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easyPOS

EasyPOS User Manual

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Introduction

Overview

EasyPOS is an all-in-one solution for your point-of-sale needs. It is designed to help you optimize your operations, stay compliant with BIR regulations, and increase productivity. EasyPOS is a user-friendly point-of-sale software that empowers businesses to efficiently manage sales, track inventory, and enhance the overall customer experience.

This user manual is your guide in using the EasyPOS system. It will walk you through the installation, setup and everyday use of software.

Hardware Specifications

- **Processor**: 12th Gen Intel Core i3
- **Memory (RAM) :** 4GB-8GB RAM
- **Storage:** 256GB SSD
- **Operating System:** Windows 10 Pro

Note: Properly shutdown the computer to avoid damage to hardware and data corruption in the database.

Who Should Use This Manual

This manual is designed for all users of the EasyPOS including business owners, administrators, cashiers, sales staff, and employees responsible for processing sales, managing inventory, and serving customers. You may find comprehensive details, step-by-step instructions, and best practices for using our POS system throughout this document.

II: Getting Started

Introduction

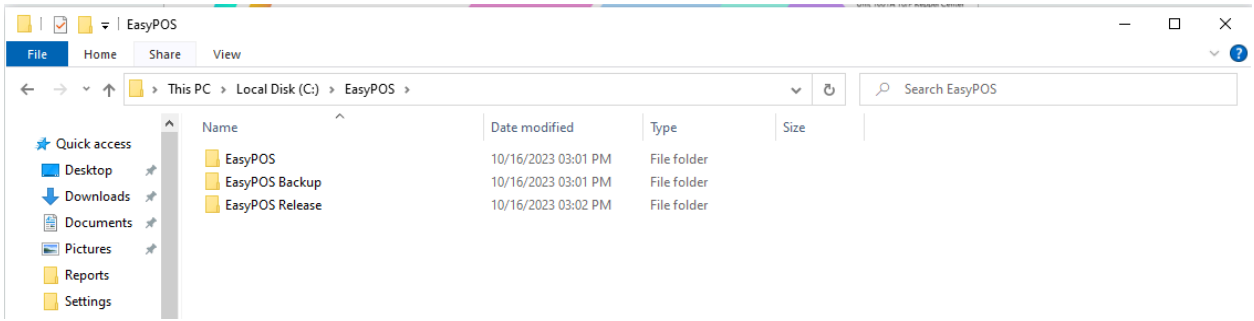
Welcome to EasyPOS! You will be guided through the first steps necessary to set up and operate your EasyPOS system in this section.

Installation of EasyPOS

Keeping file organized

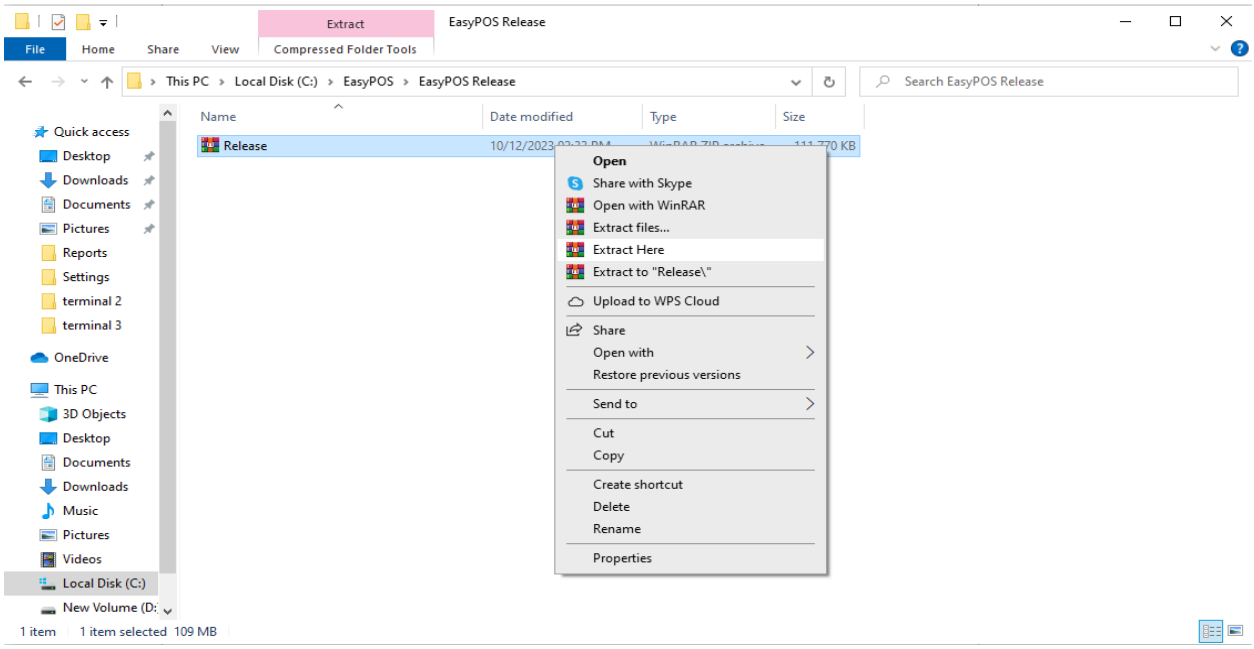
- Create an “EasyPOS” folder
- Create an “EasyPOS Backup” folder

- Create an “EasyPOS Release” folder



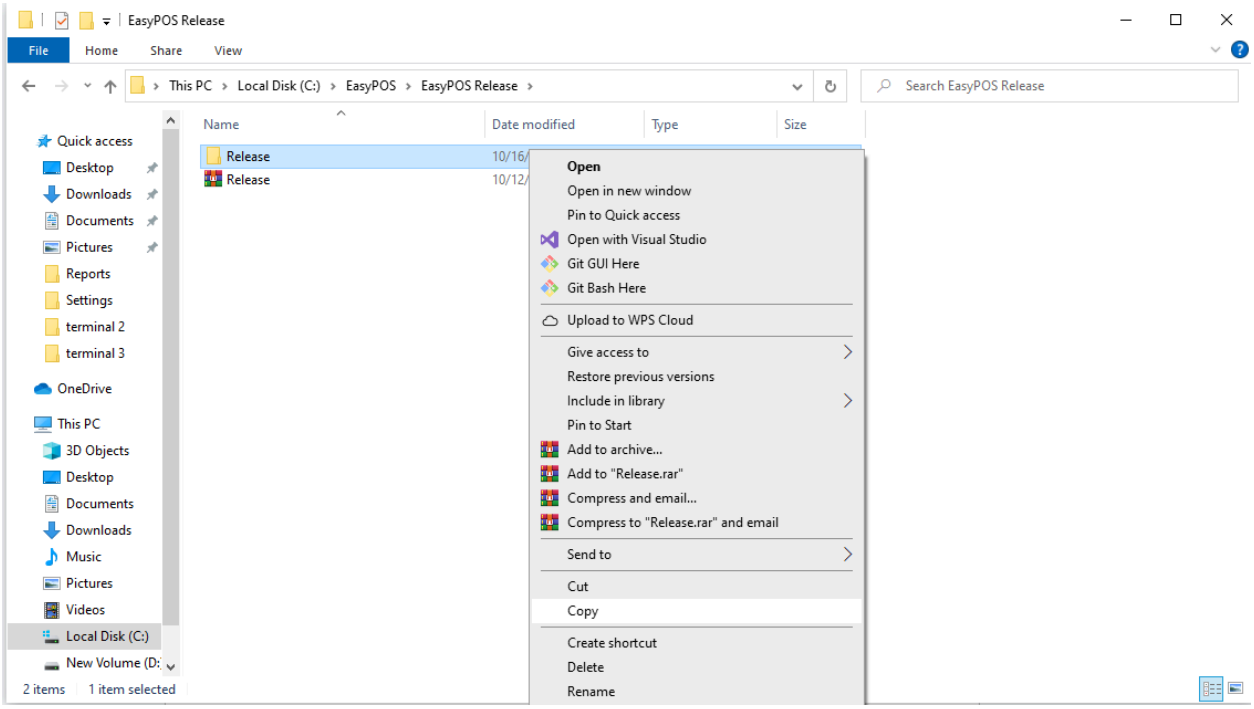
Extraction of the compressed EasyPOS Release File

- Go to EasyPOS Release and right click on it
- Select “Extract Here” to extract the compressed file



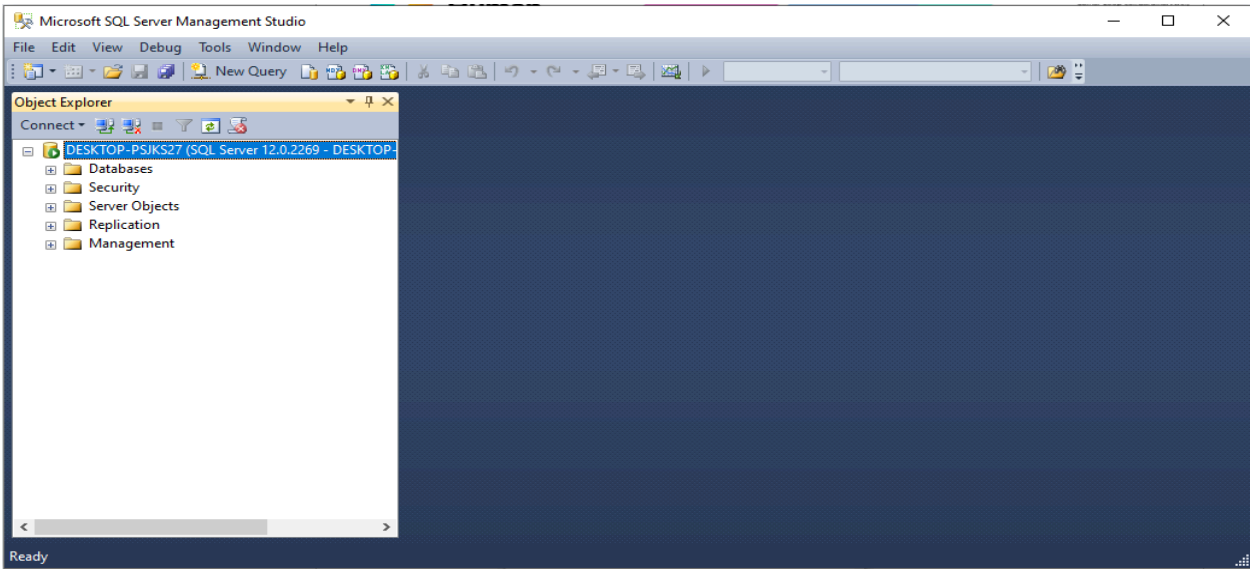
Pasting the file to the appropriate folder

- Right click on the “Release” and select “cut or copy”
- Then paste it in the “EasyPOS” folder



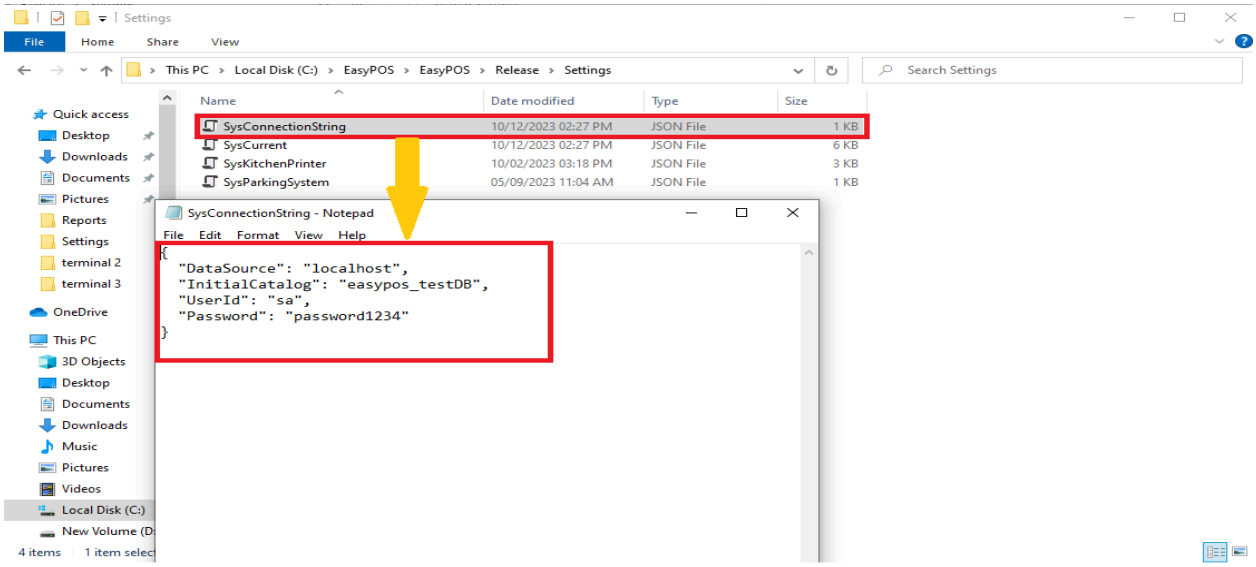
Install SQL Server

- Download the SQL server.
- Click the link to download and install the SQL server: https://www.microsoft.com/en-us/download/details.aspx?id=101064
- Restore a clean database in SQL server



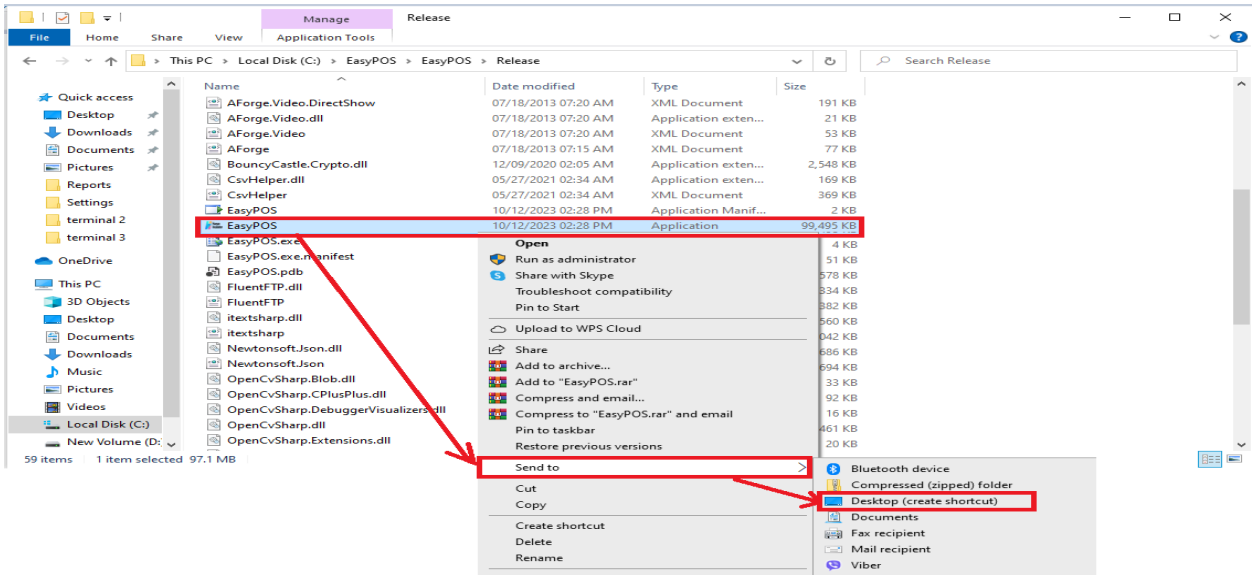
Setup database for storing data

- Go to “EasyPOS” folder
- Open the release file and select “Settings” folder
- Select SysConnectionString and open with notepad
- Setup the database name in SysConnectionString



Creating an EasyPOS shortcut app on the desktop

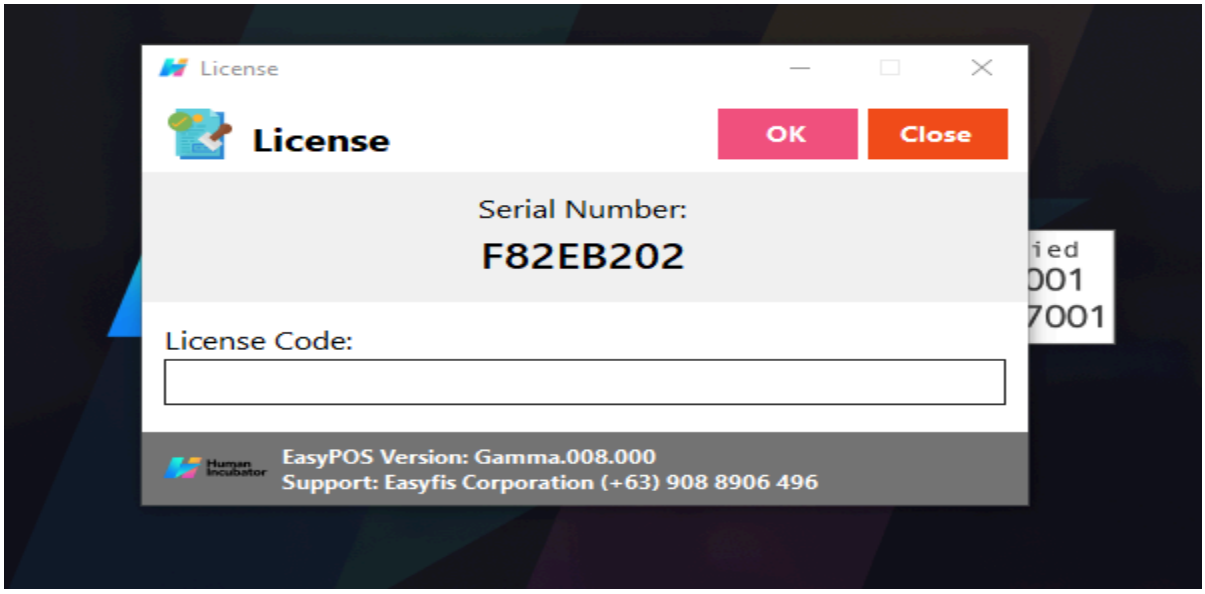
- Go to “EasyPOS” folder and open the “Release” folder
- Find and right click the EasyPOS application, then select “Send to” and “Desktop (create shortcut)”



Opening the EasyPOS application

- Go to your desktop and open EasyPOS

- It will ask for a license the first time opening the EasyPOS application on the computer
- Copy the serial number and forward it to the designated personnel for the creation of the license

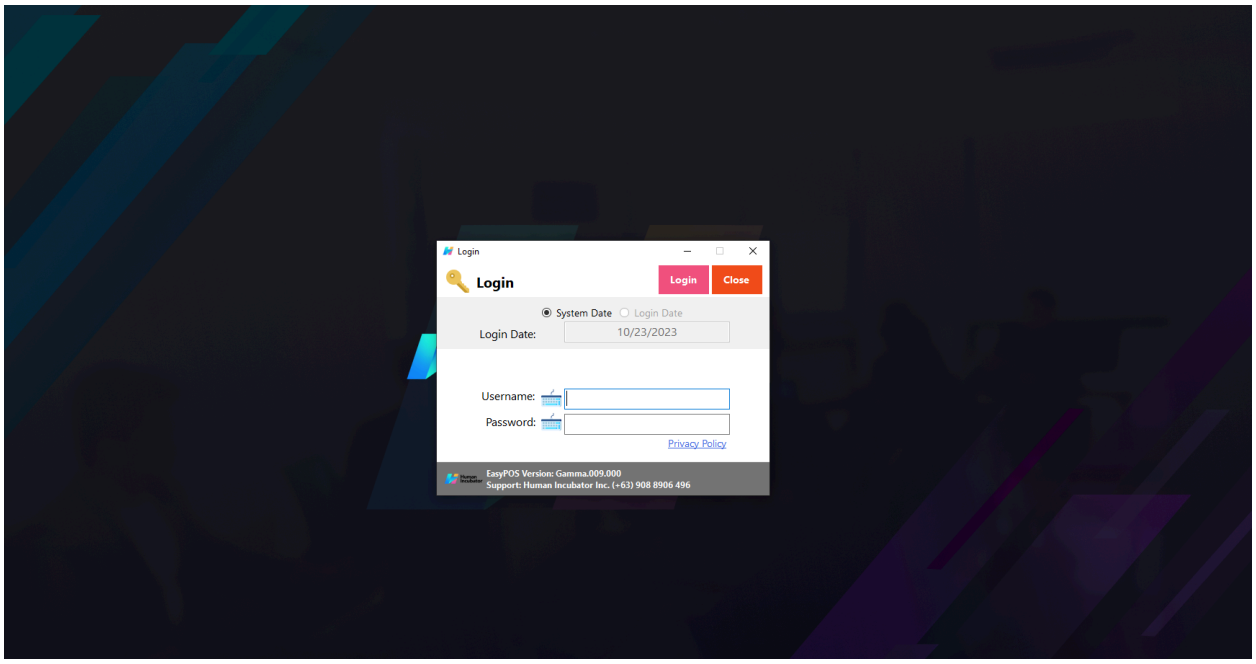


III: Login Page

Login Page

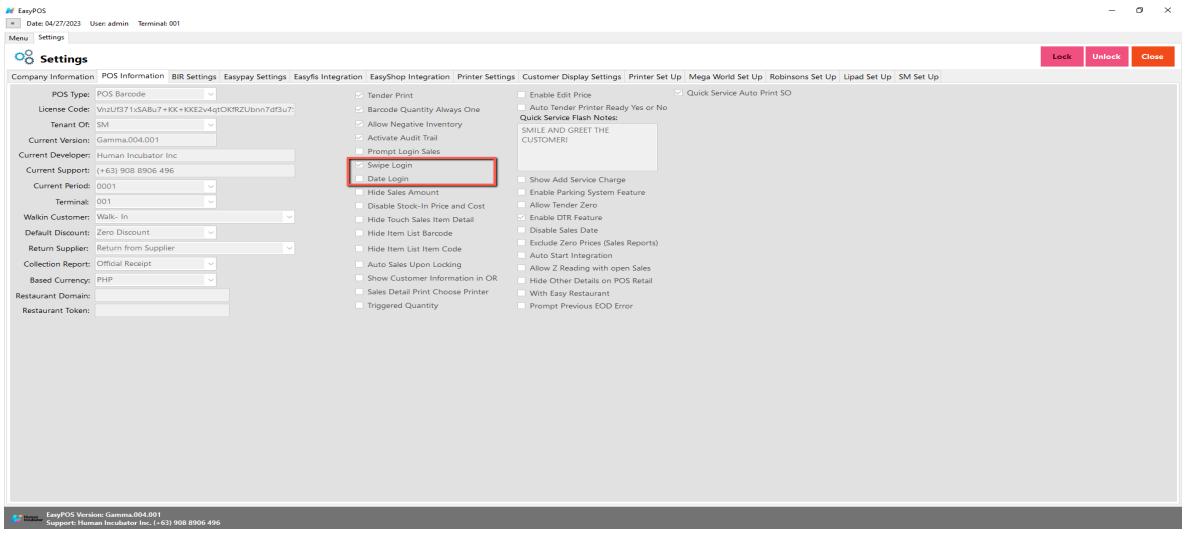
Overview

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

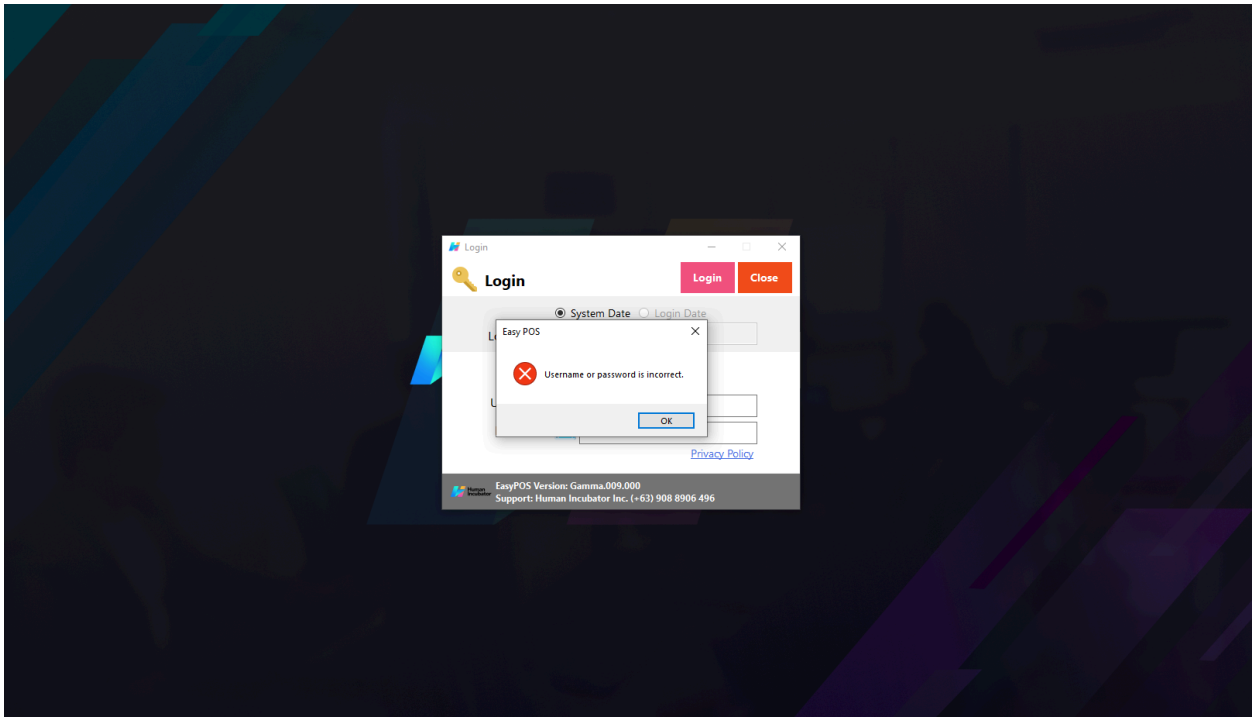


- Login using card number and user code

- 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.

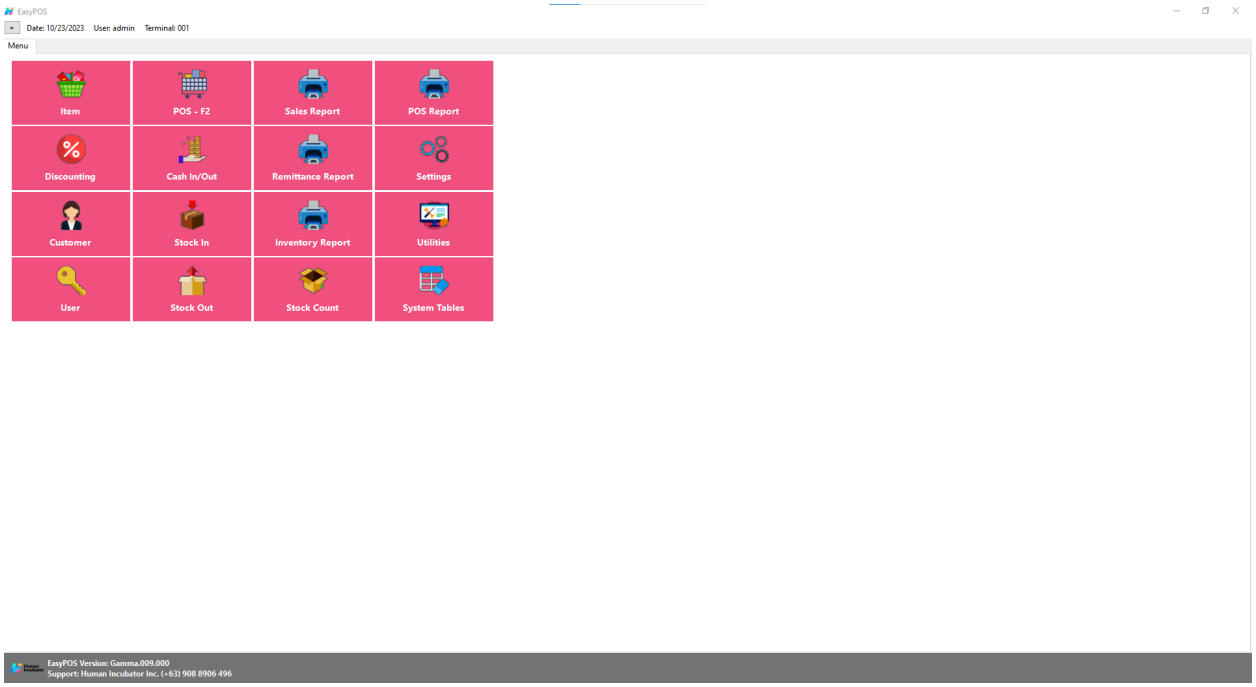


IV: System Menu Page

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.
- **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.

V: Set Up

Item Setup

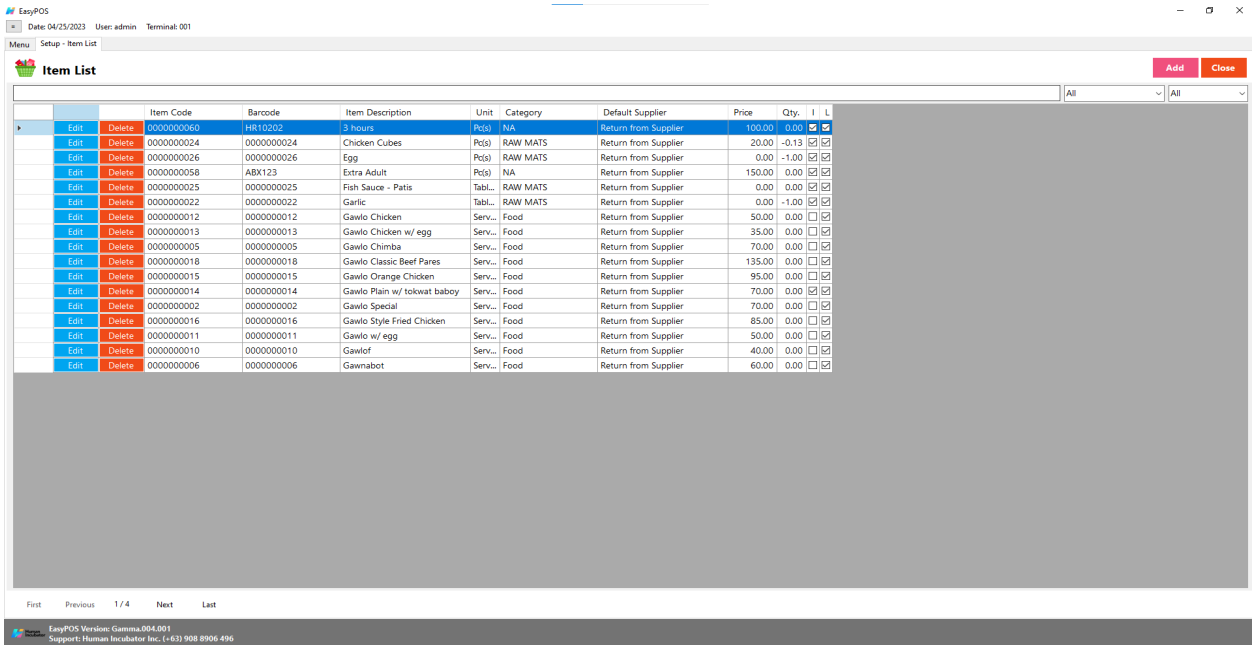
Overview

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

*Take Note: If the **EasyPOS** has an **EasyFS Integration,** the setting of items or adding of items should be done in the EasyFS system. The item detail that you should be attentive to is the "**Tax Code**" for each "**Tax Type**" saved in each system. In EasyFS it is "**SI VAT**" and in EasyPOS it is "**Sales VAT**". Otherwise you will be getting an error in integration that says "**Output Tax Mismatch**"*

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.

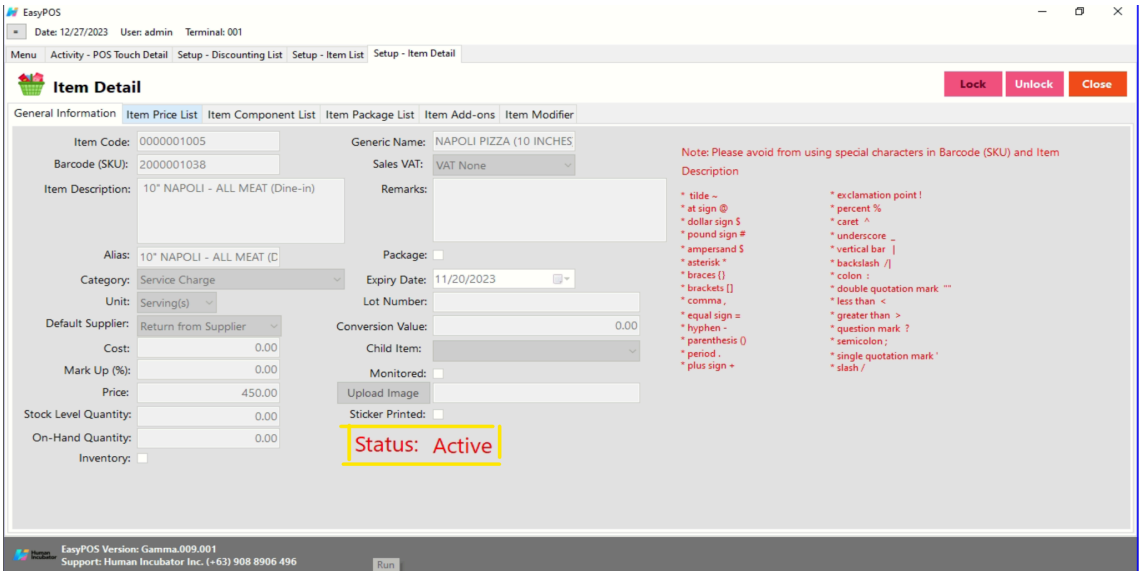


		Item Code	Barcode	Item Description	Unit	Category	Default Supplier	Price	Qty.
Edit	Delete	0000000060	HR10202	3 hours	Pc(s)	NA	Return from Supplier	100.00	0.00
Edit	Delete	0000000024	0000000024	Chicken Cubes	Pc(s)	RAW MATS	Return from Supplier	20.00	-0.13
Edit	Delete	0000000026	0000000026	Egg	Pc(s)	RAW MATS	Return from Supplier	0.00	-1.00
Edit	Delete	0000000058	ABX123	Extra Adult	Pc(s)	NA	Return from Supplier	150.00	0.00
Edit	Delete	0000000025	0000000025	Fish Sauce - Patis	Tabl...	RAW MATS	Return from Supplier	0.00	0.00
Edit	Delete	0000000022	0000000022	Garlic	Tabl...	RAW MATS	Return from Supplier	0.00	-1.00
Edit	Delete	0000000012	0000000012	Gawlo Chicken	Serv...	Food	Return from Supplier	50.00	0.00
Edit	Delete	0000000013	0000000013	Gawlo Chicken w/ egg	Serv...	Food	Return from Supplier	35.00	0.00
Edit	Delete	0000000005	0000000005	Gawlo Chimba	Serv...	Food	Return from Supplier	70.00	0.00
Edit	Delete	0000000018	0000000018	Gawlo Classic Beef Pares	Serv...	Food	Return from Supplier	135.00	0.00
Edit	Delete	0000000015	0000000015	Gawlo Orange Chicken	Serv...	Food	Return from Supplier	95.00	0.00
Edit	Delete	0000000014	0000000014	Gawlo Plain w/ tokwat baboy	Serv...	Food	Return from Supplier	70.00	0.00
Edit	Delete	0000000002	0000000002	Gawlo Special	Serv...	Food	Return from Supplier	70.00	0.00
Edit	Delete	0000000016	0000000016	Gawlo Style Fried Chicken	Serv...	Food	Return from Supplier	85.00	0.00
Edit	Delete	0000000011	0000000011	Gawlo w/ egg	Serv...	Food	Return from Supplier	50.00	0.00
Edit	Delete	0000000010	0000000010	Gawlof	Serv...	Food	Return from Supplier	40.00	0.00
Edit	Delete	0000000006	0000000006	Gawnabot	Serv...	Food	Return from Supplier	60.00	0.00

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
    - Please take note also to add the right category and unit for the item
    - If the Item has item components, the total cost of the item component will automatically display in the cost of the item general information tab.
    - *It has a maximum limit with 255 characters in Item code, Barcode, Item Description, Alias and Category*
    - *Avoid using special characters in All fields in Item Details like: at sign (@), dollar sign ($), pound sign (#), ampersand (&), asterisk (*), blank () , braces ({ }), brackets ([ ]), comma (,), equal sign (=), hyphen (-), parenthesis ( ), period (.), plus sign (+), semicolon (;), single quotation mark ('), slash (/) and etc. Special Characters: ~ ` ! @ # $ % ^ & * ( ) - _ + = { } [ ] | \ / : ; " ' < > , .?*
    - *If some fields have special characters, a prompt message will appear when locking or saving the data.*
    - *Default value: NA and 0.00*
- Some fields are optional like Stock Level Quantity, Package, Monitored, Conversion Value, Lot Number.
- In the Inventory checkbox, check if the item is Inventory and if the item is non-inventory just leave uncheck.
- In the Sticker Printed checkbox, check if it is a Quick Service setup and required for a sticker printed and if the setup is not a Quick Service and not required for sticker printed, just leave it unchecked.

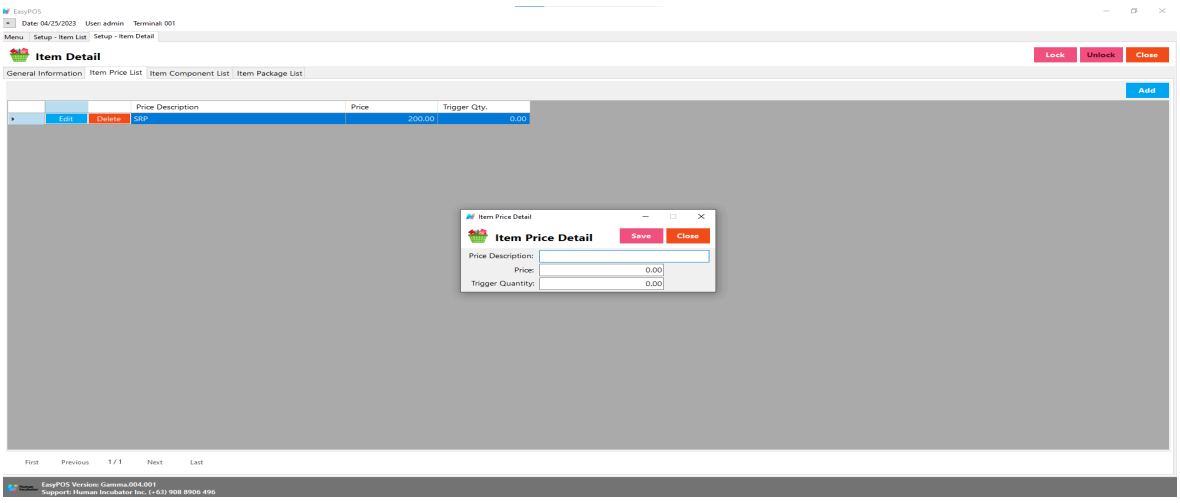
- Add Status "Active" if the item detail is lock and "Inactive" if the



item detail is unlock

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.

