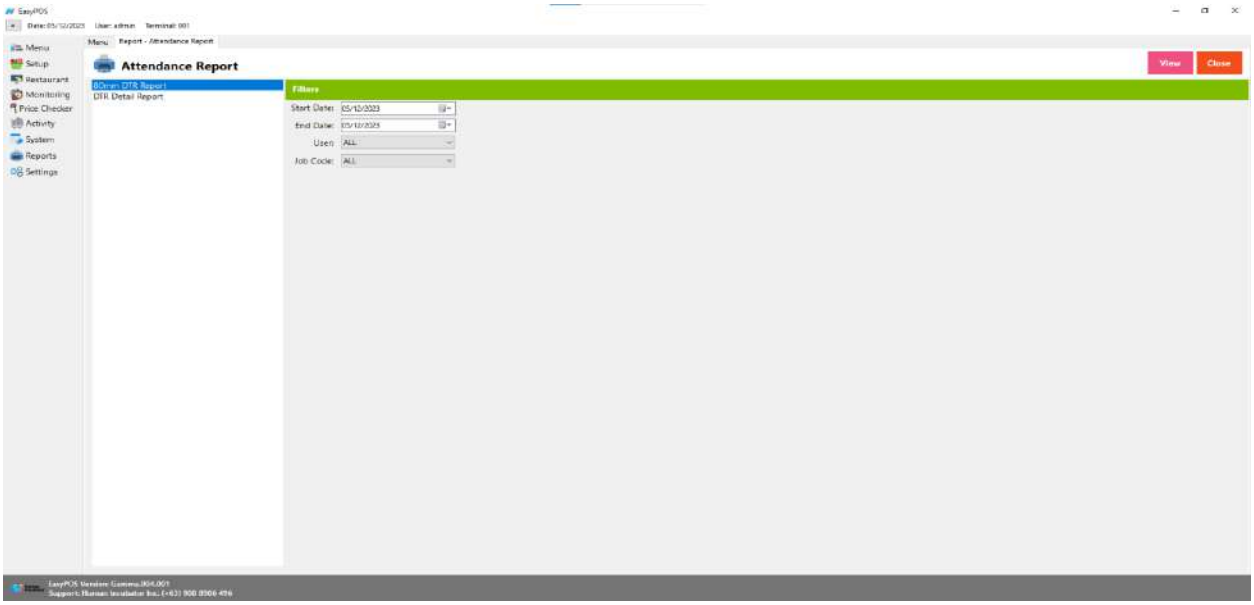
hisales@human-incubator.com
+63-32-256-2904

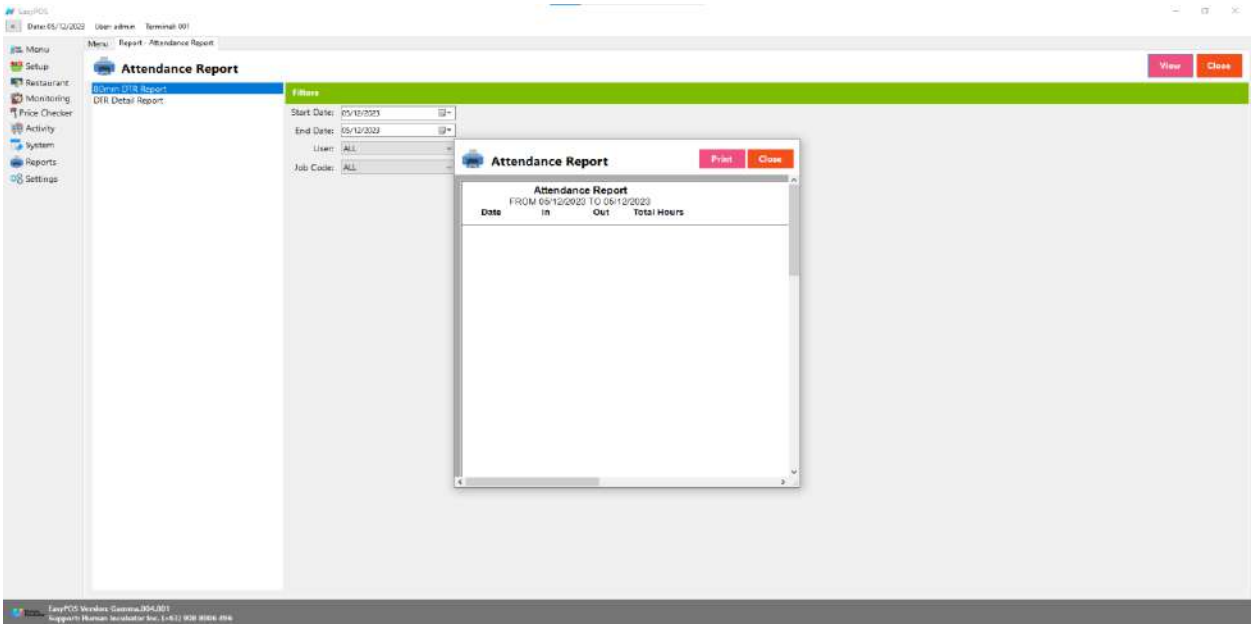
Overview

- **Attendance Report** is where the users can view the DTR report of every employee.

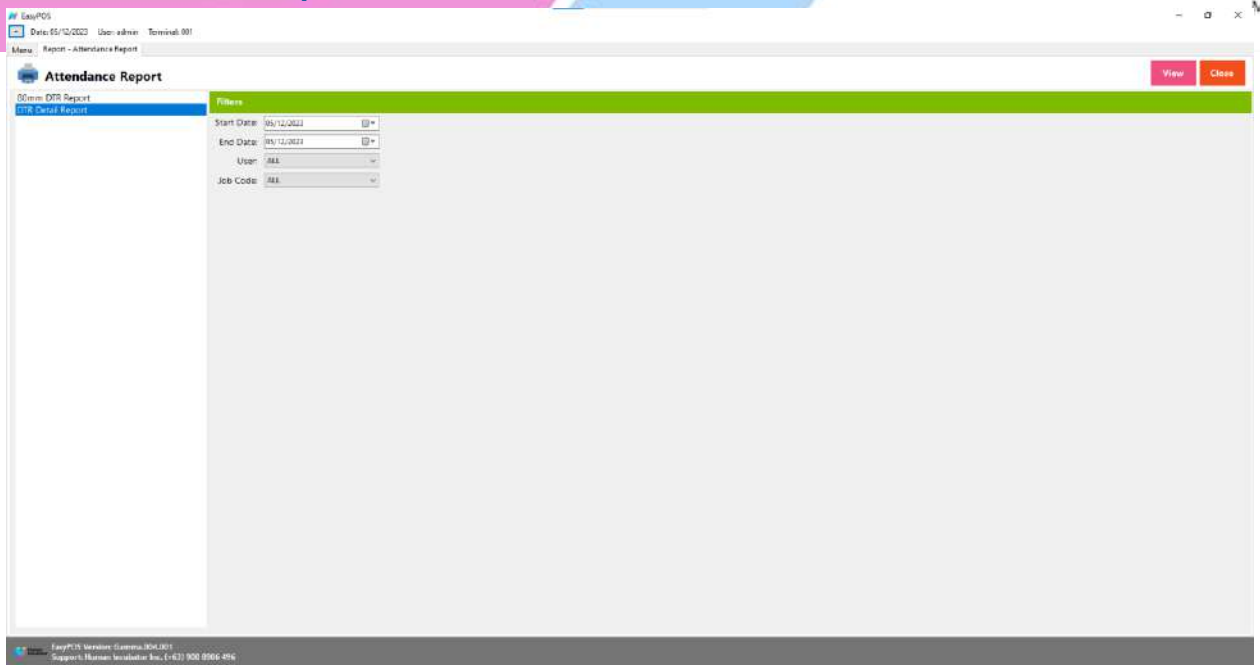
80mm DTR Report



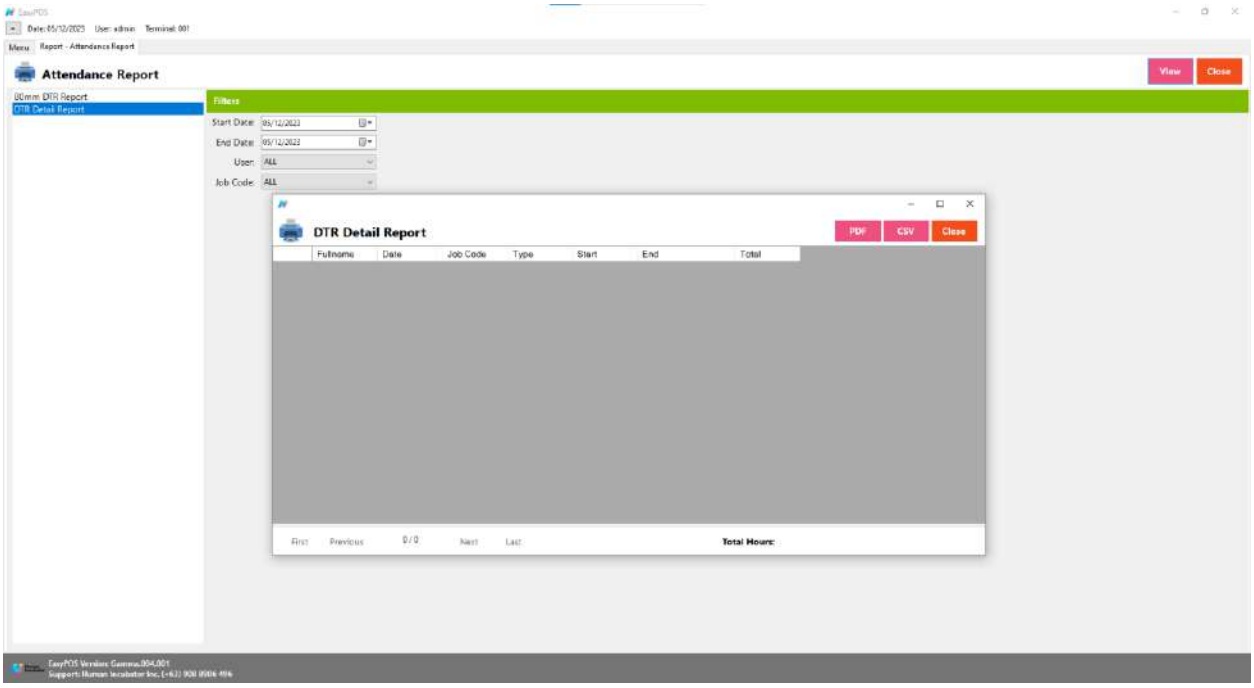
- Select Start Date, End Date, User and Job Code.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



DTR Detail Report



- Select Start Date, End Date, User and Job Code.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click CSV button to generate csv file format report

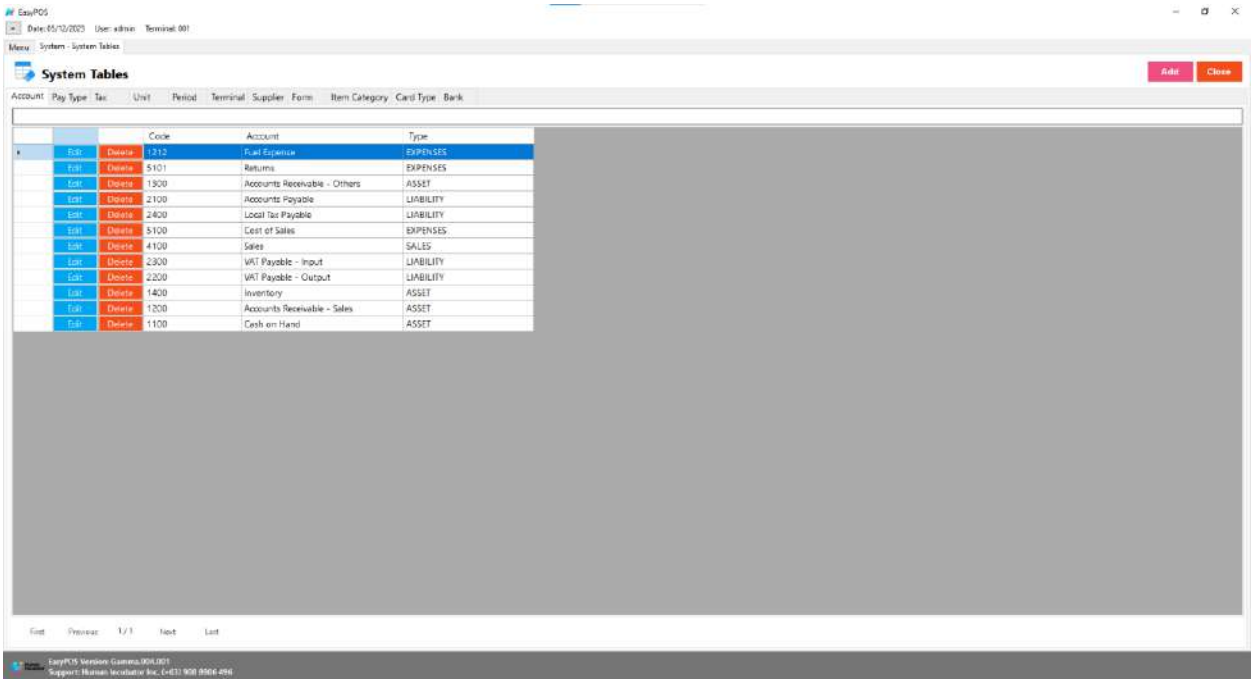


System - System Tables

Overview

- **System Tables** contains tabs of master tables where users can set up other useful modules for EasyPOS such as Pay Types, Accounts, Units, Supplier, Forms, Card Type, etc.

Accounts



- Shows the list of all added accounts.
- Delete button will proceed to deleting account details.
- Edit button will proceed to updating account details.
- Close button will proceed to closing the system table module.