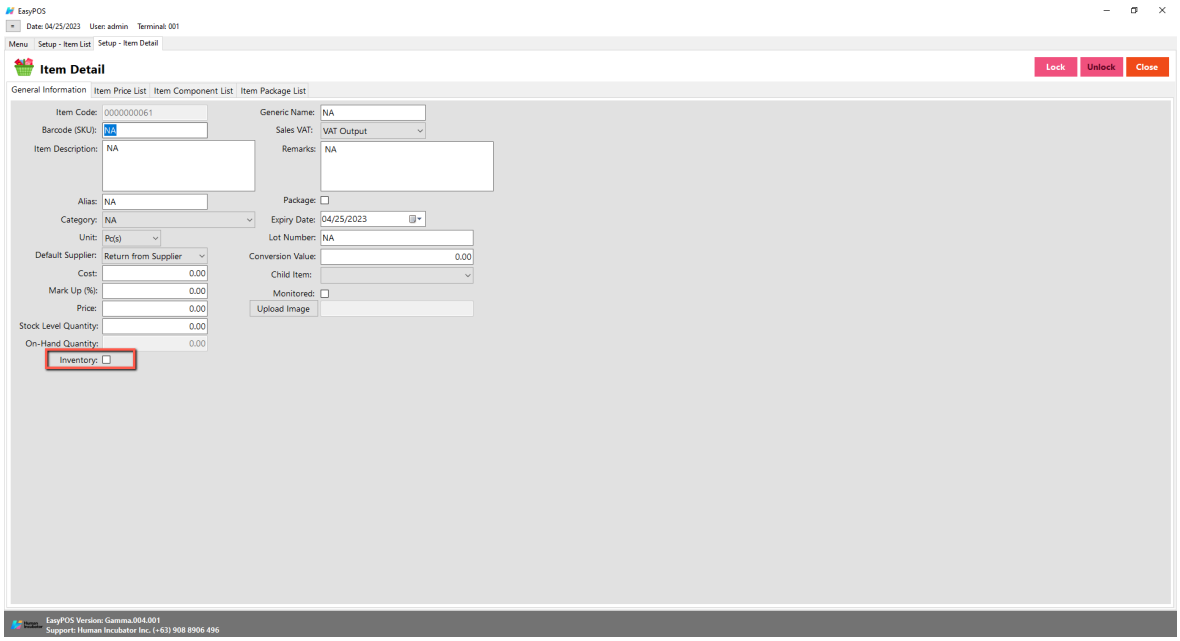


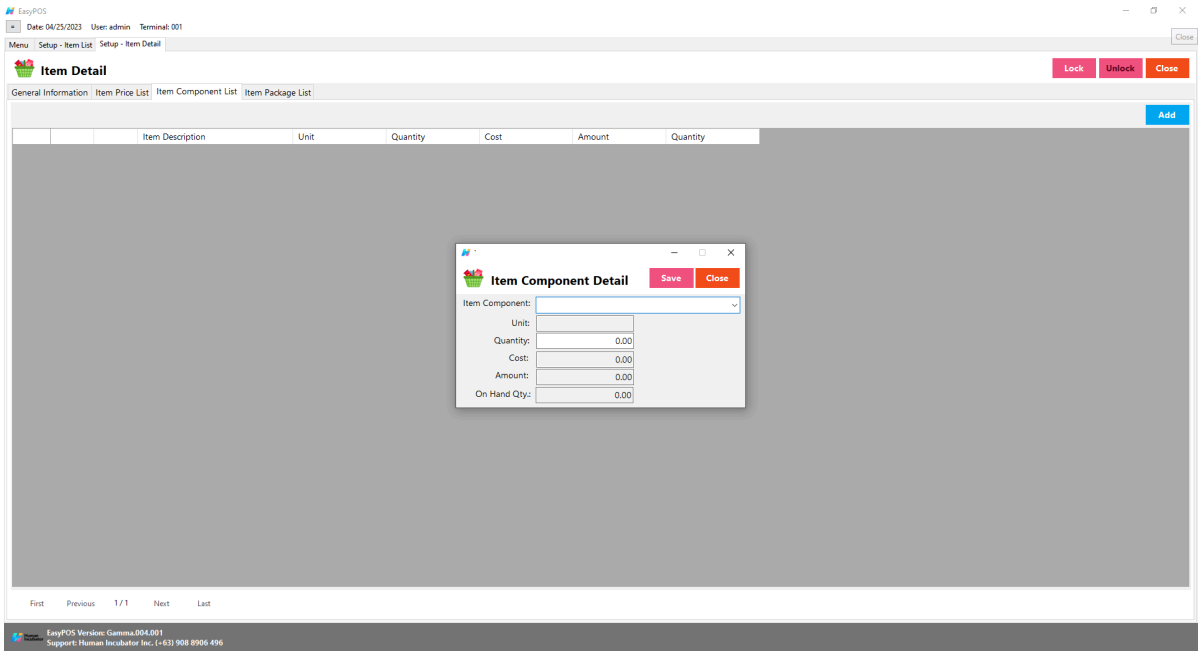
Item Component List

- 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.



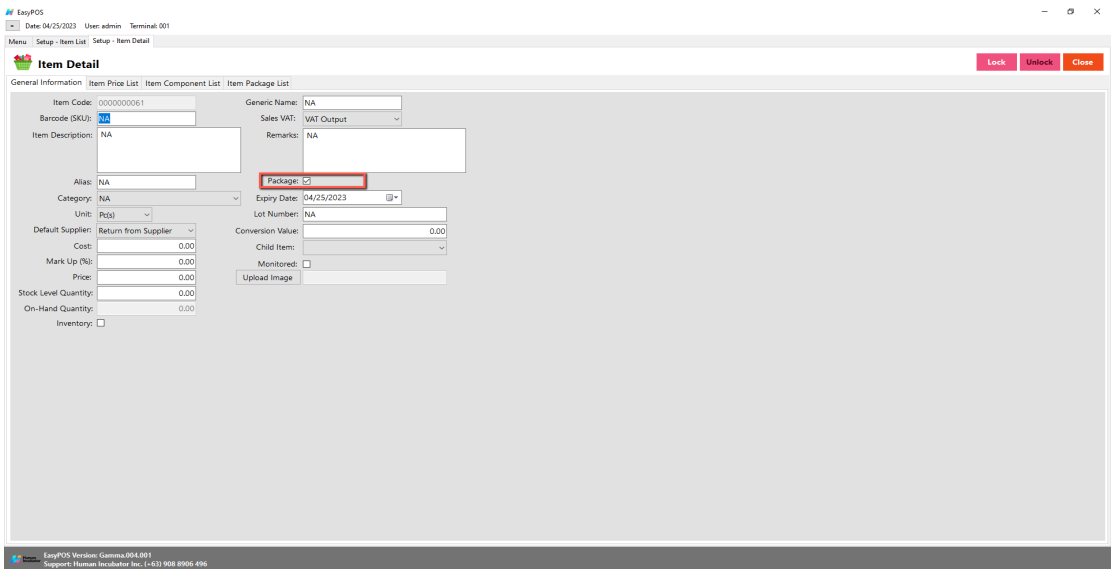


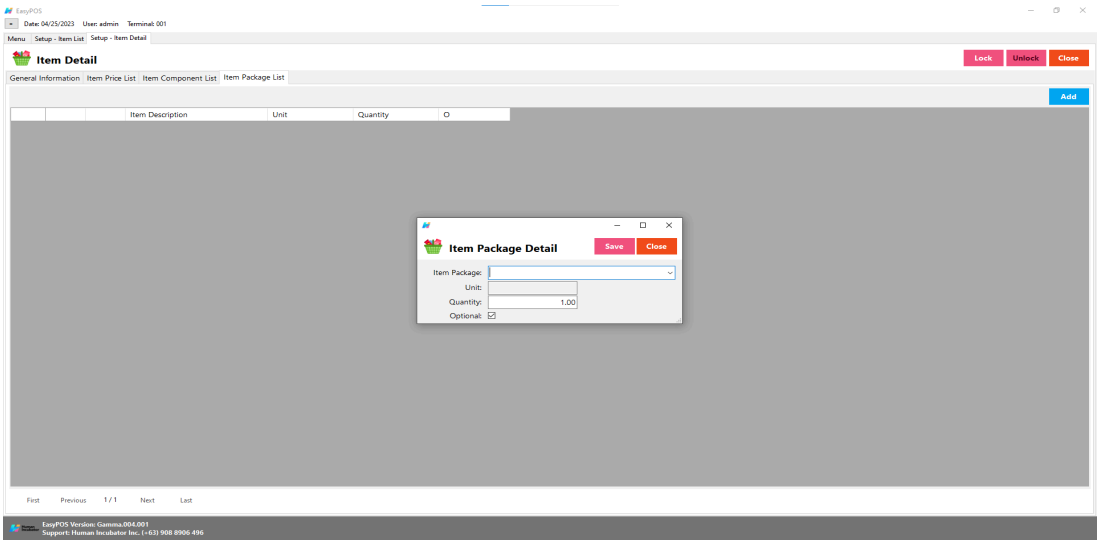
Item Package List

- 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

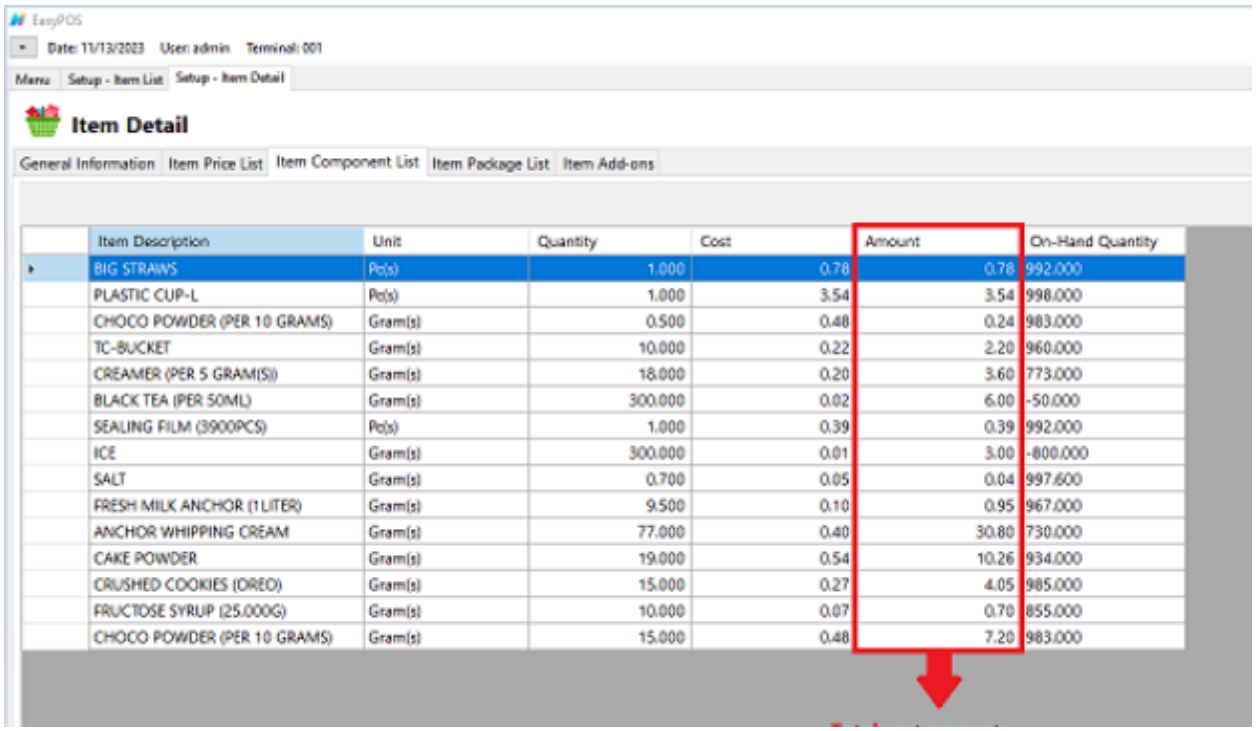
on the created package. Make sure to set the Packaged checkbox to True before setting an item component(s).

- Just click the **ADD** button to add item package details.

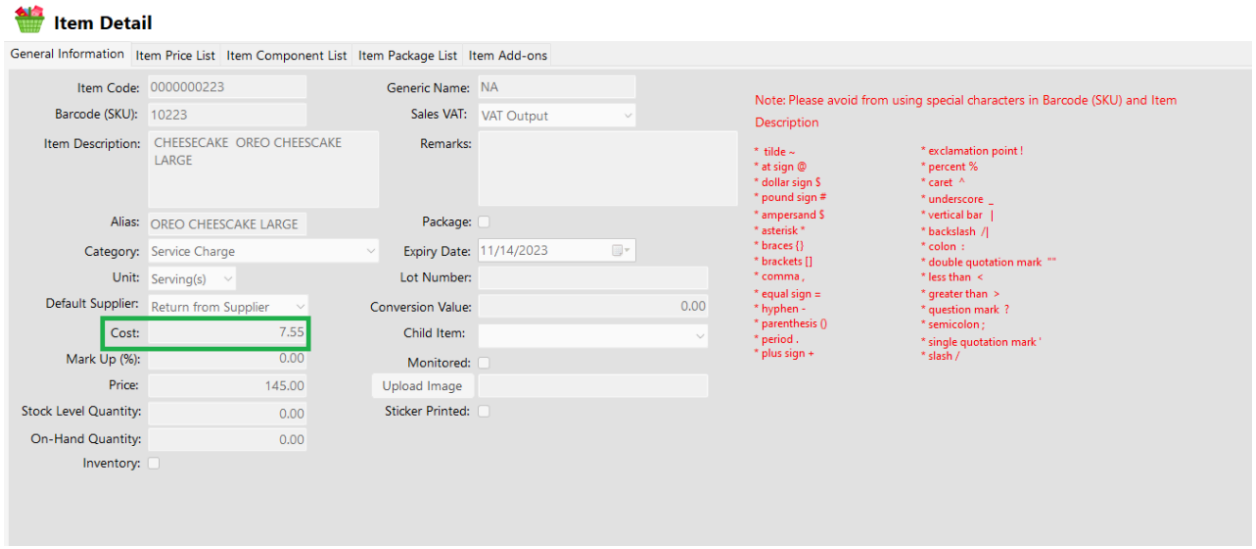




- The total cost of the item component will automatically reflect in the cost of the general information item detail.



Item Description	Unit	Quantity	Cost	Amount	On-Hand Quantity
BIG STRAWS	Pc(s)	1.000	0.78	0.78	992.000
PLASTIC CUP-L	Pc(s)	1.000	3.54	3.54	998.000
CHOCO POWDER (PER 10 GRAMS)	Gram(s)	0.500	0.48	0.24	983.000
TC-BUCKET	Gram(s)	10.000	0.22	2.20	960.000
CREAMER (PER 5 GRAM(S))	Gram(s)	18.000	0.20	3.60	773.000
BLACK TEA (PER 50ML)	Gram(s)	300.000	0.02	6.00	-50.000
SEALING FILM (3900PCS)	Pc(s)	1.000	0.39	0.39	992.000
ICE	Gram(s)	300.000	0.01	3.00	-800.000
SALT	Gram(s)	0.700	0.05	0.04	997.600
FRESH MILK ANCHOR (1 LITER)	Gram(s)	9.500	0.10	0.95	967.000
ANCHOR WHIPPING CREAM	Gram(s)	77.000	0.40	30.80	730.000
CAKE POWDER	Gram(s)	19.000	0.54	10.26	934.000
CRUSHED COOKIES (OREO)	Gram(s)	15.000	0.27	4.05	985.000
FRUCTOSE SYRUP (25.000G)	Gram(s)	10.000	0.07	0.70	855.000
CHOCO POWDER (PER 10 GRAMS)	Gram(s)	15.000	0.48	7.20	983.000



Save/Lock

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

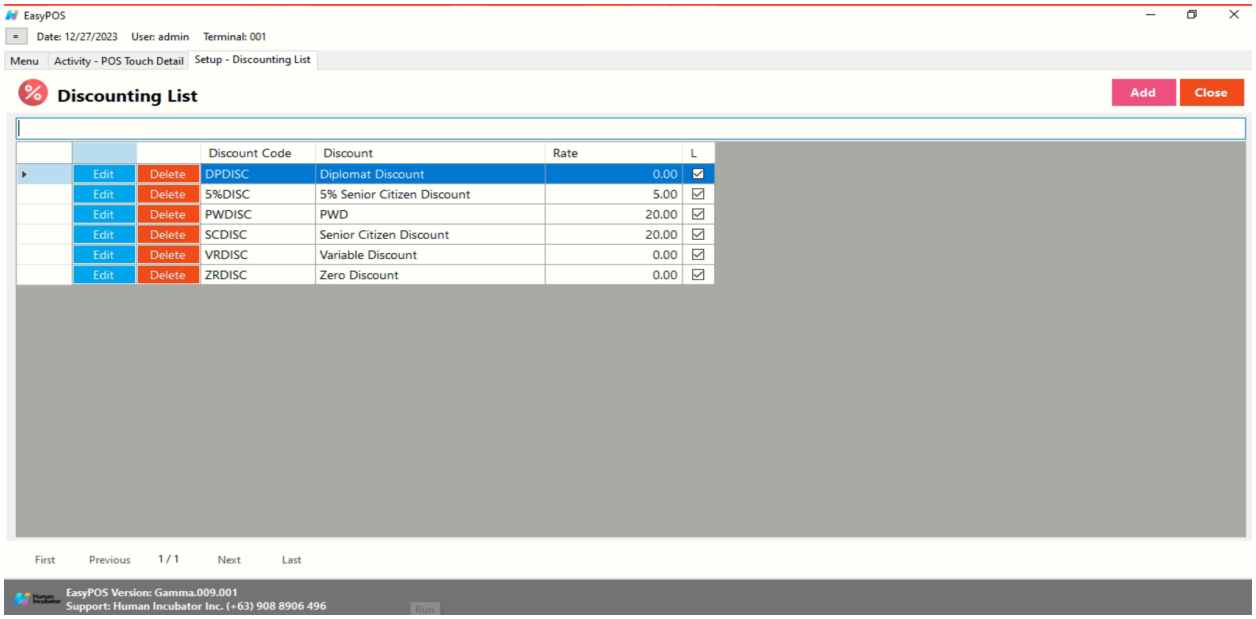
Discounting Setup

Overview

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

Discounting List

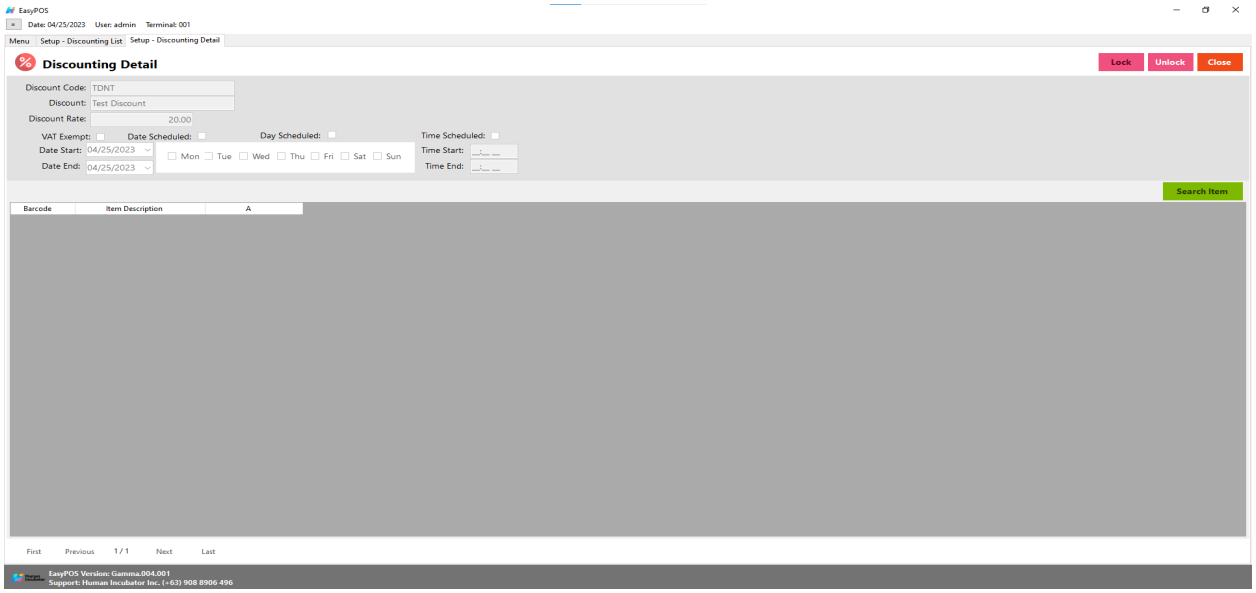
- Shows the list of all added items.
- Delete button will proceed to deleting unlocked discount record detail.
- Edit button will proceed to updating discount detail.
- Add button will proceed to adding a new discount.
- Close button will proceed to closing the discount list page.



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.



Note: Default discount is not editable: Zero Discount, Variable, Senior Citizen, PWD, 5%Senior Citizen and Solo Parent. For ***Diplomat and National Athelete*** *Discount are already Disable on this version.*

Customer Setup

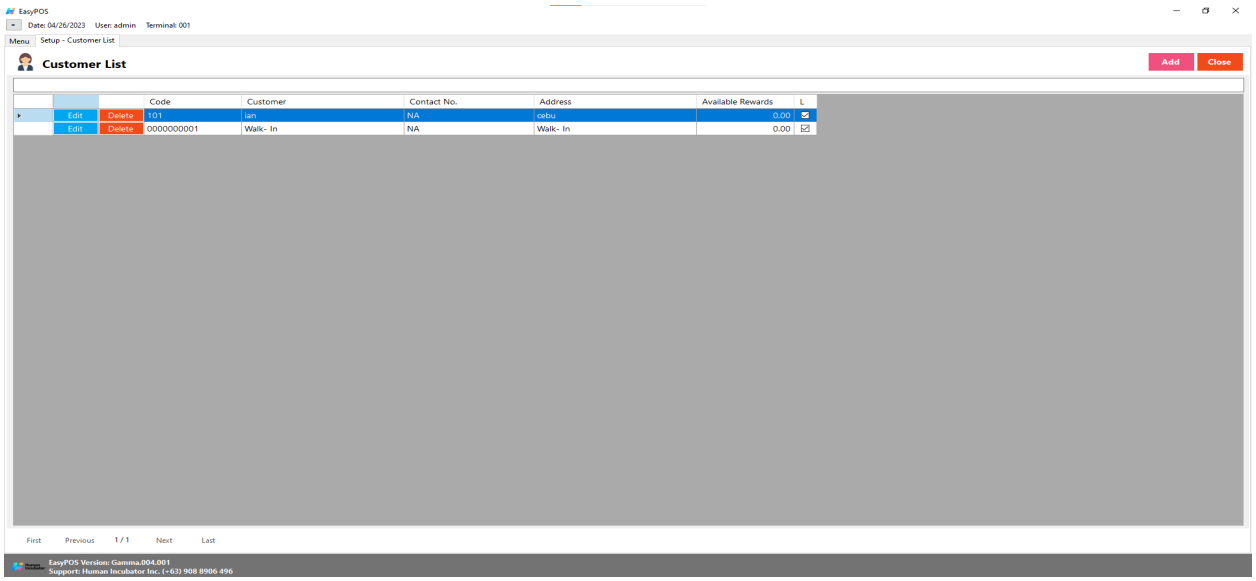
Overview

- Customers are used in making sales transactions.

Take Note: If the ***EasyPOS*** *has an* ***EasyFS Integration,*** *the setting of customer or adding of customer should be done in the EasyFS system. Make sure that the "****Term****" list and "****Discount"*** *list in EasyPOS and EasyFS should be the same.*

Customer List

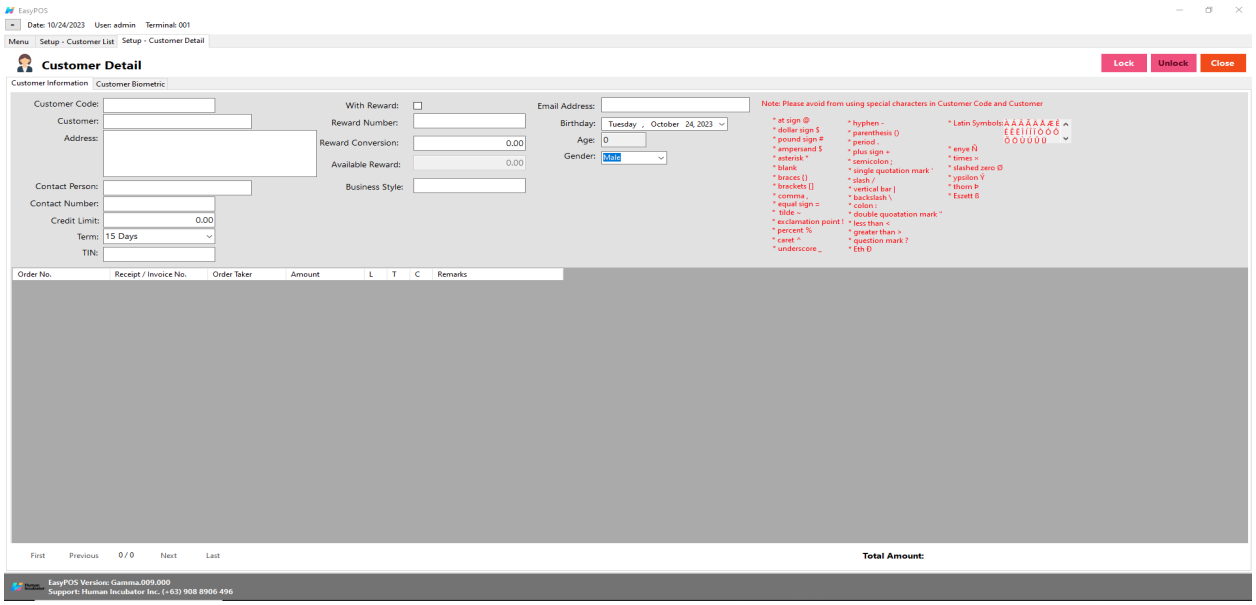
- Shows the list of all added customers.
- Delete button will proceed to deleting unlocked customer record details.
- The Edit button will proceed to updating customer details.
- Add button will proceed to adding a new customer .
- Close button will proceed to closing the customer list page.



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
    - *It has a maximum limit with 50 characters for Customer Code, Customer,Contact Person, and Contact number and 255 characters for the Address*
    - *Avoid using special characters except ampersand (&) and percent (%) in All Fields of Customer Detail like: at sign (@), dollar sign ($), pound sign (#), asterisk (*), blank () , braces ({ }), brackets ([ ]), comma (,), equal sign (=), hyphen (-), parenthesis ( ), period (.), plus sign (+), semicolon (;), single quotation mark ('), slash (/) and etc.*
      *Special Characters: ~ ` ! @ # $ % ^ & * ( ) - _ + = { } [ ] | \ / : ; " ' < > , .*
      ? À Á Â Ã Ä Å Æ Ç È É Ê Ë Ì Í Î Ï Ð Ñ Ò Ó Ô Õ Ö × Ø Ù Ú Û Ü Ý Þ ß
    - *If some fields have special characters, a prompt message will appear when locking or saving the data.*
    - *Default value: NA and 0.00*

- 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.



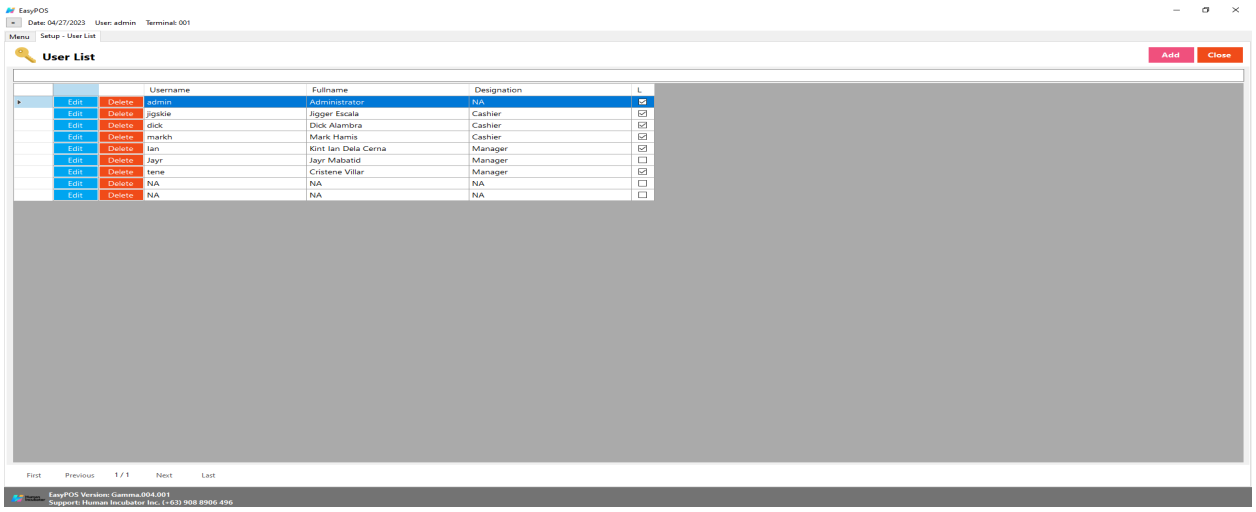
User Setup

Overview

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

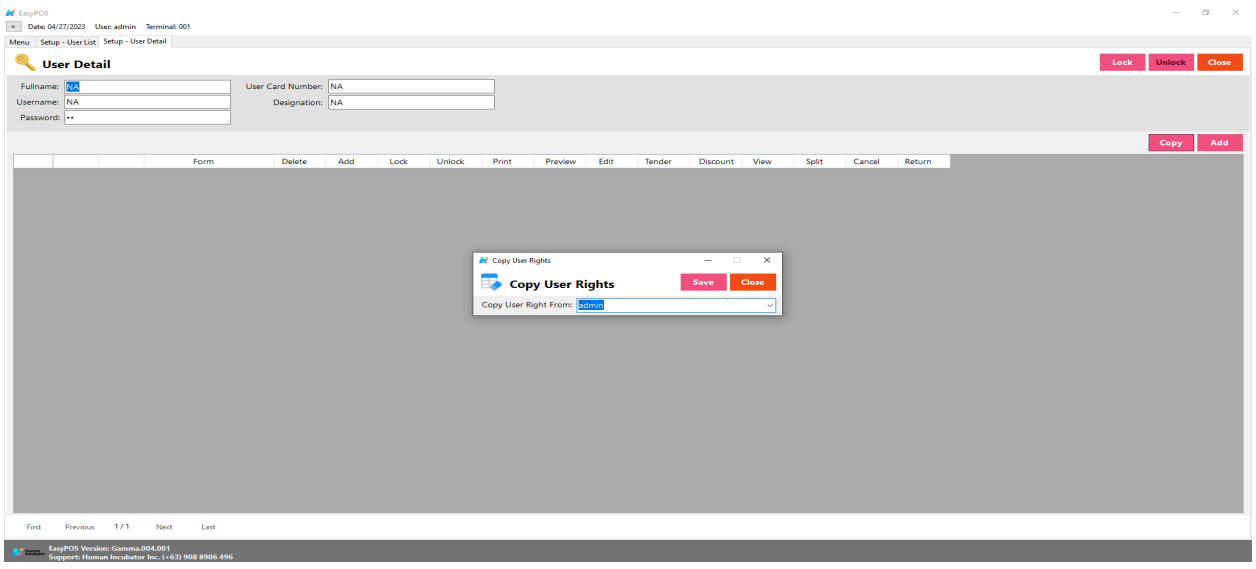
User List

- 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.

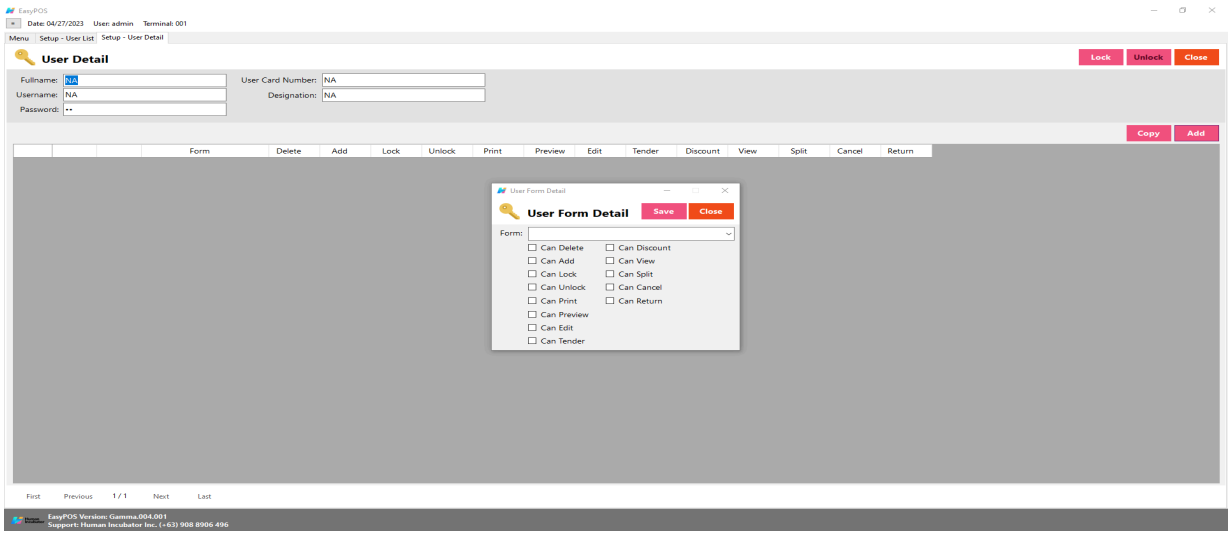


User Detail

- **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.

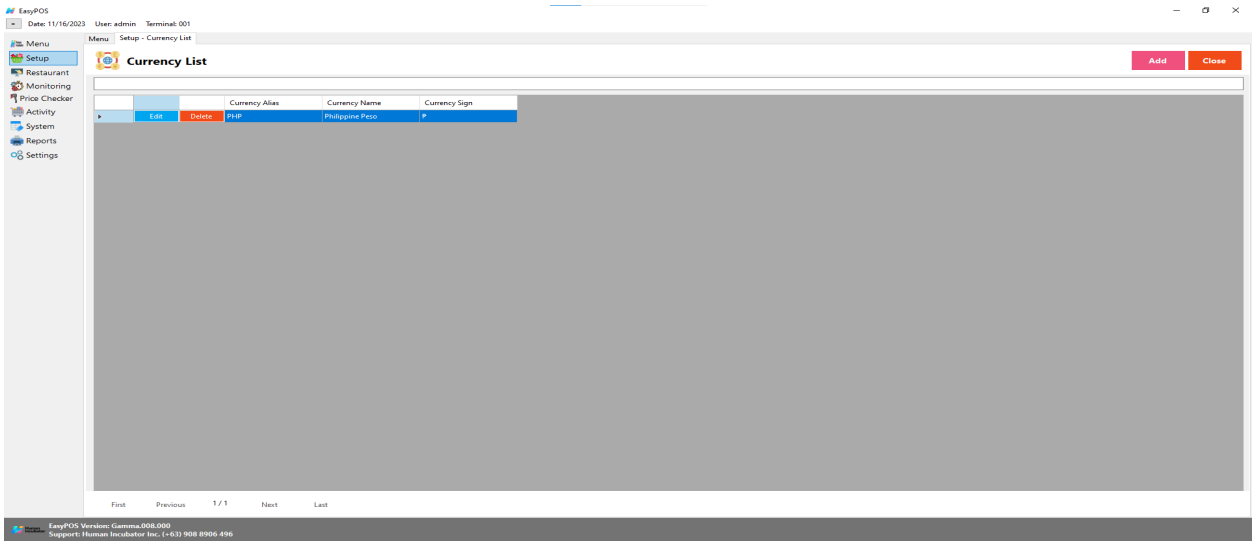
Currency Setup

Overview

- It is where the user can set up currencies.

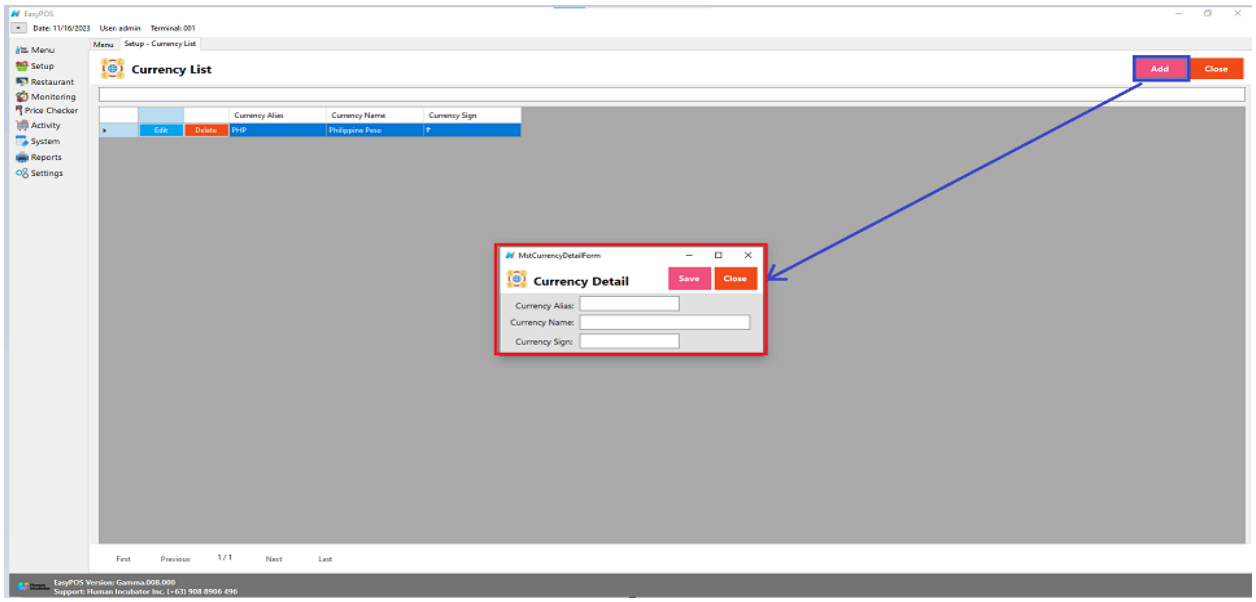
Currency List

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



Currency Detail

- **Assumption**: **Add** button is already clicked on the upper right corner in the Currency list.
- Fill up all the necessary information like:
  - Currency Alias, Currency Name and Currency Sign.
  - Make sure that the currency sign for Philippine Peso must be the Peso sign "₱" and not the letter "P".
- Click the **Save** button to add currency



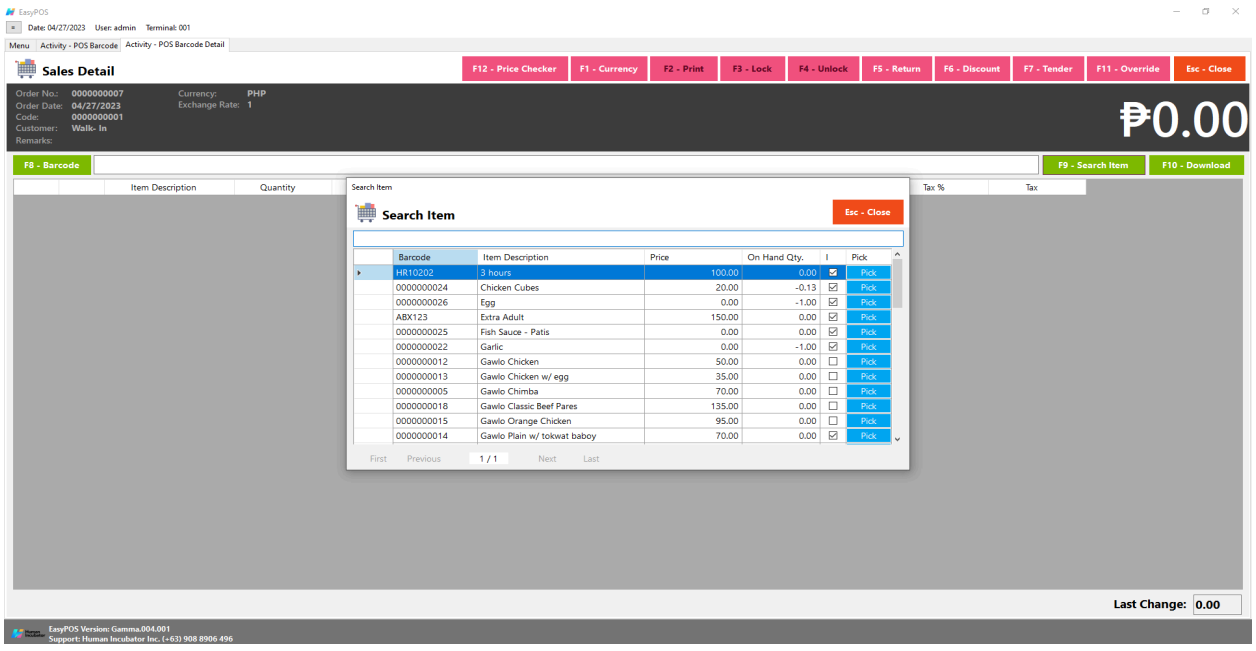
VI: Activity

Activity - POS Barcode

Overview

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

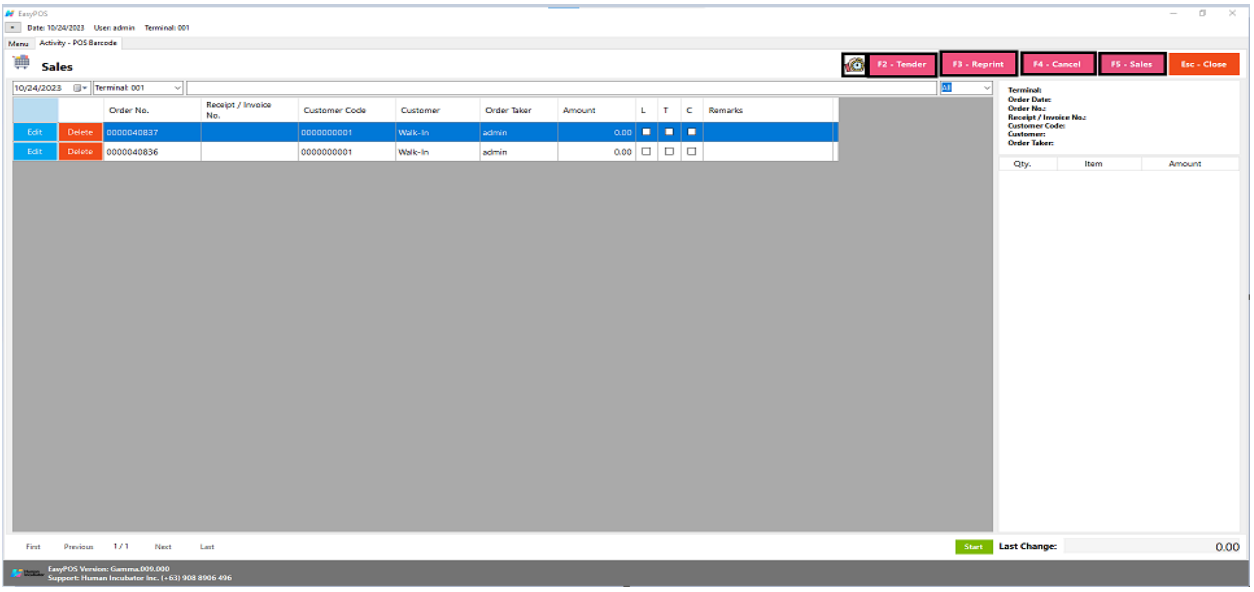
User Interface



Barcode Sales List

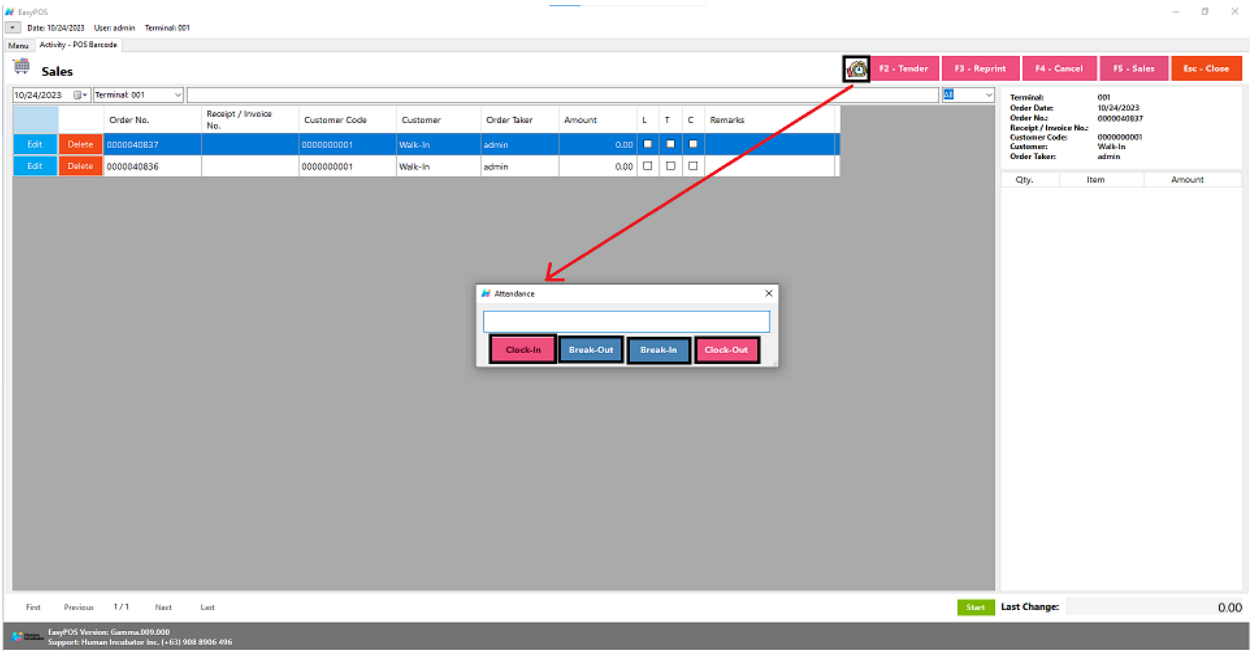
- Shows the list of all barcode sales transaction lists.

- 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. It will print a canceled receipt.
- The **Sales** button will proceed to adding line items.
- The **Edit** button will proceed to editing sales.
- The **Clock** icon will appear proceed to Attendance feature
- The **Delete** button will proceed to deleting sales. Make sure that the sale(s) is unlocked.



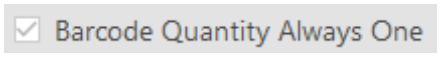
Attendance Feature

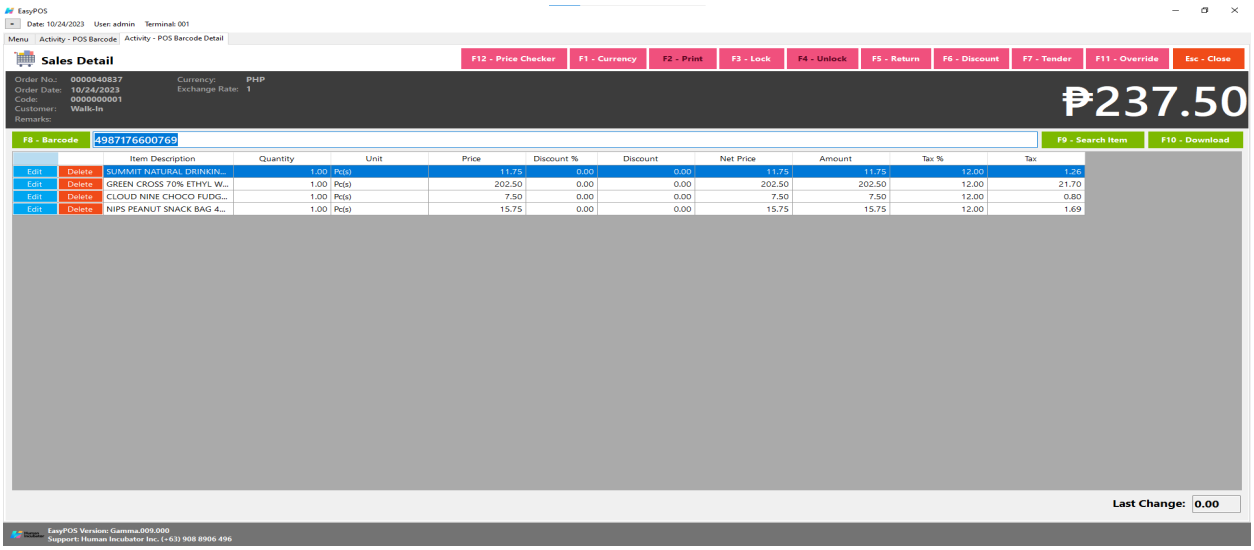
- Click the **Clock** icon to proceed in the attendance form
- Input the user card number
- The **Clock-in** button is for the start of shift
- The **Break-out** button is for the start of break
- The **Break-in** button is for the end of break
- The **Clock-out** button is for the end of shift



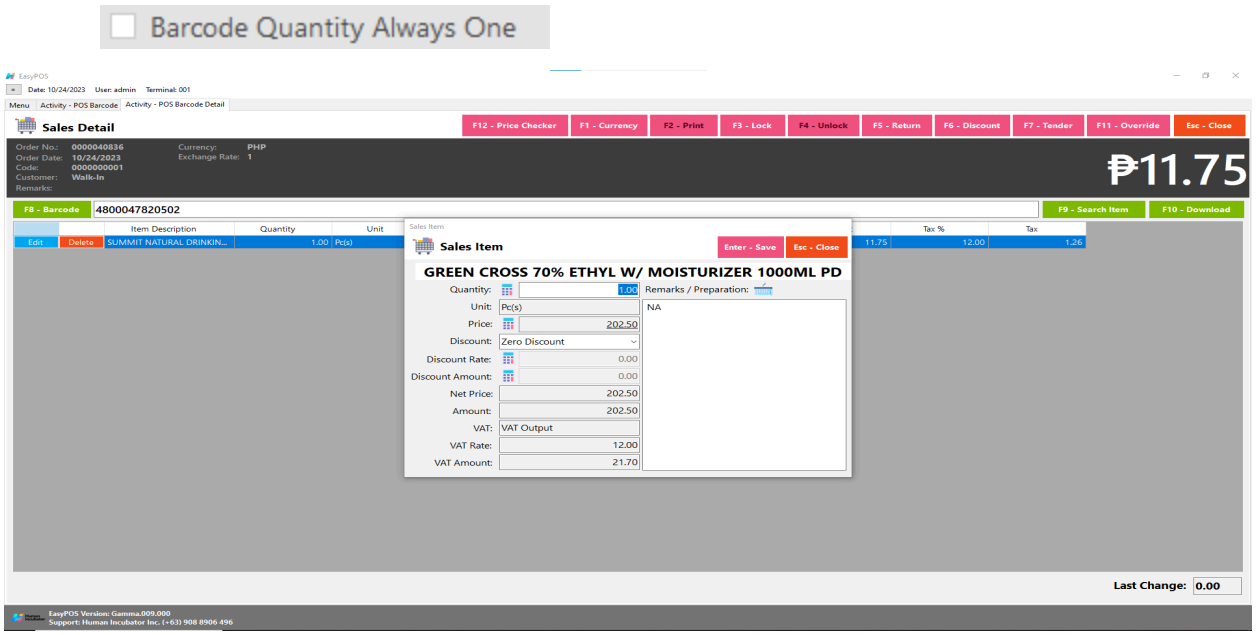
Barcode Sales Detail

- There are three(3) ways on how to add sales line item(s),
  a. By scanning the item barcode. Scan the item barcode
     - If the Barcode Quantity Always One feature is enable or check in the settings, it automatically add sales line item

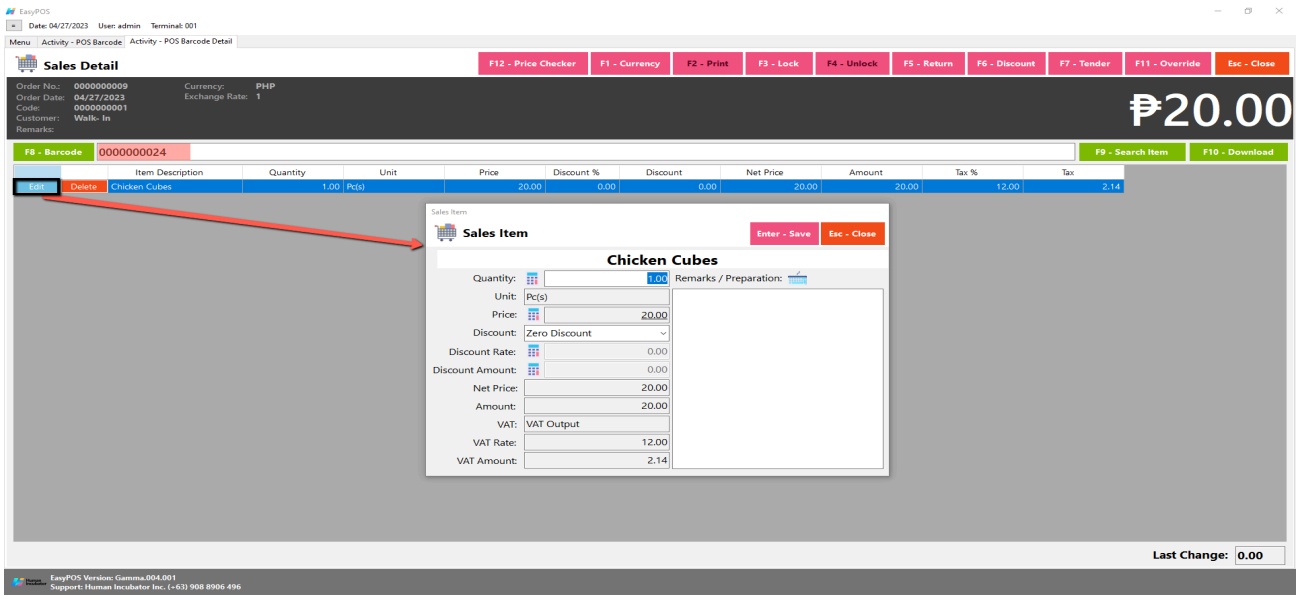




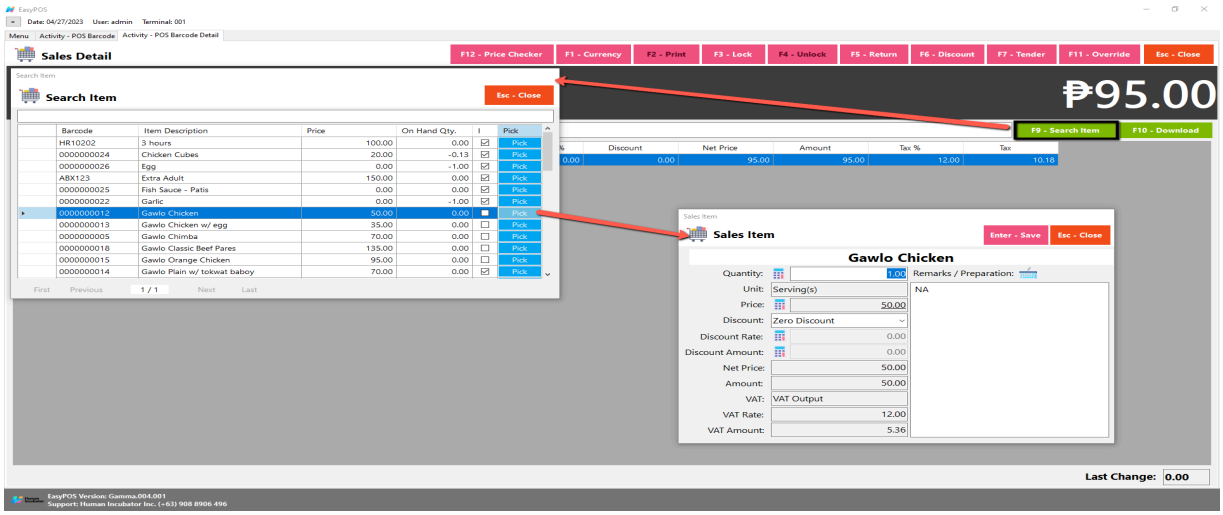
     - If it is unchecked, the sales item form will appear to allow you to edit the quantity.



b. 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.

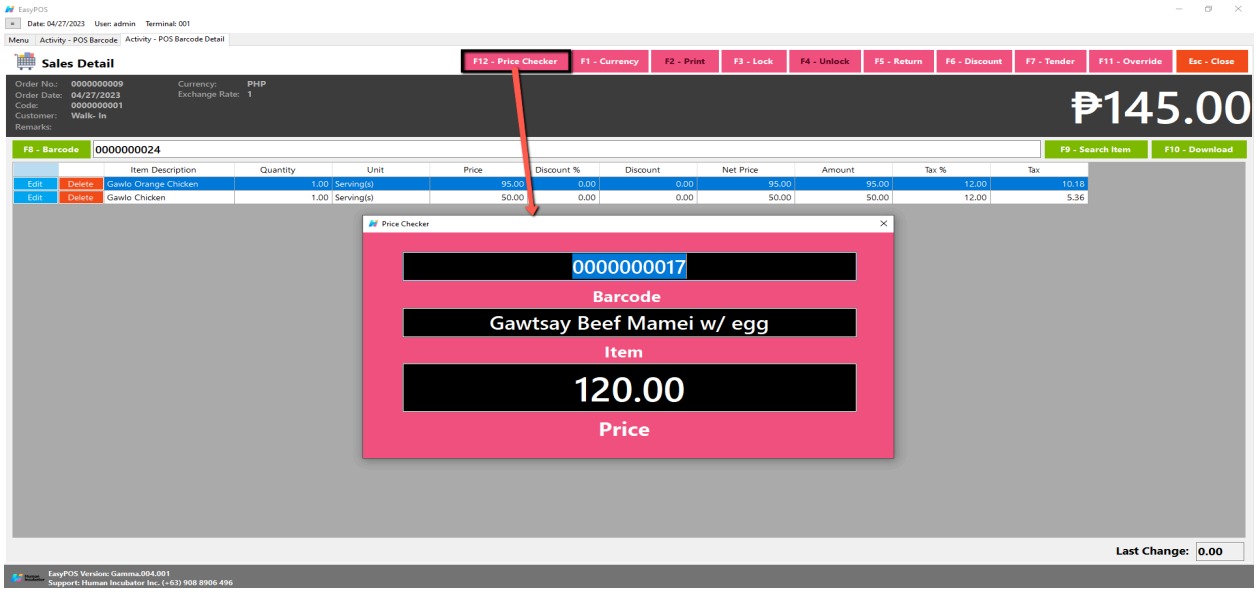


c. By the Search Item button, when clicked, a list of items is displayed. To
add the item to the current sales, click the **Pick** button.
    - When the **Pick** button is clicked, the Sales Line Item will automatically display.
    - Sales Line item shows the details of the selected item and the current 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.



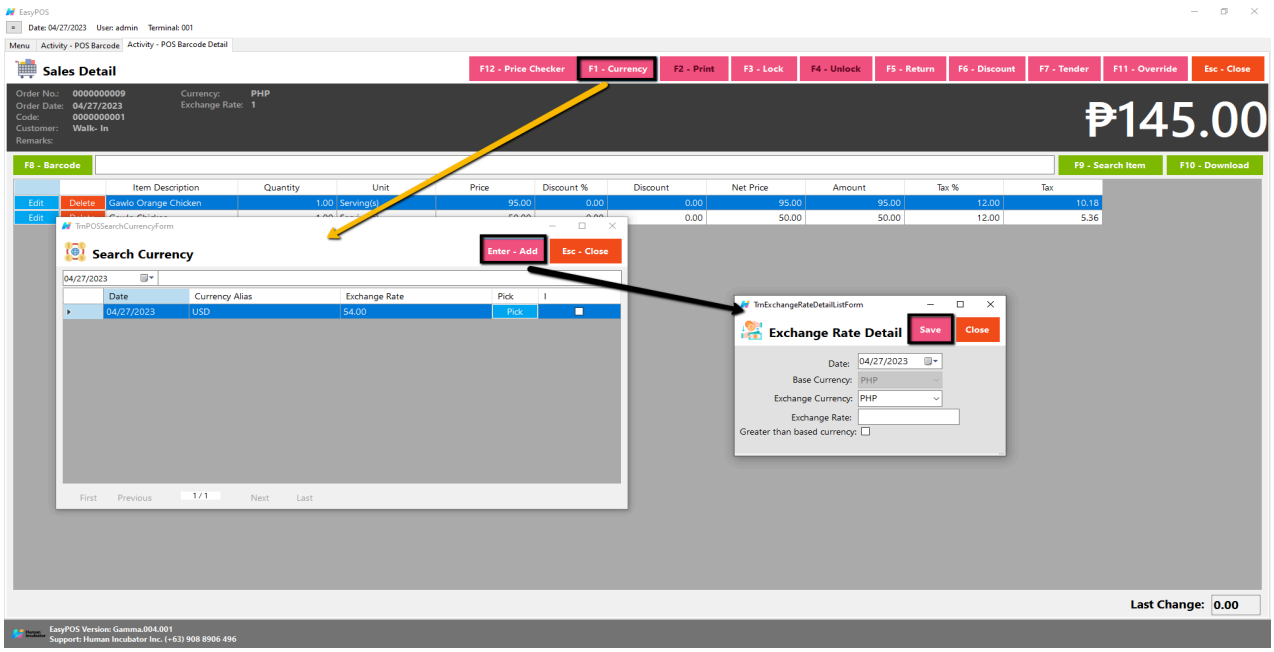
Barcode Sales Detail - Relevant Buttons

- **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.

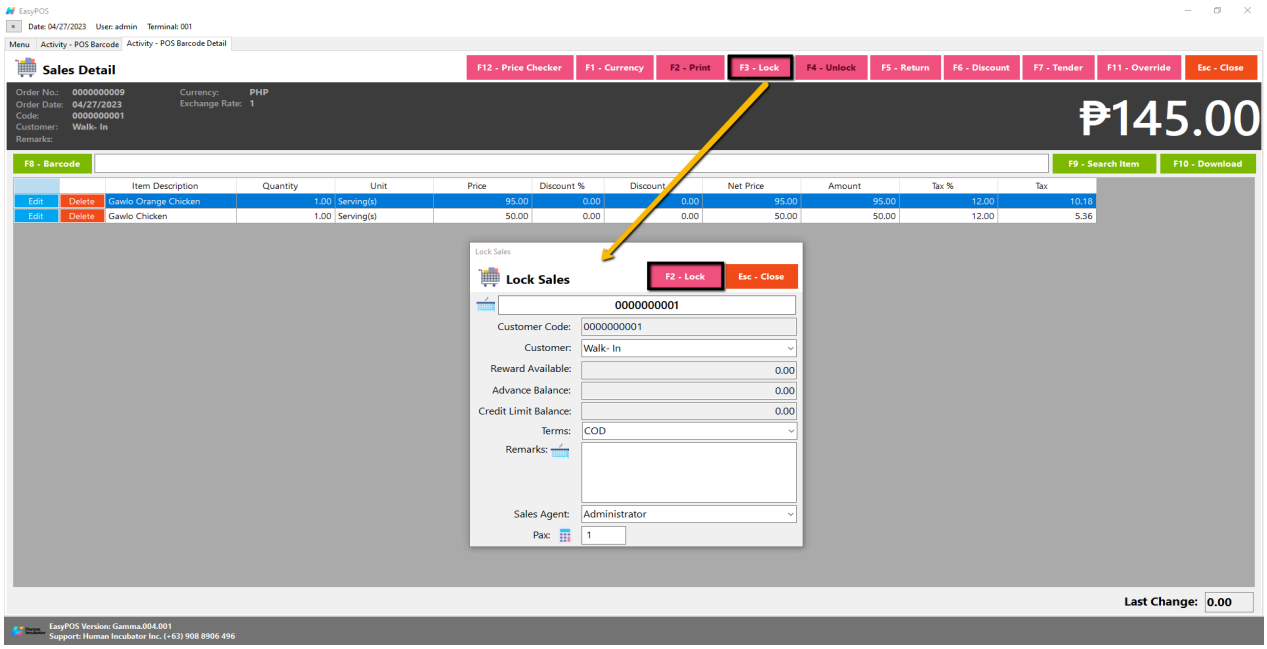


- **Currency**
  - Click the Currency button when you want to have the transaction with different currency.

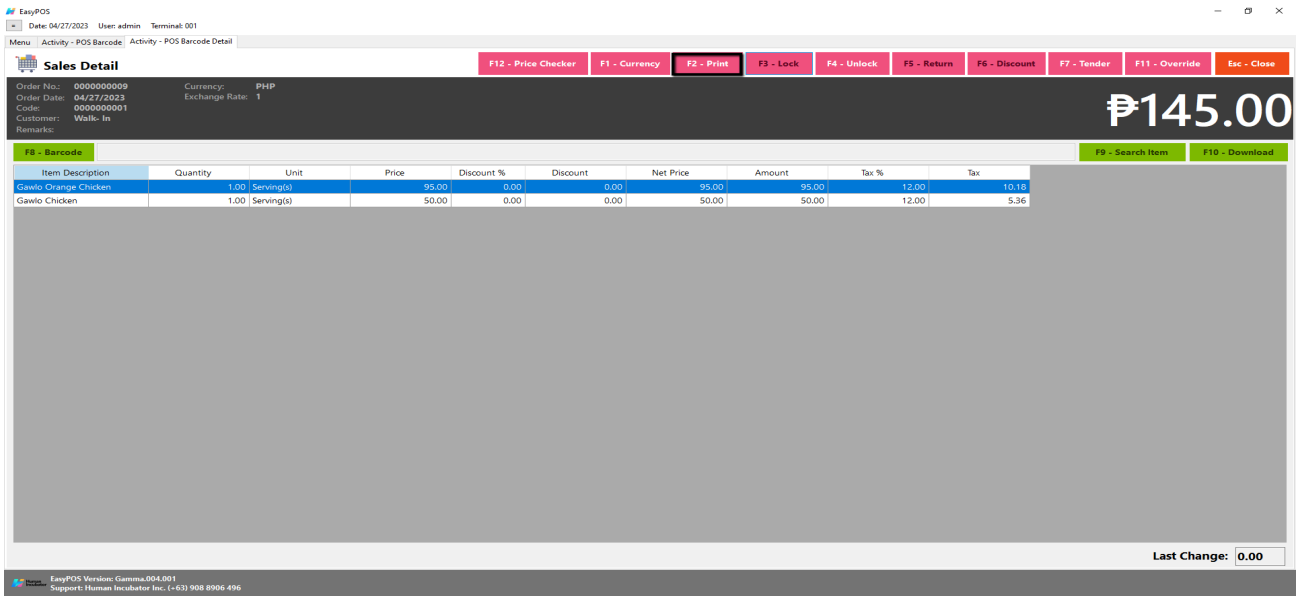
- Once clicked, a Currency form will appear.
- Select a currency where you want to use by clicking the **Pick** button.
- If NO currency is displayed or the currency you want to select is not available,
  - Click the **Add** button and provide the necessary informations such as:
    - Exchange Currency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

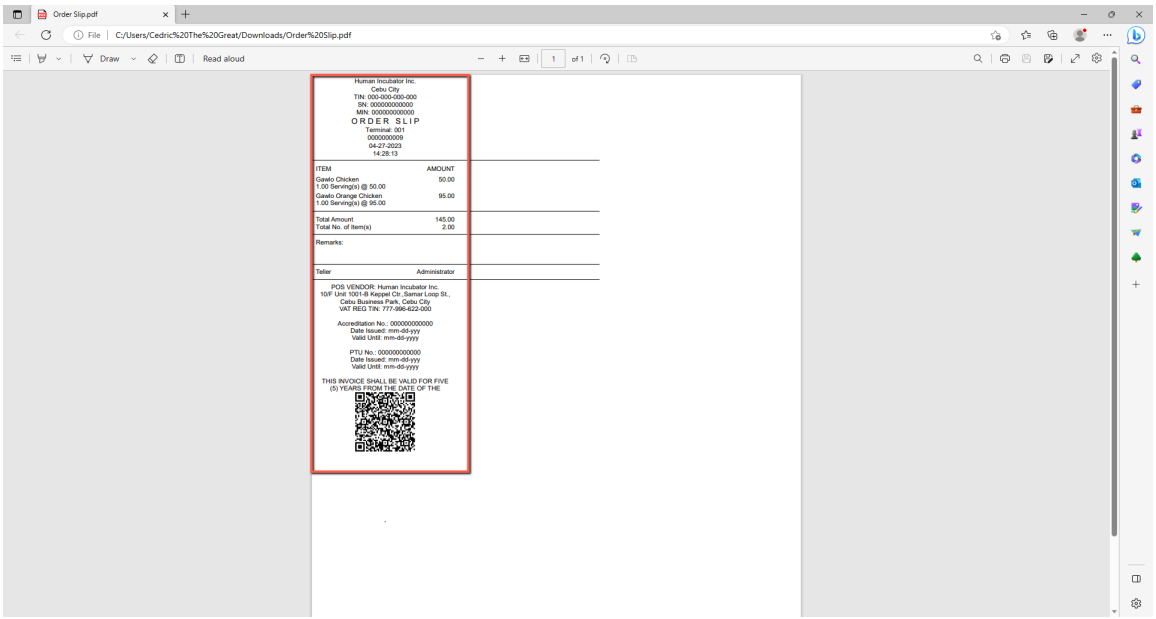


- **Lock**
  - Click the Lock button to save the sales information.
  - Provide the necessary information then click the Lock button to finish locking the sales information.

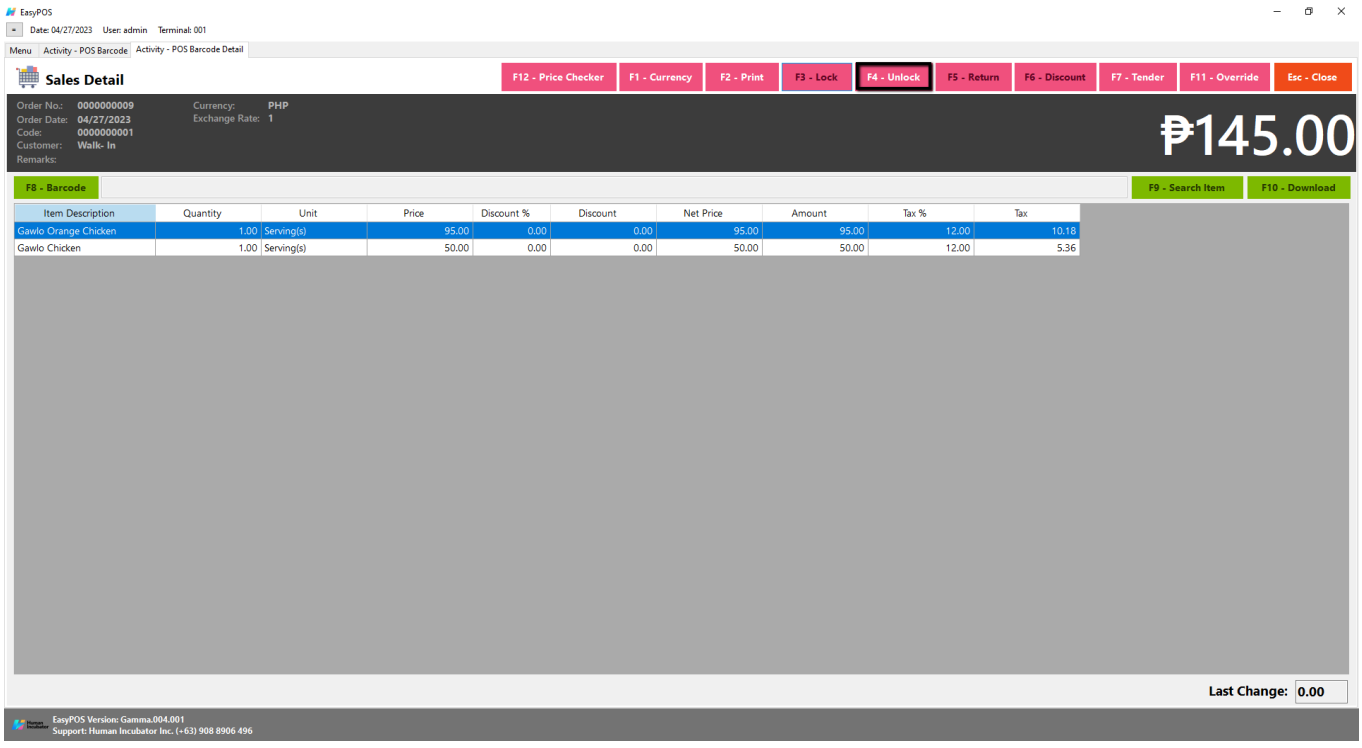


- **Print**
  - Click the Print button to download the Order Slip in PDF file, then print.
  - Take note, Print will only be enabled once the Sales detail is already locked.
  - Make sure to save the generated pdf file to a folder where you can easily locate it.



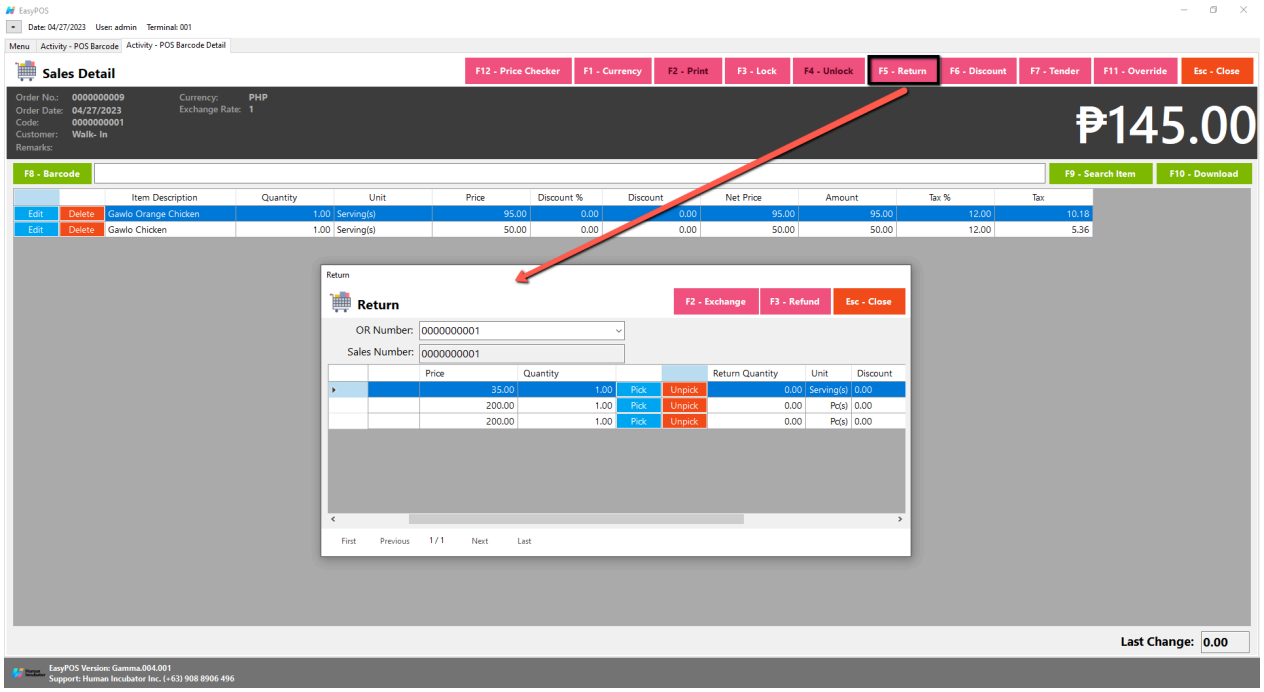


- **Unlock**
  - Click the Unlock button if you want to modify the sales detail or add sales line items.

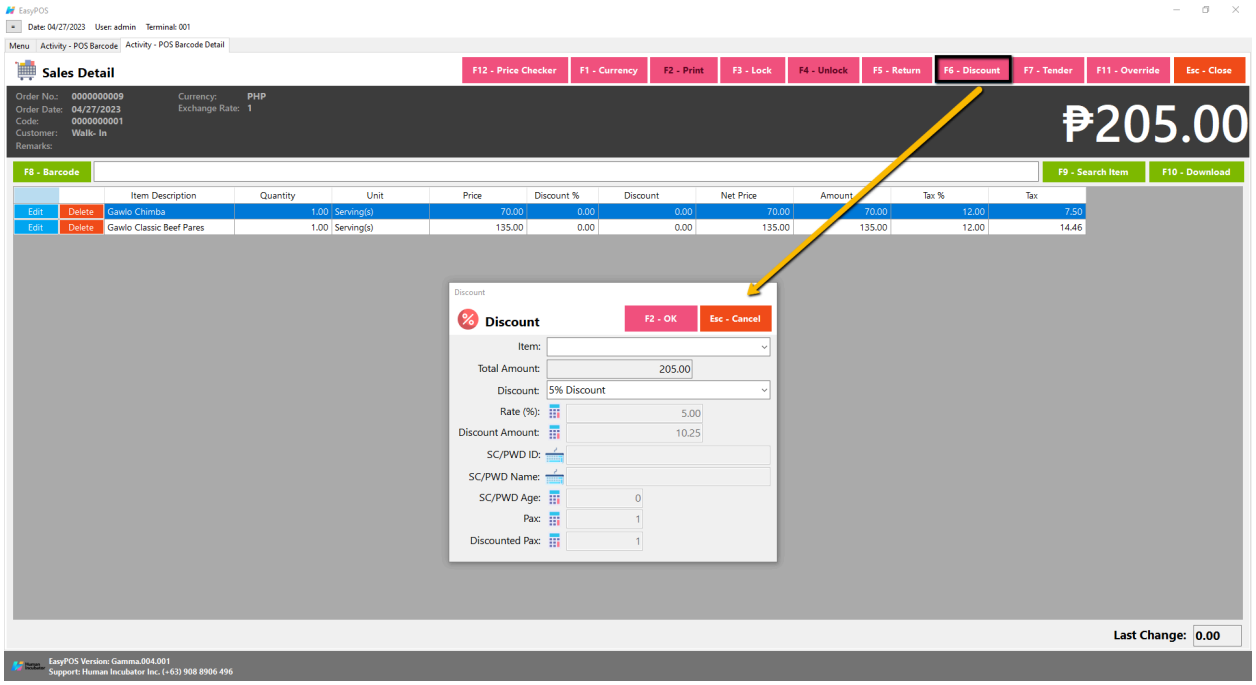


- **Return**
  - Click the Return button if the customer returned a product.