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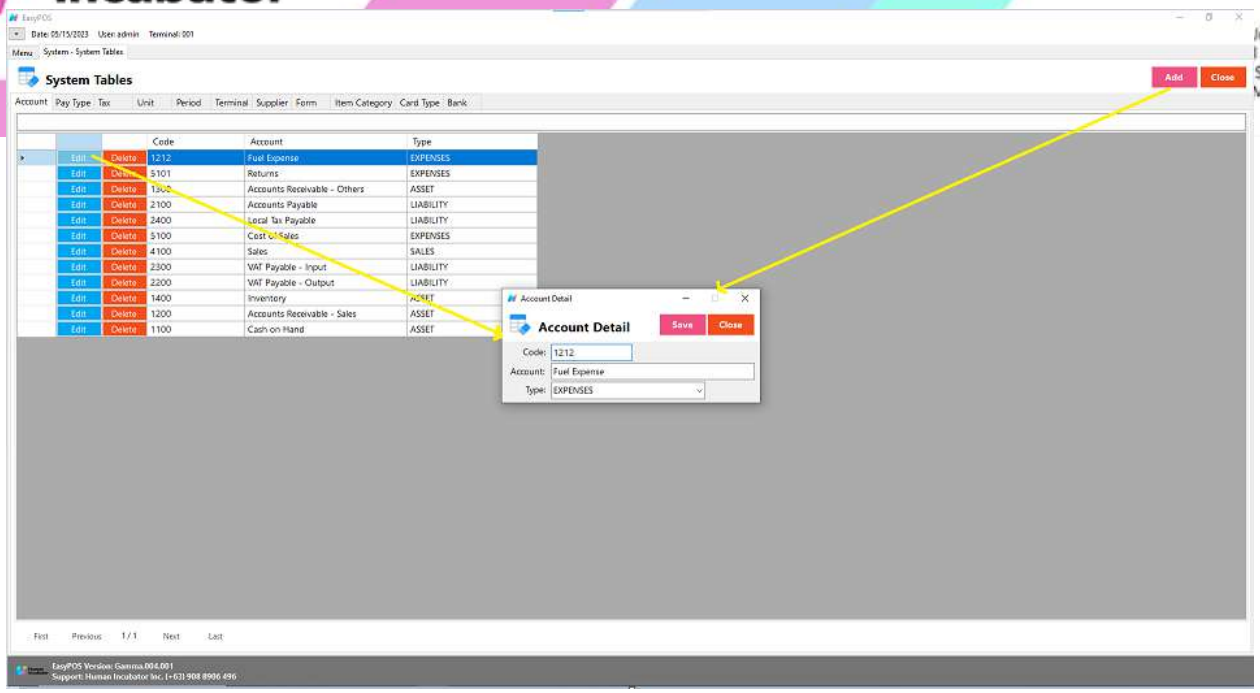
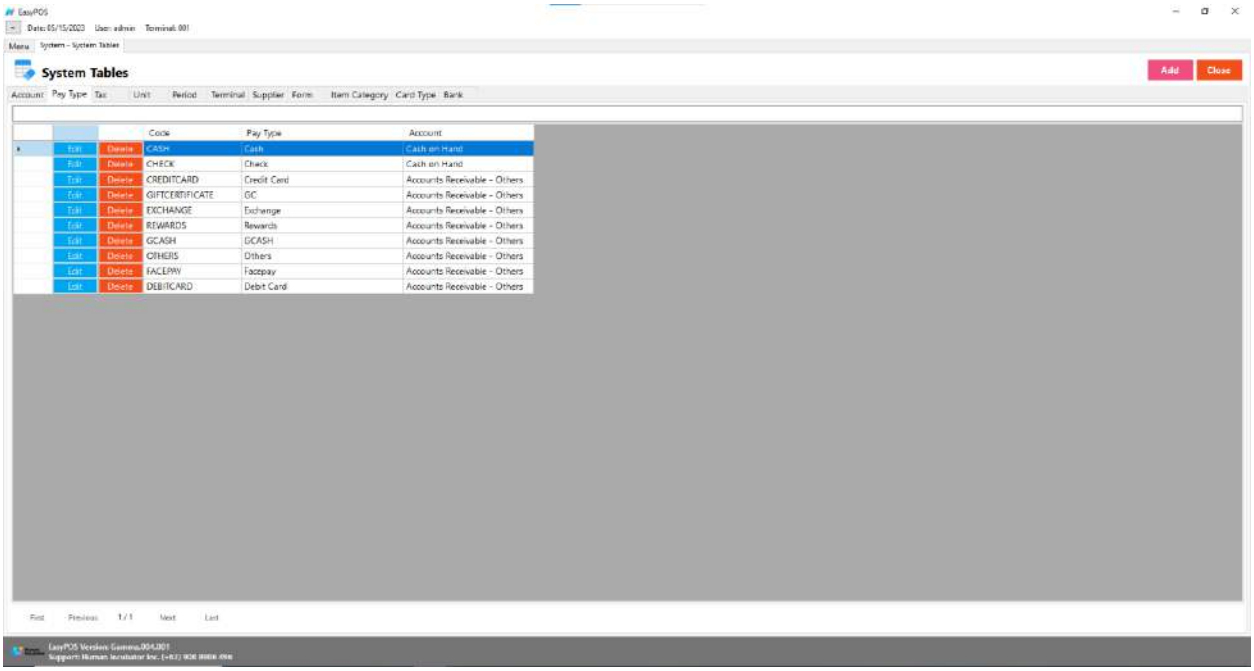
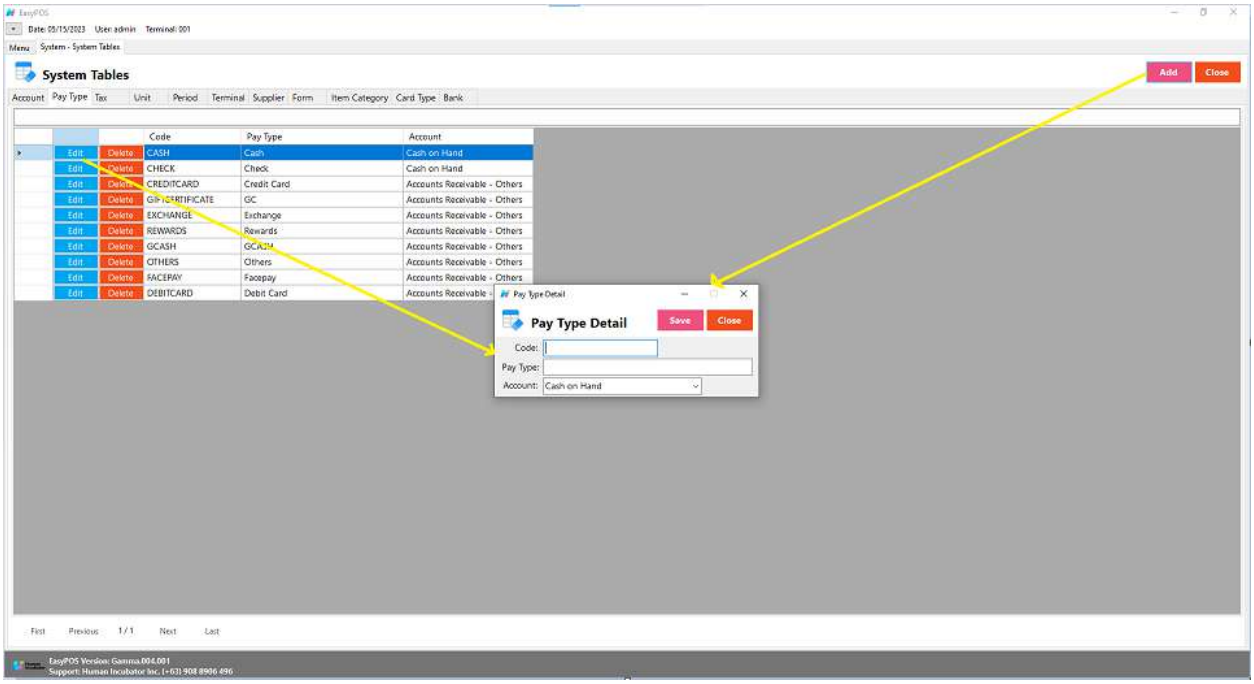


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Code, Account and Type
- Click the Save button to save account details.

Pay Type

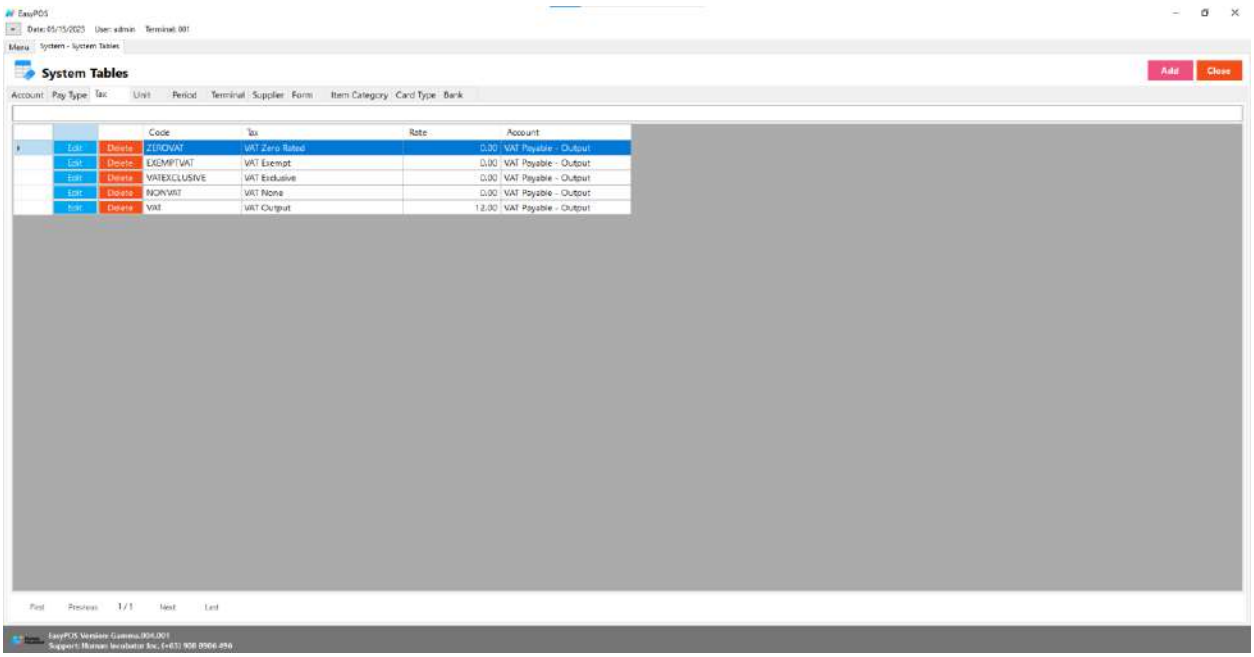


- Shows the list of all added pay types.
- Delete button will proceed to deleting pay type details.
- Edit button will proceed to updating pay type details.
- Close button will proceed to closing the system table module.

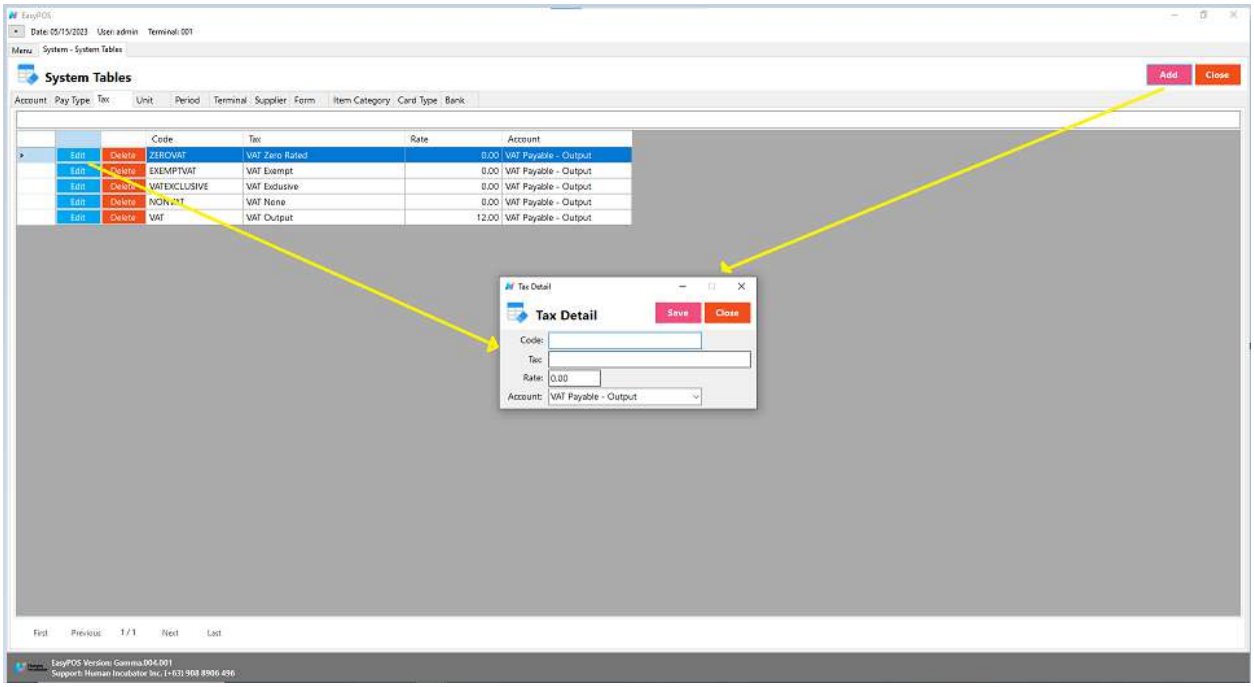


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Code, Pay Type and Account
- Click the Save button to save pay type details.

Tax



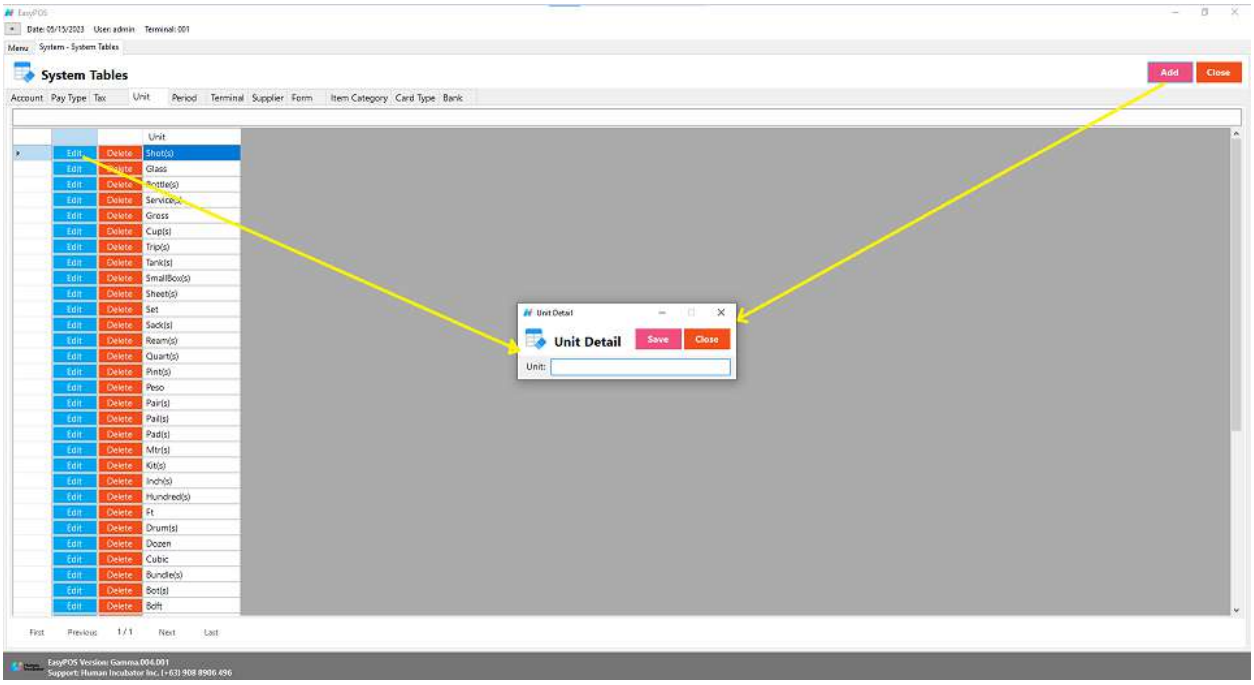
- Shows the list of all added taxes.
- Delete button will proceed to deleting tax details.
- Edit button will proceed to updating tax details.
- Close button will proceed to closing the system table module.



- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Code, Tax, Rate and Account
- Click the Save button to save tax details.

Unit

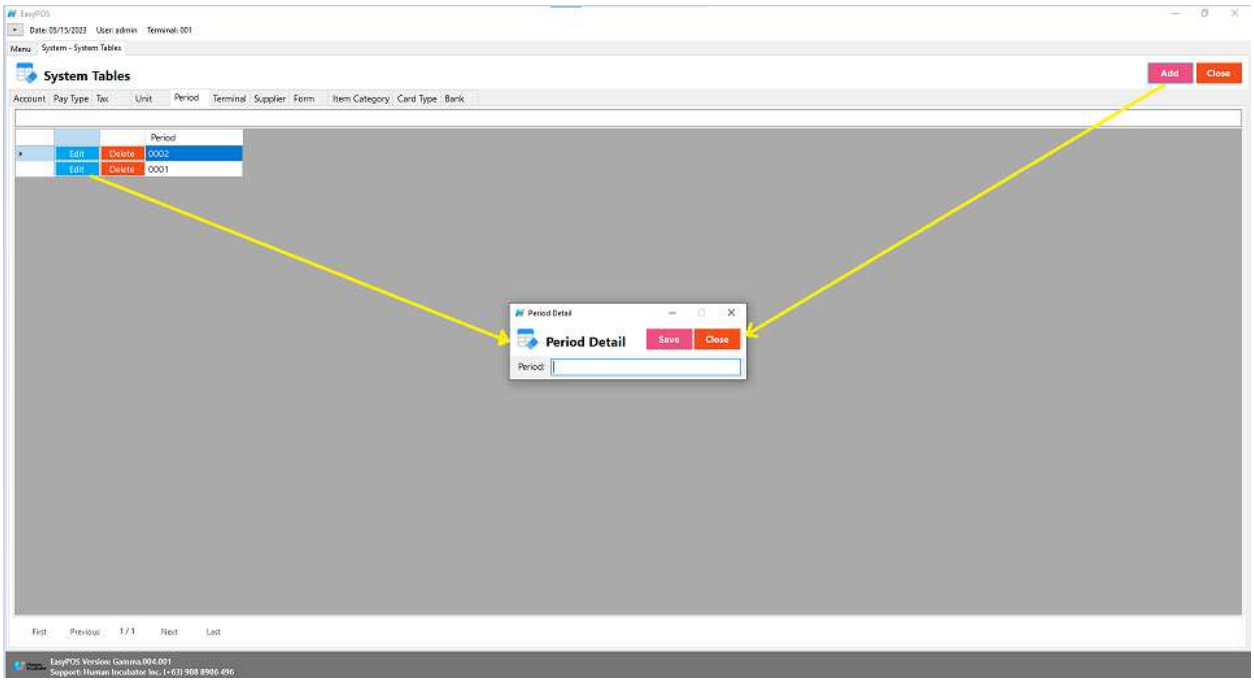
- Shows the list of all added units.
- Delete button will proceed to deleting unit details.
- Edit button will proceed to updating unit details.
- Close button will proceed to closing the system table module.



- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Unit
- Click the Save button to save unit details.

Period

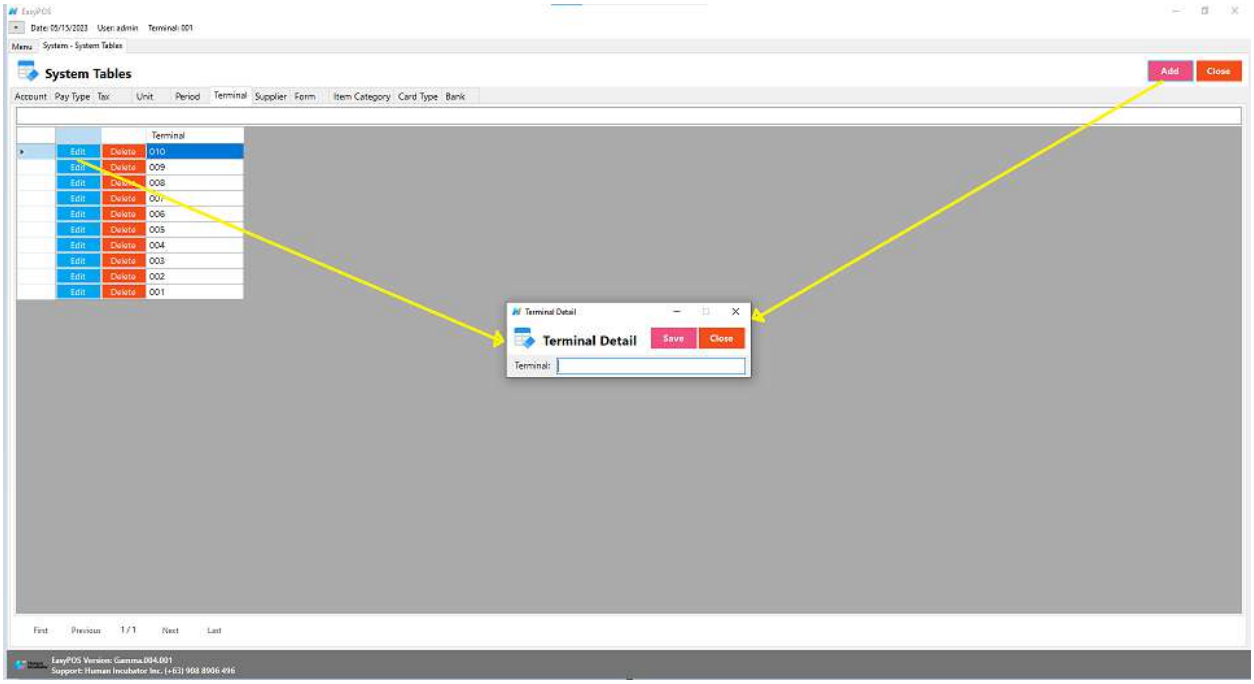
- Shows the list of all added periods.
- Delete button will proceed to deleting period details.
- Edit button will proceed to updating period details.
- Close button will proceed to closing the system table module.



- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Unit
- Click the Save button to save unit details.

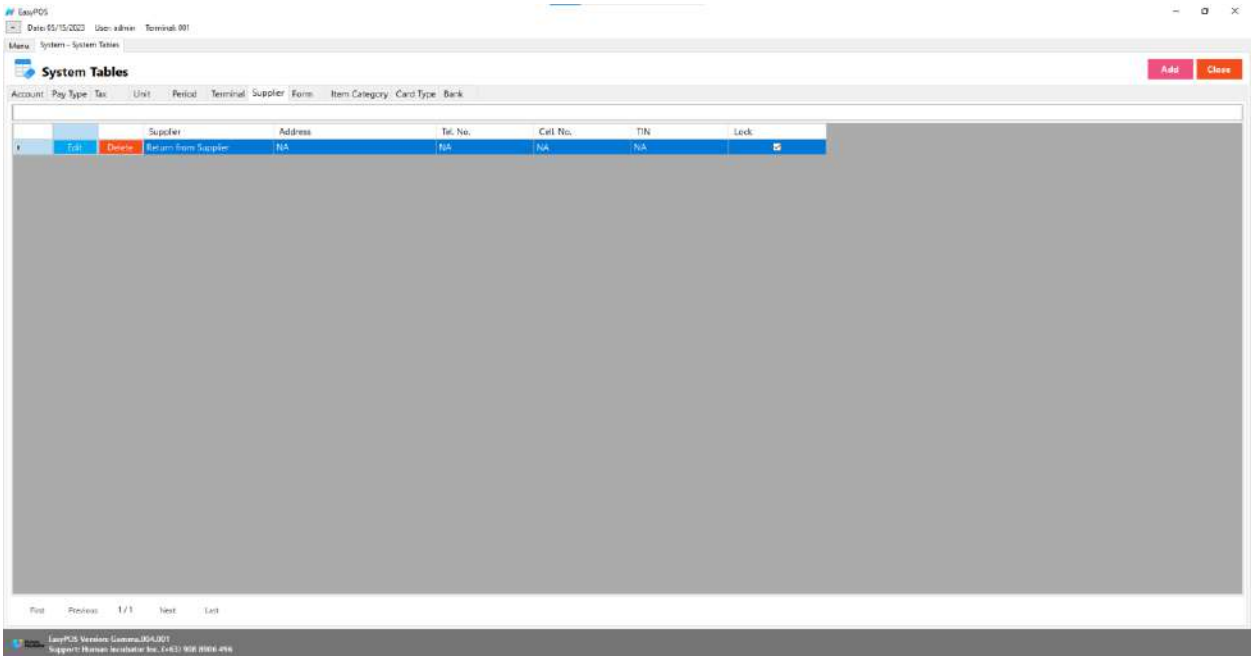
Terminal

- Shows the list of all added terminals.
- Delete button will proceed to deleting terminal details.
- Edit button will proceed to updating terminal details.
- Close button will proceed to closing the system table module.

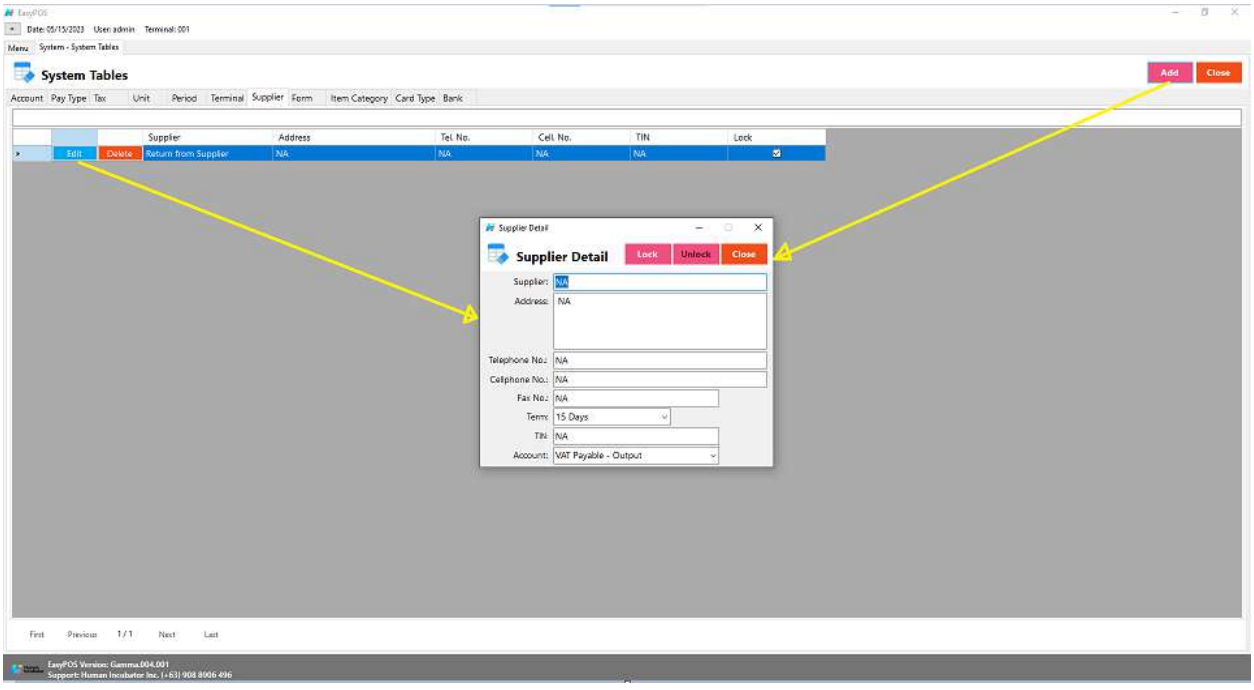


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Terminal
- Click the Save button to save terminal details.

Supplier

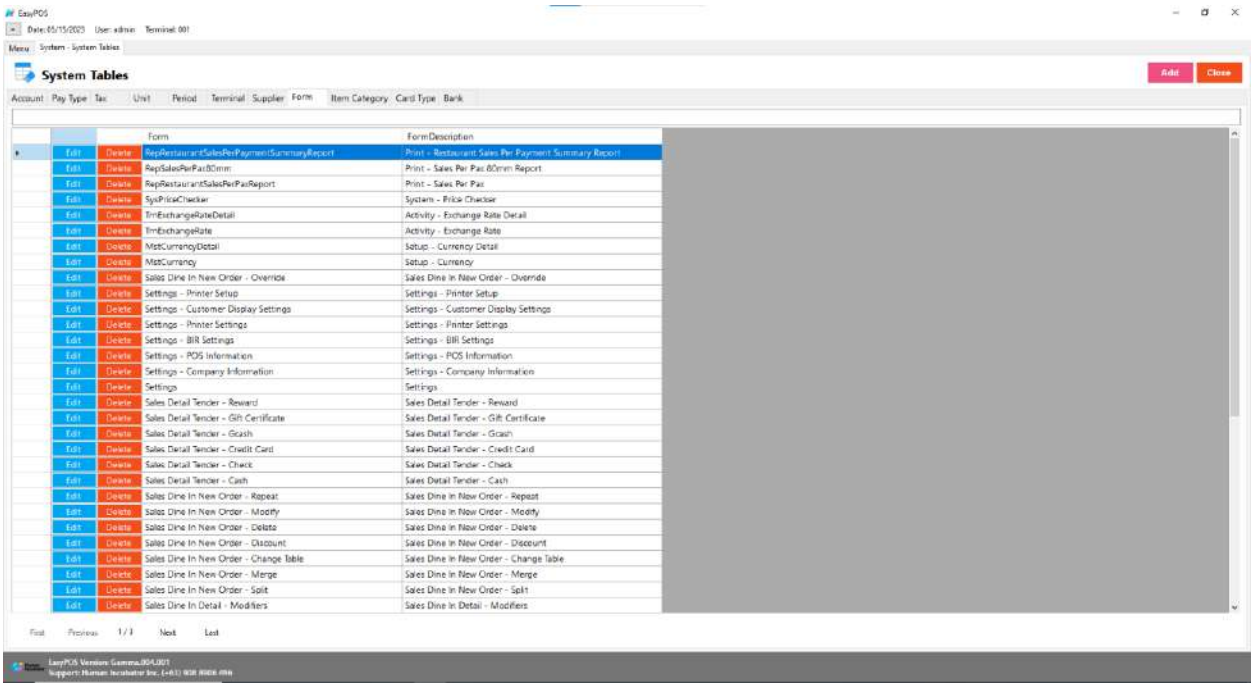


- Shows the list of all added suppliers.
- Delete button will proceed to deleting supplier details.
- Edit button will proceed to updating supplier details.
- Close button will proceed to closing the system table module.