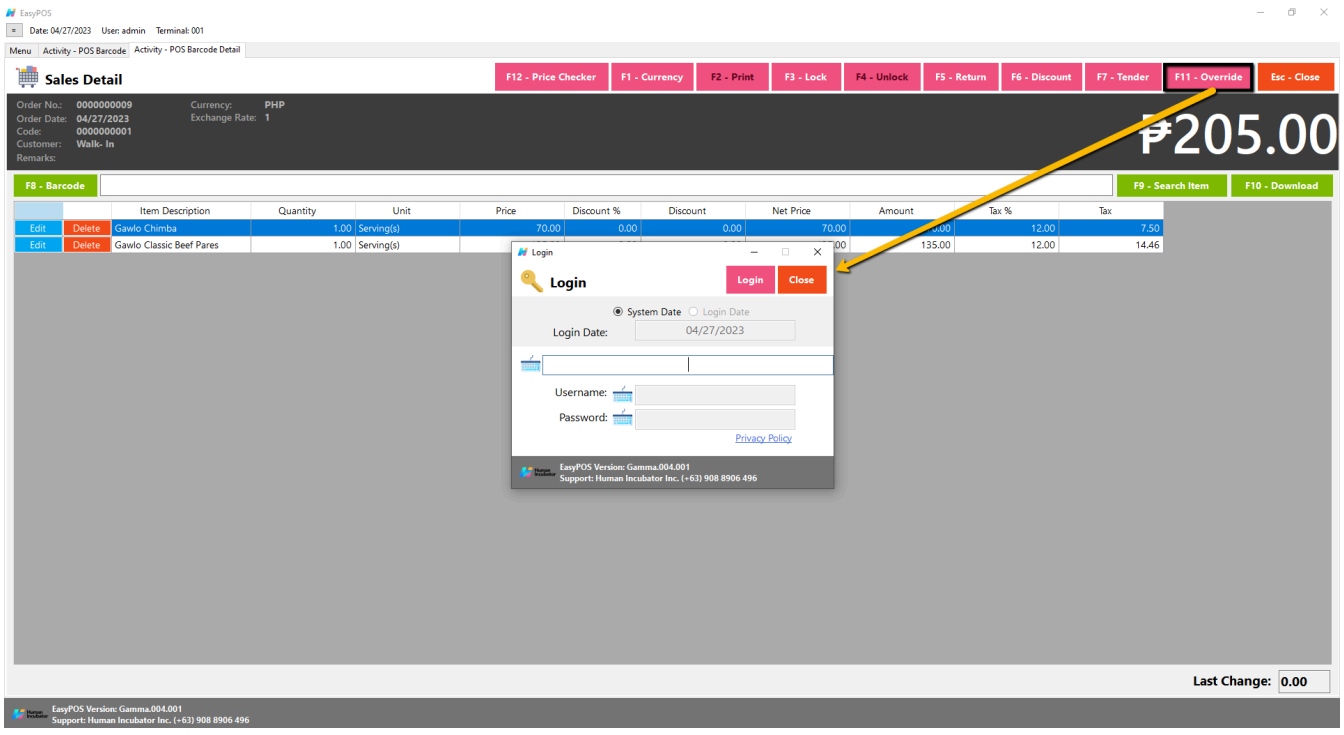
- Provide the OR Number then list of items will be displayed automatically.
- Click the **Pick** button if you want to add a return quantity.
- Click the **Unpick** button if you want to reset the return quantity to zero(0).
- Click the **Exchange** button, if you want to ONLY exchange an item to a customer.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

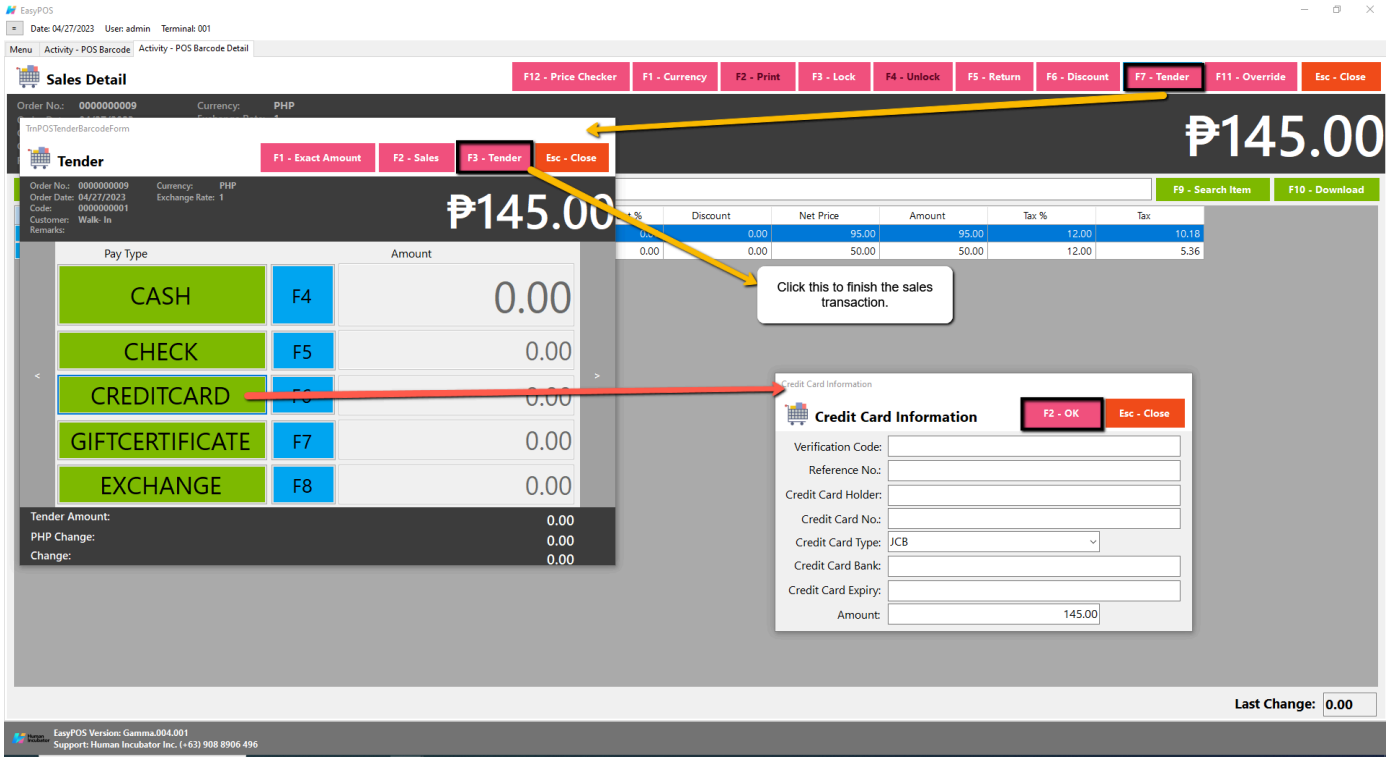


- **Override**
  - Click the Override button if you want to suspend, reject, or cancel a transaction.



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.

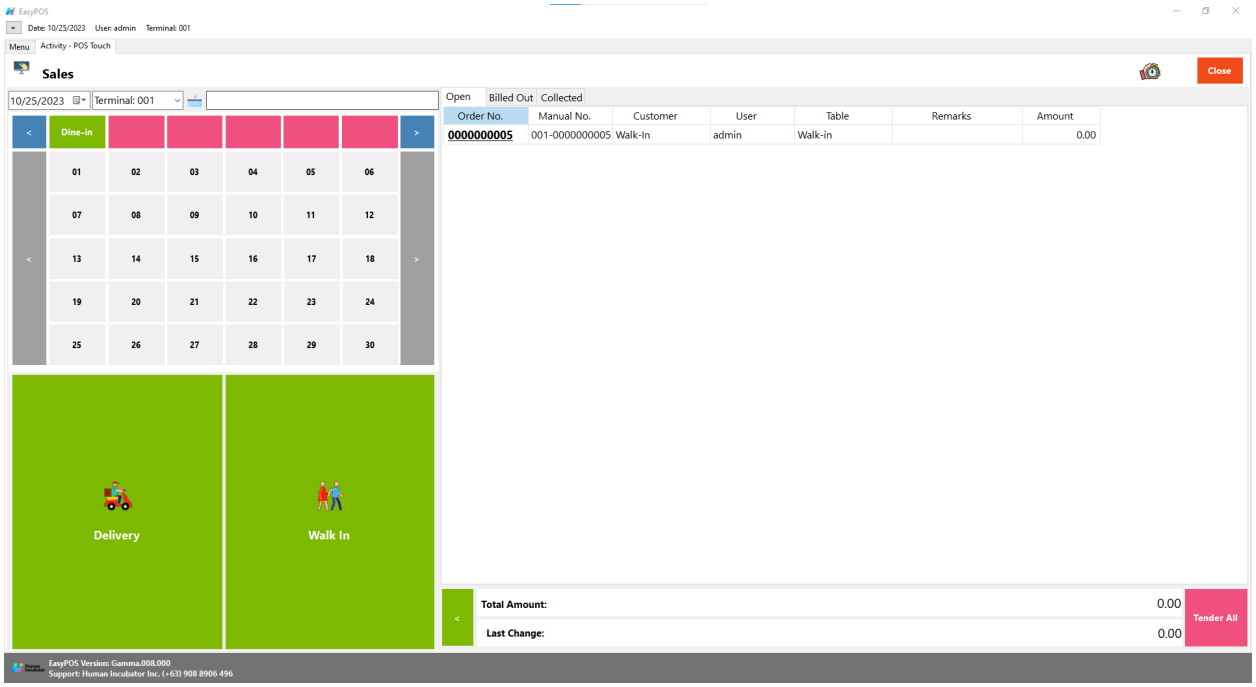


Activity - POS Touch

Overview

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

User Interface



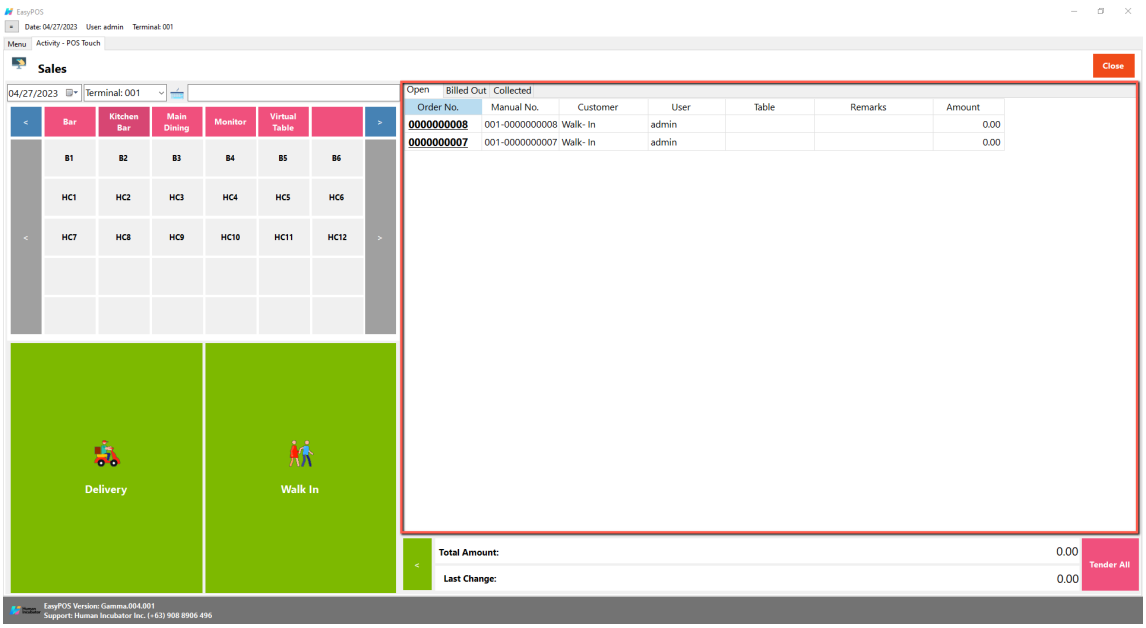
POS Touch Definition of Buttons

- **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.

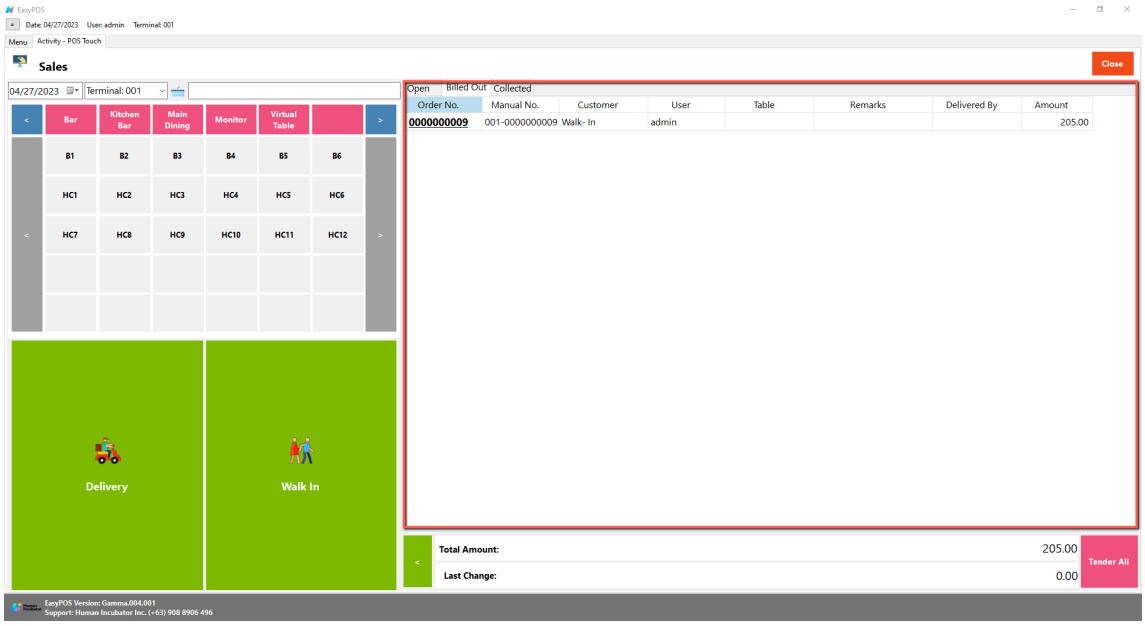
- Two **Green** large buttons → represents if the transaction is for Walk-In customers or for delivery.
- **Red** large button with “Tender All” label → represents tendering all sales.
- **Blue** button → navigating the table groups to left and right.
- **Clock** icon → represents the attendance feature.

POS Touch Sales List

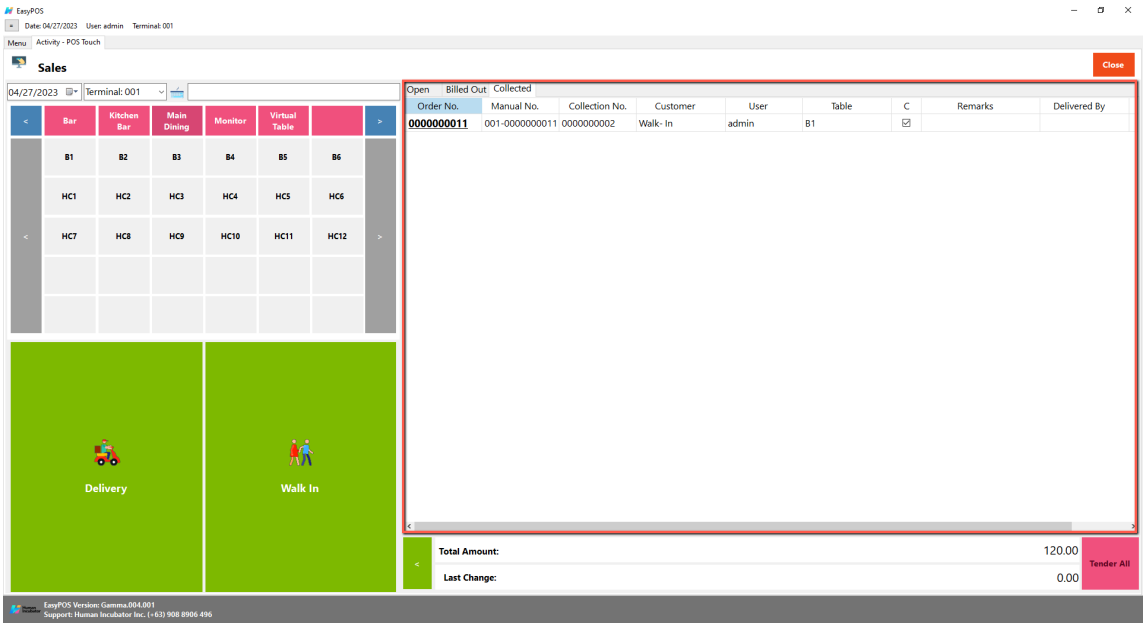
- Sales list for POS Touch consists of three(3) tabs:
    - Open → display list of Touch sales that are still open which means, not yet billed or collected. Also, system users can still delete the created sales detail here.



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

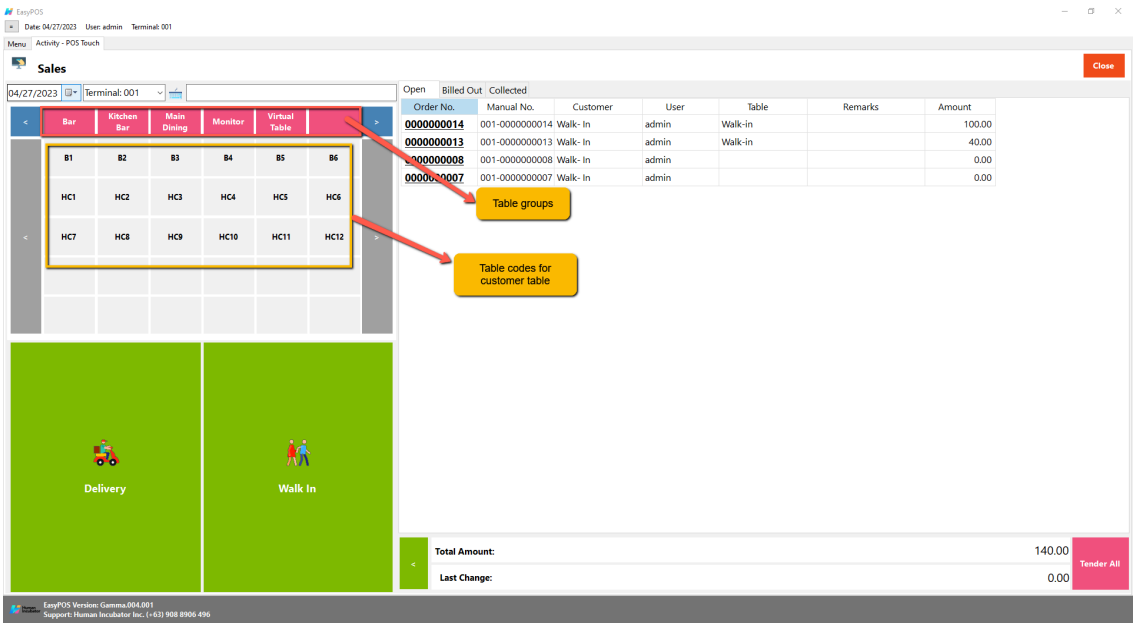


- Collected → display list of sales that are already tendered.

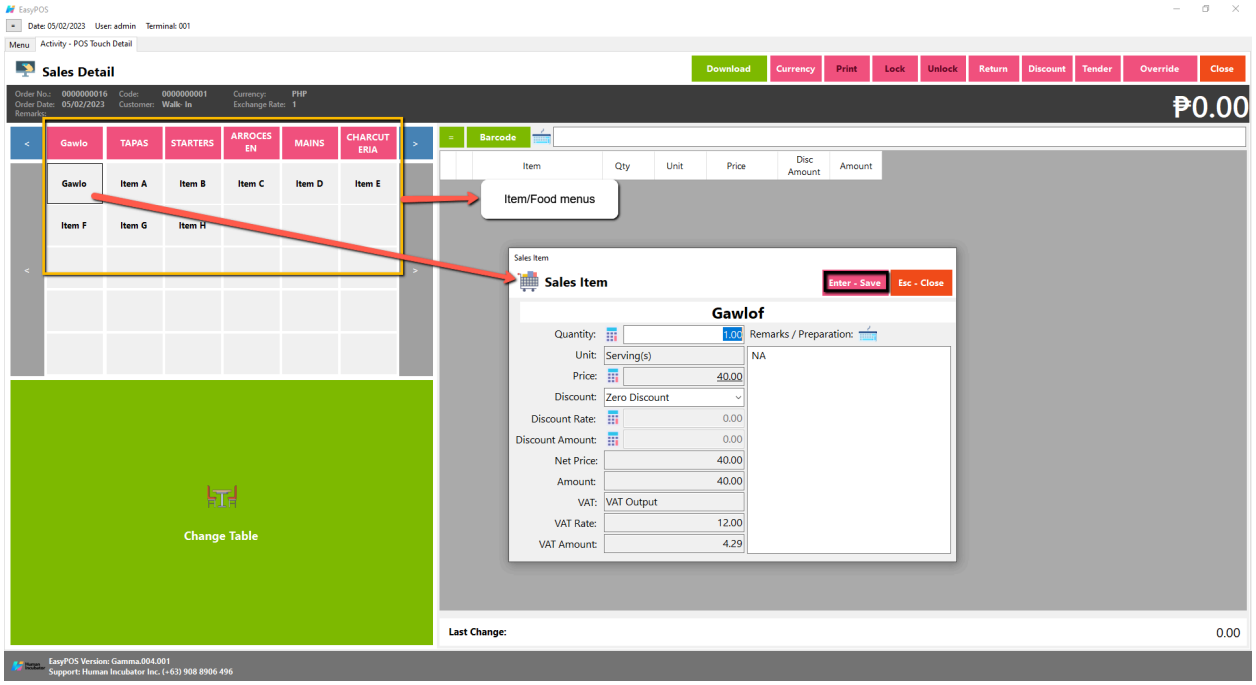


POS Touch Sales Detail

- 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.

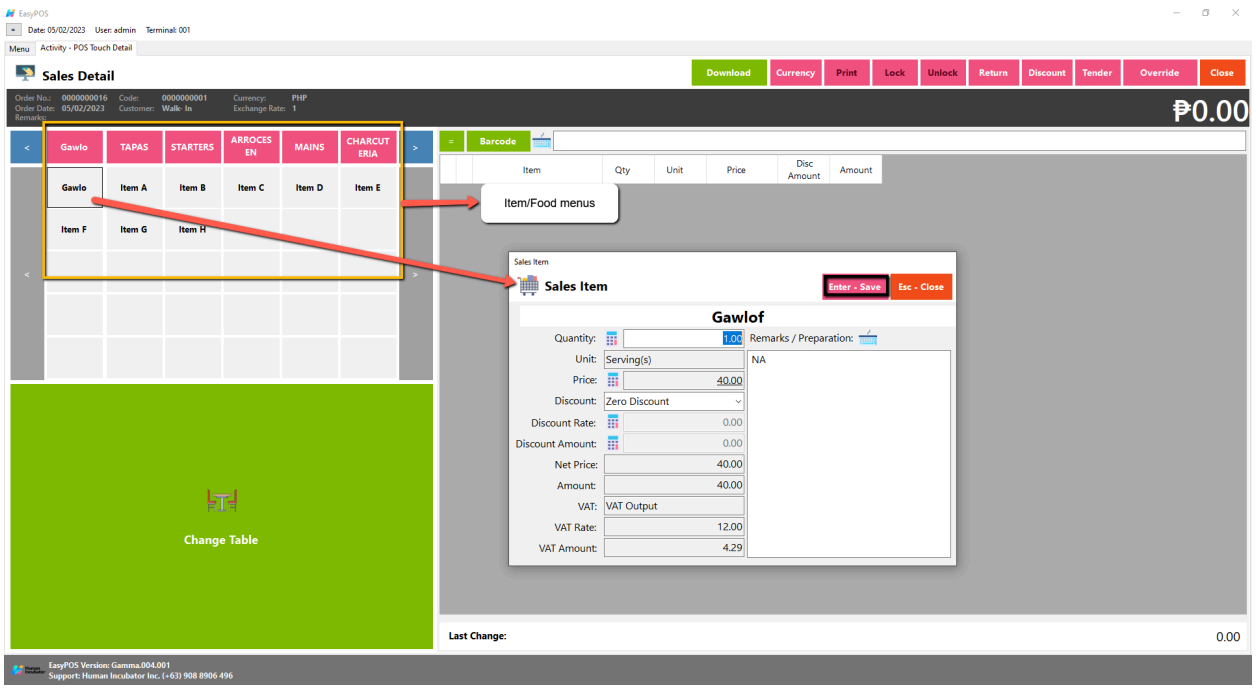


- After selecting, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit the Enter button from your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



b. Walk-In button

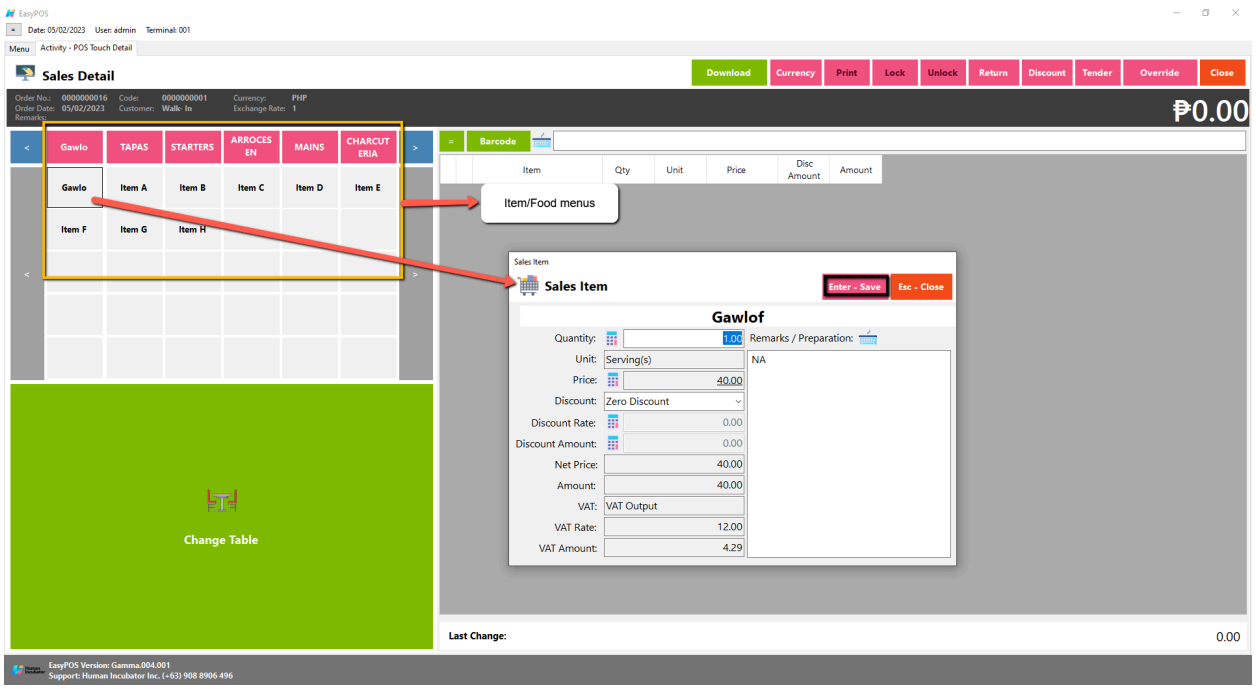
- Click the green button with the Walk In label.
- The same process with the Dine In table, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information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



c. Delivery button

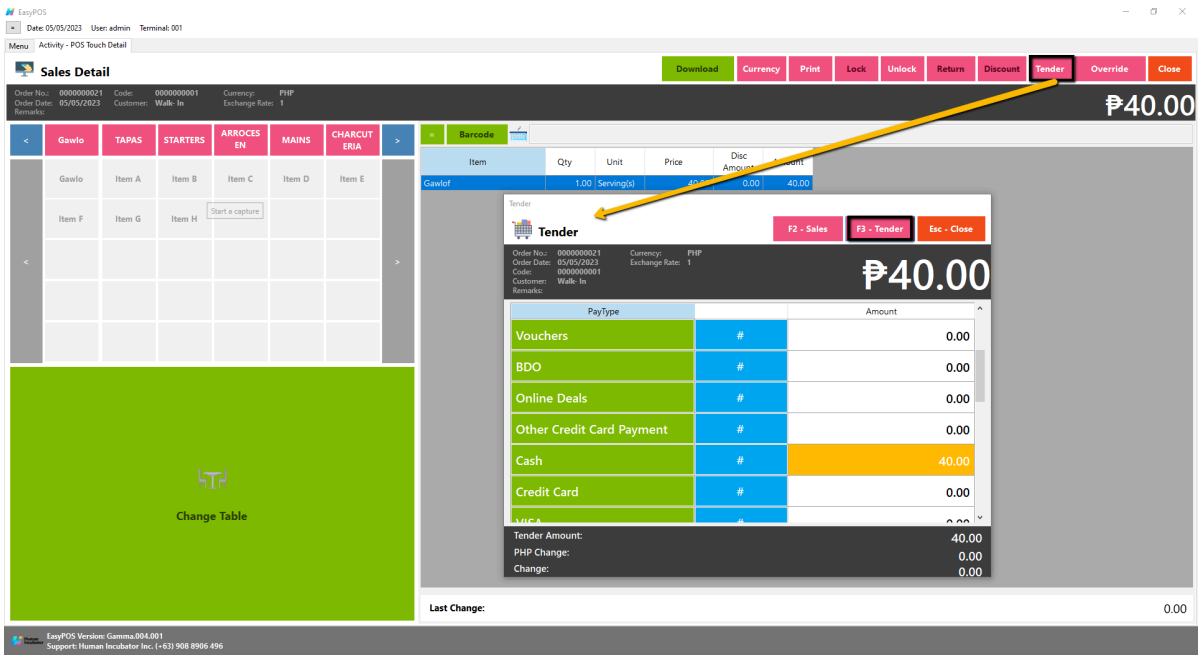
- Click the green button with the Delivery label.

- 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.

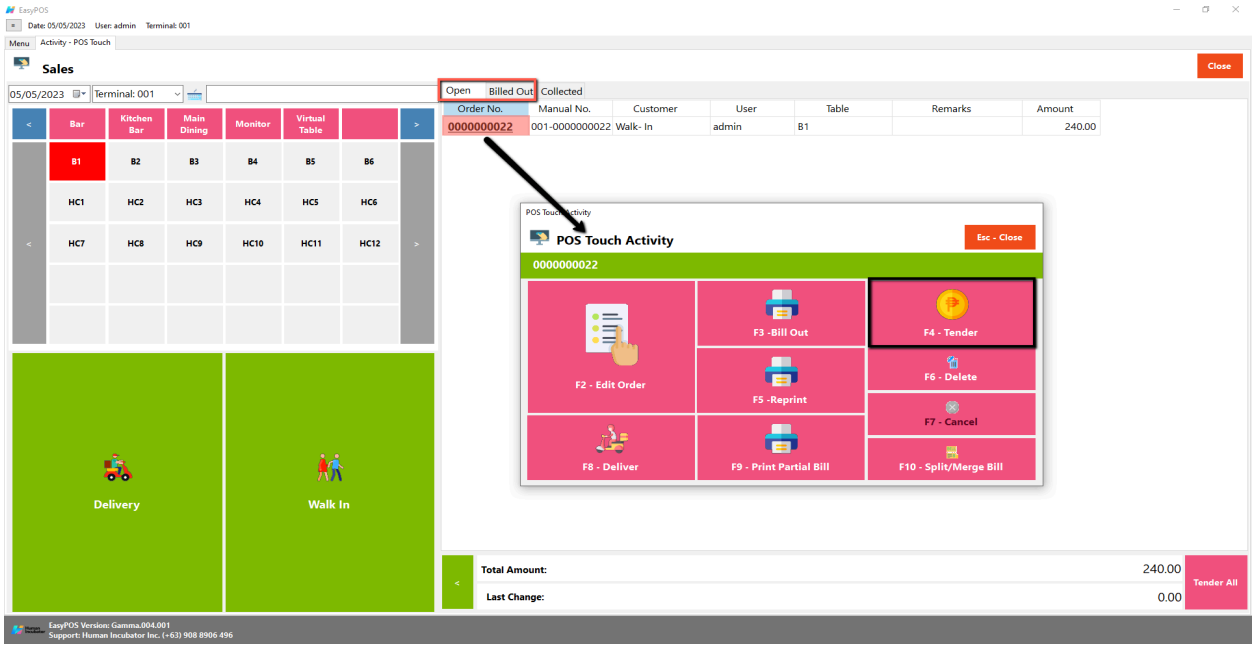


POS Touch Sales - Tender

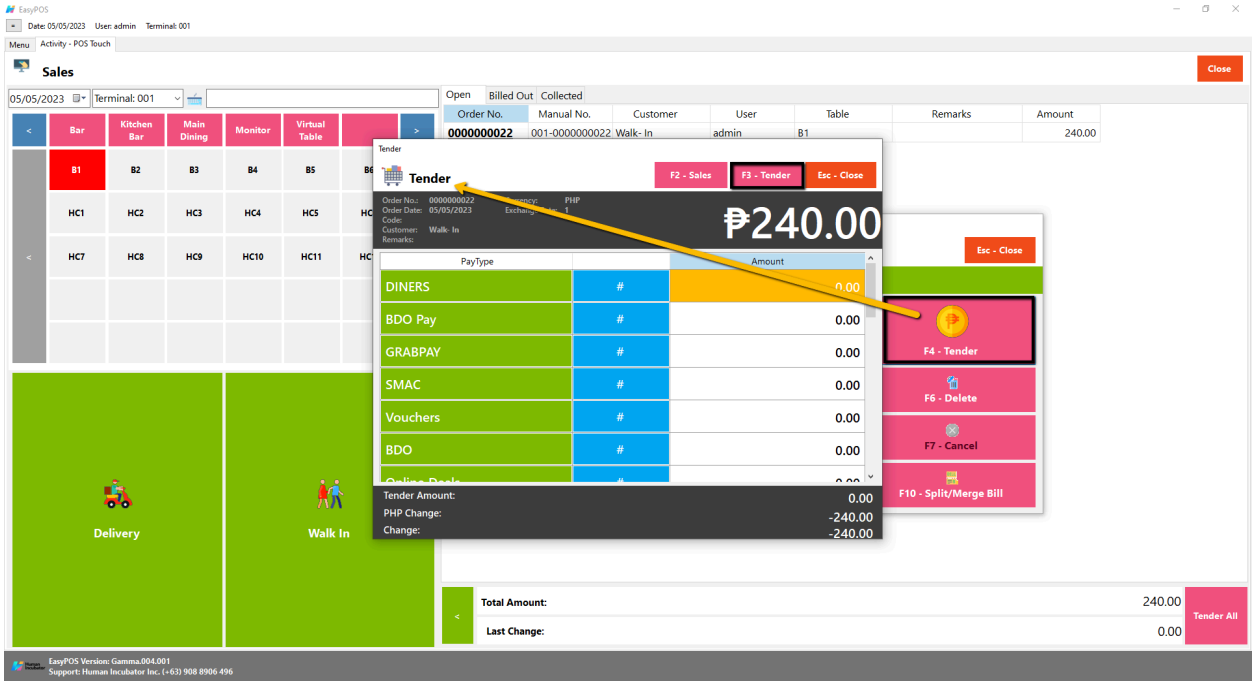
- There are 3 ways on how to tender sales:
    - Via Sales Detail page
        - Assuming that you are in the Sales Detail page, click the Tender button that can be seen on the Sales Detail form to tender transaction.
        - When clicked, a tender form shows where it asks the buyer's payment amount. 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.



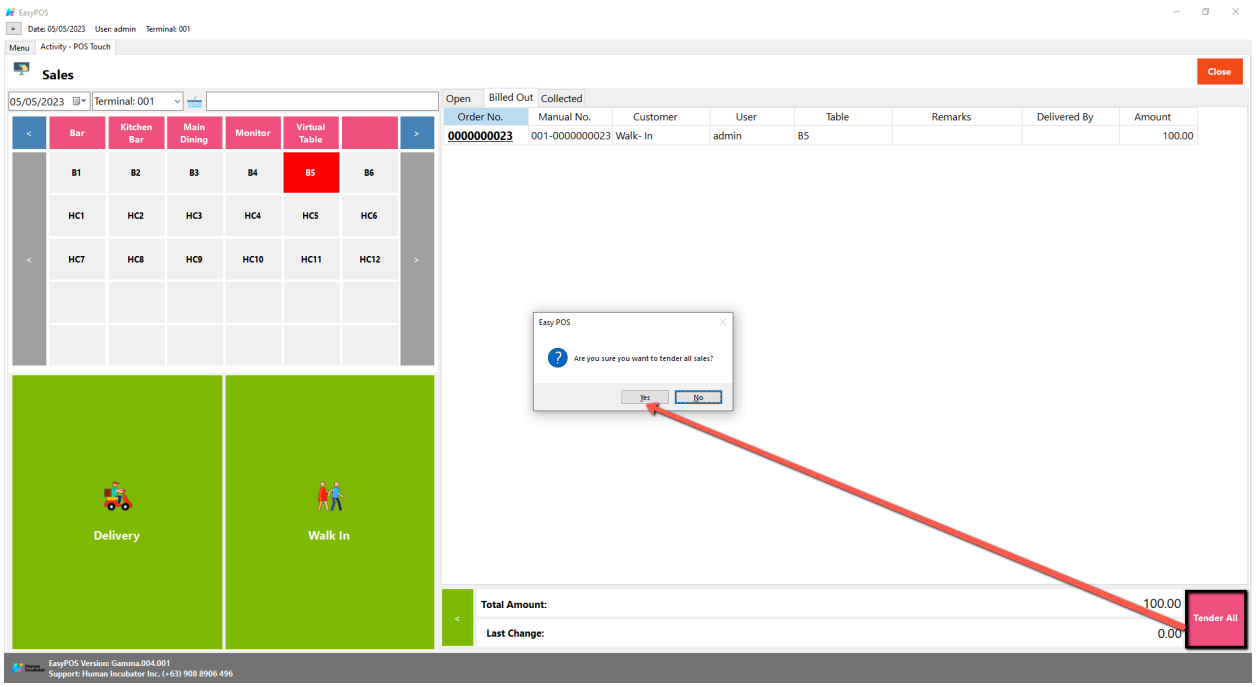
- Via Open and Billed Out tab
  - From the Open or Billed Out tab, select a sales order number that you want to tender.
  - A POS Touch window will display, then select Tender or simply press F4.



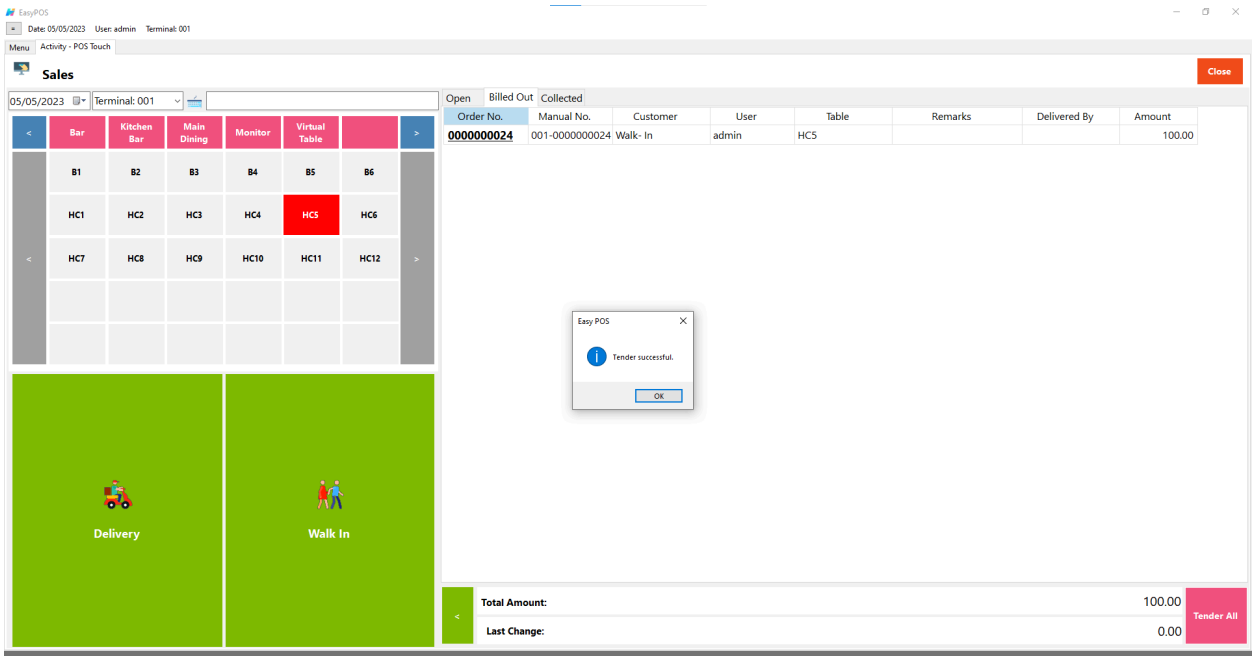
- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales 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.



  - 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.



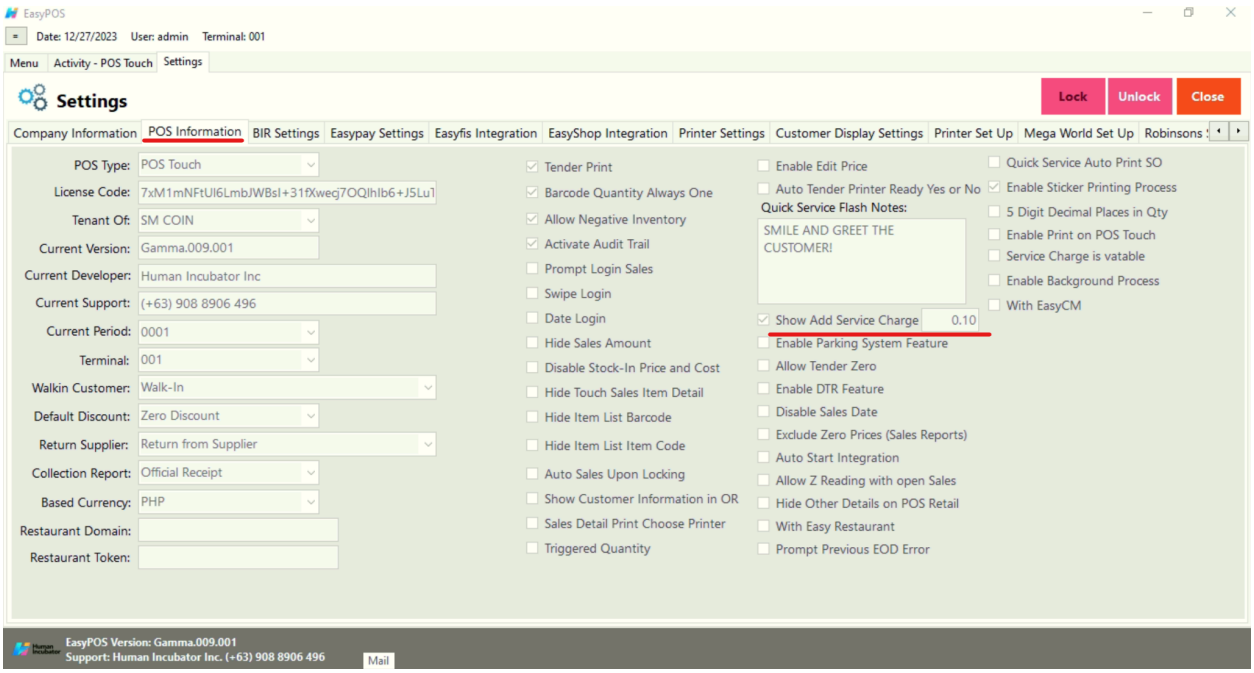
- A tender successful message will display then all the Sales Order from the tab will be moved to the Collected tab.



POS Touch Sales - Service Charge

- To Set service charge

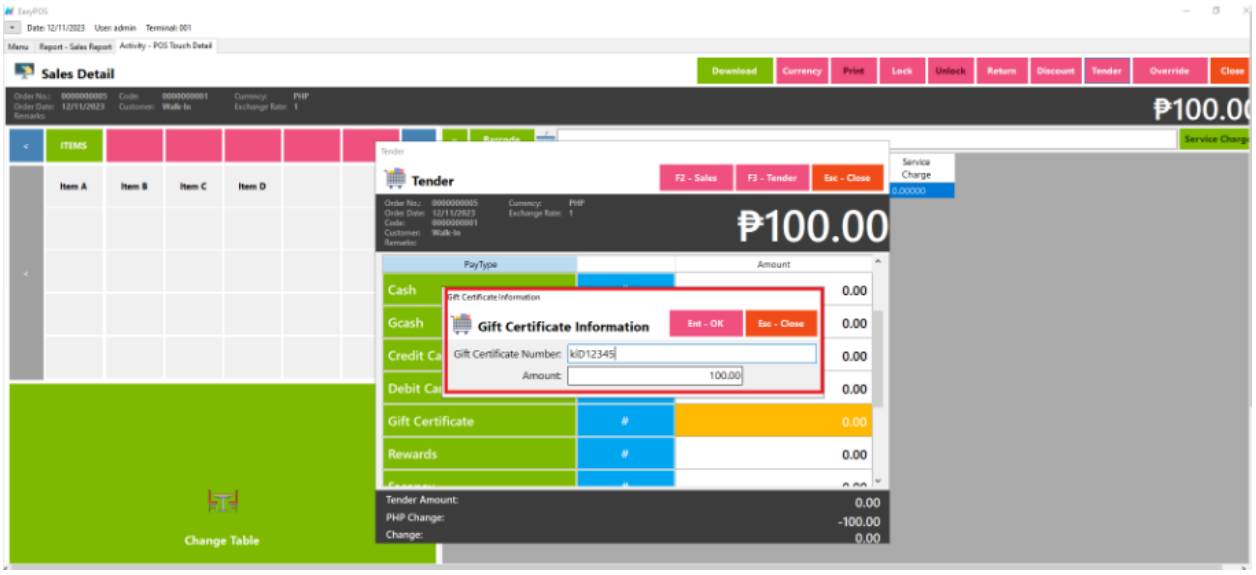
- Open POS Information

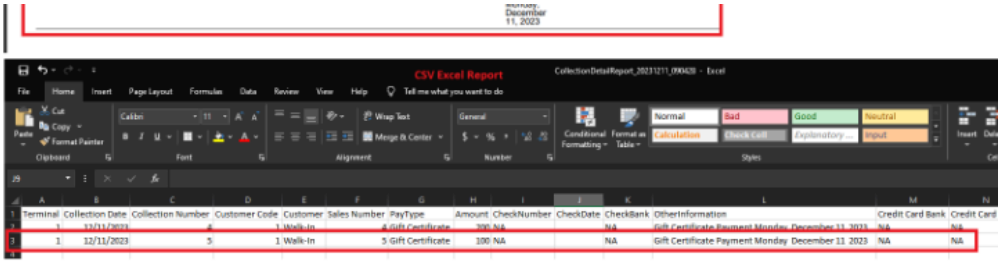


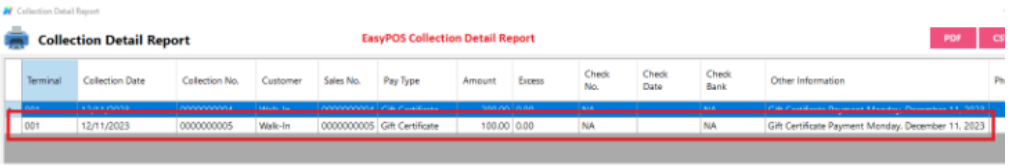
- Select unlock, input service charge amount, then lock it again.
- Go to POS -> must be on POS Touch Setup
- Make a transaction and add a service charge
- Take a look on the Service Charge Column
- The amount should be aligned right, Standard format with 2 decimal places.

POS Touch Sales - Gift Certificates

- Gift Certificate
    - Punch In orders from the customer.
    - Settle the transaction via Gift Certificate
    - Input the Gift Certificate #
    - Print the Receipt
    - Check the official receipt & collection detail report (csv excel, PDF & User Interface Report) Screenshot

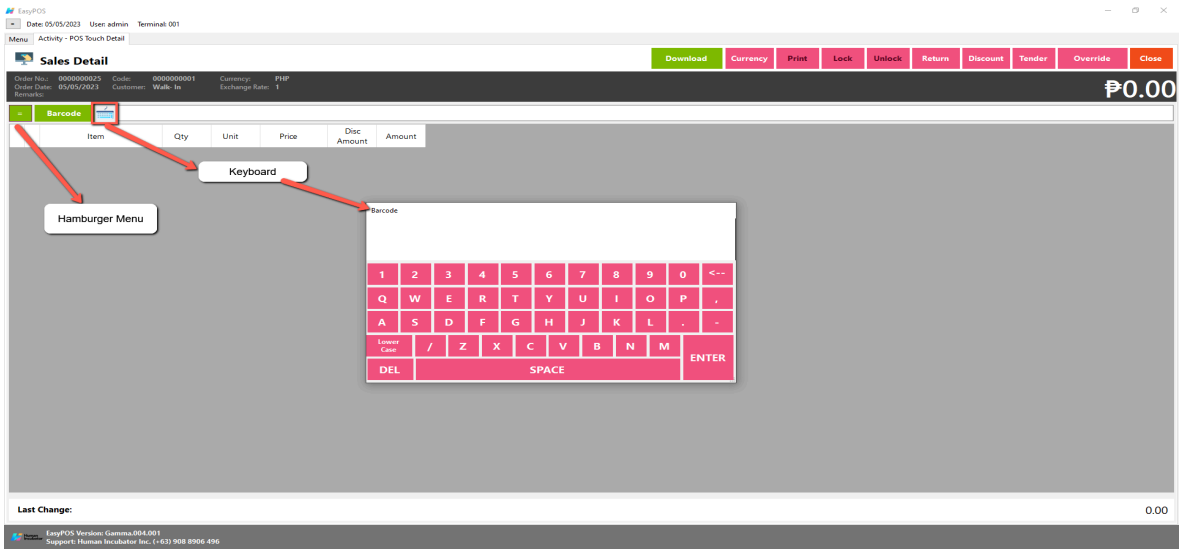




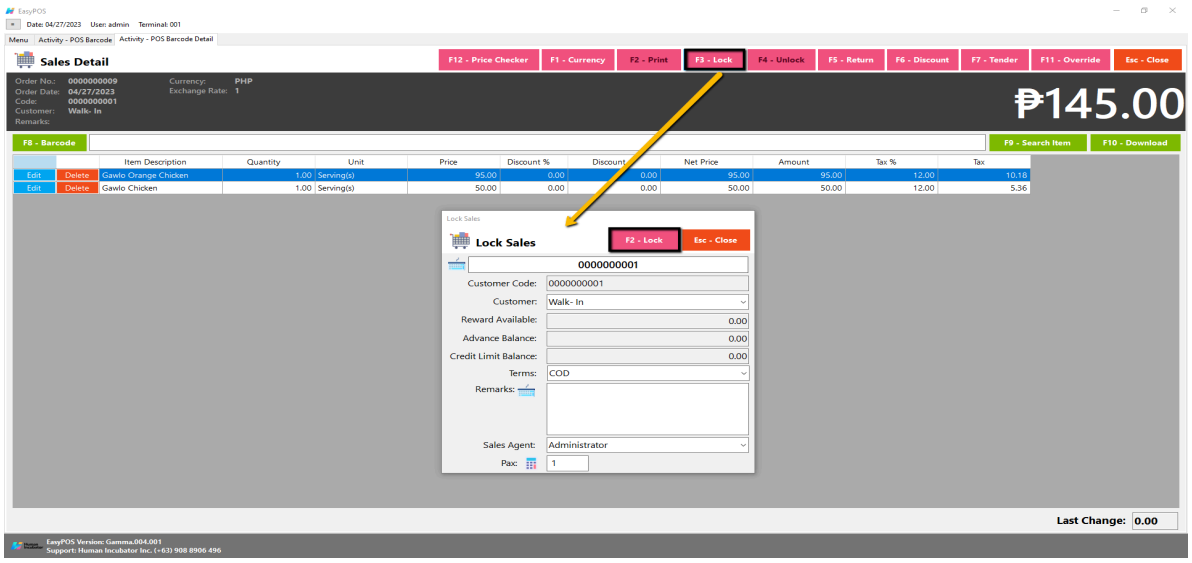


Barcode Touch - Relevant Buttons

- **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.

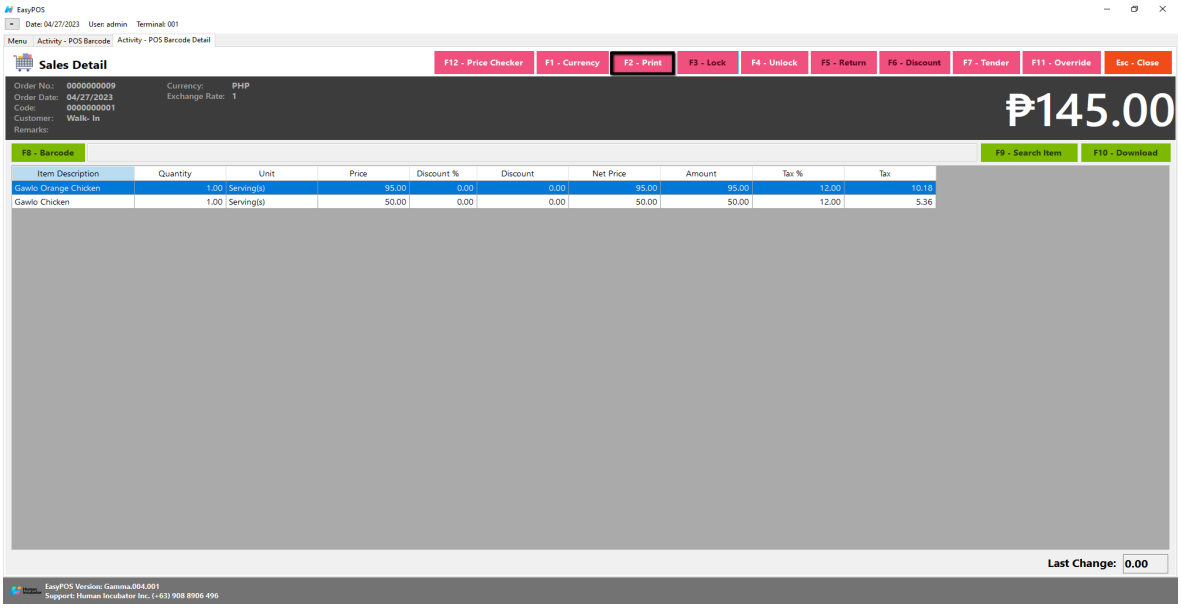


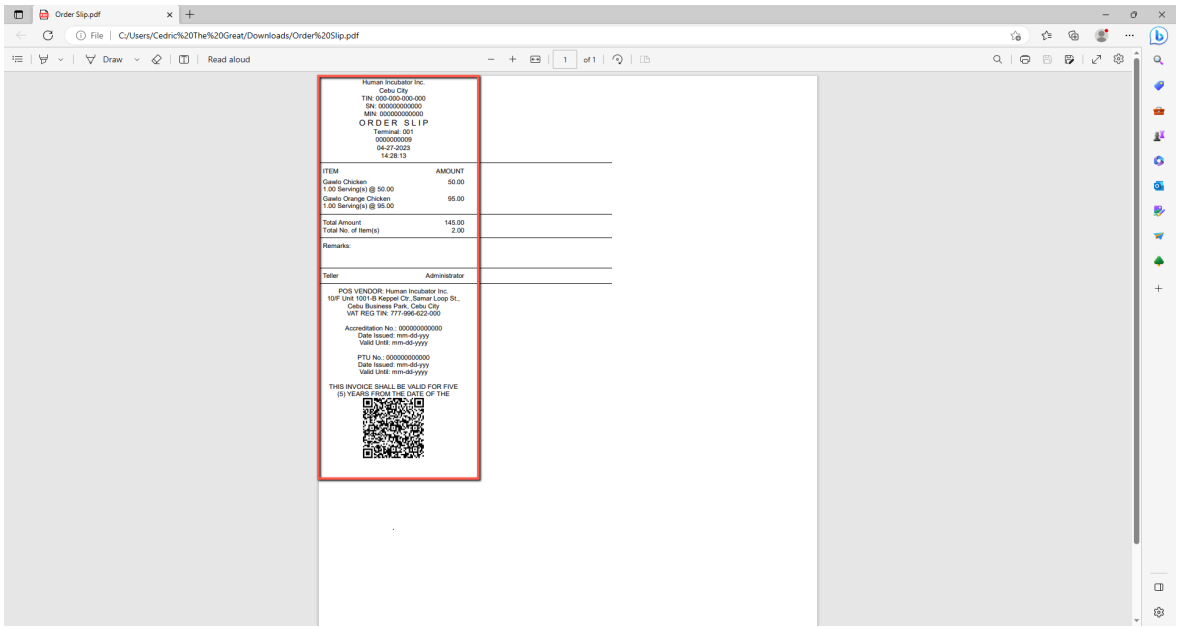
- **Lock**
  - Click the Lock button to save the sales information.
  - Provide the necessary information then click the Lock button to finish locking the sales information.



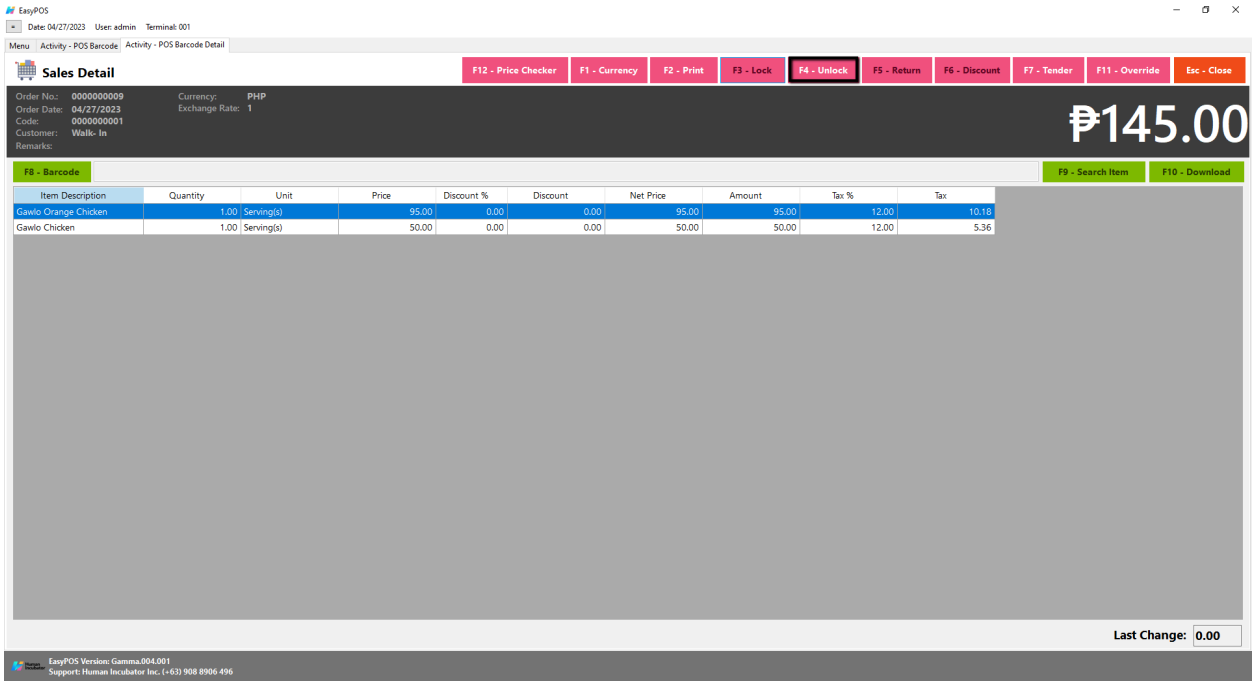
- **Print**
  - Click the Print button to download the Order Slip in PDF file, then print.
  - Take note, Print will only be enabled once the Sales detail is already locked.

- Make sure to save the generated pdf file to a folder where you can easily locate it.

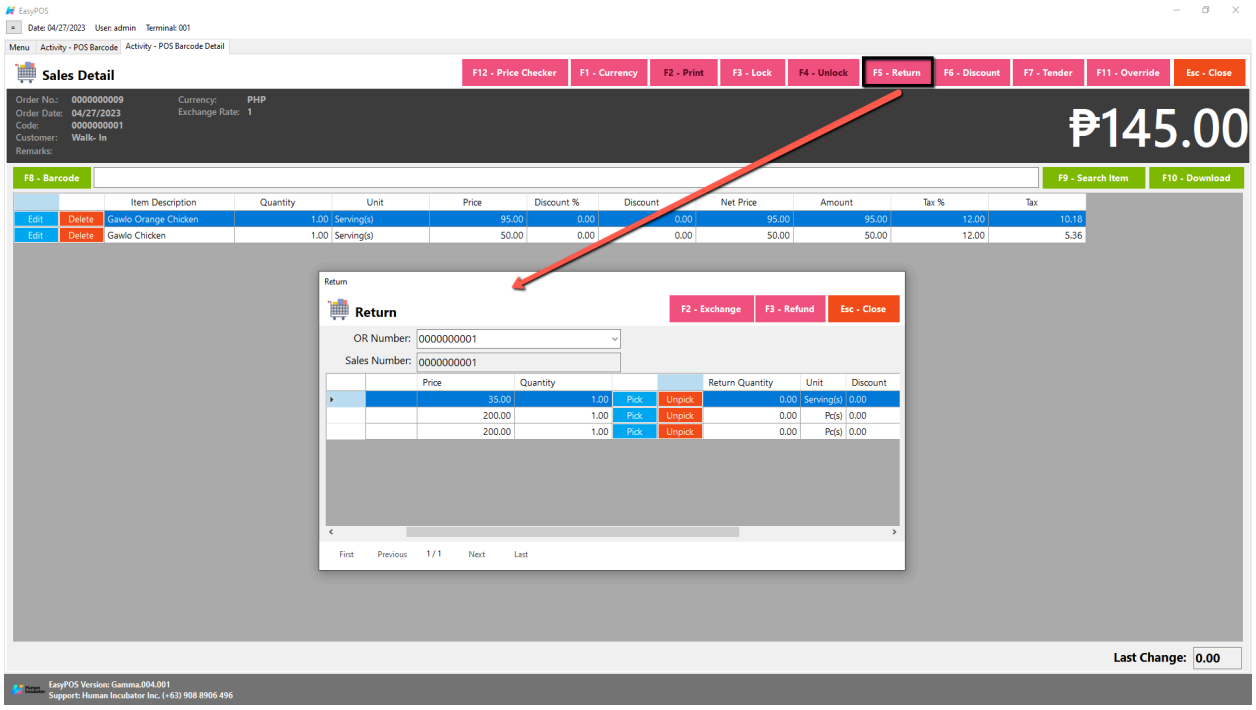




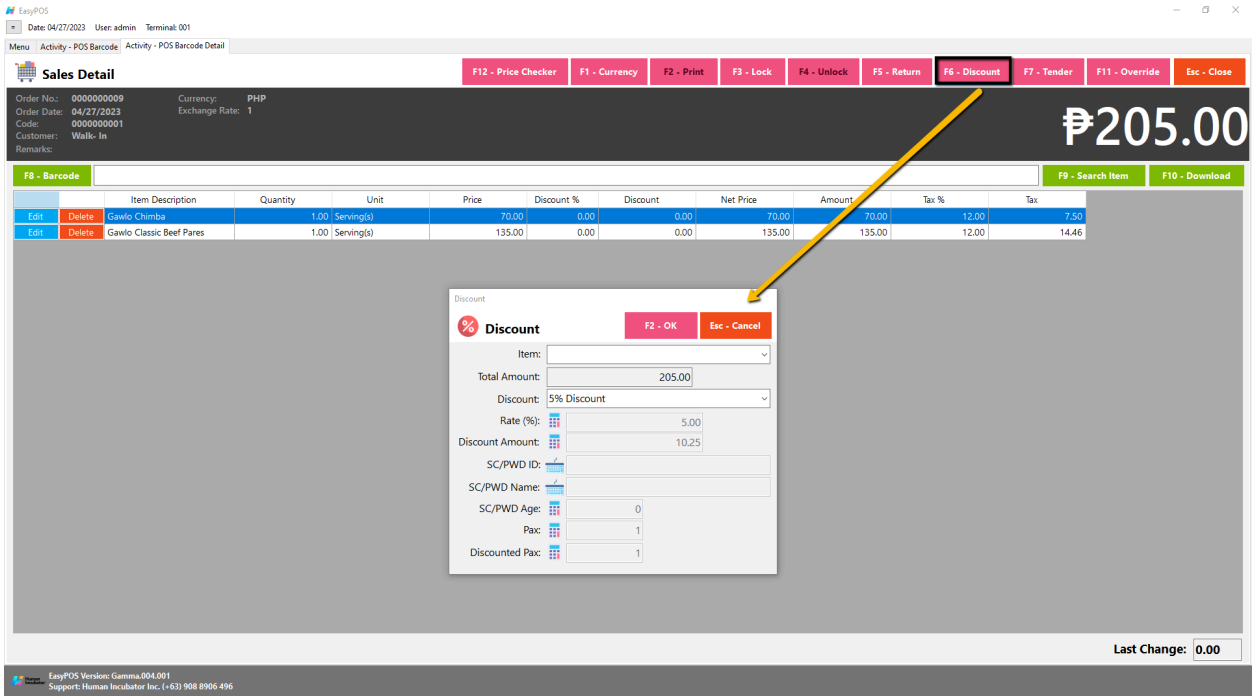
- **Unlock**
  - Click the Unlock button if you want to modify the sales detail or add sales line items.



- **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.

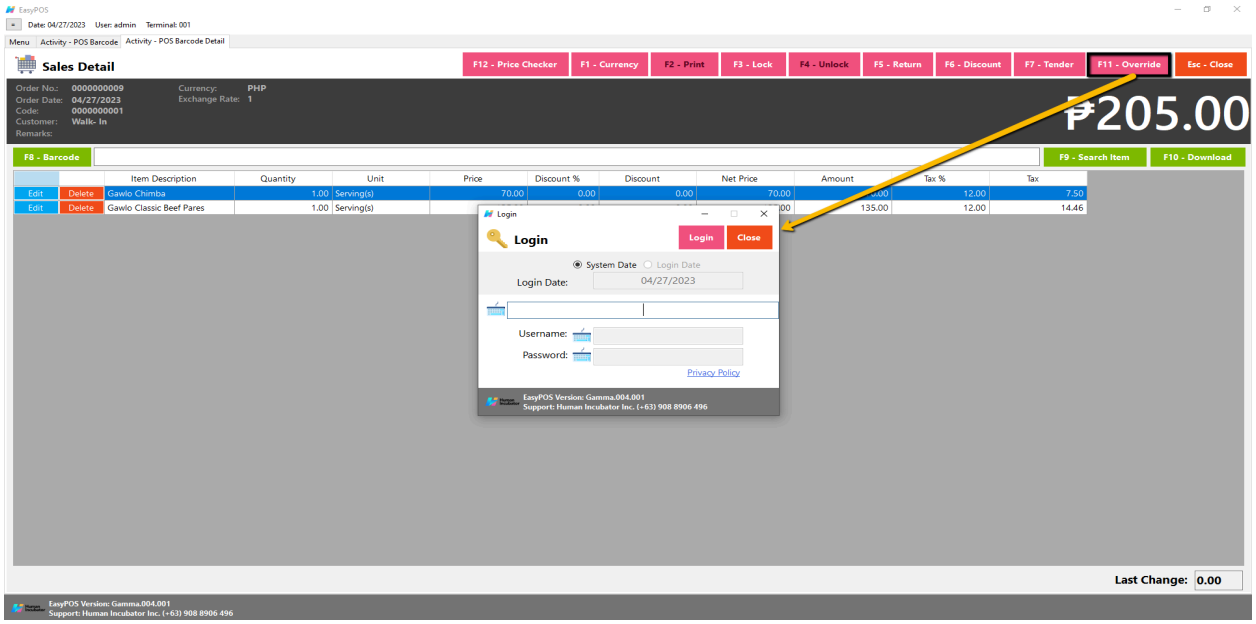


- **Discount**
  - Click the Discount button if you want to set up a discount for the sales line items. You can also set the discount per line item.



- **Override**

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

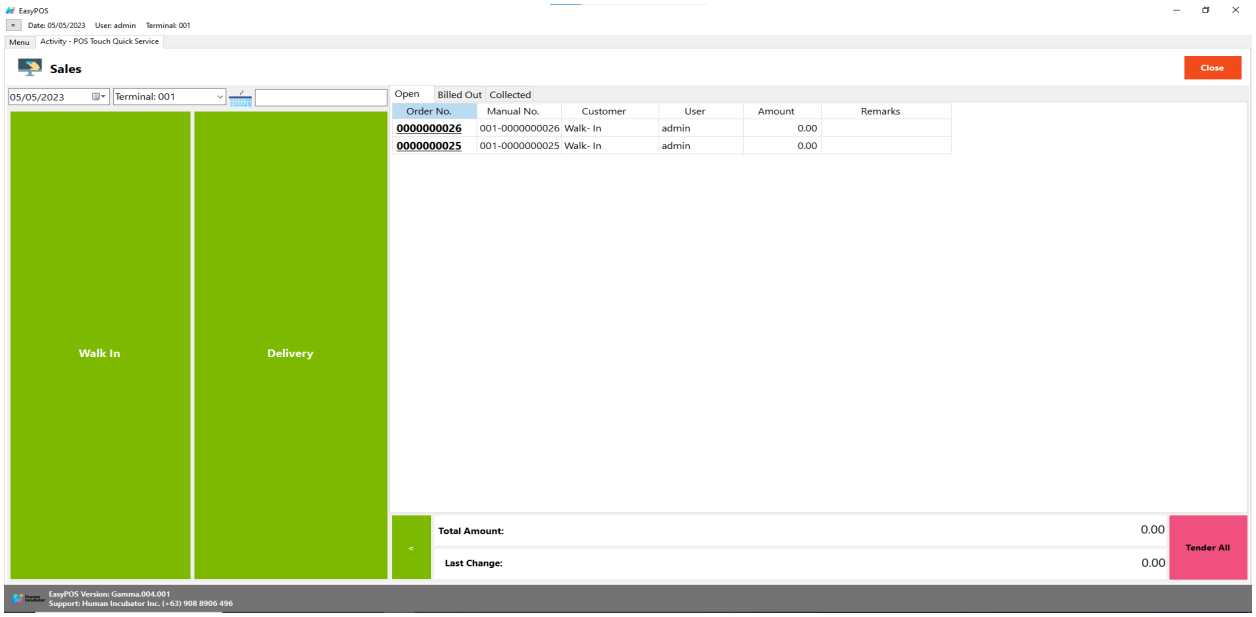


Activity - POS Quick Service

Overview

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

User Interface

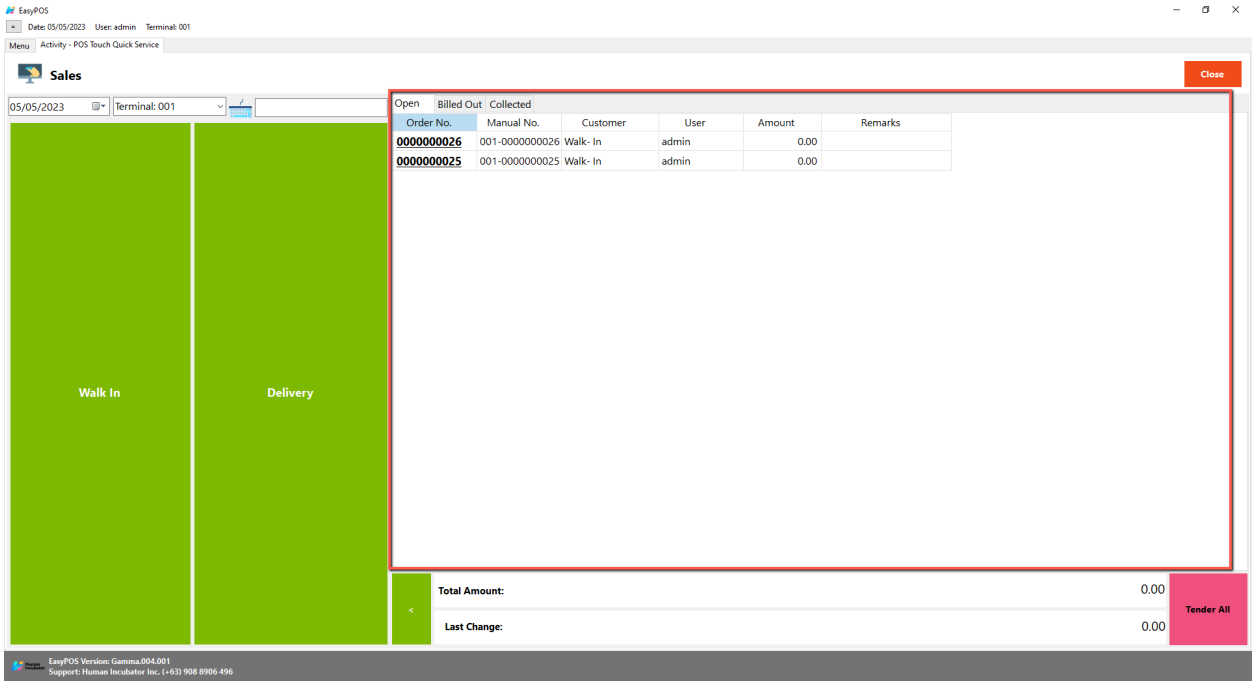


POS Quick Service Definition of Buttons

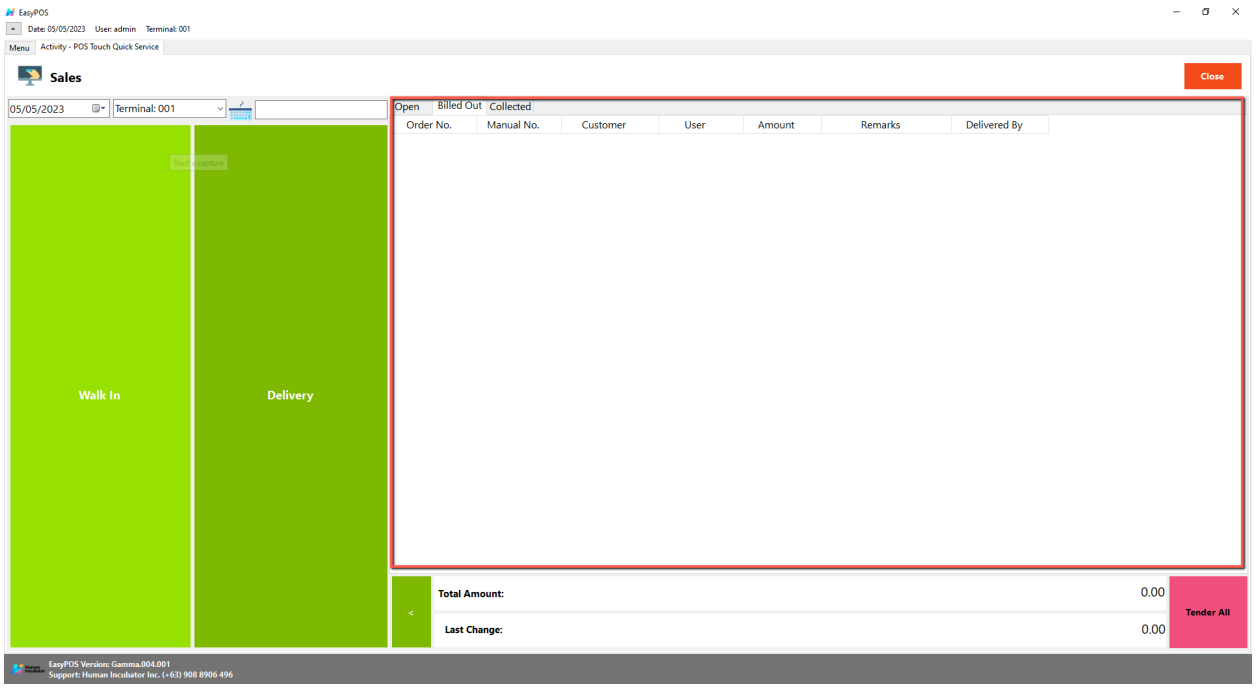
- Two **Green** large buttons → represents if the transaction is for Walk-In customers or for delivery.

POS Quick Service Sales List

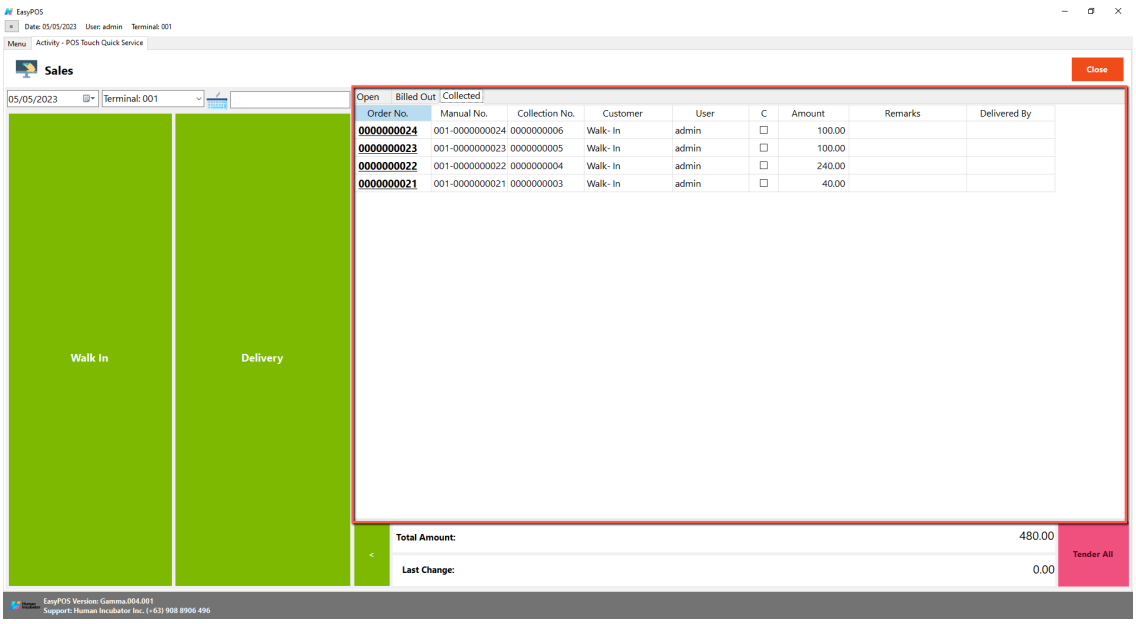
- Sales list for POS Quick Service consists of three(3) tabs:
    - Open → display list of Quick Service sales that are still open which means, not yet billed or collected. Also, system users can still delete the created sales detail here.



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

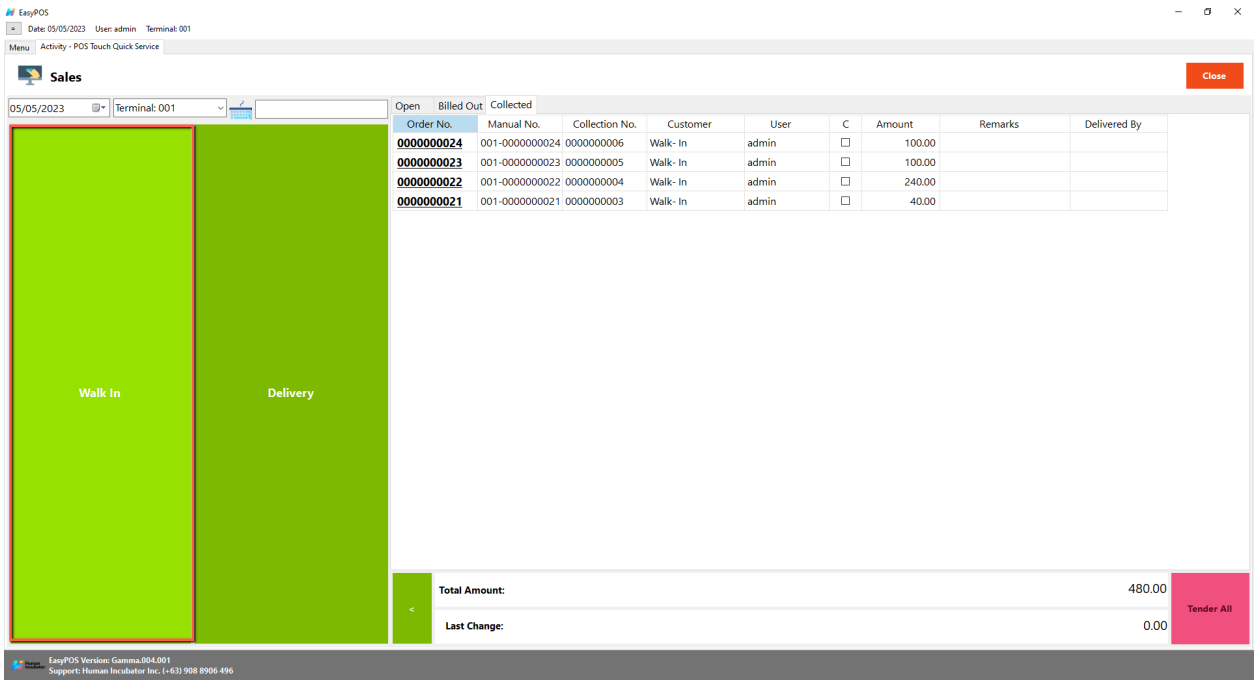


- Collected → display list of sales that are already tendered.