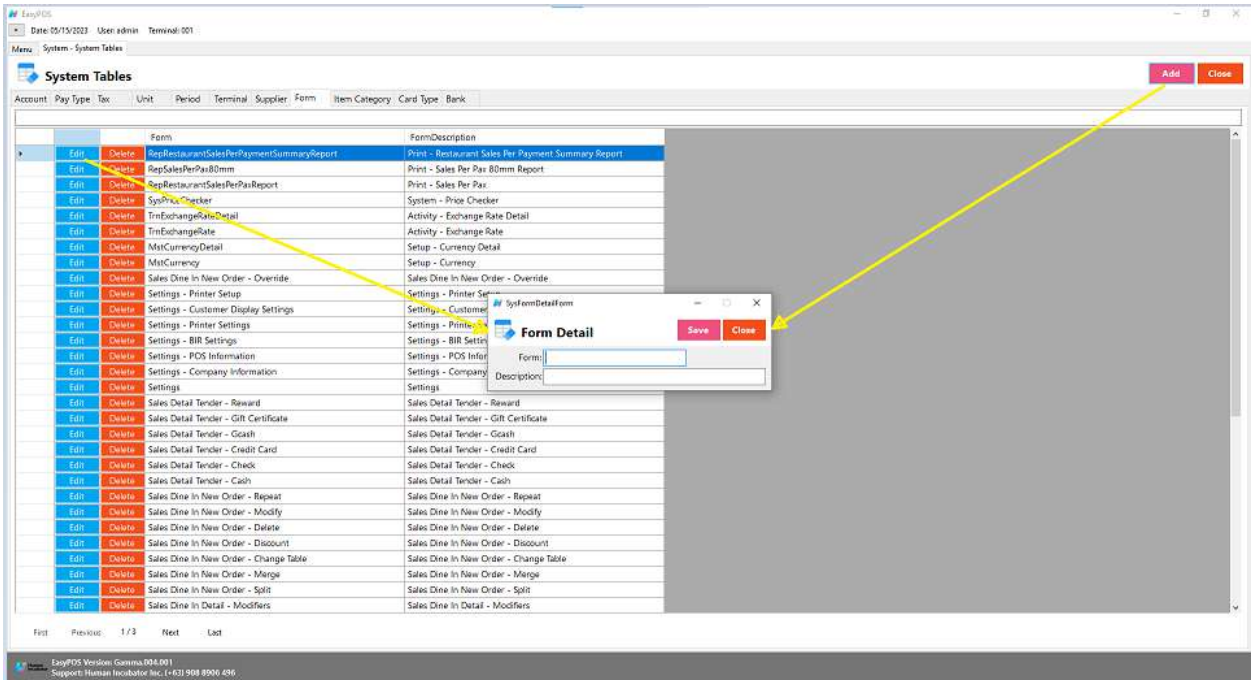


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Supplier, Address, Telephone No., Cell Phone no., Fax no., TIN, and Account
- Click the Save button to save supplier details.

Form

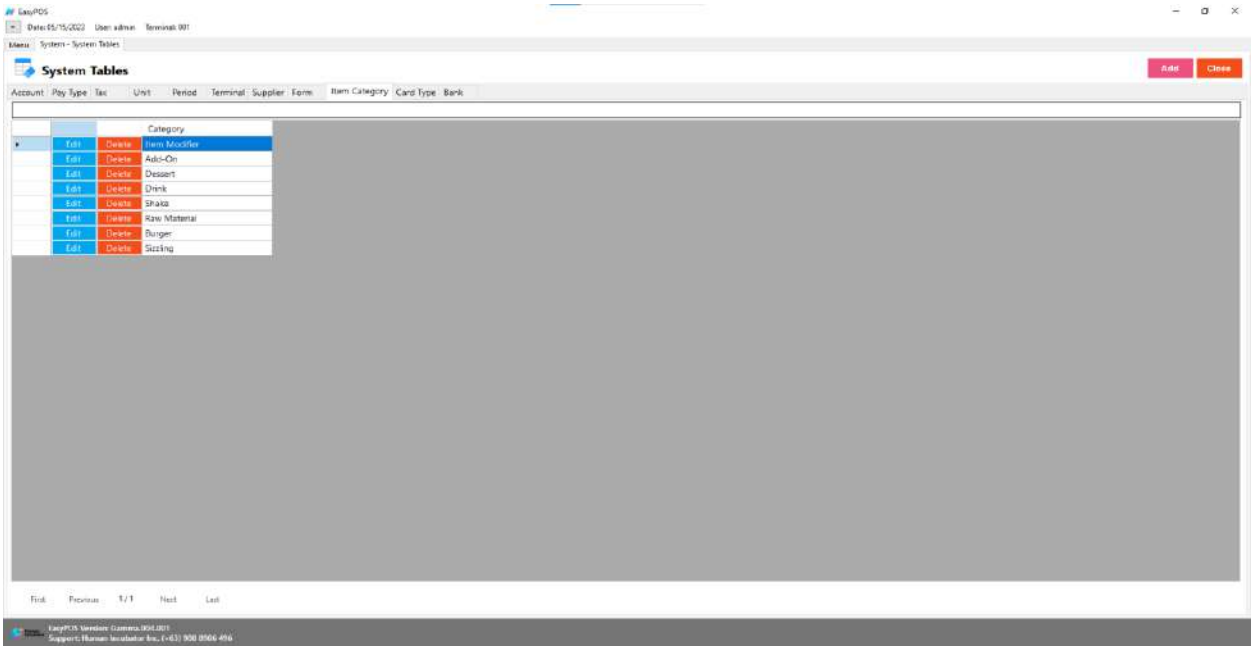


- Shows the list of all added forms.
- Delete button will proceed to deleting form details.
- Edit button will proceed to updating form details.
- Close button will proceed to closing the system table module.

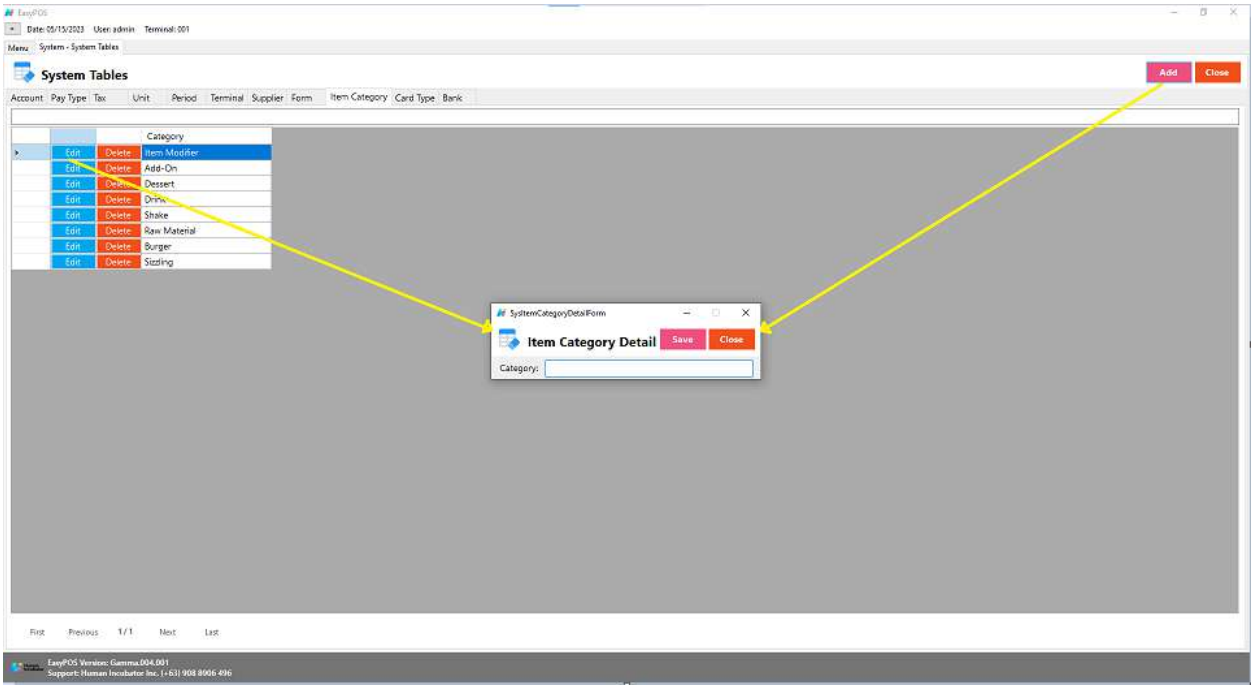


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Form and Description
- Click the Save button to save form details.

Item Category

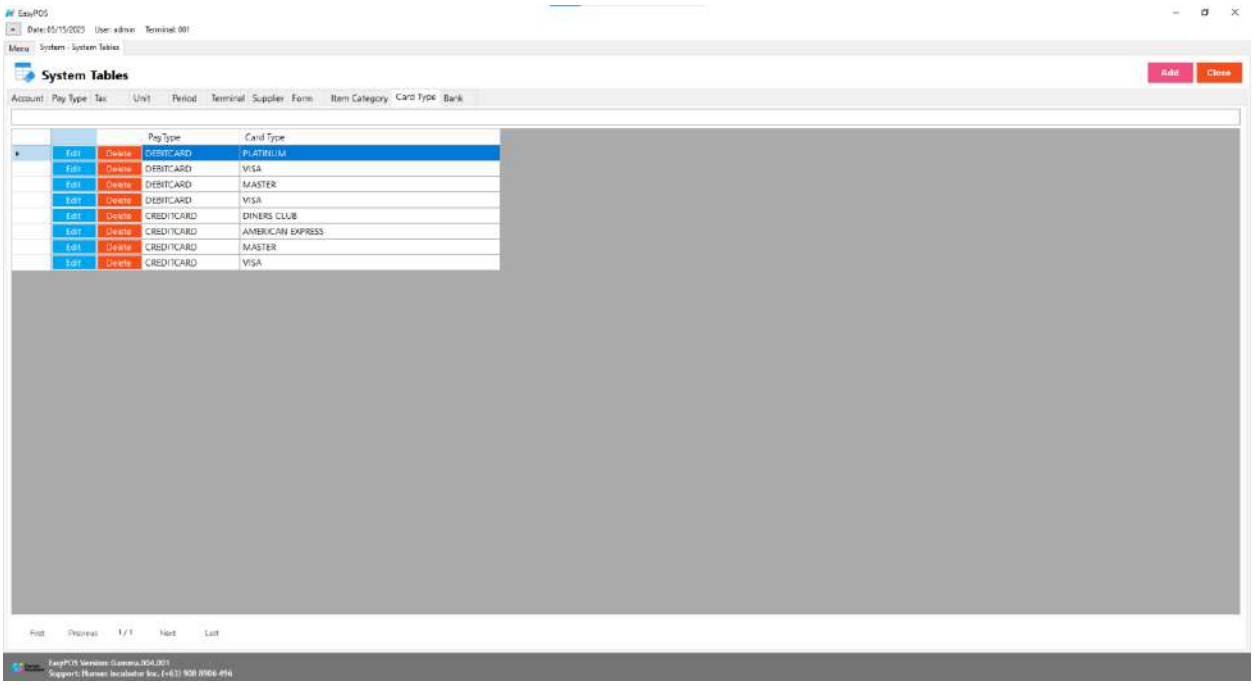


- Shows the list of all added Item Categories.
- Delete button will proceed to deleting item category details.
- Edit button will proceed to updating item category details.
- Close button will proceed to closing the system table module.

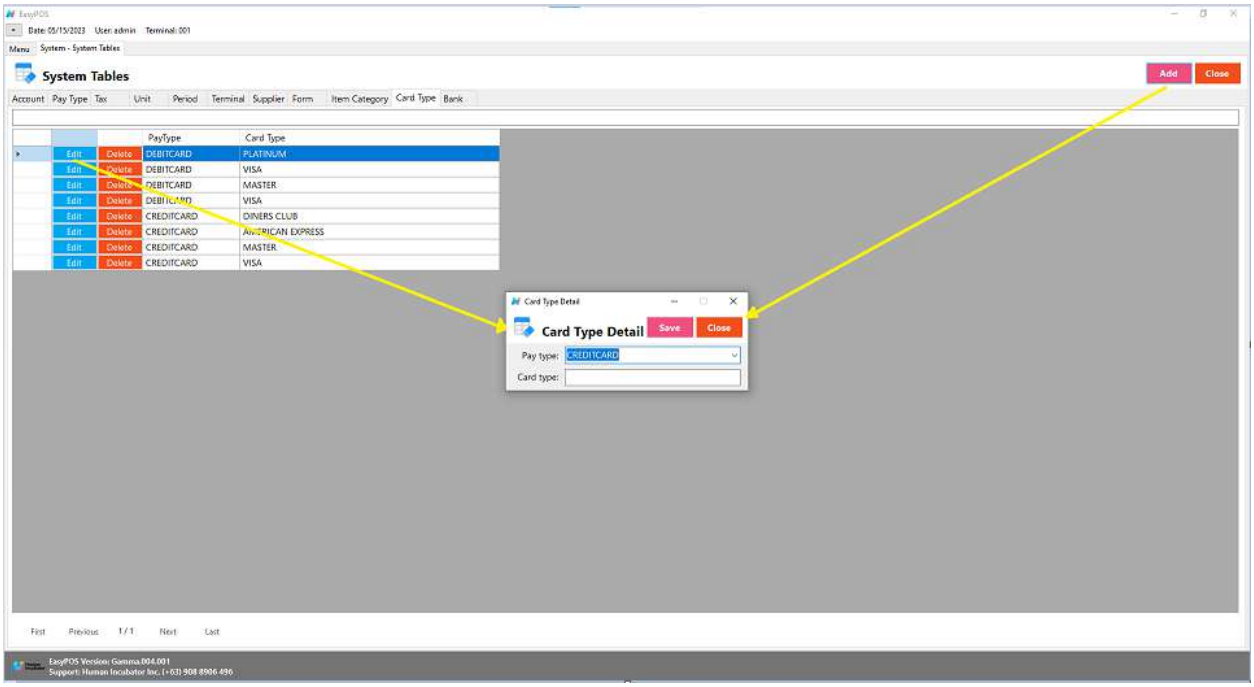


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Category
- Click the Save button to save item category details.