POS Touch Sales Detail

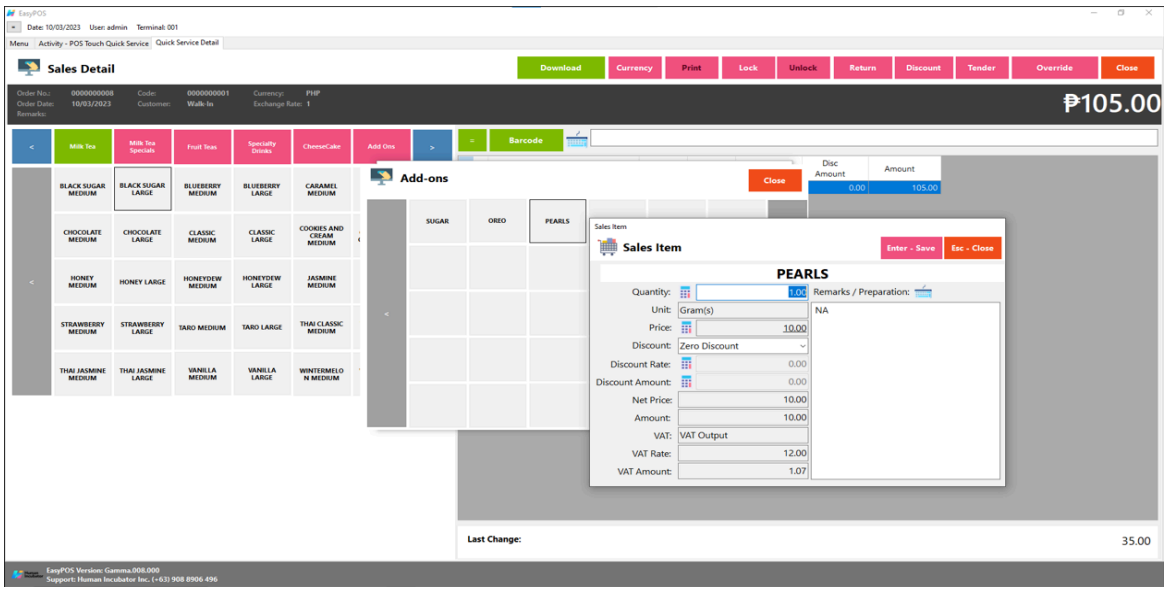
- There are 2 ways on how to navigate the sales detail:
  a. Walk-In button
     - Click the green button with the Walk In label.



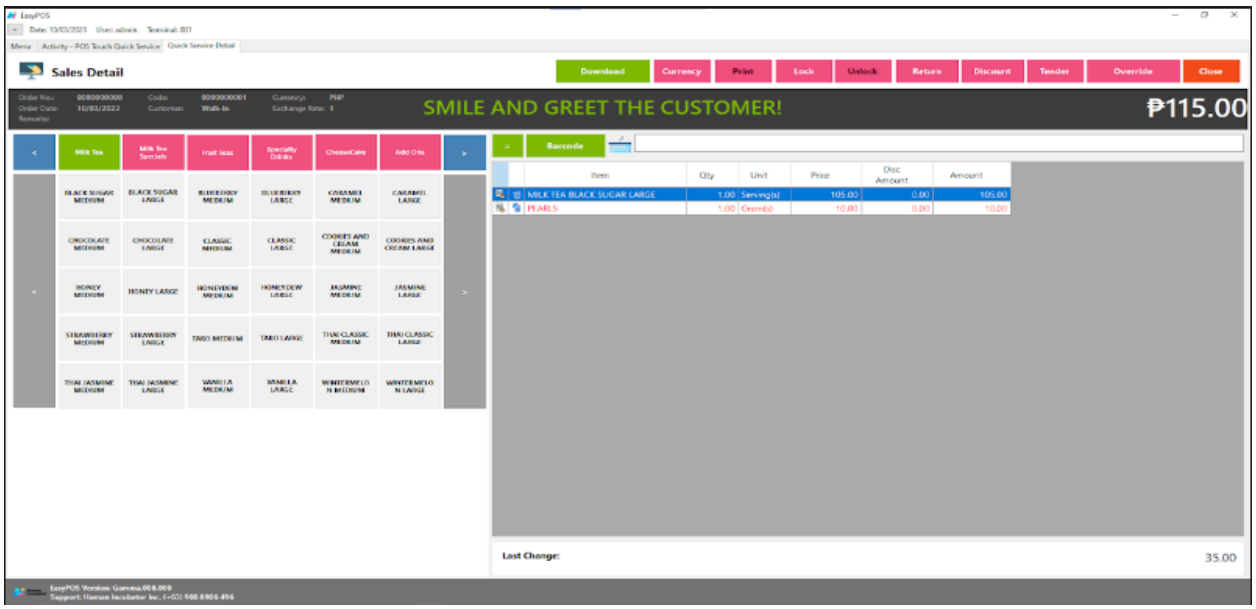
     - You will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus

beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount.

- If the Item has Item Add-ons, a form will pop-up for the item add-ons



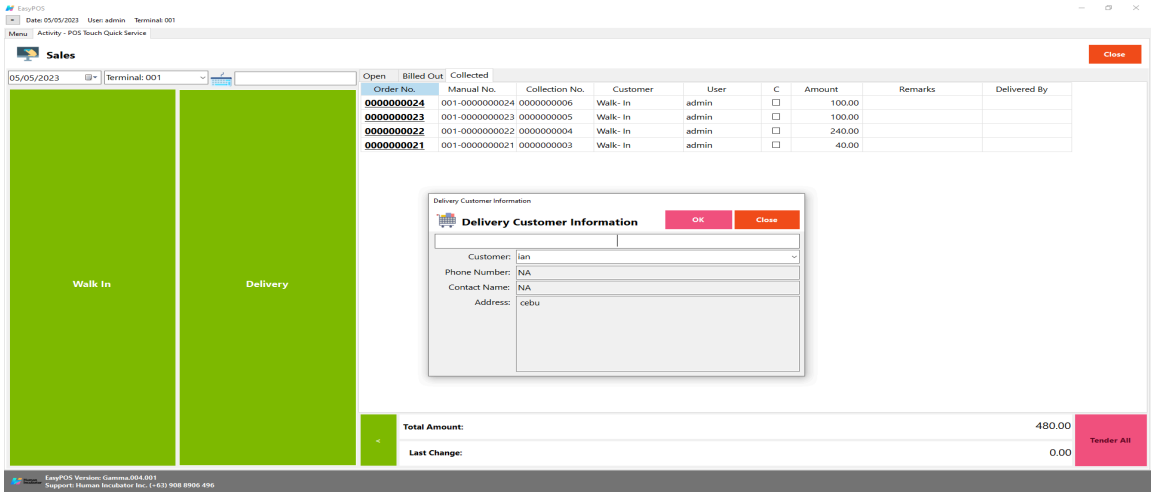
- To save, hit the Enter button from your keyboard or click the Save button.



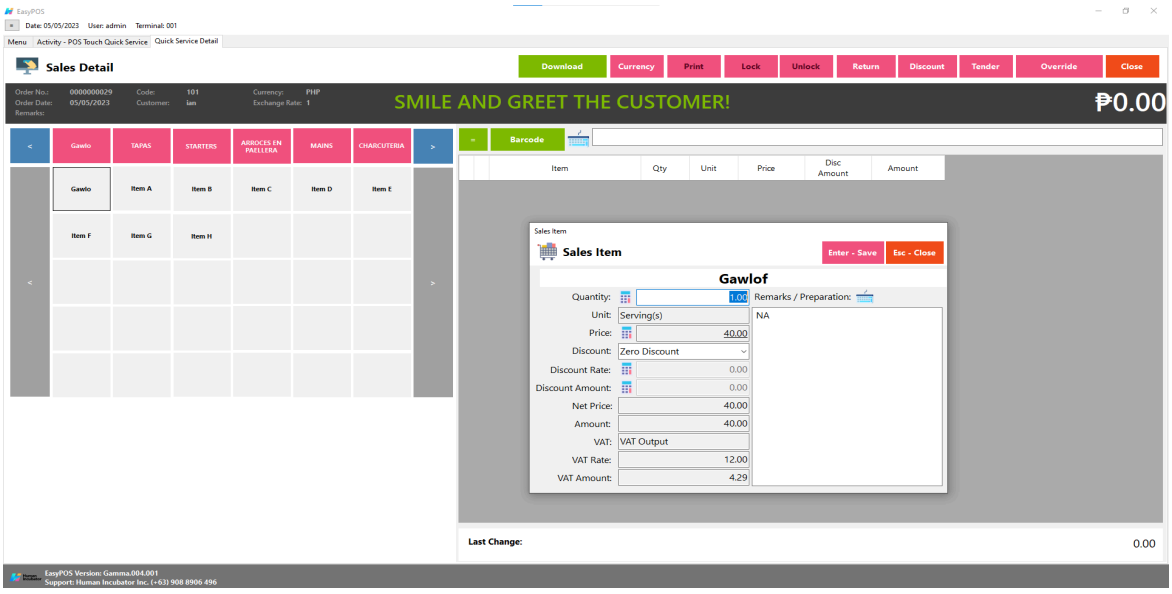
b. Delivery button

- Click the green button with the Delivery label.

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



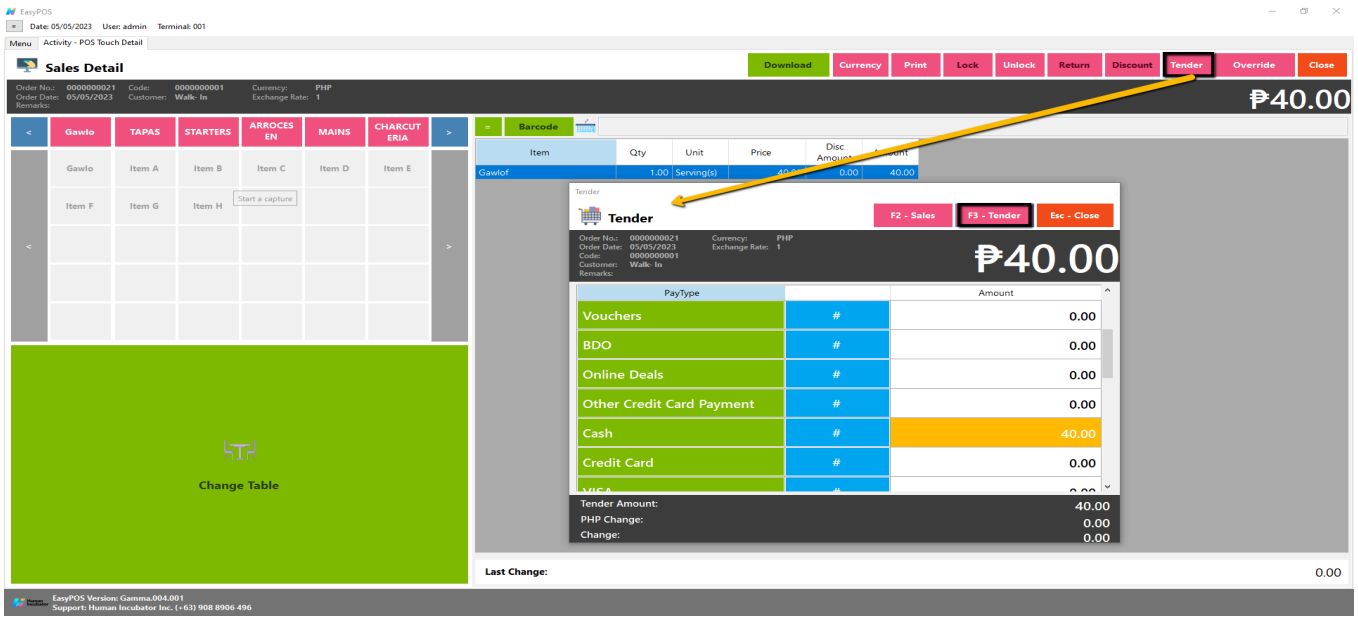
- The same process with the Dine In table, you will be redirected to the Sales Detail. To add a Sales line item, select an item from the food menus beside the sales line item list. Then, a popup Sales Item will appear. Provide all the necessary information such as quantity and discount. To save, hit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



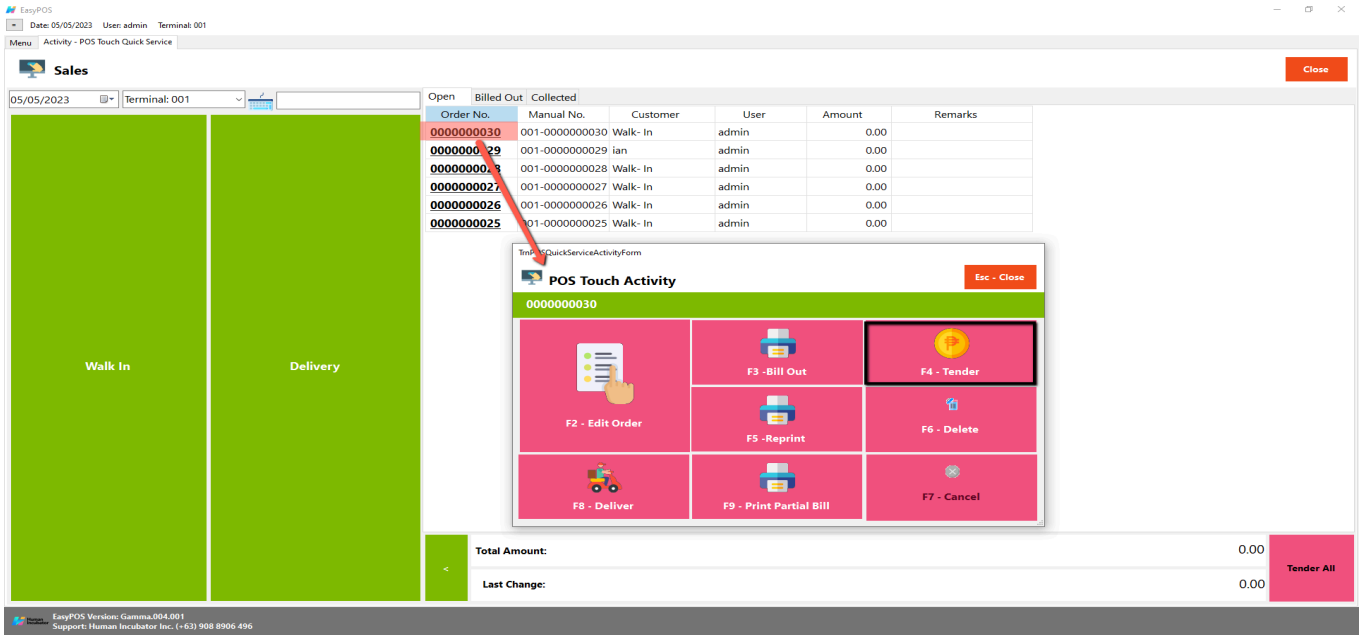
POS Quick Service - Tender

- There are 3 ways on how to tender sales:

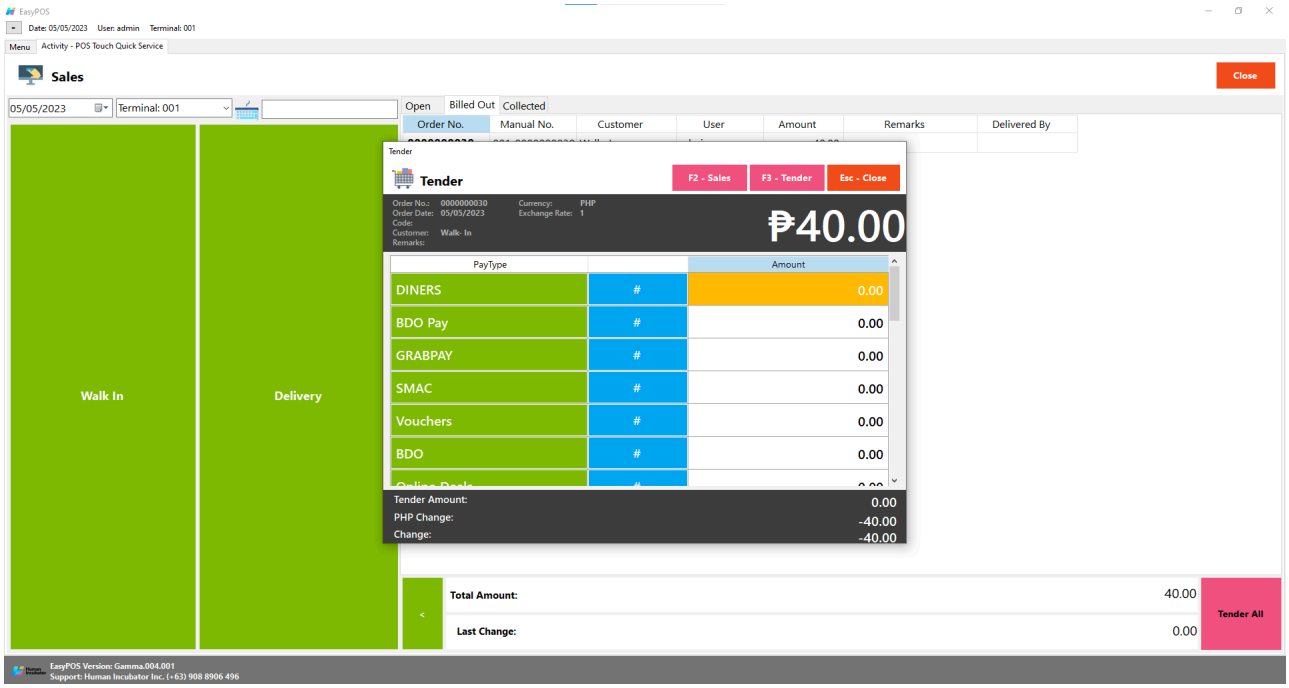
- Via Sales Detail page
  - Assuming that you are in the Sales Detail page, click the Tender button that can be seen on the Sales Detail form to tender transaction.
  - When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other 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.



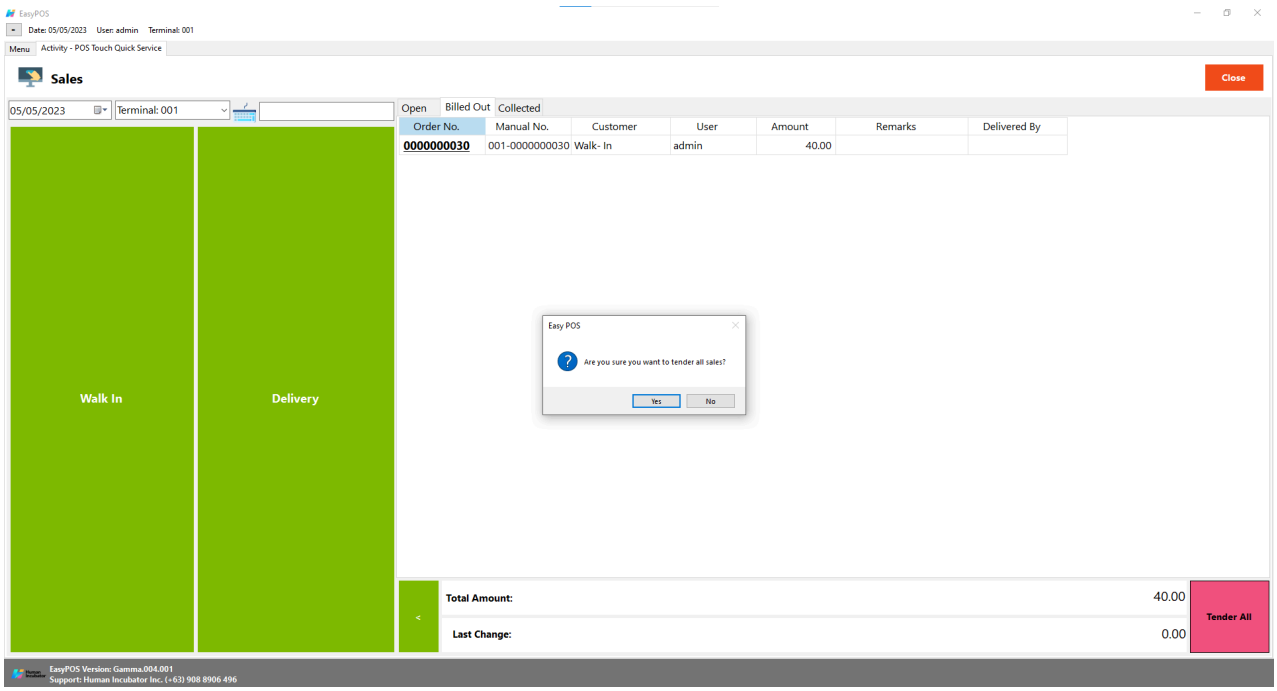
- Via Open and Billed Out tab
  - From the Open or Billed Out tab, select a sales order number that you want to tender.
  - A POS Touch window will display, then select Tender or simply press F4.



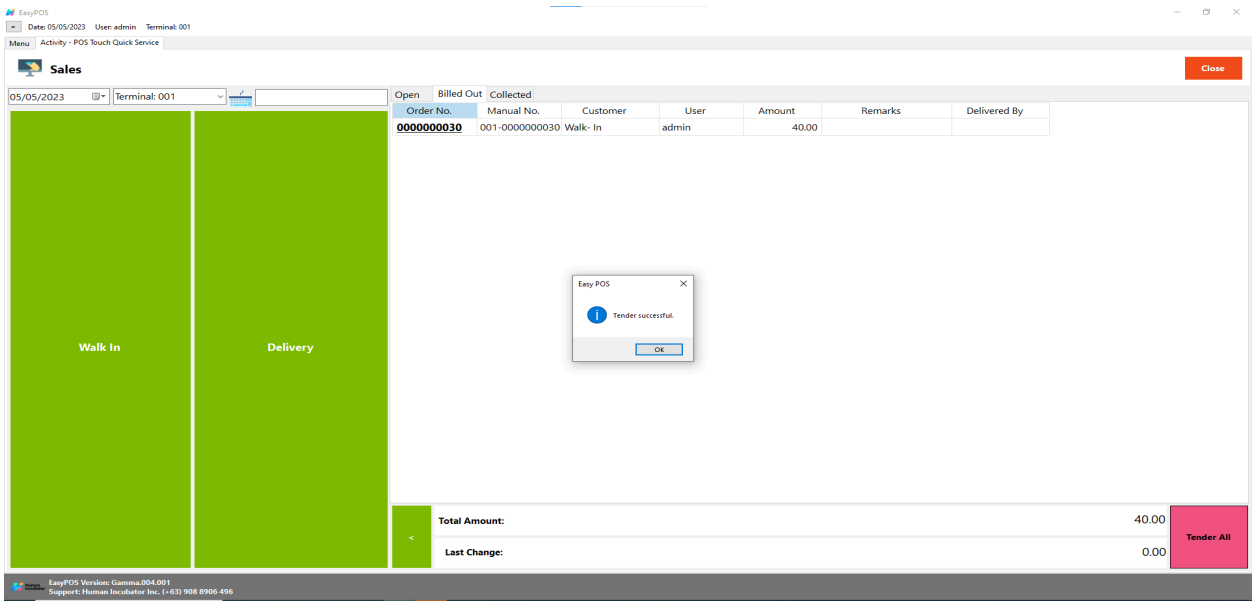
- When clicked, a tender form shows where it asks the buyer's payment amount. The EasyPOS system accepts multiple payment types. Other payment types require additional information, excluding the payment type **Cash.** Just click the **OK** button to save the additional information.
- To finish the sales 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.



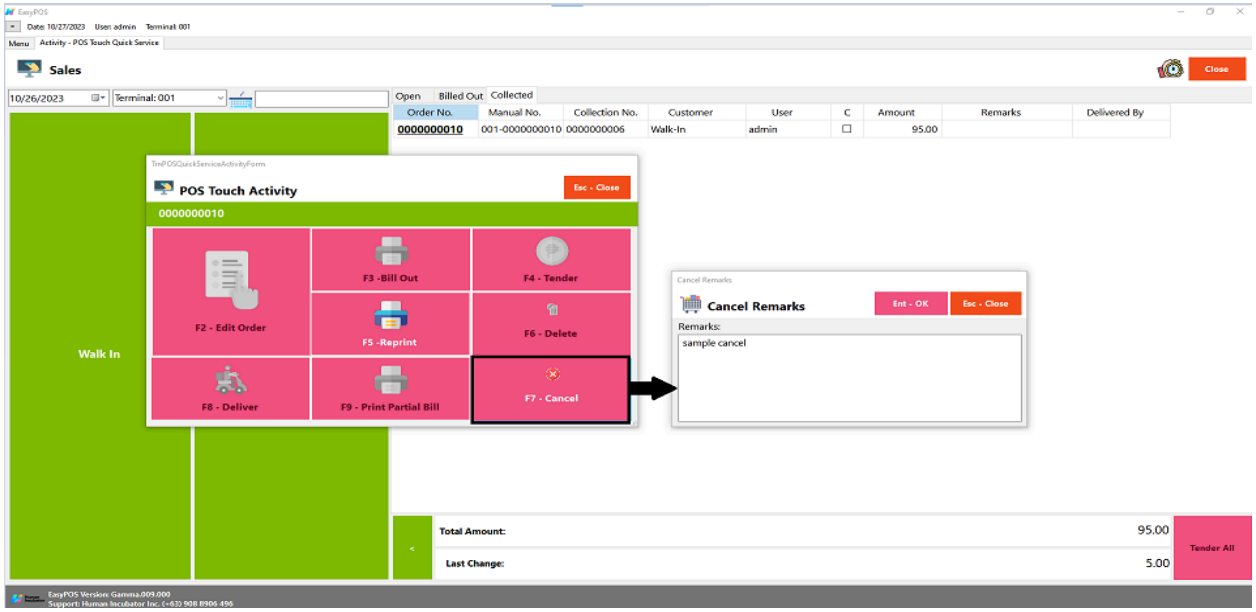
- Via Tender All button
  - From the Open or Billed Out tab, look for the Tender All red button.
  - A confirmation message will popup, then click Yes.



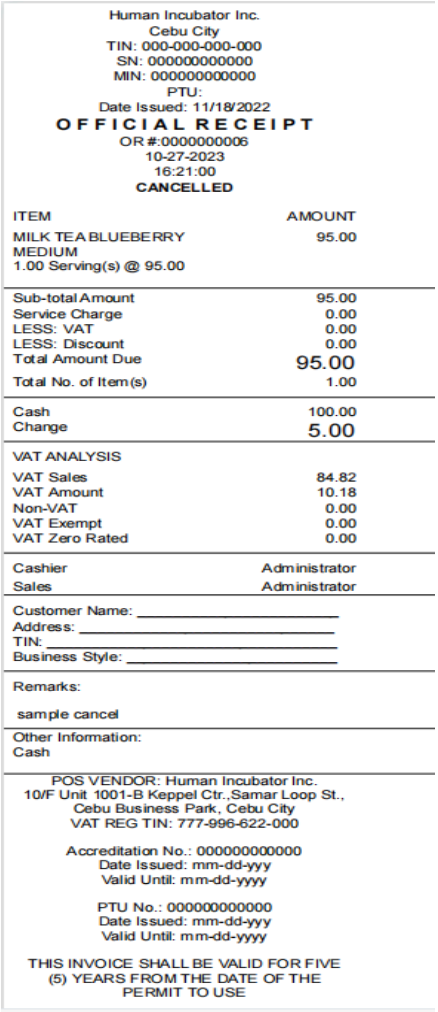
- A tender successful message will display then all the Sales Order from the tab will be moved to the Collected tab.



- Cancel transaction
  - To cancel transaction, select order number in the collection tab
  - Click the cancel button and input the remarks on the popup cancel remarks form.



- Click Ent -OK to cancel the transaction
- It will automatically generate the cancel receipt



Human Incubator Inc.
Cebu City
TIN: 000-000-000-000
SN: 000000000000
MIN: 000000000000
PTU:
Date Issued: 11/18/2022

OFFICIAL RECEIPT

OR #:0000000006
10-27-2023
16:21:00
CANCELLED

ITEM	AMOUNT
MILK TEA BLUEBERRY MEDIUM 1.00 Serving(s) @ 95.00	95.00
Sub-total Amount	95.00
Service Charge	0.00
LESS: VAT	0.00
LESS: Discount	0.00
Total Amount Due	95.00
Total No. of Item(s)	1.00
Cash	100.00
Change	5.00

VAT ANALYSIS

VAT Sales	84.82
VAT Amount	10.18
Non-VAT	0.00
VAT Exempt	0.00
VAT Zero Rated	0.00
Cashier	Administrator
Sales	Administrator

Customer Name: _____
Address: _____
TIN: _____
Business Style: _____

Remarks:
sample cancel

Other Information:
Cash

POS VENDOR: Human Incubator Inc.
10/F Unit 1001-B Keppel Ctr.,Samar Loop St.,
Cebu Business Park, Cebu City
VAT REG TIN: 777-996-622-000

Accreditation No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

PTU No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

THIS INVOICE SHALL BE VALID FOR FIVE (5) YEARS FROM THE DATE OF THE PERMIT TO USE

Exchange Rate

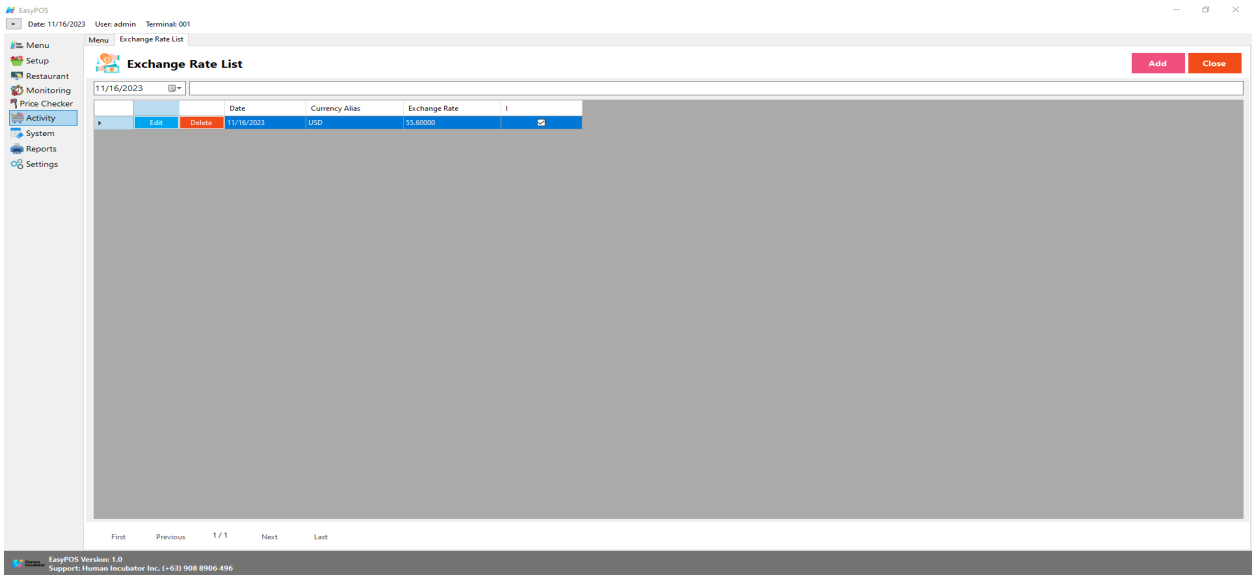
Overview

- It is where the user can add exchange rate for the specific currency

Exchange Rate List

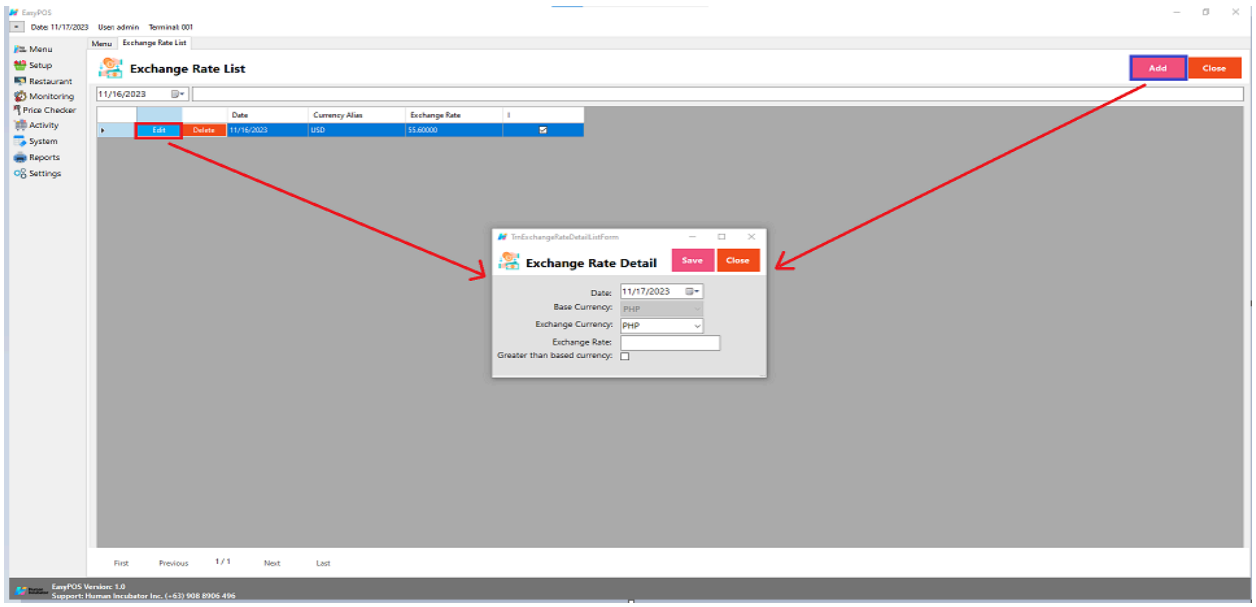
- Shows the list of added exchange rates
- **Delete** button will proceed to deleting unlocked exchange rate record detail.
- **Add** button will proceed to adding new exchange rates.
- **Edit** button will proceed to updating exchange rate detail.

- **Close** button will proceed to closing the exchange rate list page.



Exchange Rate Detail

- **Assumption**: **Add** button is already clicked on the upper right corner in the Exchange Rate list.
- Fill up the Exchange rate and select Exchange Currency
- If the exchange rate is greater than the base currency, check or uncheck the checkbox .
- Click the Save button to successfully add the exchange rate.

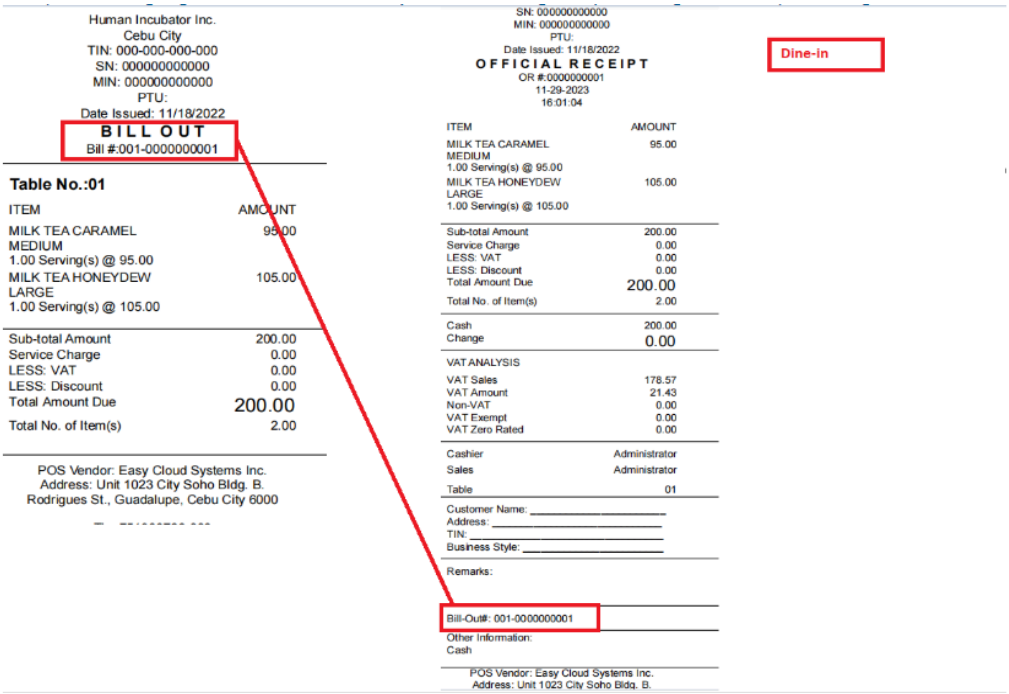


Official Receipt

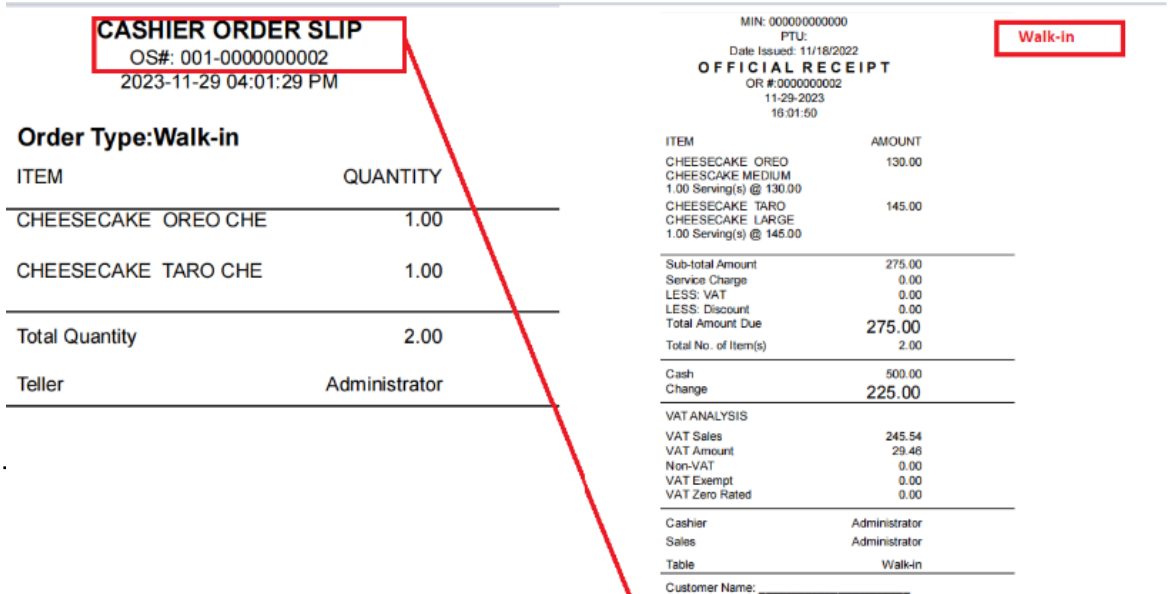
Overview

- Reference for official receipt

Dine-in : Billout number



Takeout : Sales number



Cancelled Transaction

- For Barcode Setup
- Select a tendered transaction
- Click cancel button
- Input remarks for canceled
- It will automatically print canceled document

Cebu City
TIN: 000-000-000-000
SN: 000000000000
MIN: 000000000000
PTU:
Date Issued: 11/18/2022

OFFICIAL RECEIPT

OR #:0000000004
11-20-2023
17:08:04
CANCELLED

ITEM	AMOUNT
Cheese Burger Deluxe 1.00 Serving(s) @ 135.00	135.00
Sub-total Amount	135.00
Service Charge	0.00
LESS: VAT	0.00
LESS: Discount	0.00
Total Amount Due	135.00
Total No. of Item(s)	1.00
Cash	135.00
Change	0.00
VAT ANALYSIS	
VAT Sales	120.54
VAT Amount	14.46
Non-VAT	0.00
VAT Exempt	0.00
VAT Zero Rated	0.00
Cashier	Administrator
Sales	Administrator

Customer Name: _____
Address: _____
TIN: _____
Business Style: _____

Remarks:

ca

Other Information:
Cash

POS VENDOR: Human Incubator Inc.
10/F Unit 1001-B Keppel Ctr.,Samar Loop St.,
Cebu Business Park, Cebu City
VAT REG TIN: 777-996-622-000

Accreditation No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

PTU No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

THIS INVOICE SHALL BE VALID FOR FIVE (5) YEARS FROM THE DATE OF THE PERMIT TO USE

Order slip / Kitchen print-out

Overview

- Order Slip for cashier's copy - same output of kitchen printout (touch and quick service setup)

CASHIER ORDER SLIP
OS#: 001-0000000001
2023-11-22 04:59:56 PM

Table No.:CT01

ITEM	QUANTITY
Regular Burger	1.00
Total Quantity	1.00
Teller	Administrator

VII: Cash In/Out

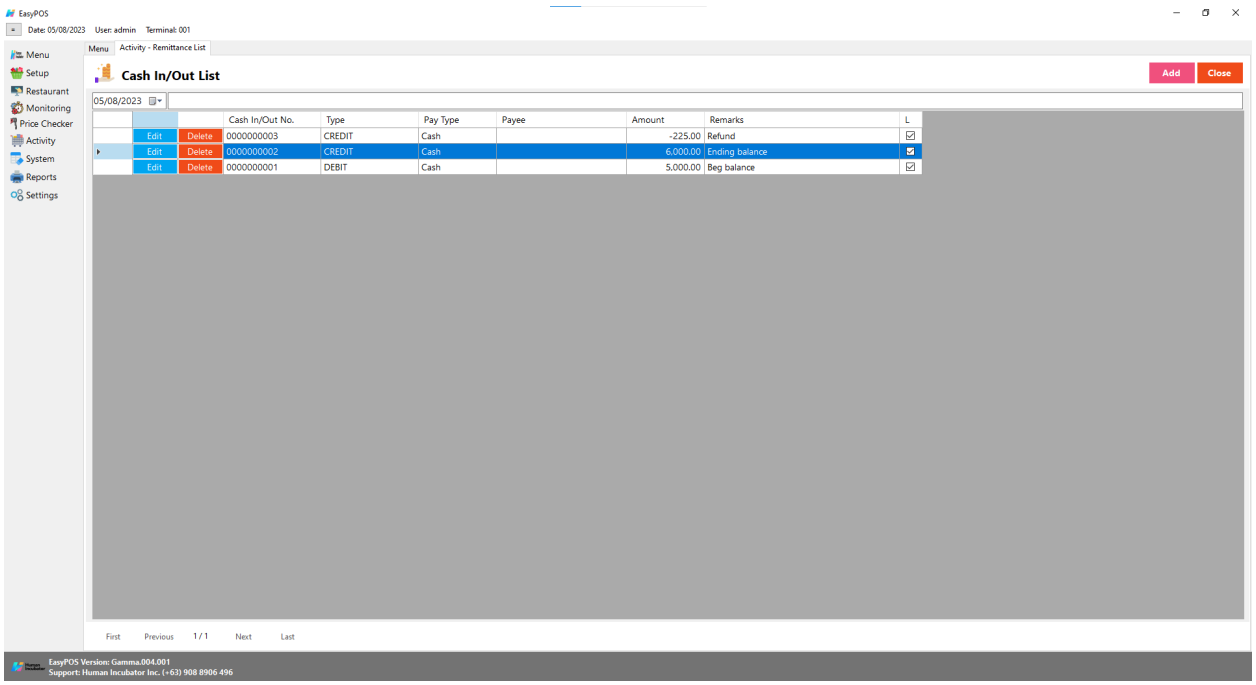
Cash In/OutPage

Overview

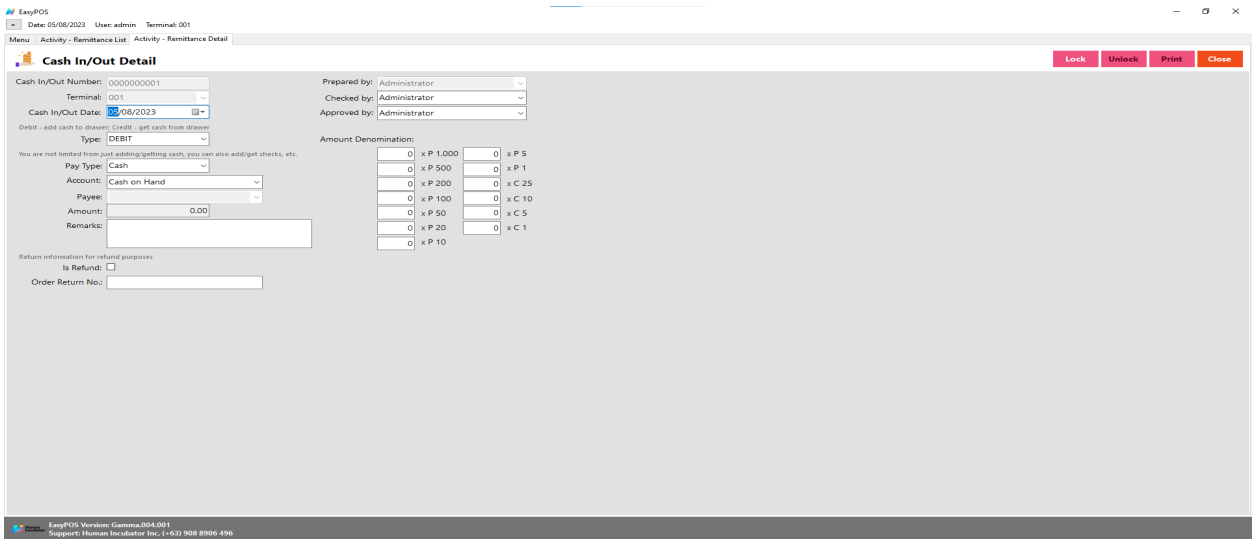
- Cash in/out allows to keep track of incoming and outgoing payments.

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.
- **Add** button will proceed to adding a cash in/out transaction.
- 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
- For **Type**; We have Debit and Credit, debit is use for adding cash to the drawer and credit is to get cash from the drawer. Although, it is good that it is already indicated in our system.
- Click the Lock button to save new Cash In/Out details.
- **Print** button can print cash in/out details when it's already locked.

VIII: Inventory

Stock In

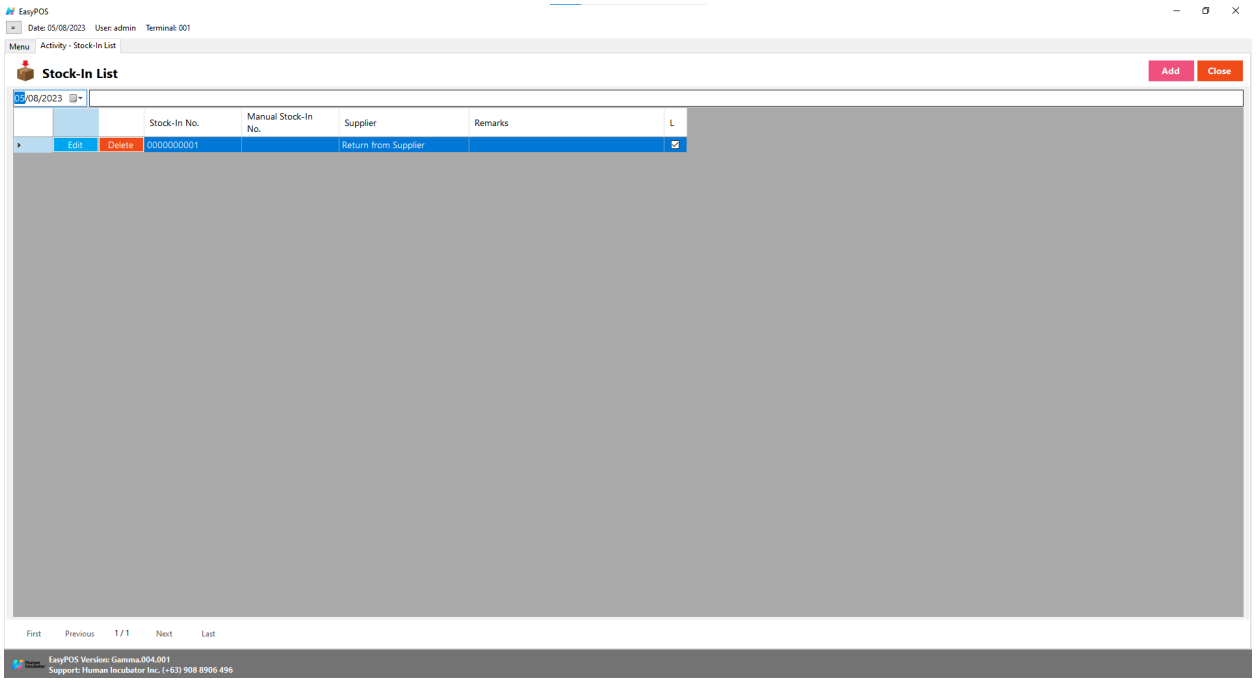
Overview

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

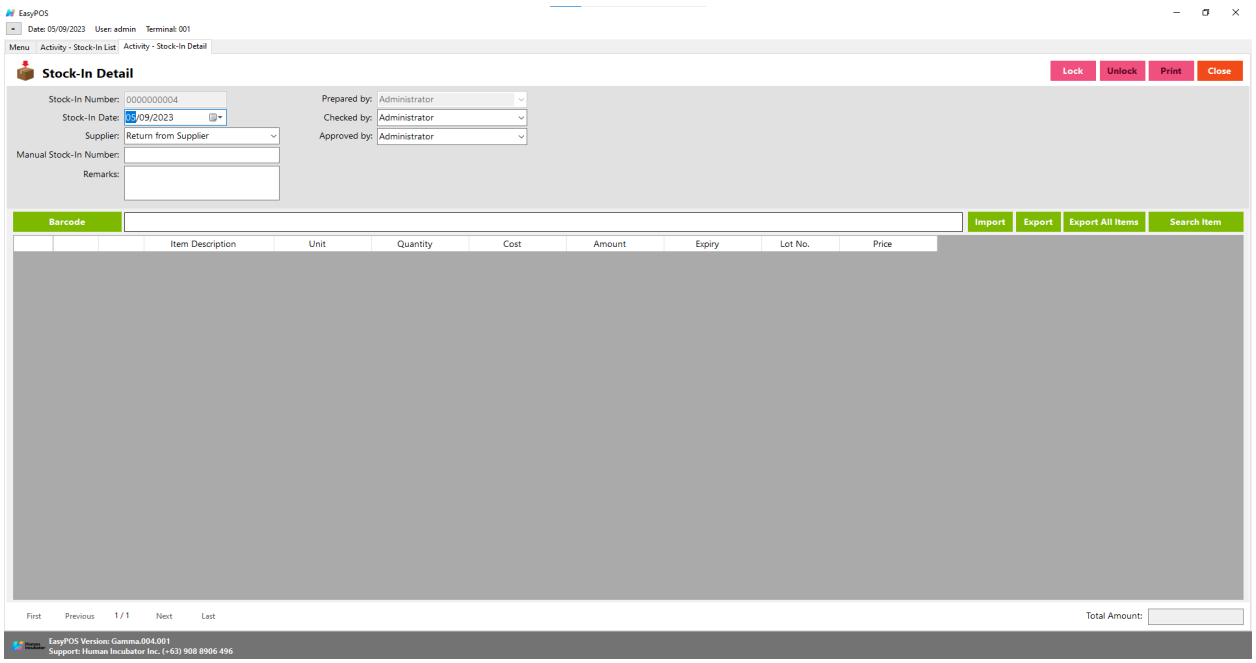
*Take Note: If the **EasyPOS** has an **EasyFS Integration,** stock-in of items should be done in the EasyFS system.*

Stock In List

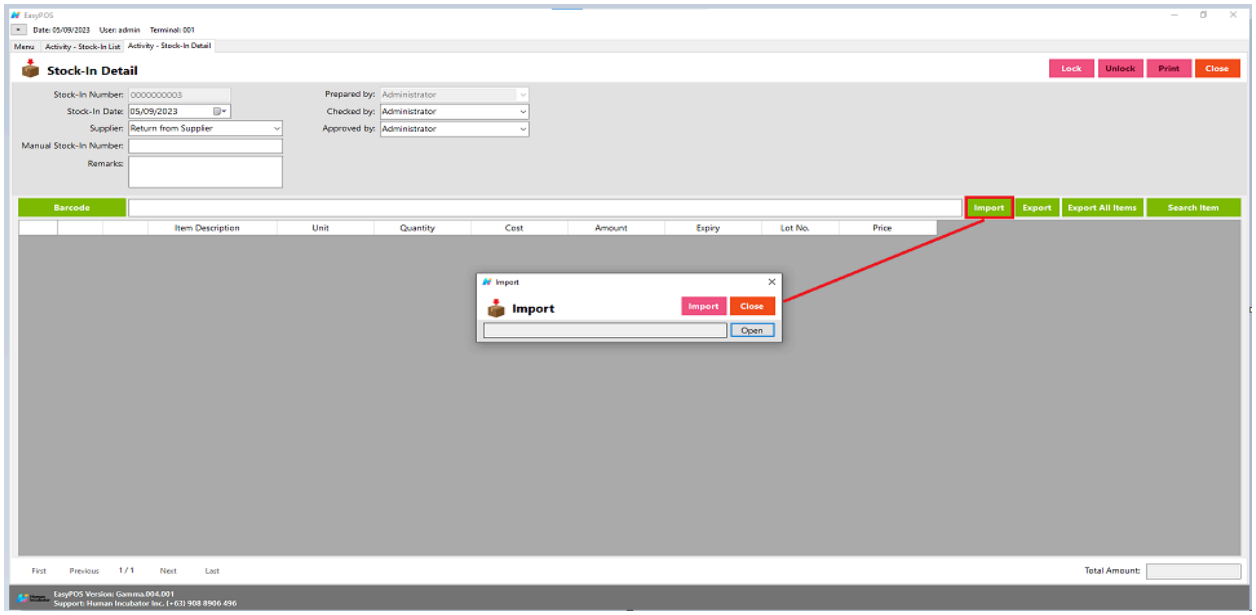
- Shows the list of added stock in items.
- It can also be filtered by date
- Delete button will proceed to deleting unlocked stock in record detail.
- Edit button will proceed to updating stock-in detail.
- Close button will proceed to closing the stock-in list page.

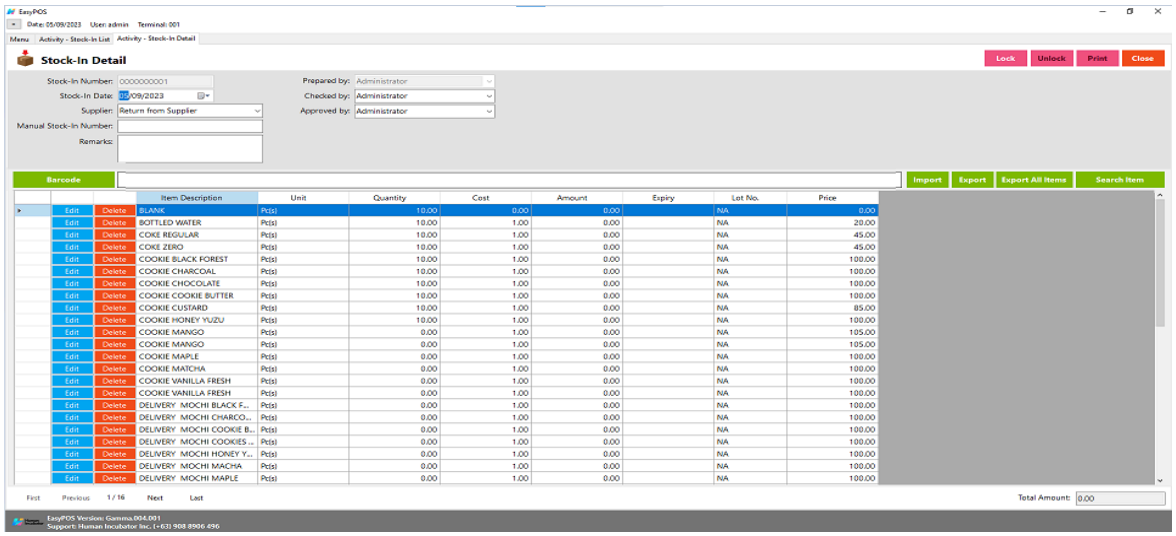


Stock In Detail



- **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

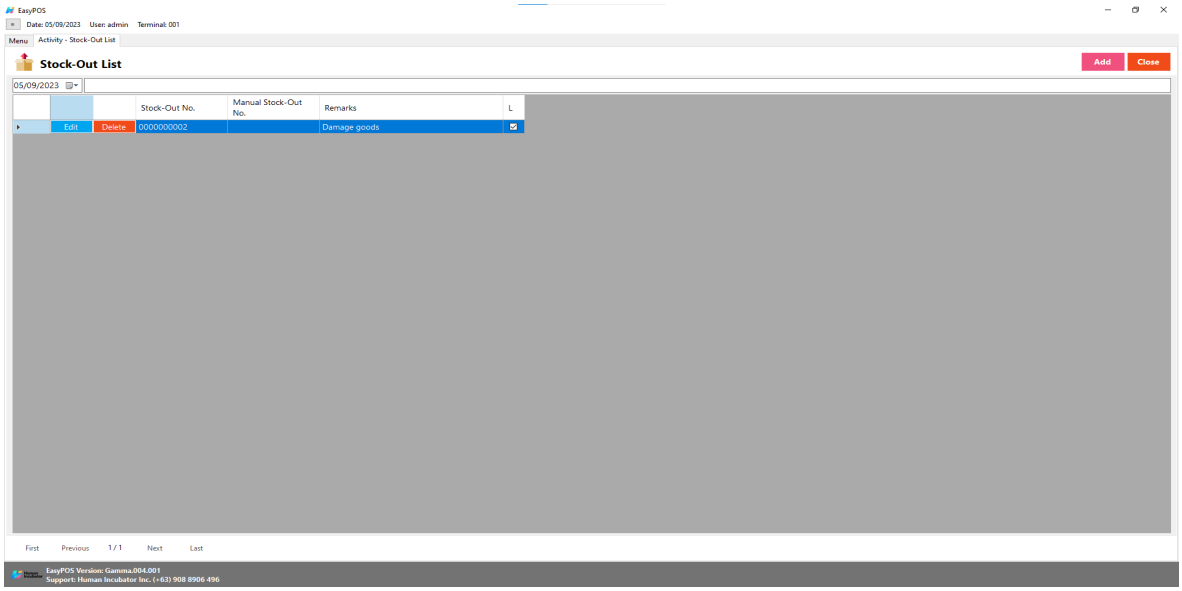
Overview

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

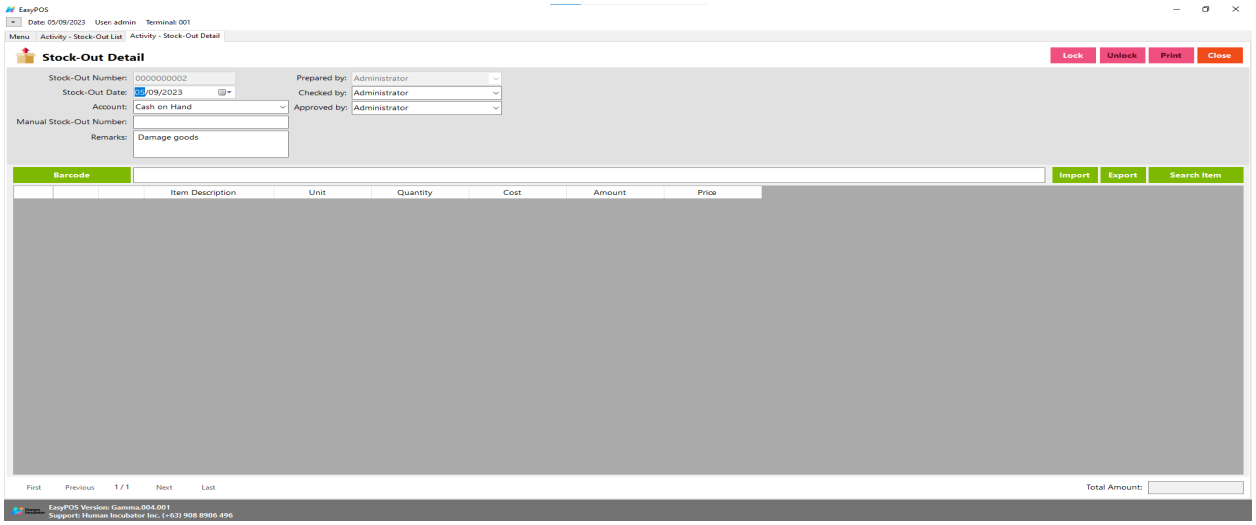
*Take Note: If the **EasyPOS** has an **EasyFS Integration,** stock-out of items should be done in the EasyFS system.*

Stock Out List

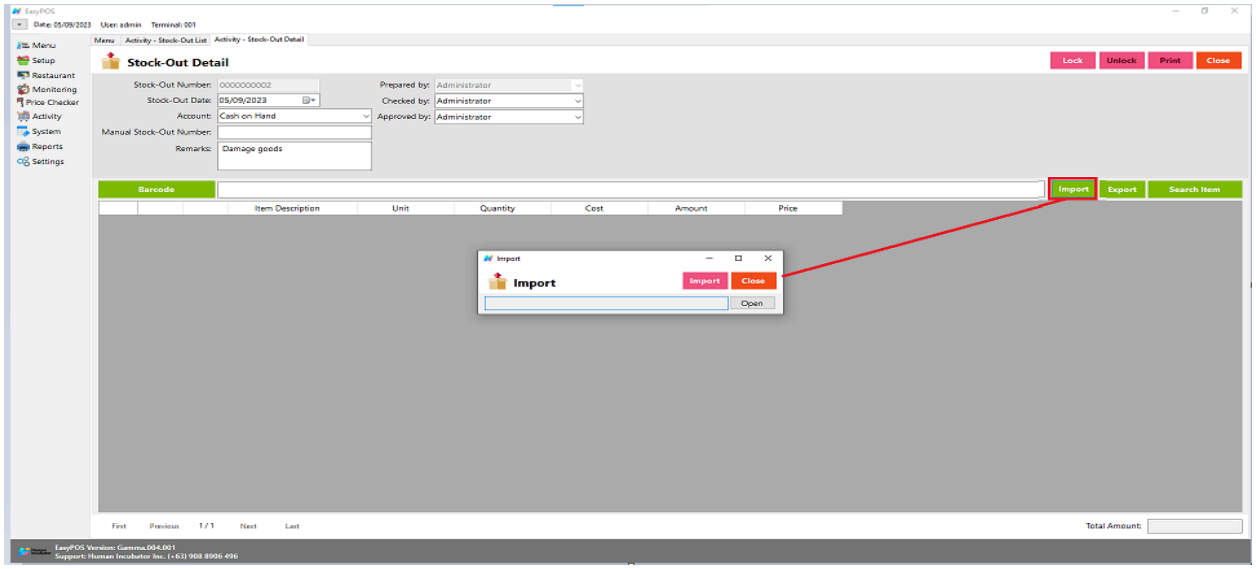
- Shows the list of added stock out items.
- It can also be filtered by date
- Delete button will proceed to deleting unlocked stock out record detail.
- Edit button will proceed to updating stock-out detail.
- Close button will proceed to closing the stock-out list page.



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

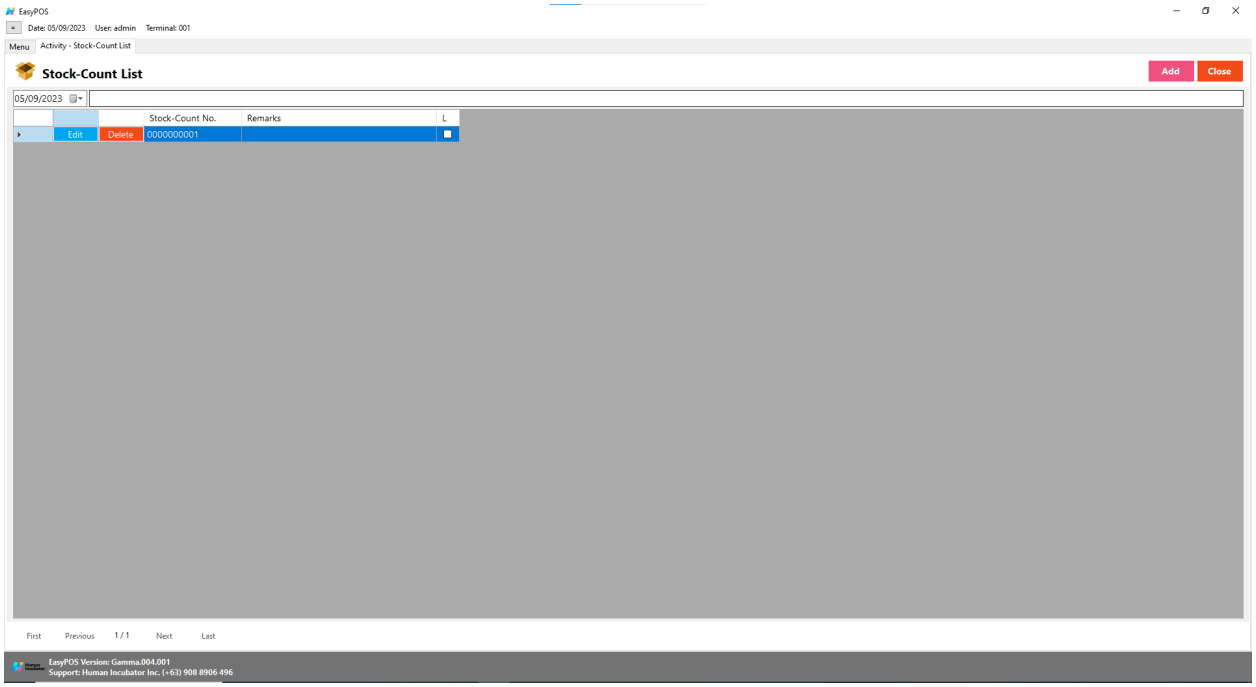
Overview

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

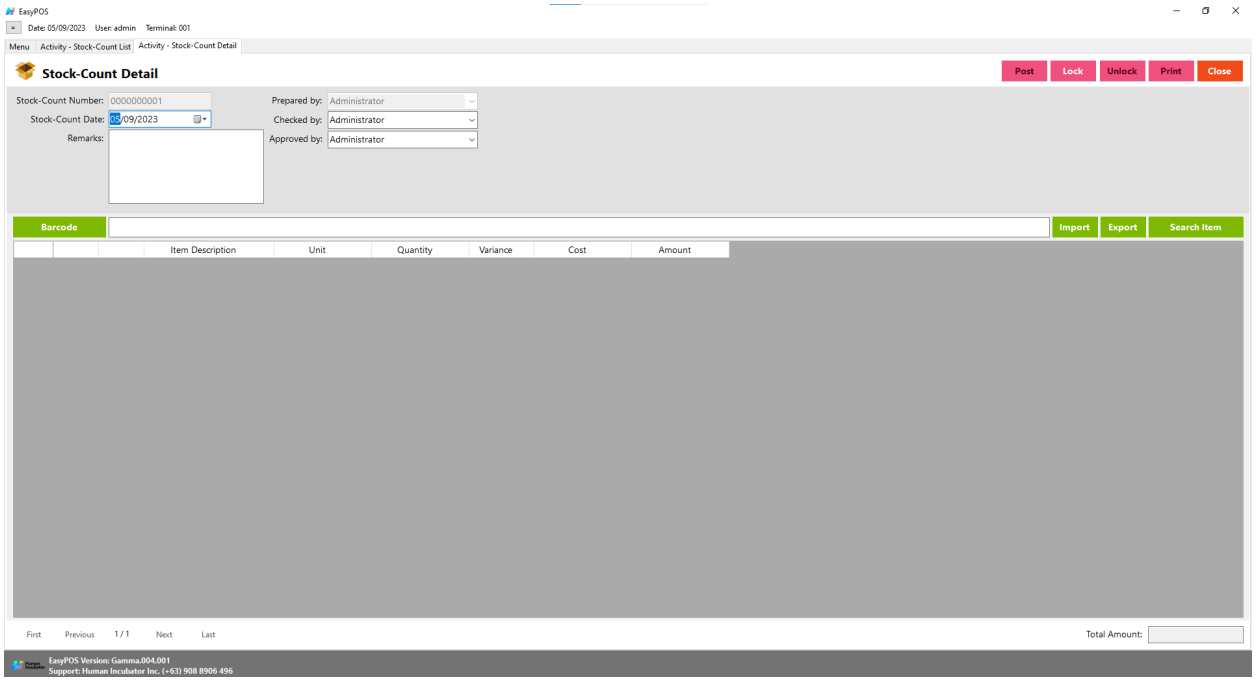
*Take Note: If the **EasyPOS** has an **EasyFS Integration,** stock count of items should be done in the EasyFS system.*

Stock Count List

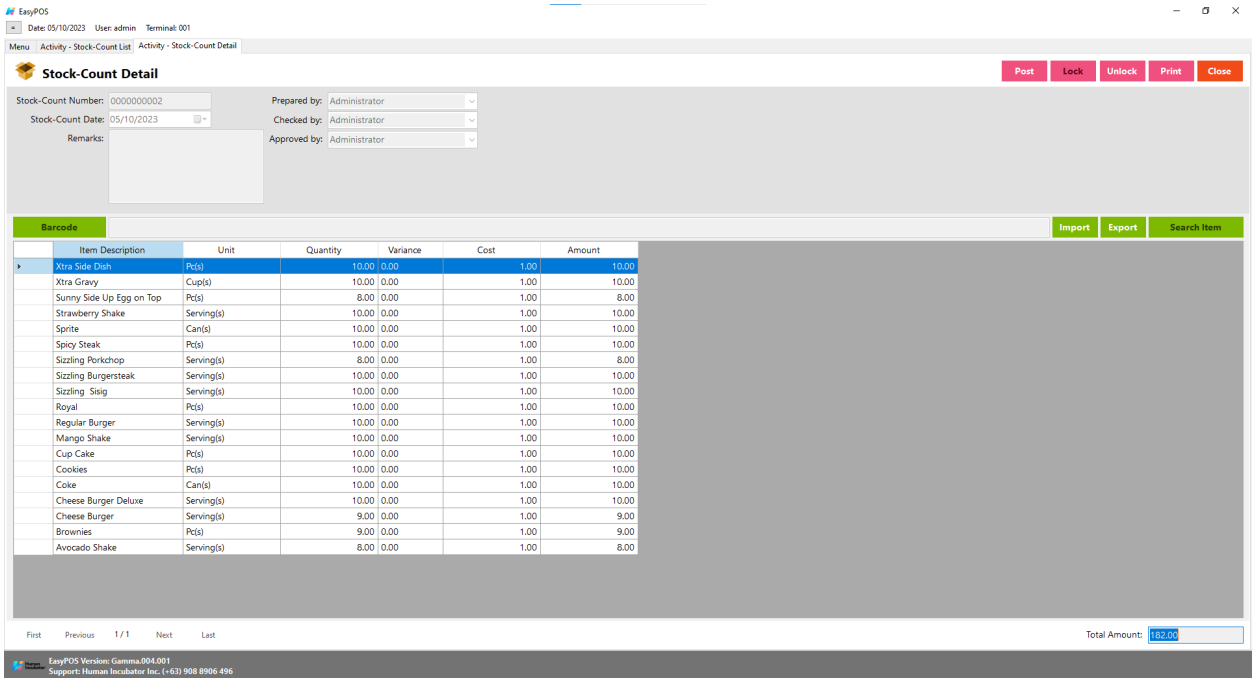
- Shows the list of added stock count items.
- It can also filtered by date
- Delete button will proceed to deleting unlocked stock count record detail.
- Edit button will proceed to updating stock count detail.
- Close button will proceed to closing the stock count list page.



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.

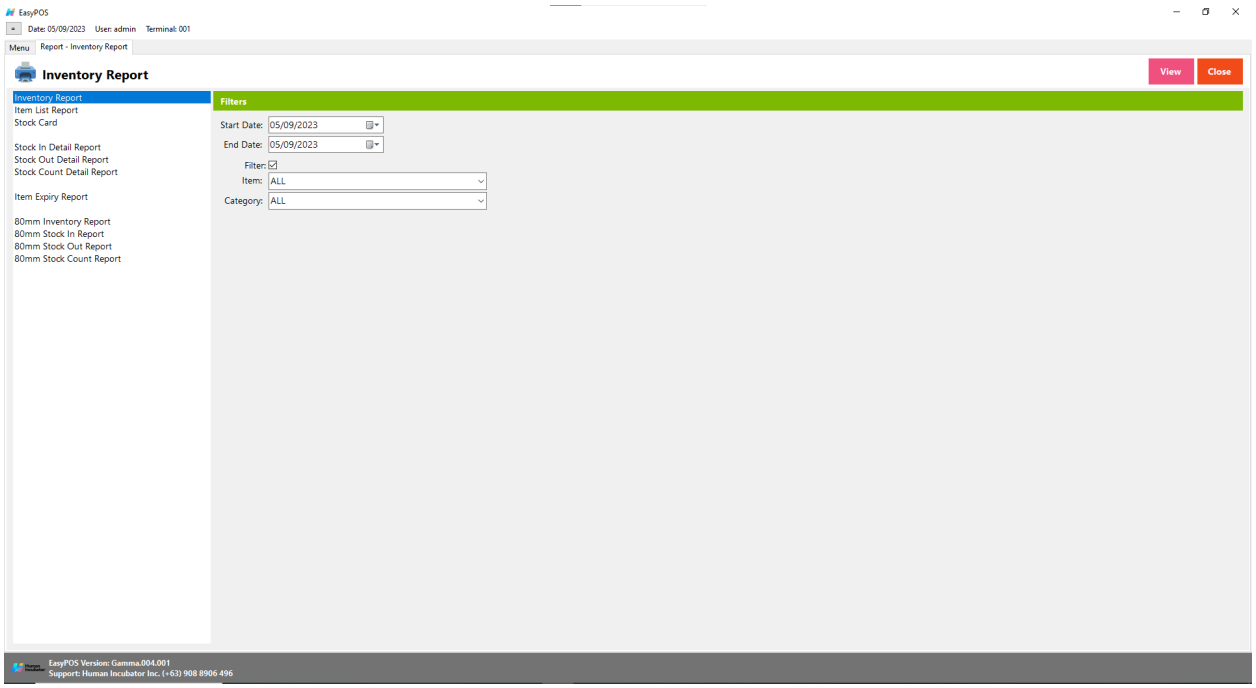
IX: Reports

Inventory Report

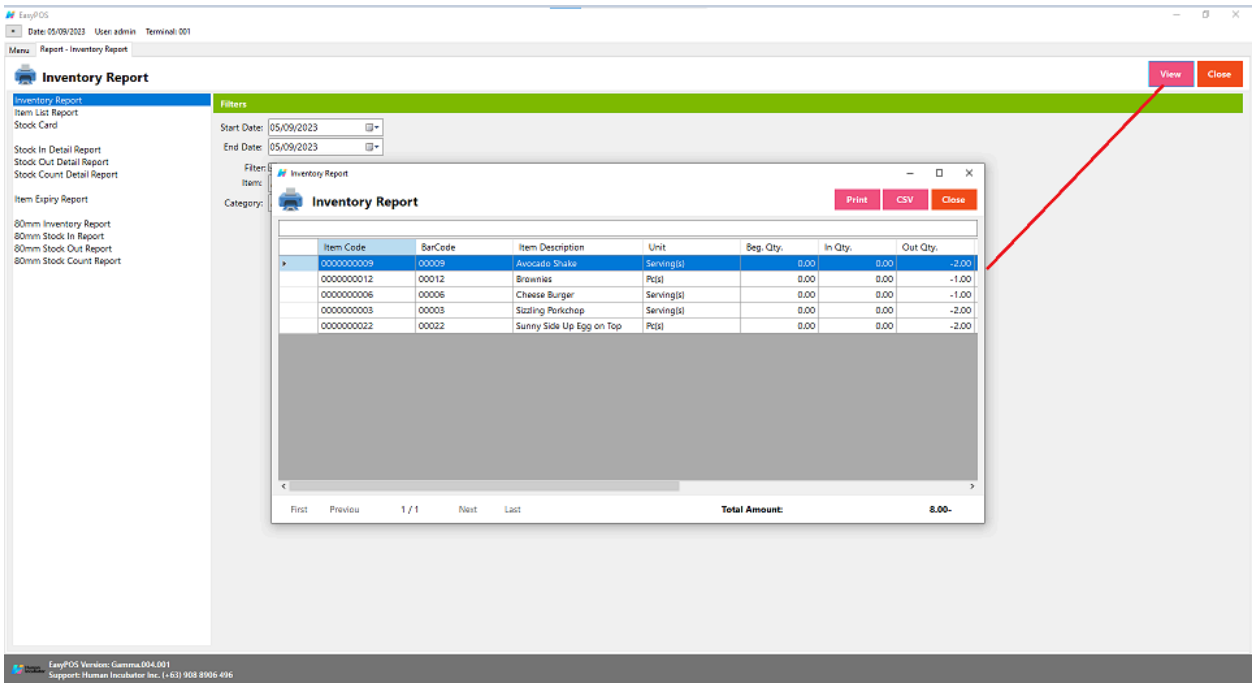
Overview

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

Inventory Report

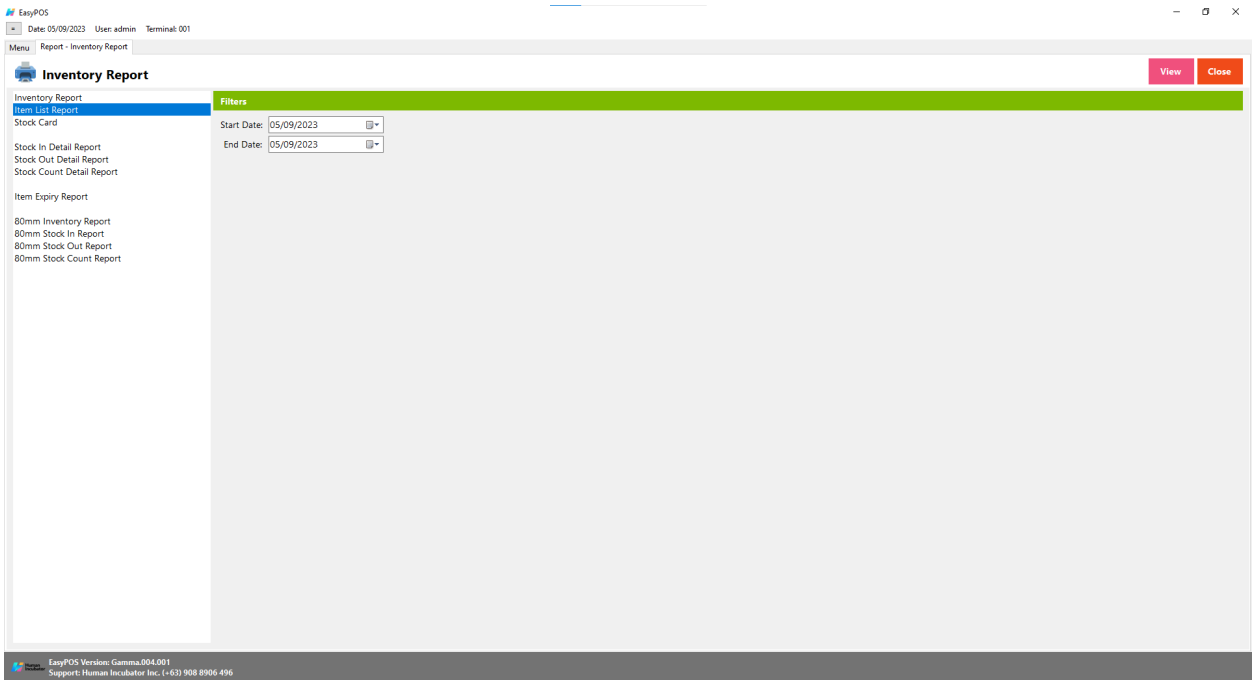


- It can select the start date and end date.
- Check the filter checkbox to display the Item and Category field.
- Click the **view** button to view the report.