Card Type

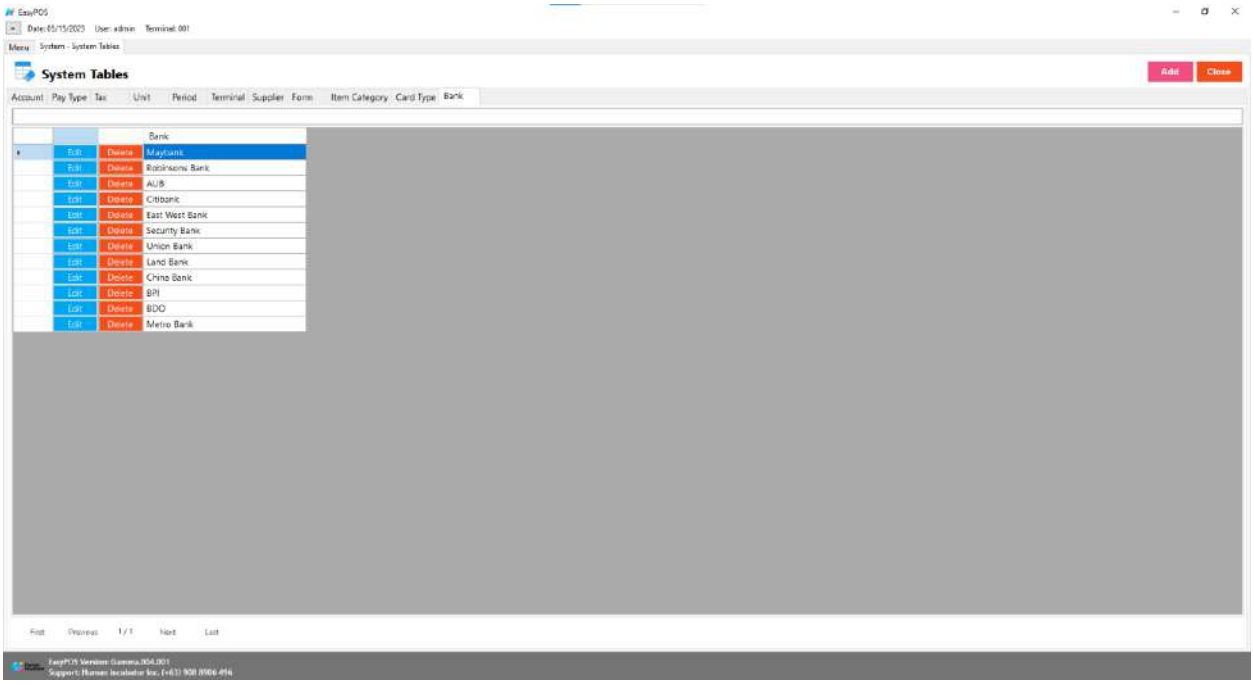


- Shows the list of all added card types.
- Delete button will proceed to deleting card type details.
- Edit button will proceed to updating card type details.
- Close button will proceed to closing the system table module.

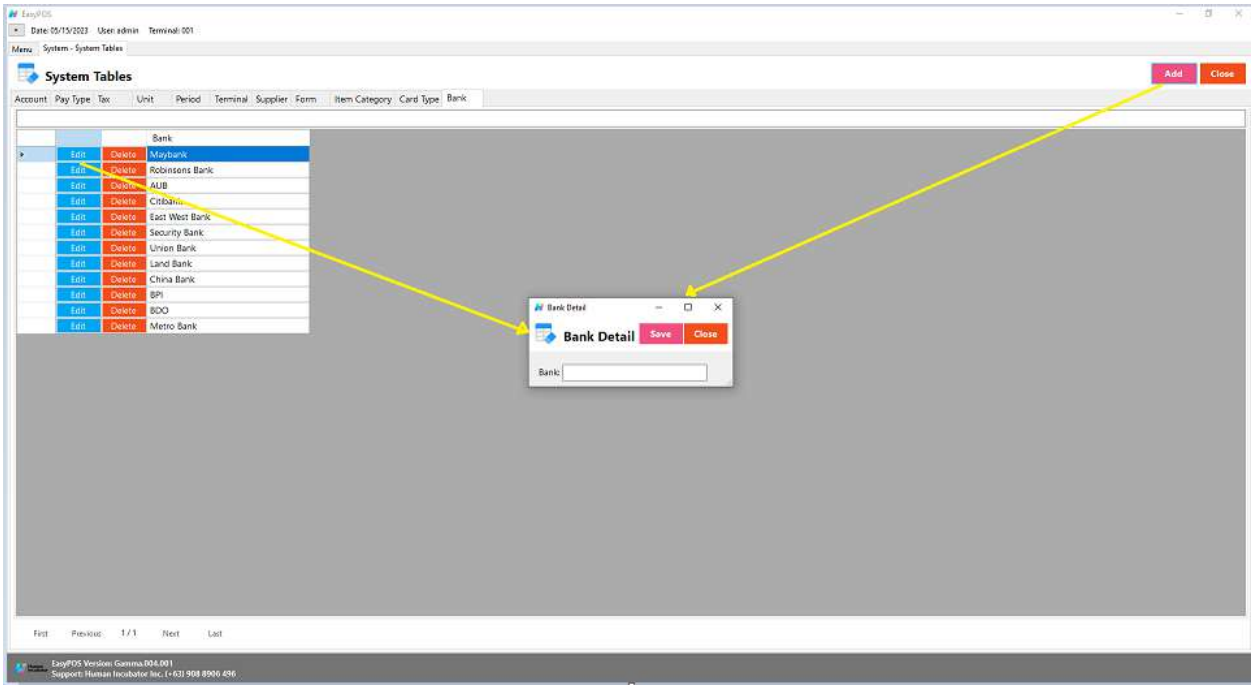


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Pay Type and Card Type
- Click the Save button to save card type details.

Bank



- Shows the list of all added banks.
- Delete button will proceed to deleting bank details.
- Edit button will proceed to updating bank details.
- Close button will proceed to closing the system table module.



- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Bank
- Click the Save button to save bank details.

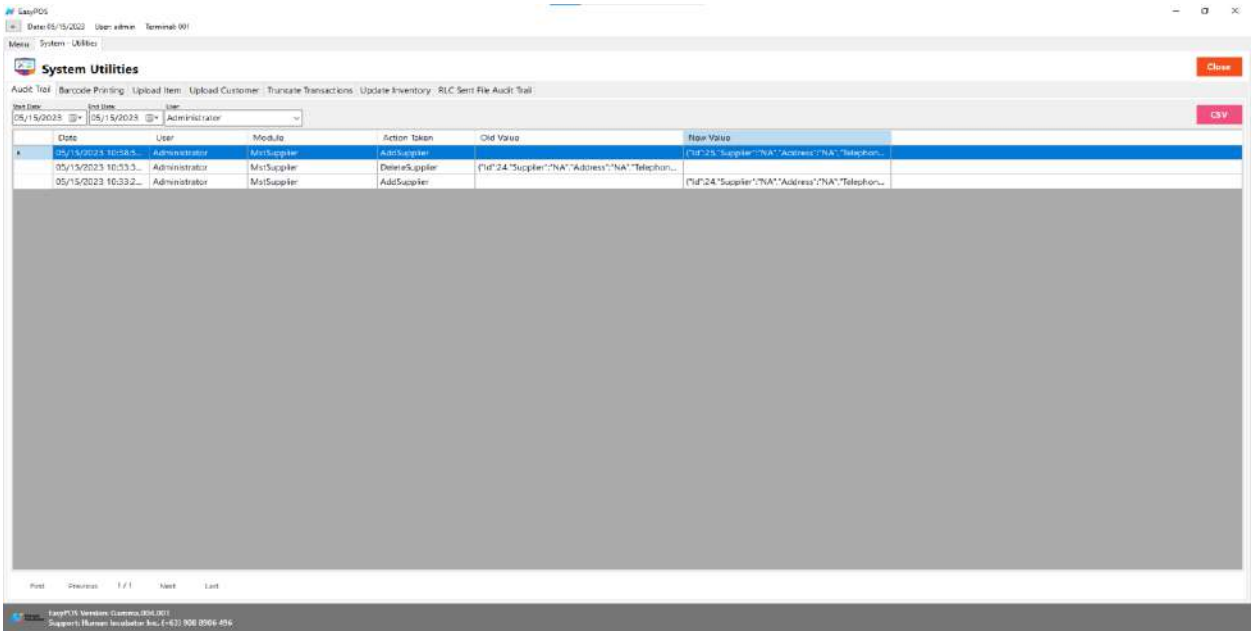
System - Utilities

Overview

- **Utilities** is where users can use the EasyPOS utilities such as barcode printing, truncate transactions, etc.

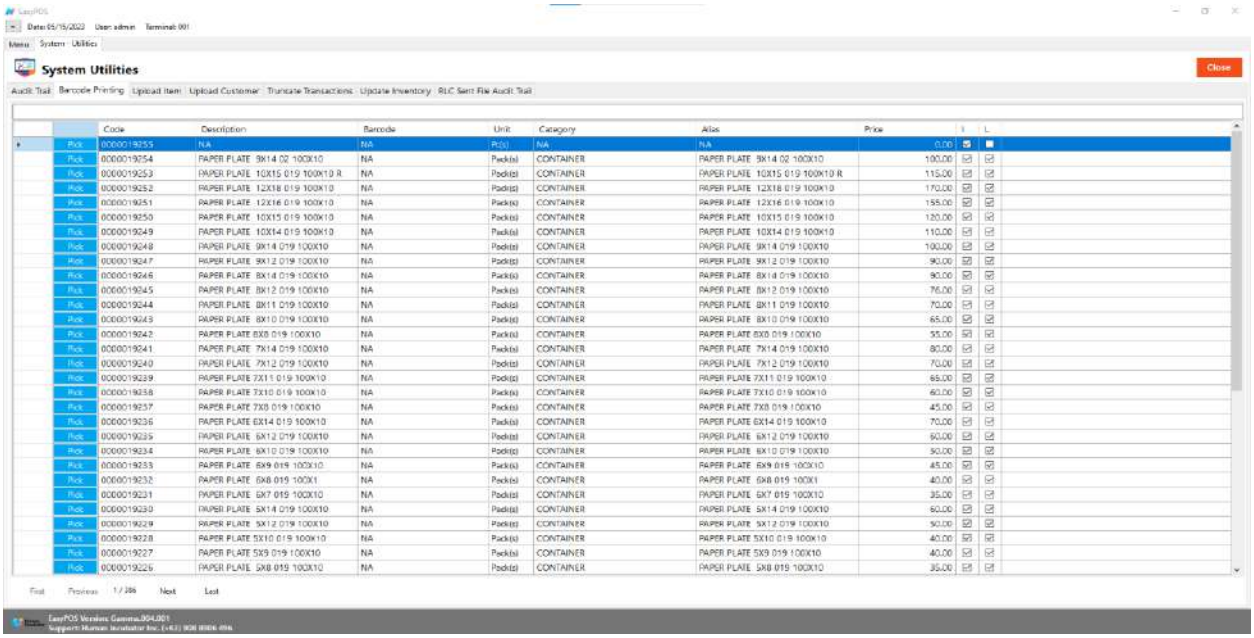
Audit Trail

- Audit trail is where the users can view the activities or logs
    - Click the CSV button to generate a csv file format of audit trails.
    - Close button will proceed to closing the system utilities module.

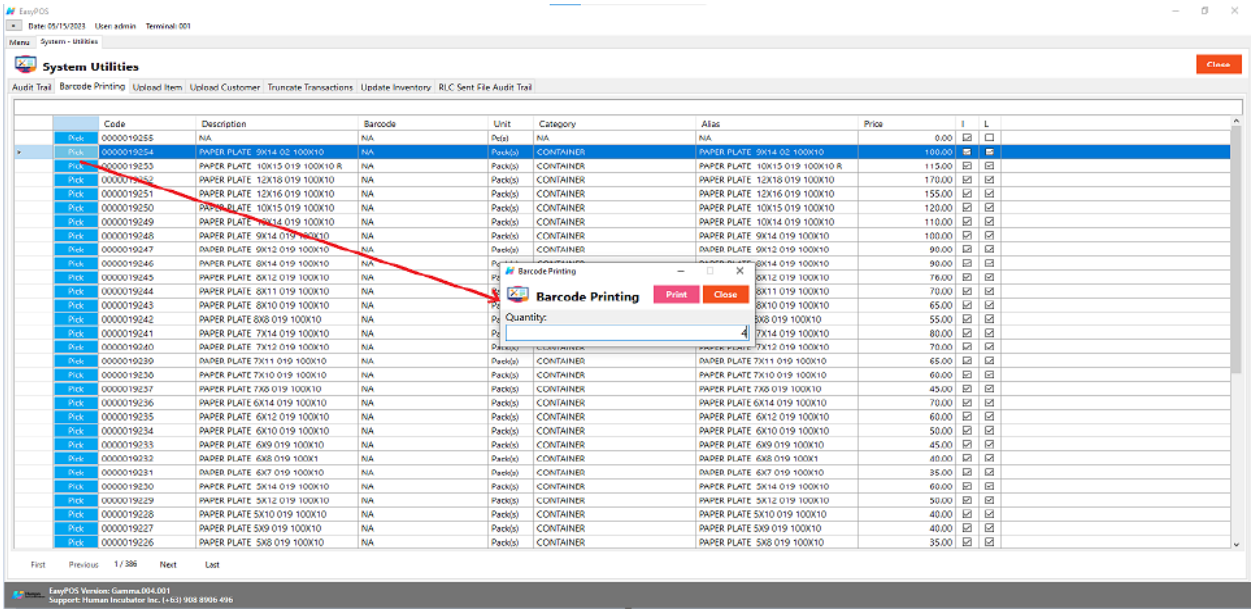


Barcode Printing

- Barcode printing is where the user can print barcode of the items

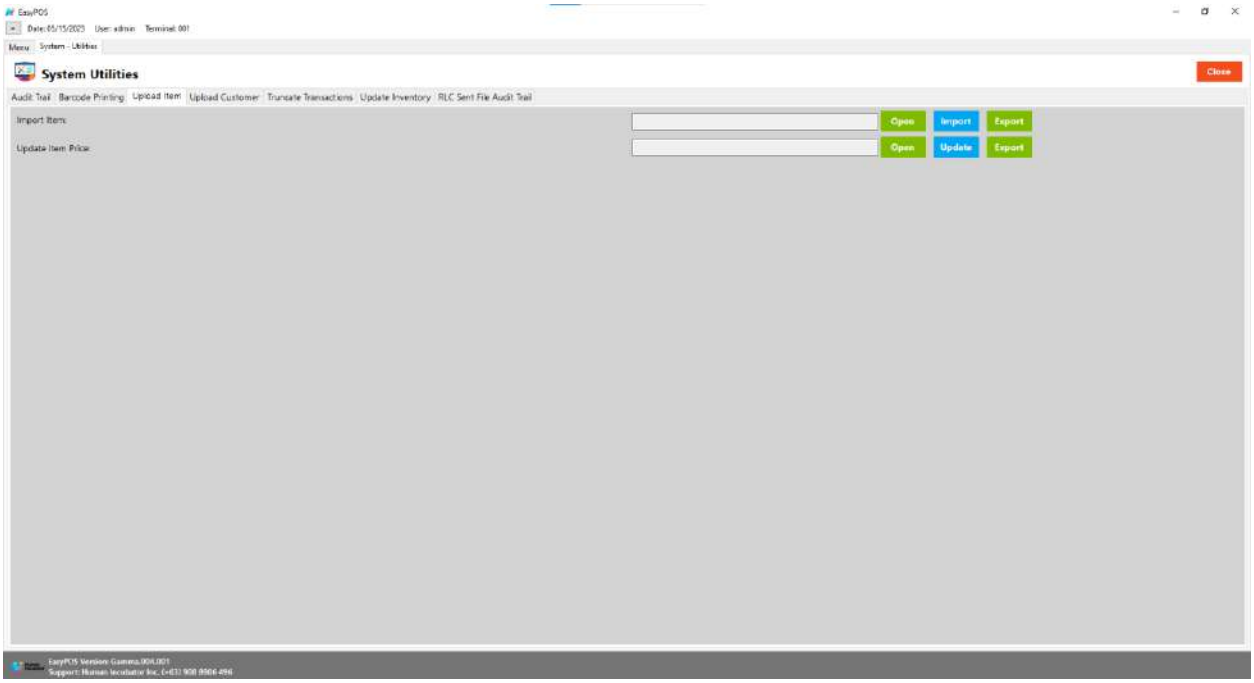


- Click the **Pick** button to select an item.
- Input the quantity of the barcode to be printed.
- Click the **Print** button to print the barcodes.



Upload Item

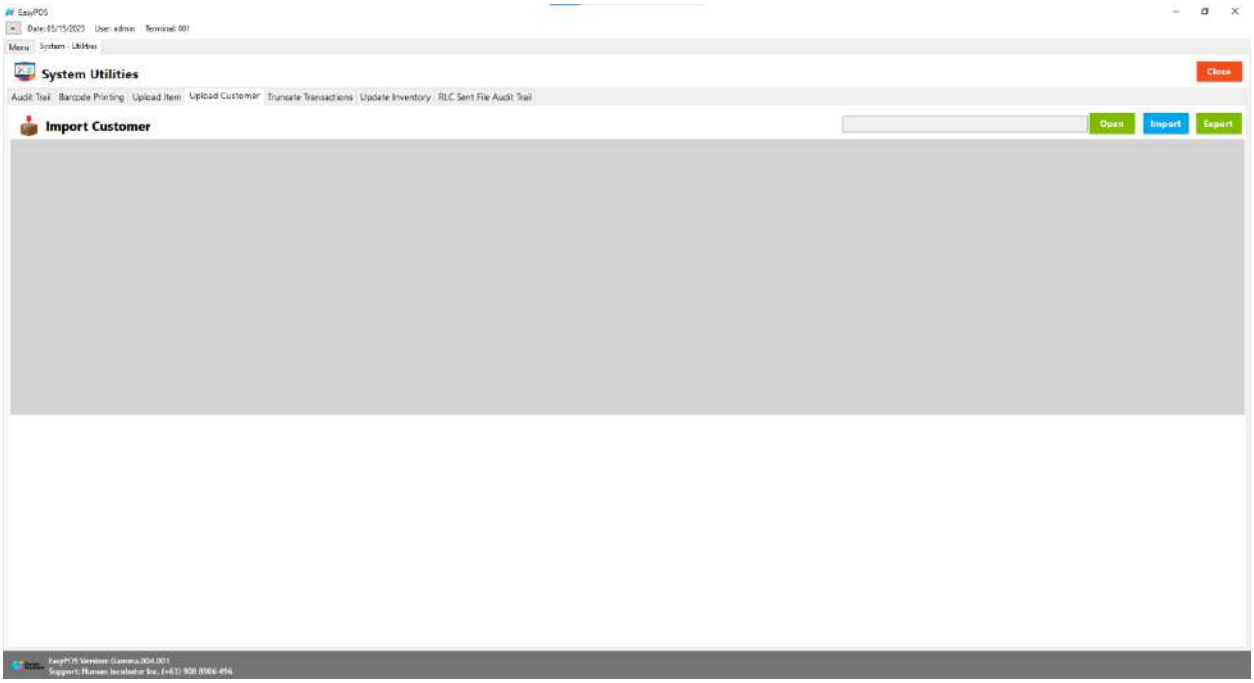
- It is another way to upload items and update item prices.



- **Import Item**
  - Click Export button to generate csv file format
  - Click Open button to select the file after inputting necessary information of the item
  - Click Import button to import the file
- **Update Item Price**
  - Click Export button to generate csv file format
  - Click Open button to select the file after inputting the updated price
  - Click Update button to upload the file

Upload Customer

- It is another way to add a list of customers.



- Click Export button to generate csv file format
- Click Open button to select the file after inputting necessary information of the customers
- Click Import button to import the file

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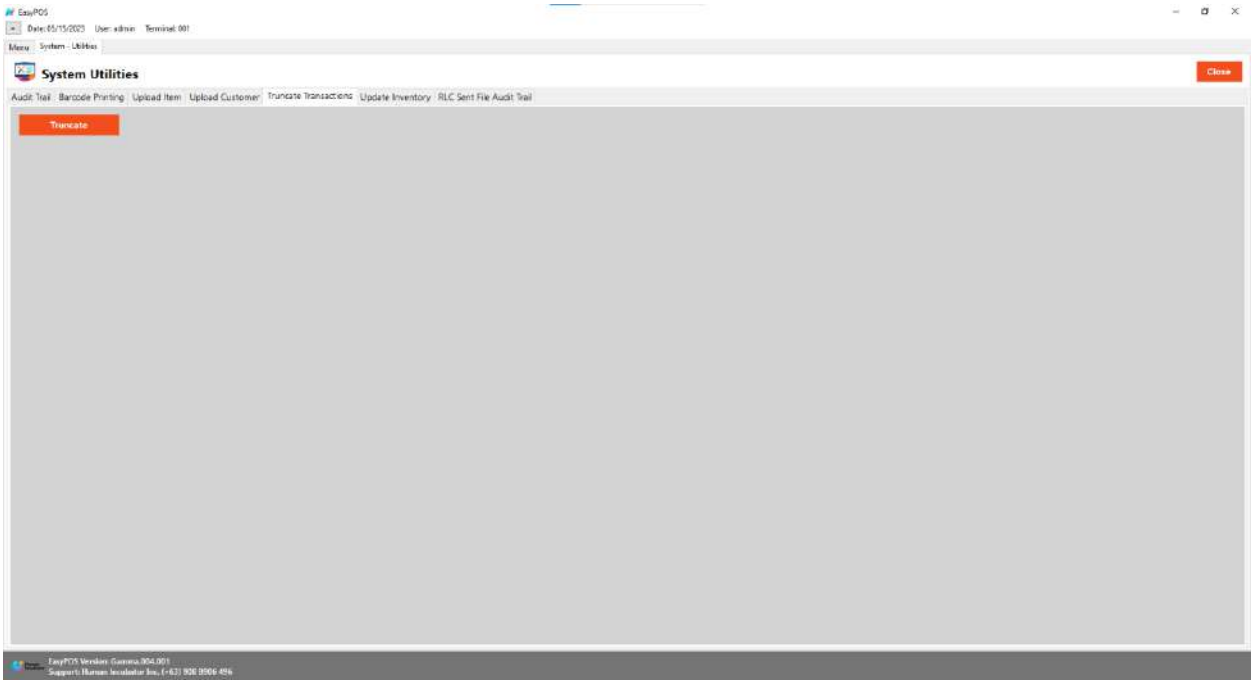
Truncate Transaction

- Deleting all transactions including stock in, stock out, cash in/out, etc.
    - Click the Truncate button to delete all transactions.



Section IX: Settings

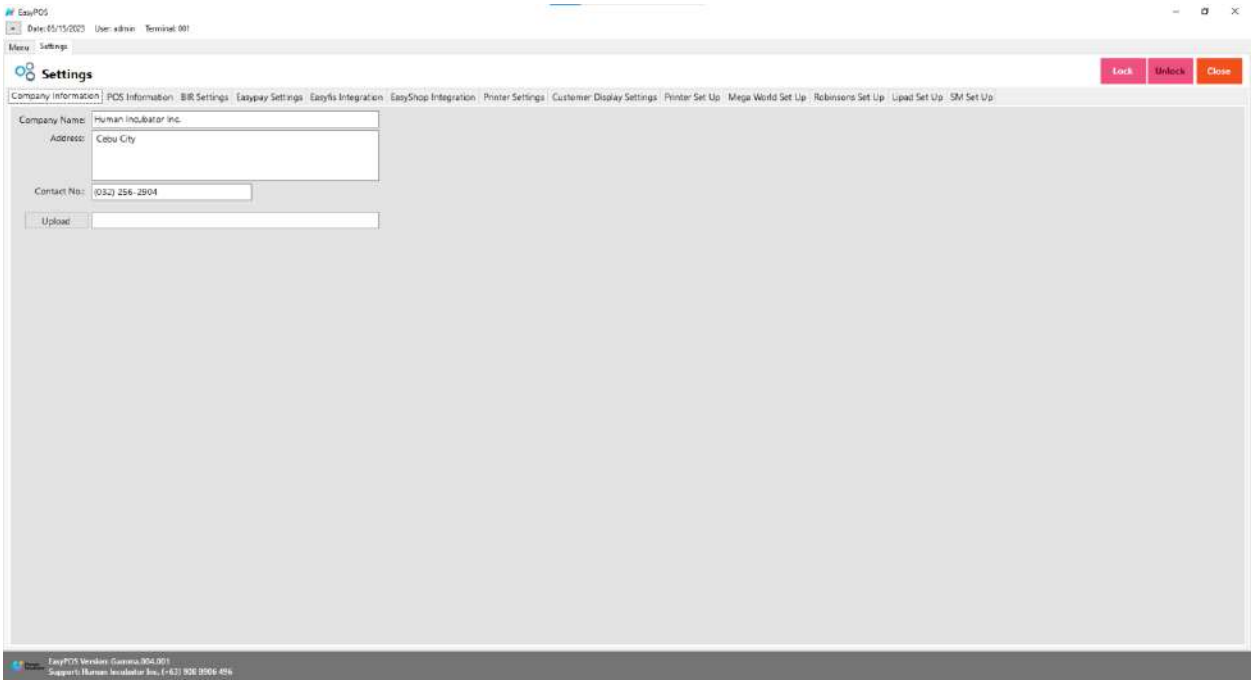
Settings

Overview

- **Settings** is where users can manage the functions of EasyPOS such as enabling/disabling the EasyPOS features, Easy series integrations, printer setup, etc.

Company Information

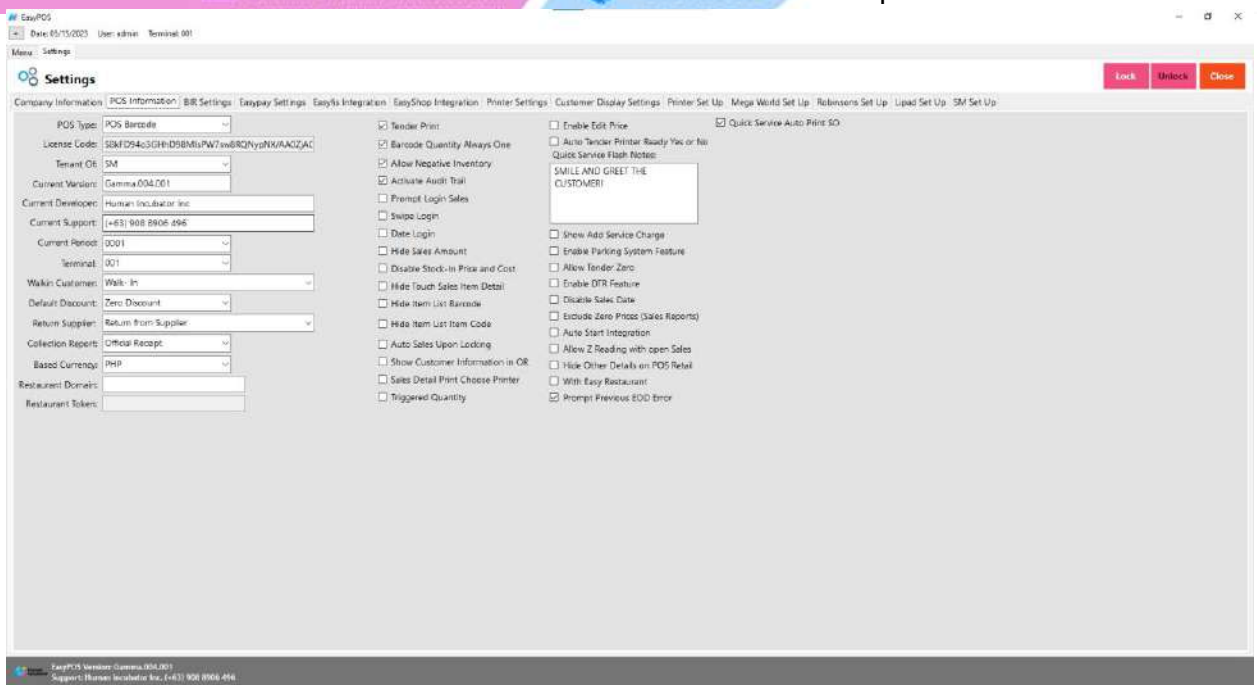
- It is where the user can set up their company information



  - Fill up the necessary information like:
    - Company name, Address, Contact number and upload image
  - Click Lock to save the details.
  - Click Unlock to edit the details
  - Close button will proceed to closing the system table module.

POS Information

- It is where the user can set the information and set up their POS.



- Fill up the necessary information like:
  - Base Currency, Tenant Of, etc
- **Tender Print**
  - Allow the user to enable or disable the print receipt
- **Barcode Quantity Always One**
  - When this feature is enabled, the user cannot edit the quantity of the item after scanning the barcode.
- **Allow Negative Inventory**
  - The user is allowed to make a transaction when there is zero inventory of the item.
- **Activate Audit Trail**
  - Activities and logs of the user will display in the Audit Trail in the Utilities module when it is enabled.
- **Prompt Login Sales**
  - It can be used by the teller or order taker.
- **Swipe Login**
  - Allow the user to login using a swipe card and a card number.
- **Date Login**
  - Allow the user to set the date manually in login.

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Metro Manila, Philippines

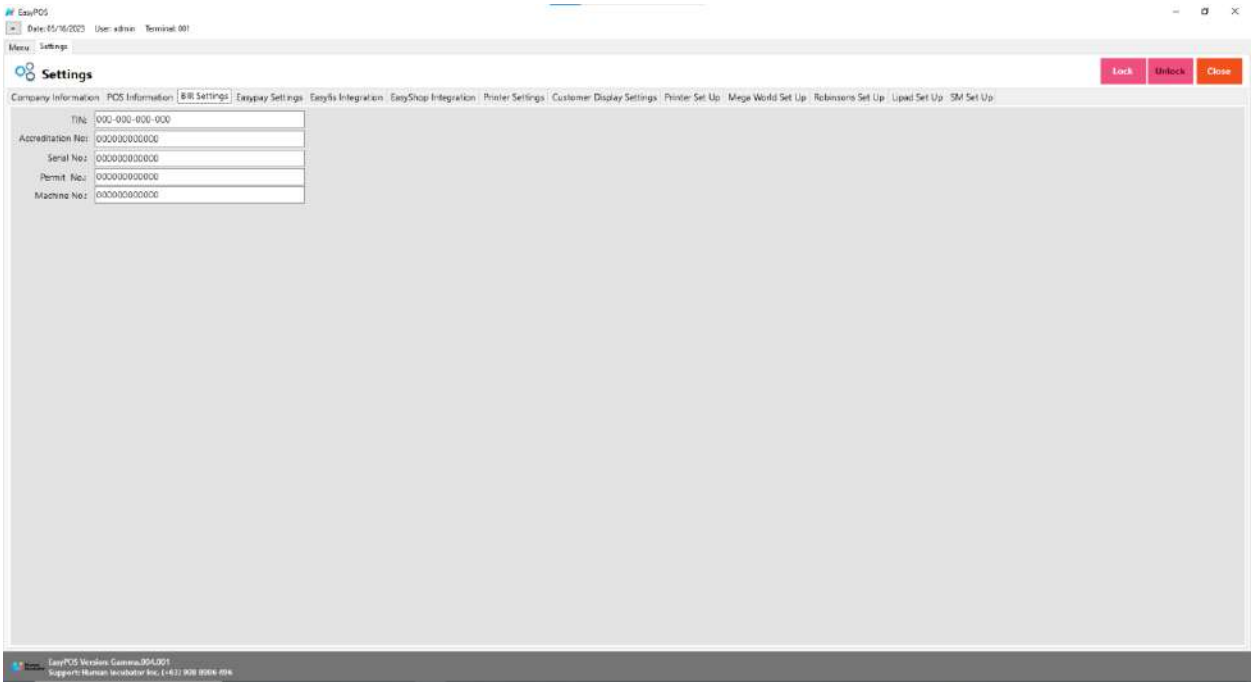
hisales@human-incubator.com

- **Hide Sales Amount**
  - When it is enabled, the sales amount will be hidden in the POS barcode.
- **Disable Stock-in Price and Cost**
  - When adding a stock-in, the price and cost of the item are disabled and not editable.
- **Hide Touch Sales Item Detail**
  - It is use to hide sales item detail in POS Touch
- **Hide Item List Barcode**
  - The barcode of the items will be hidden in the item list.
- **Hide Item List Item Code**
  - The item code of the items will be hidden in the item list.
- **Auto Sales Upon Locking**
  - When it is enabled, it will automatically create new sales upon locking the transaction.
- **Show Customer Information in OR**
  - The customer information will display in the OR when it is enabled.
- **Enable Edit Price**
  - The user is allowed to edit the price when creating a transaction
- **Auto Tender Printer Ready Yes or No**
  - Disable the prompt message for printer ready yes or no.
- **Show Add Service Charge**
  - Allow the user to add service charge in POS Touch and Quick service.
- **Allow Tender Zero**
  - Allow the user to tender zero transactions.
- **Enable DTR Feature**
  - It is used to monitor the attendance of the employees. The employees can clock in/out and break in/out.
- **Disable Sales Date**
  - Sales date is disable and the user is not allowed to select date in sales
- **Exclude Zero Prices (Sales Report)**
  - The item that has a zero(0) price is not included in the sales report
- **Auto Start Integration**
  - Automatically start the integration like easyfis.
- **Allow Z Reading with Open Sales**
  - Allow the user to view or print z reading report with an open sales

- **Hide Other Details on POS Retail**
  - When this feature is enabled, it will only display the item description, quantity, price, discount and amount in sales detail.
- **With Easy Restaurant**
  -
- **Prompt Previous EOD Error**
  - It is a prompt message error for the previous EOD.
- **Quick Service Auto Print SO**
  - It can print order slips in the quick service when it is enabled.

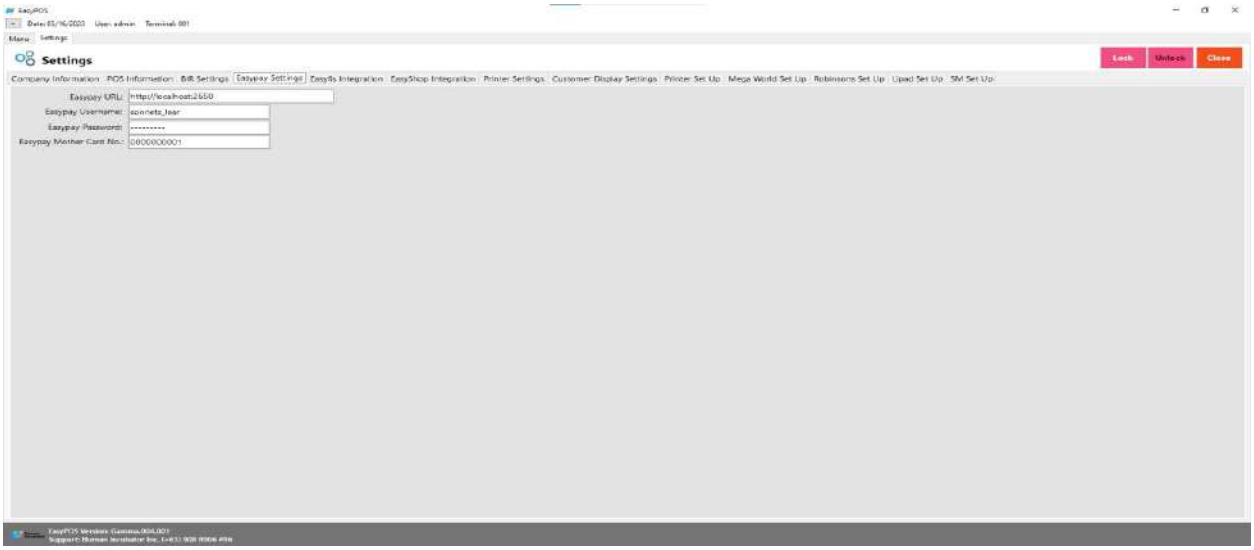
BIR Settings

- It is where the user can set up their BIR credentials and receipt documentation.



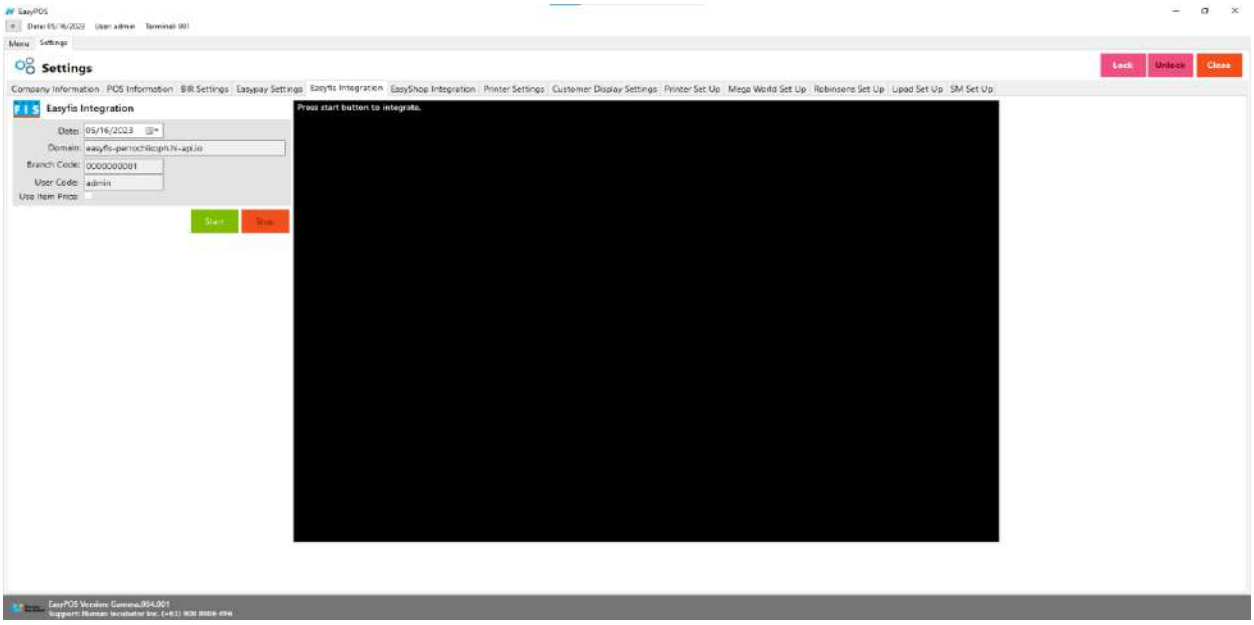
Easypay Settings

- This is for the easypay integration where the user will set up the URL, username, password and card no.

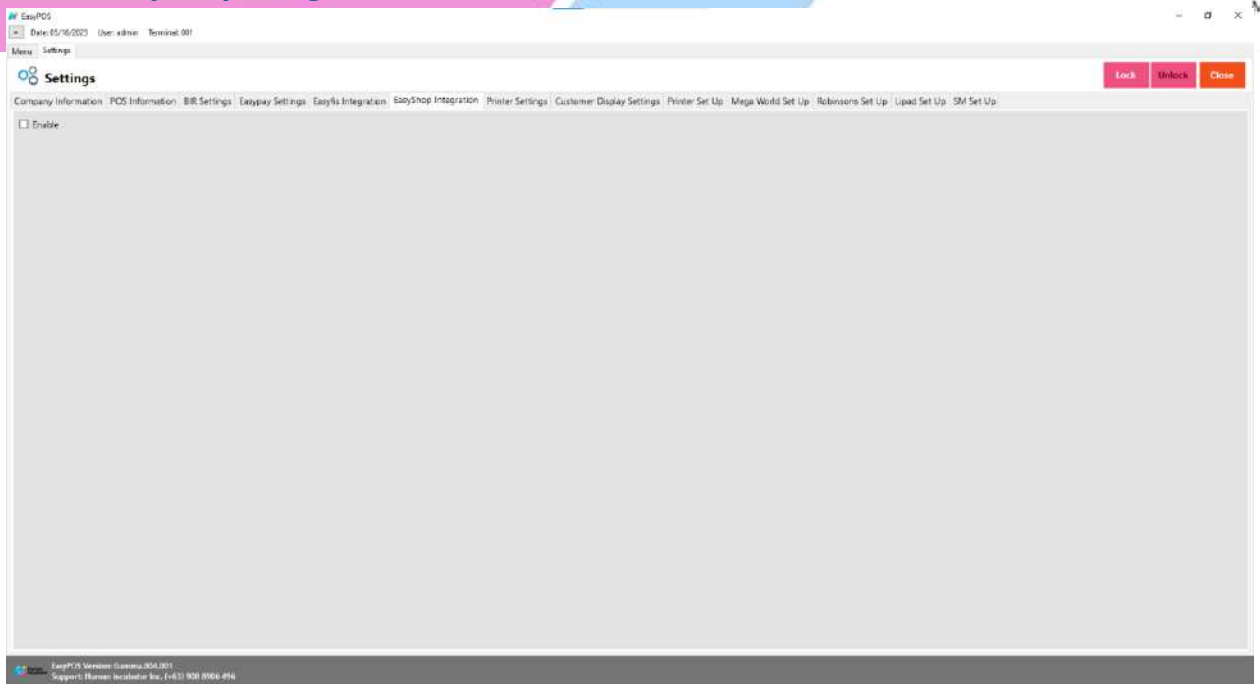


Easyfis Integration

- This is for easyfis integration where it is a connection and integration between the easyfis and EasyPOS product.
- Fill up the necessary fields like:
  - Domain(ex: https://easyfis-perrochikoph.hi-api.io)

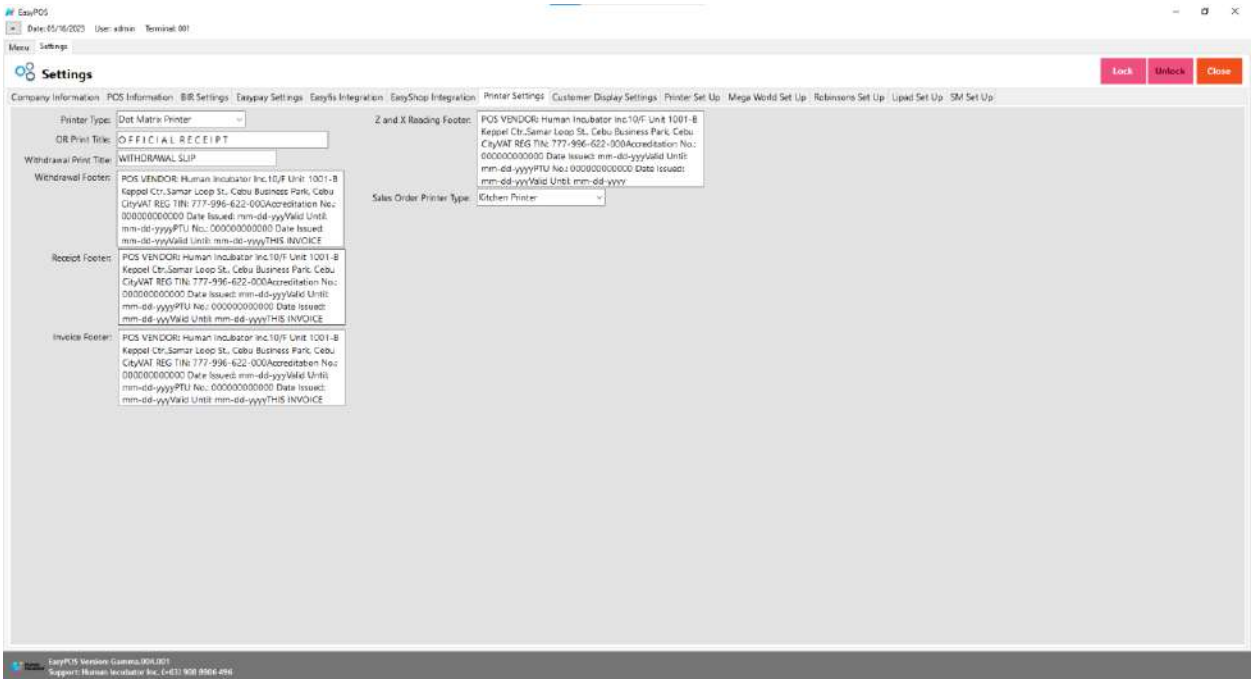


EasyShop Integration



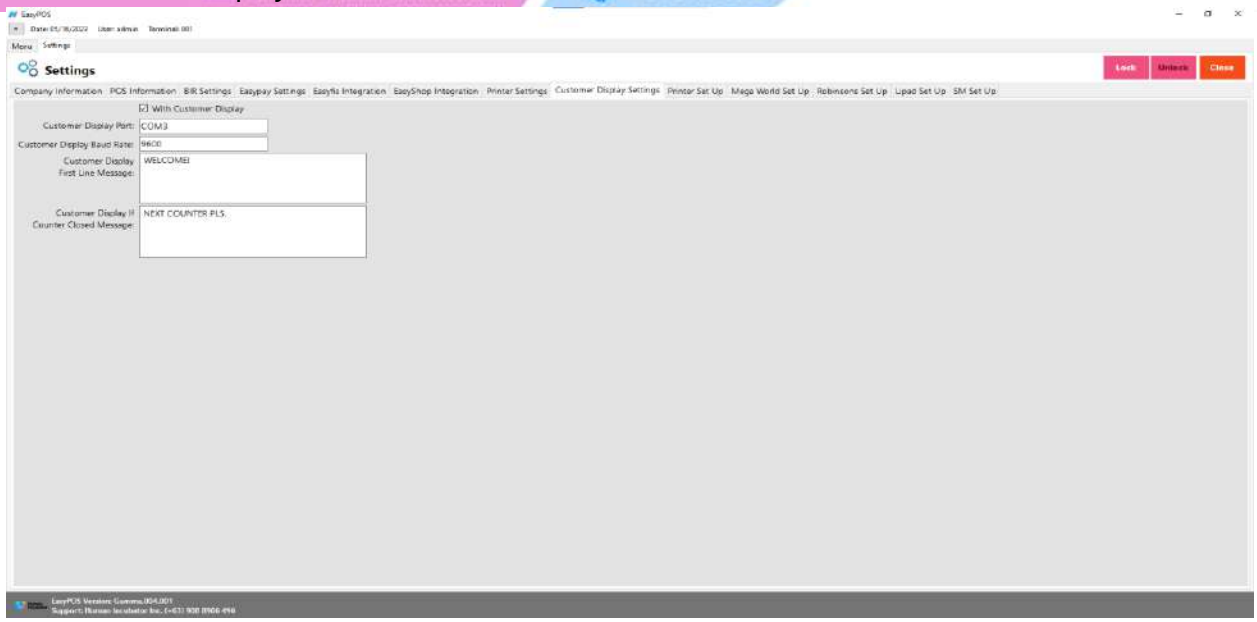
Printer Settings

- This is where the user will set up for the output of the printer receipt.



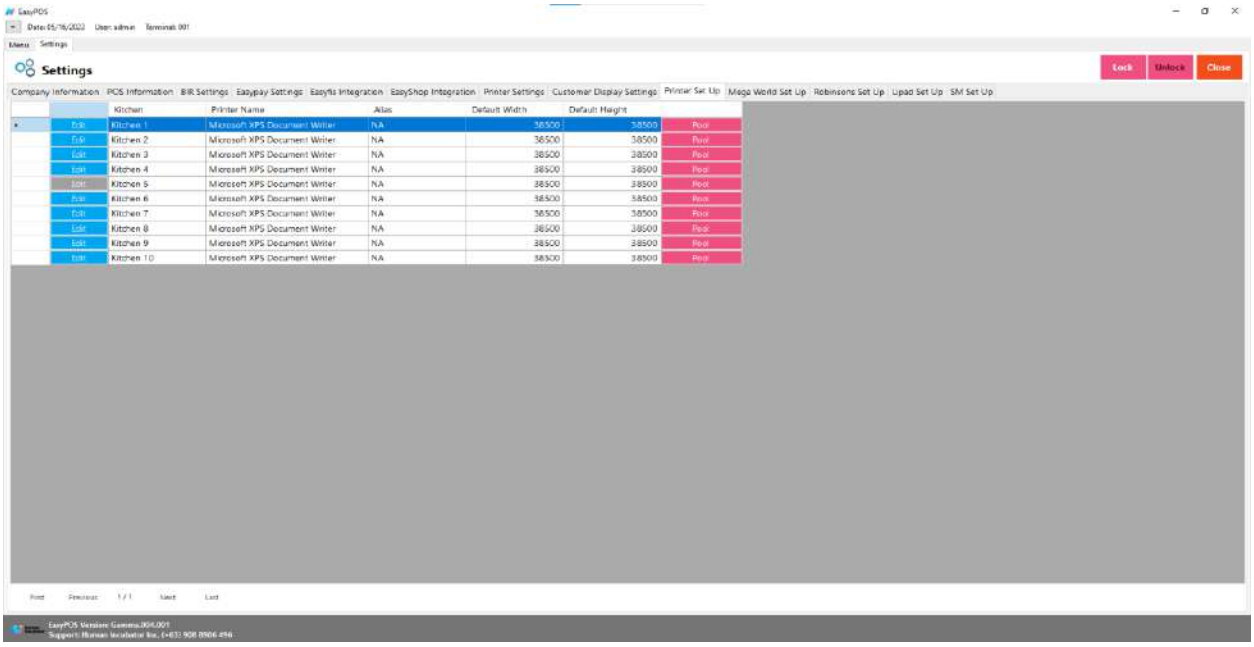
Customer Display

- This is where the user can set up the customer display like greetings. It will also display in the VFD.



Printer Setup

- The user can set up the printer, edit and pool for the different output of receipts in different printers.



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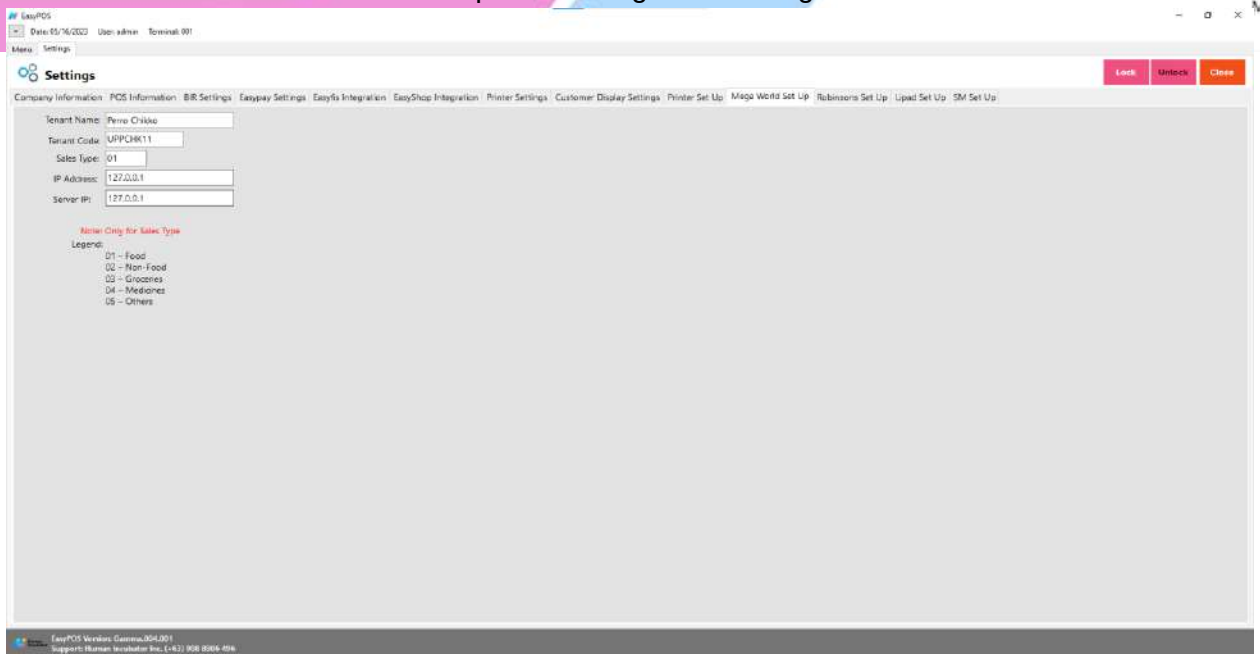
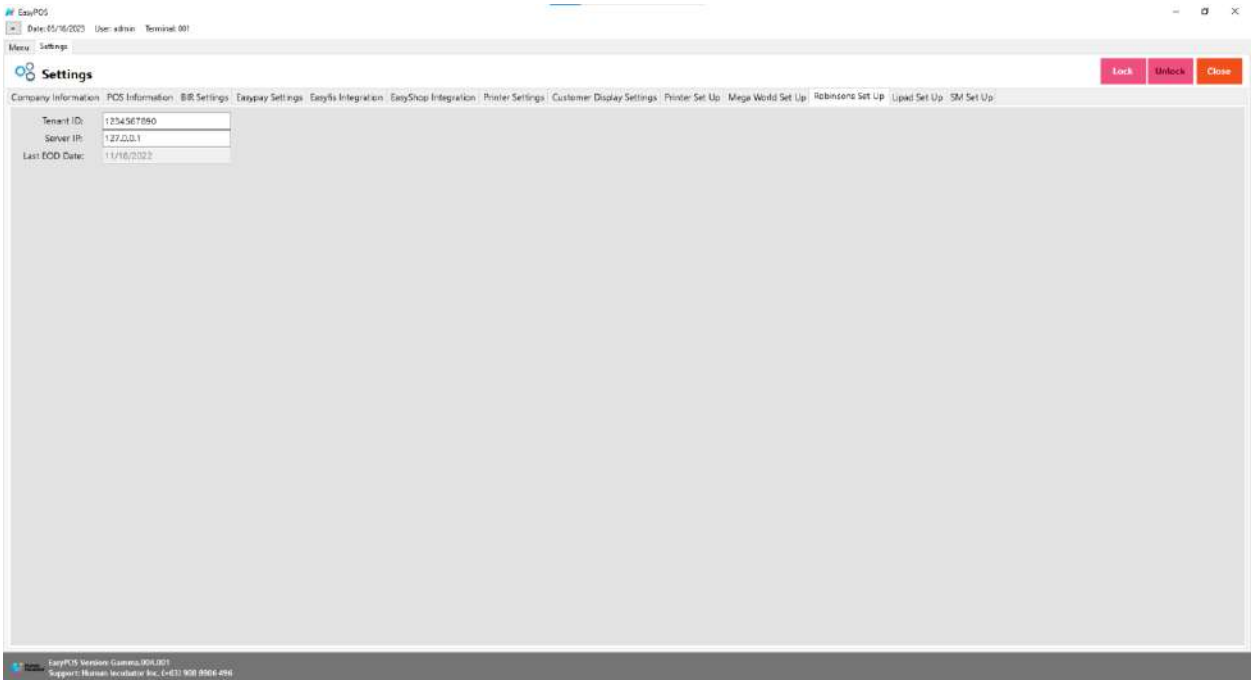
Mega World Setup

- This is where to set up for the mega world integration.



Robinson Setup

- This is where to set up for the Robinson integration.



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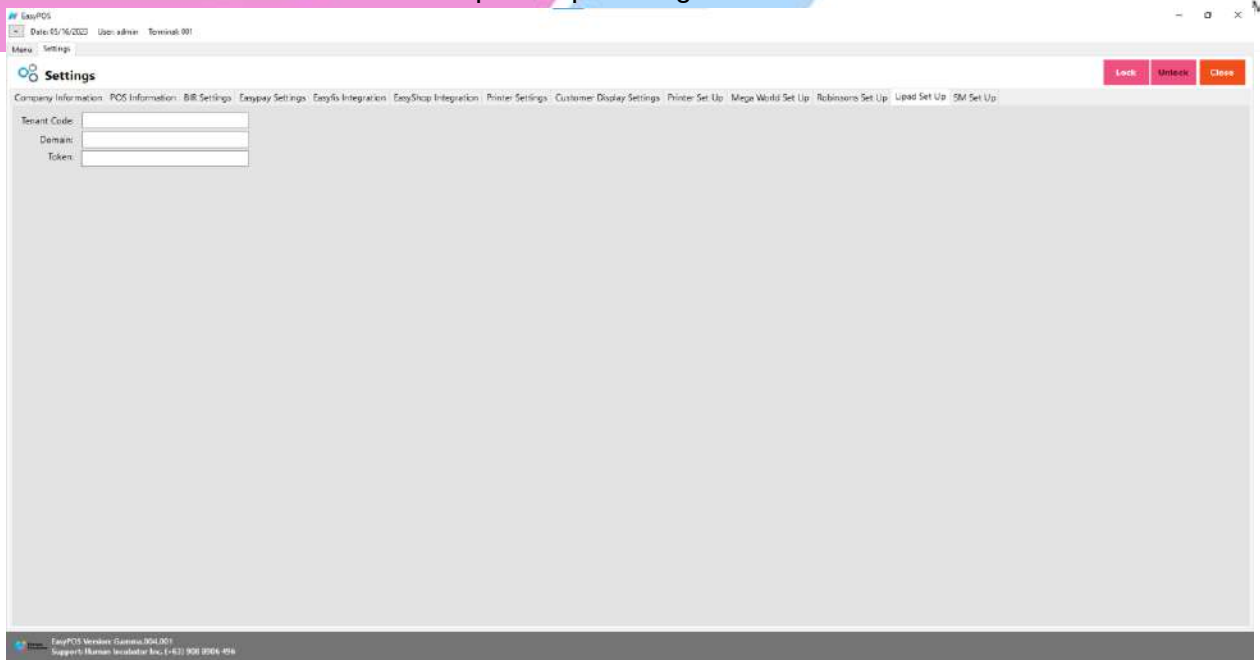
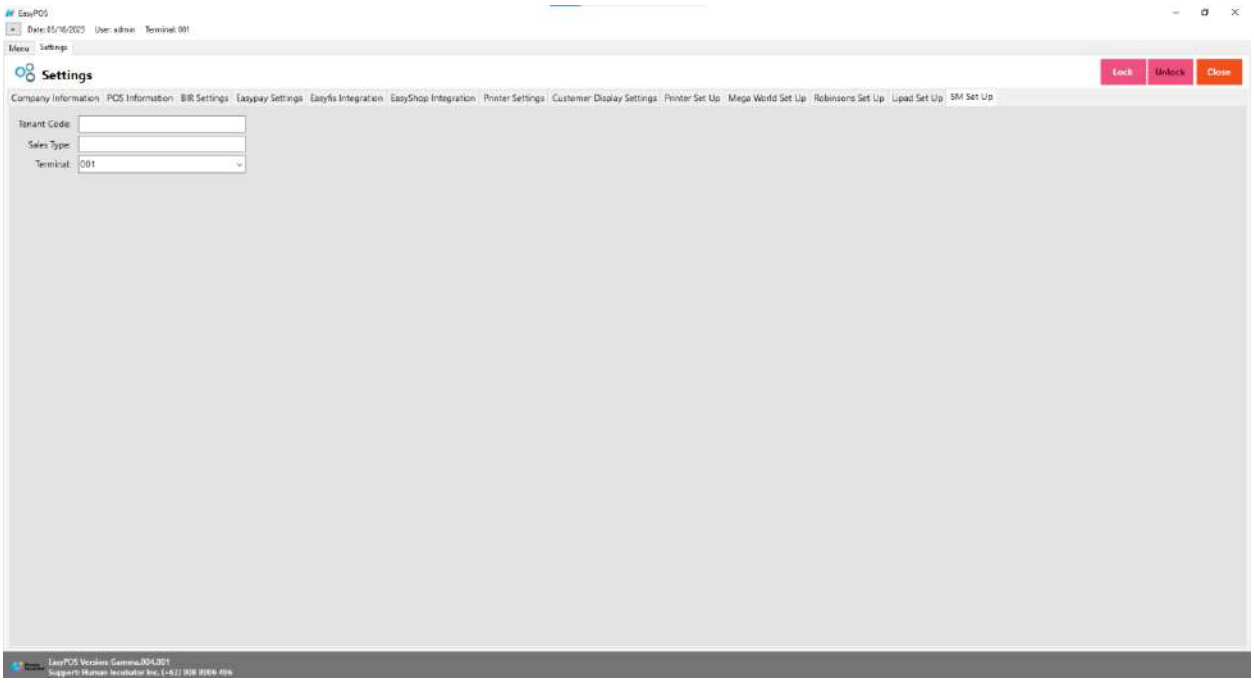
Lipad Setup

- This is where to set up the Lipad integration.



SM Setup

- This is where to set up the SM integration.