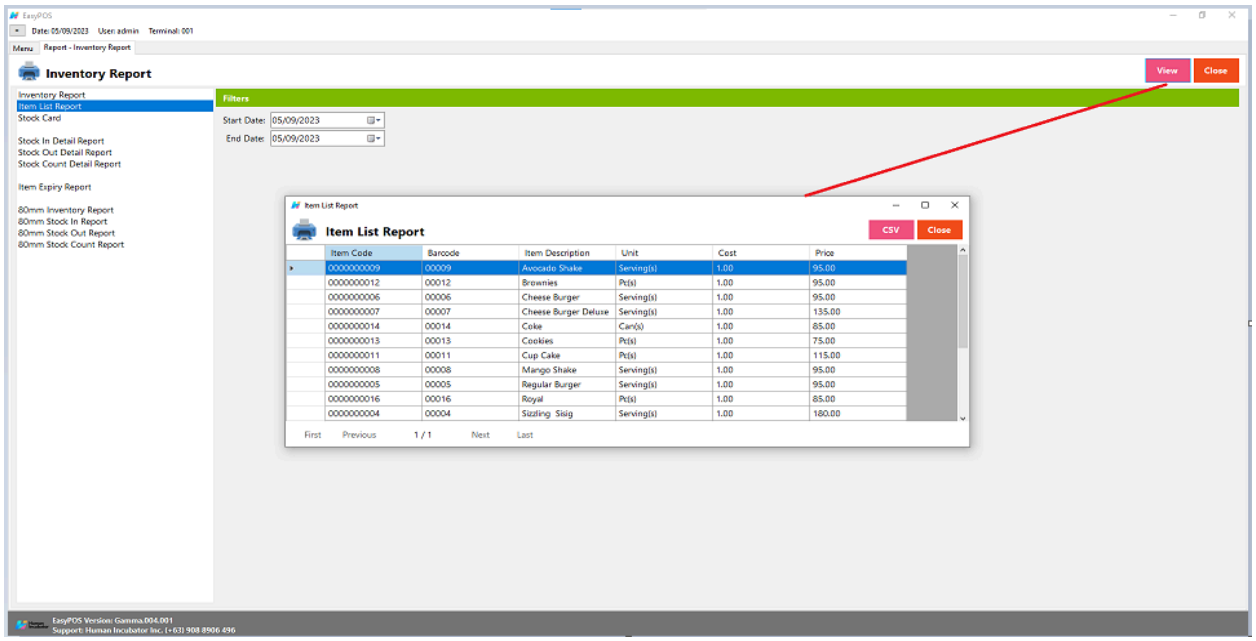


- The report can be printed as PDF form or CSV file format.

Item List Report

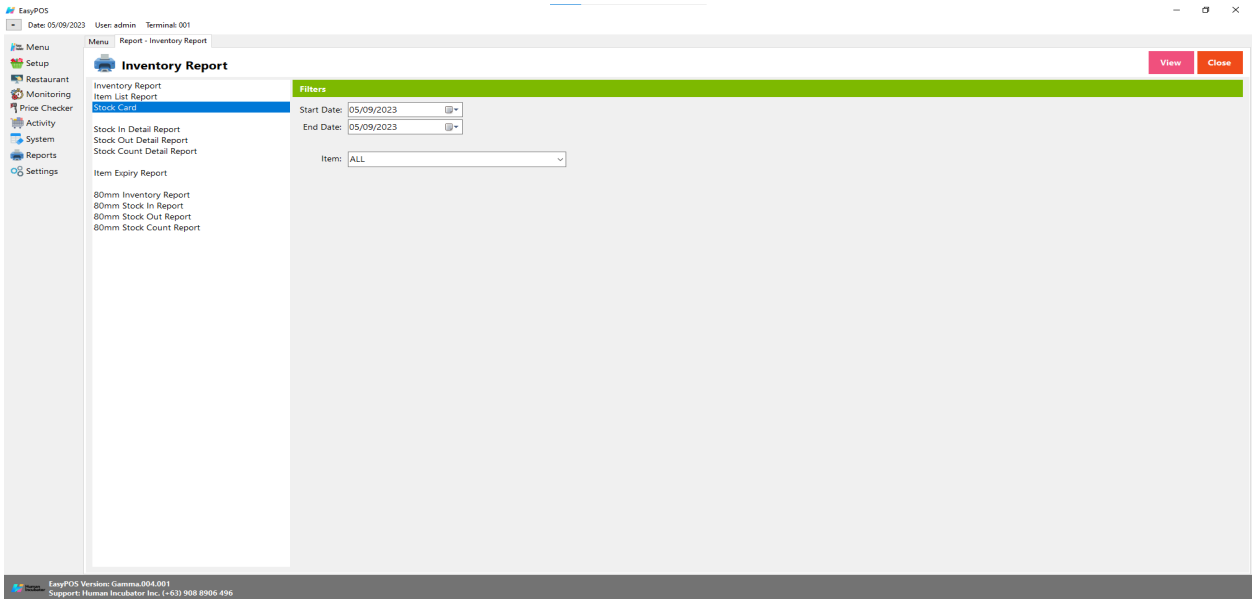


- It can select the start date and end date.
- Click the **view** button to view the item report.

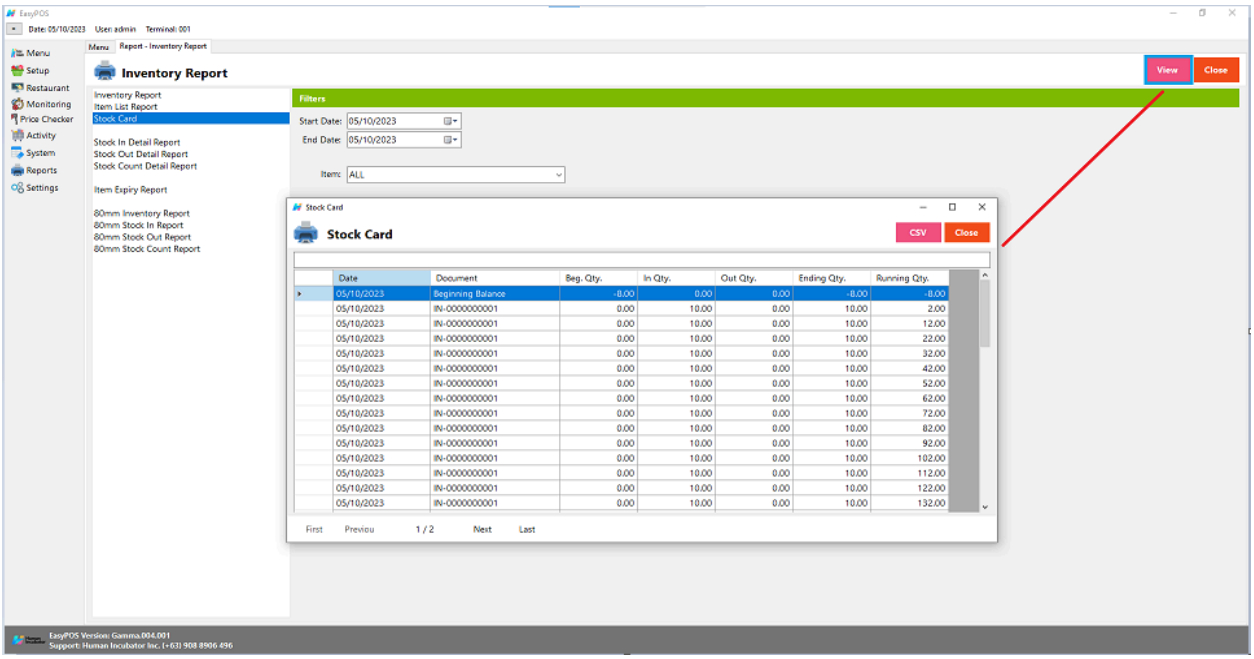


- The report can be generated as CSV file format.

Stock Card

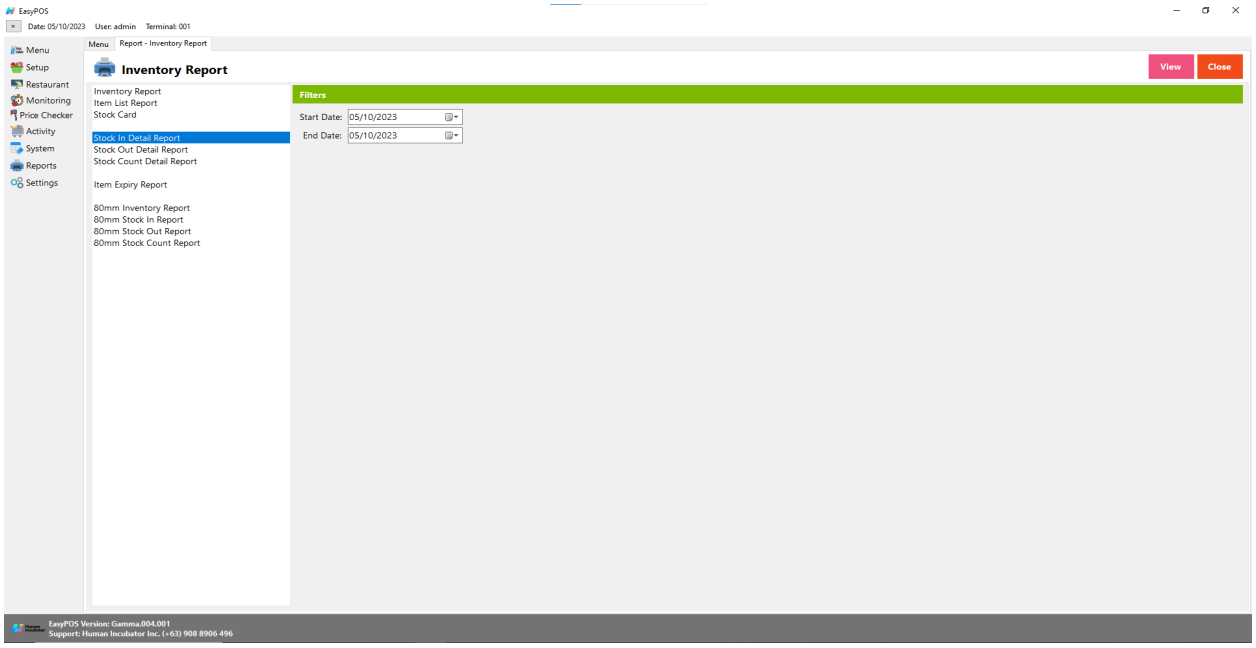


- Select start date and end date
- It can filtered by Item
- Click **View** button to view the report

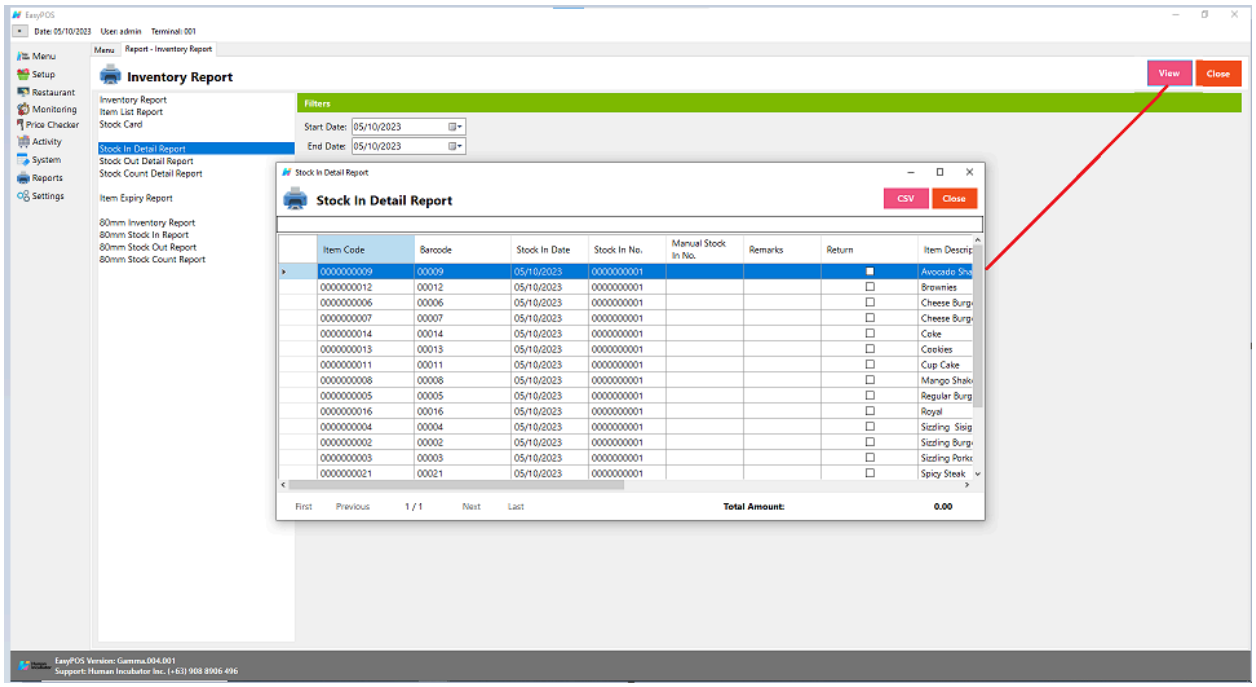


- Click **CSV** button to generate csv file format report

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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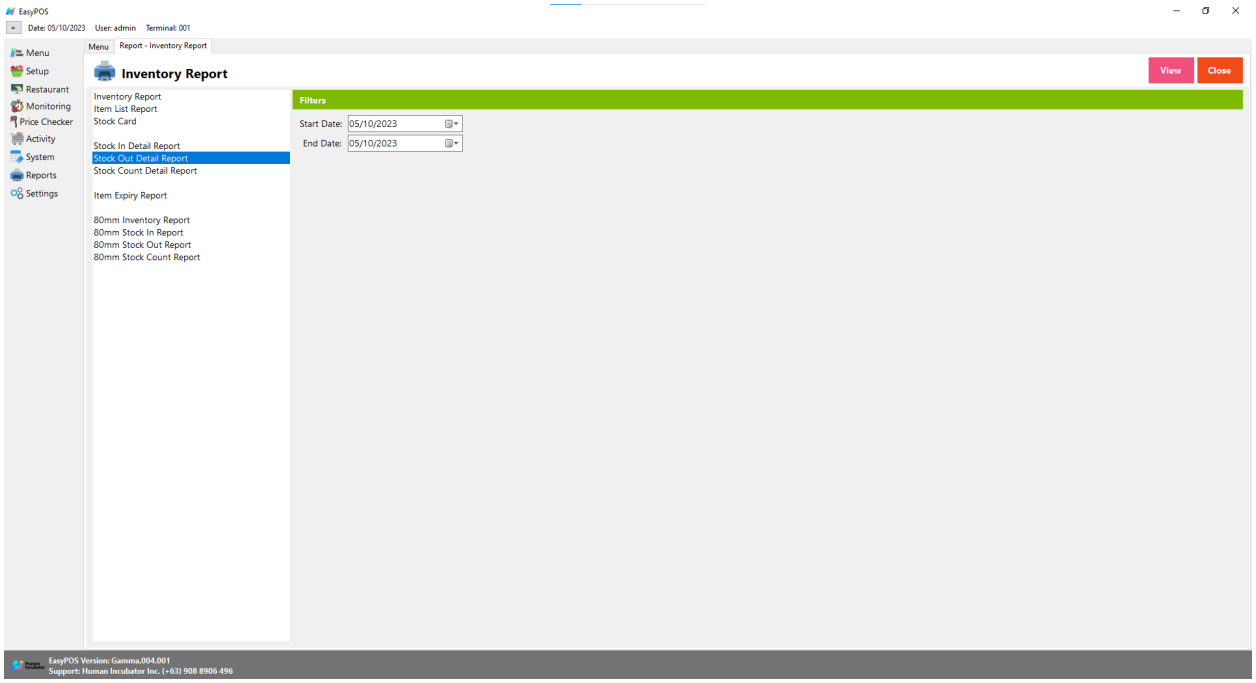
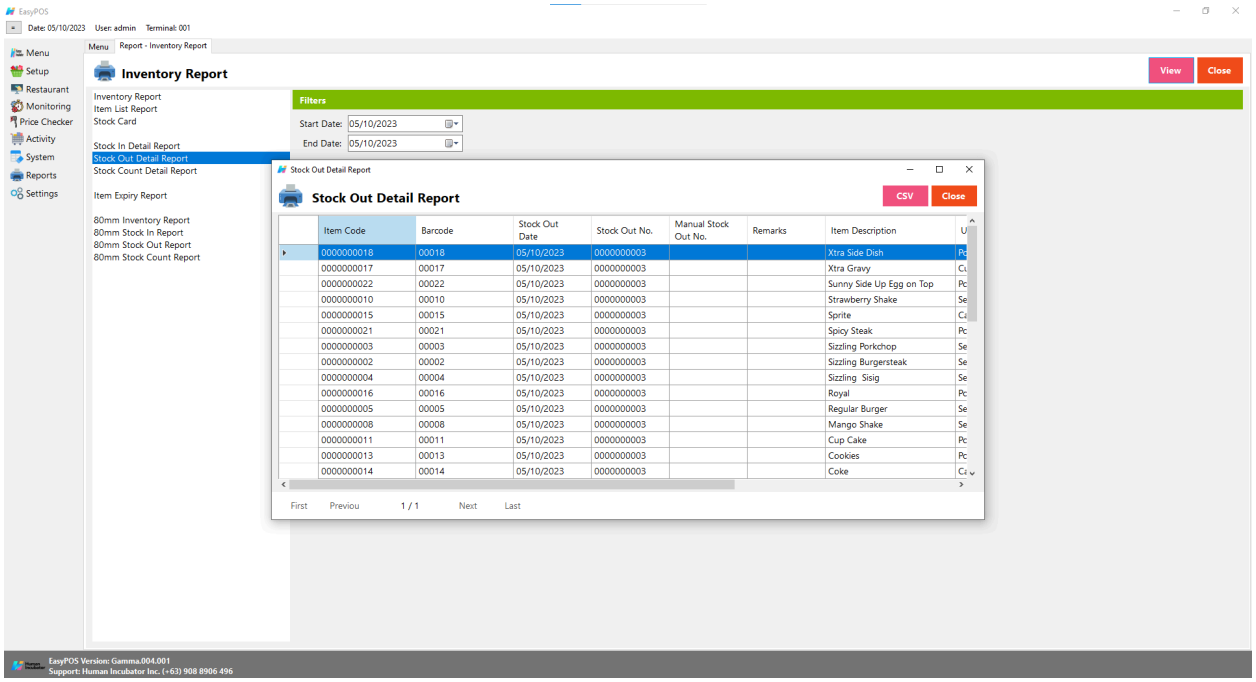
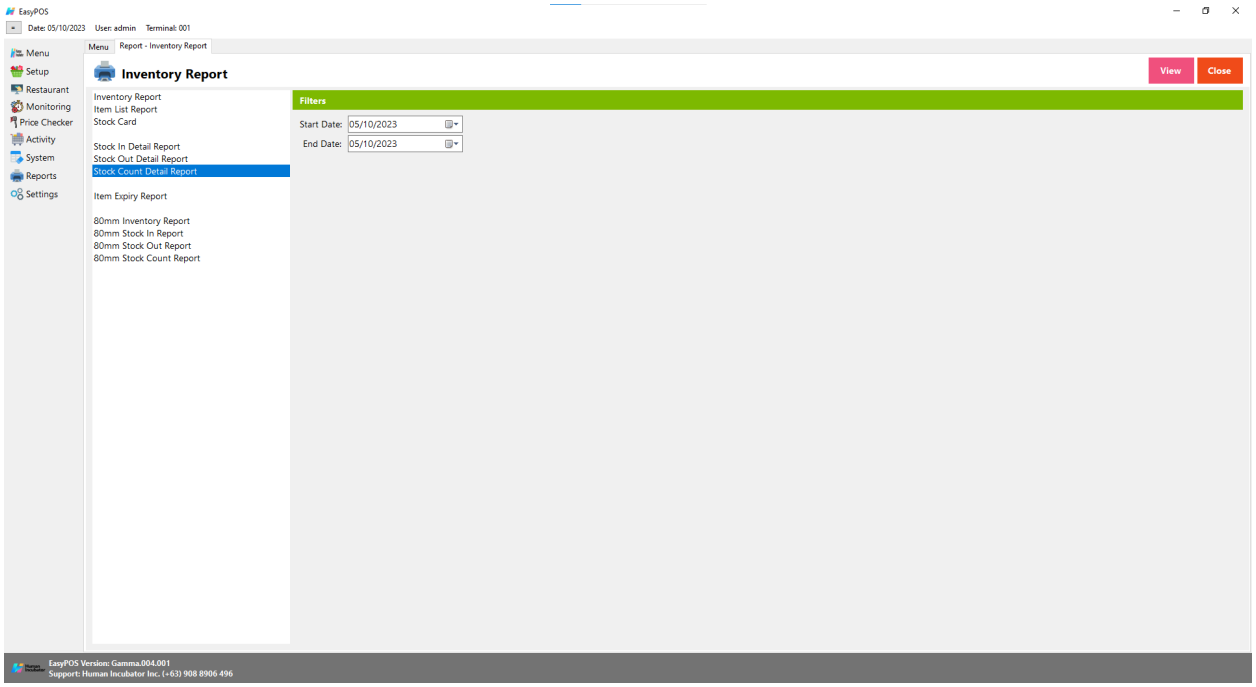
Stock Out Detail Report



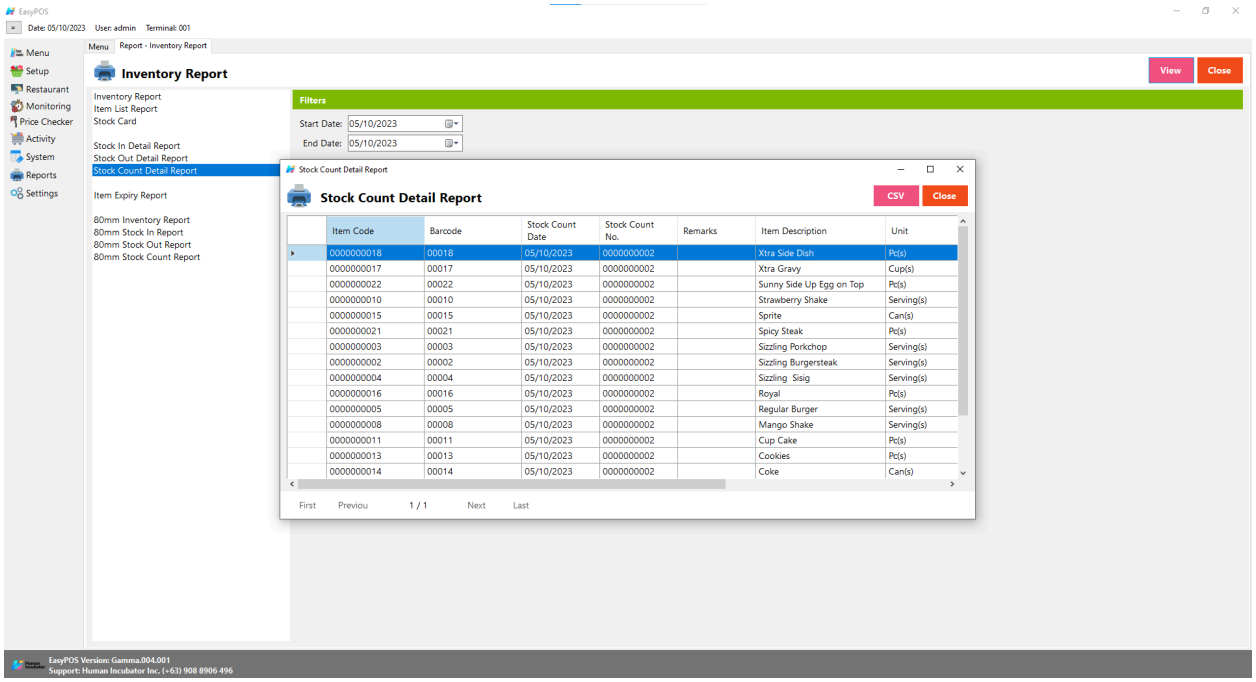
- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



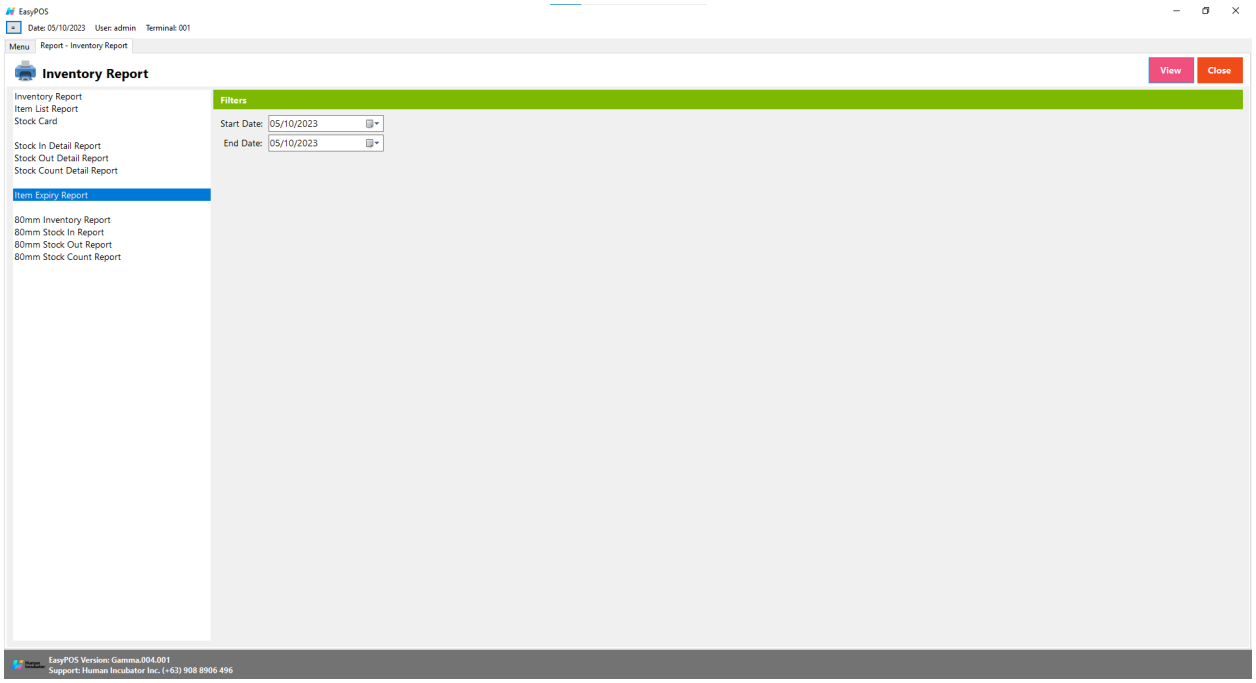
Stock Count Detail Report



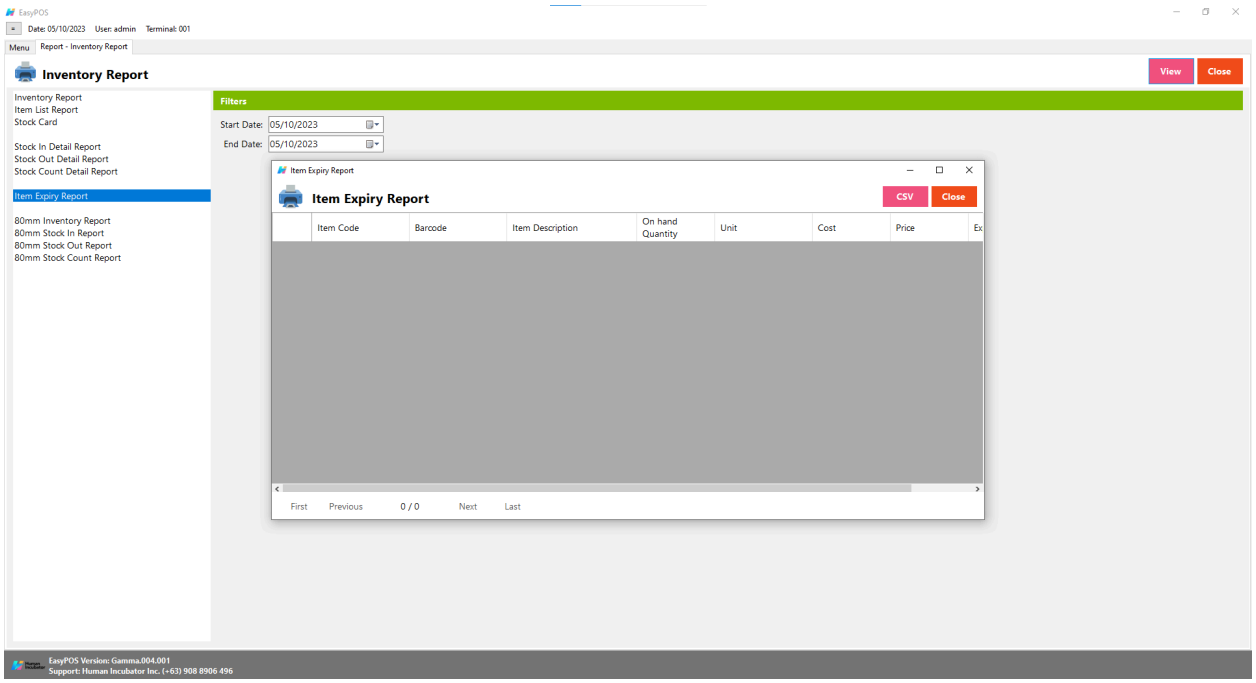
- Select start date and end date.
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



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.

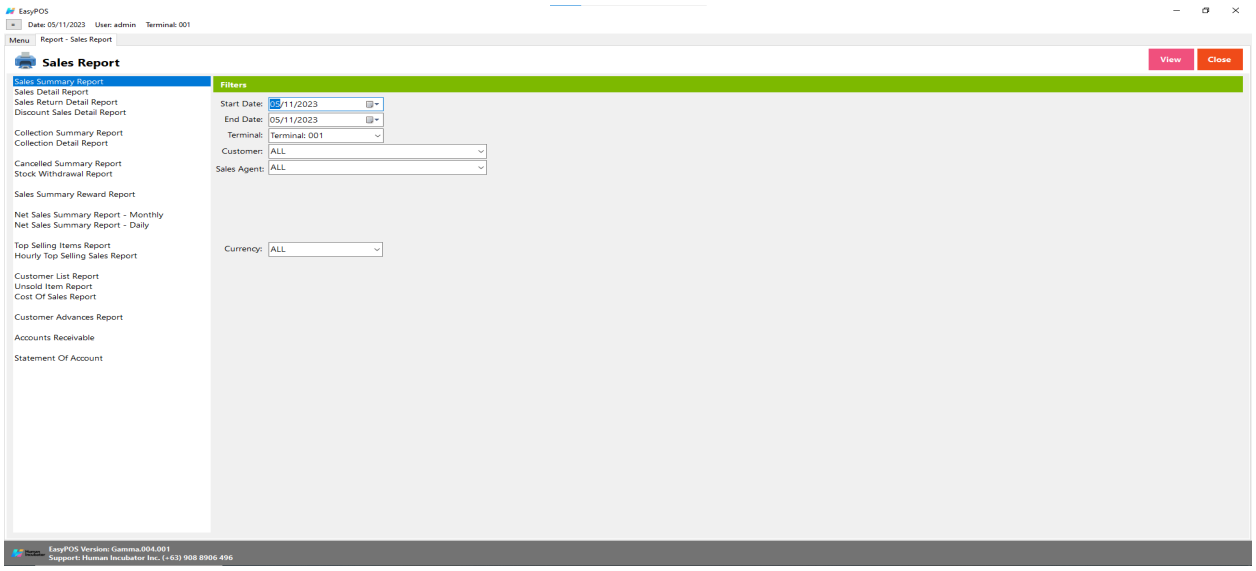


Sales Report

Overview

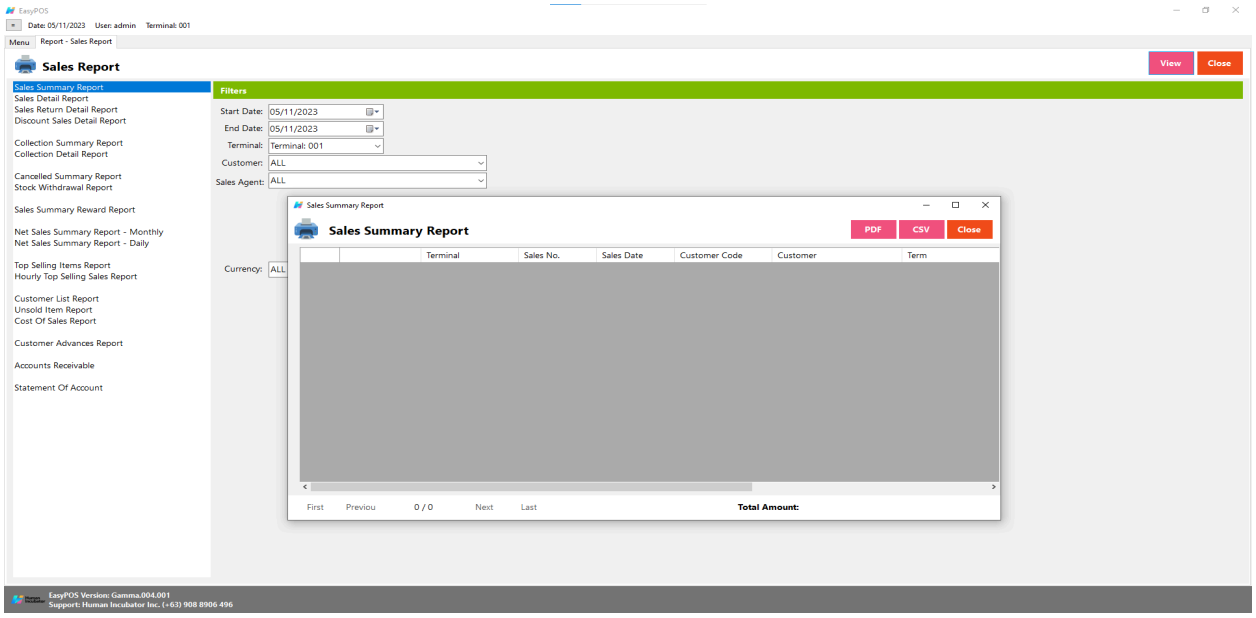
- Sales Report is where users can see the sales reports.

Sales Summary Report

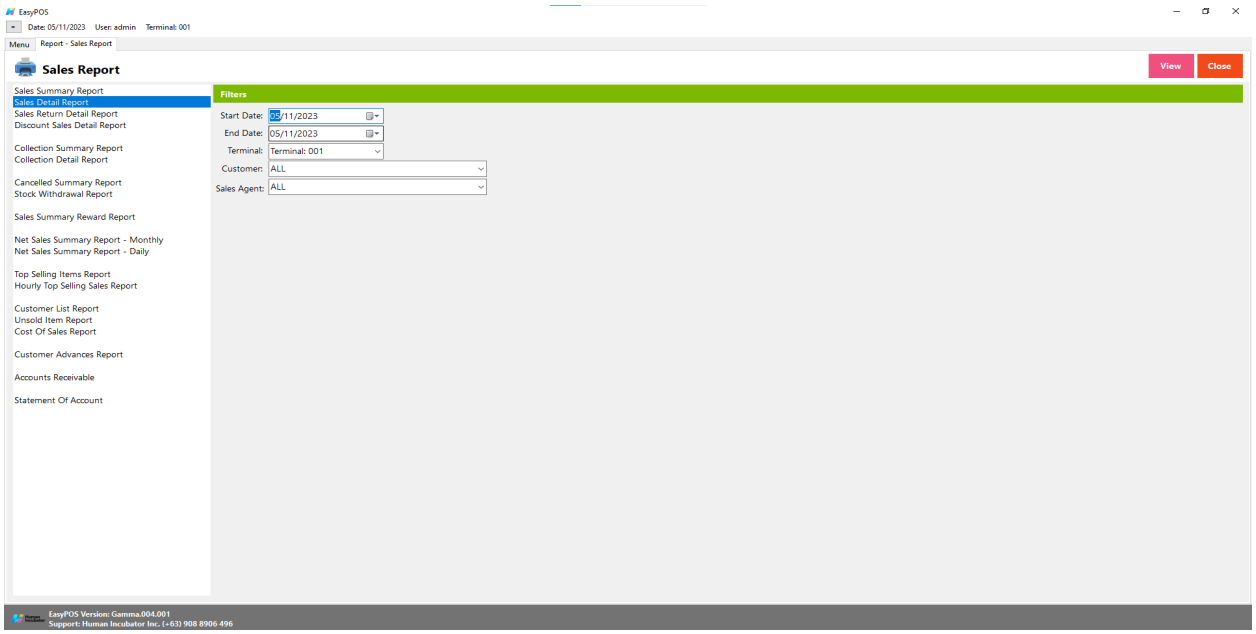


- Select start date and end date.
- It can also filtered by Terminal, Customer, Sales Agent and Currency
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report

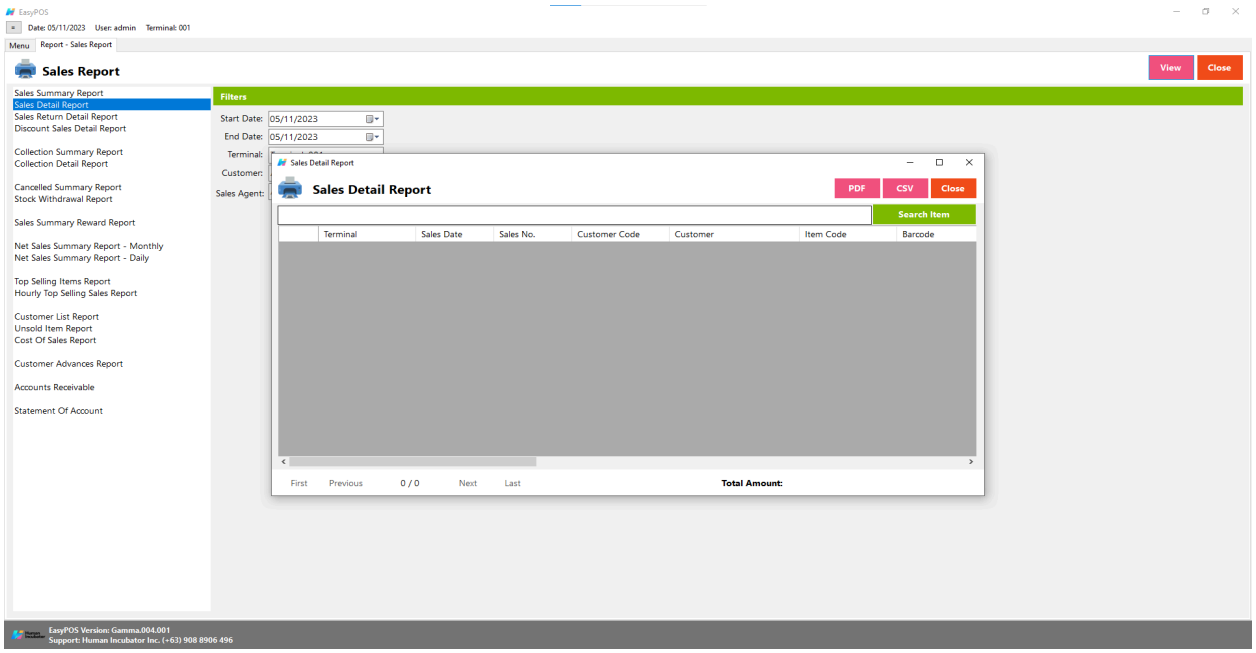
- Click the **CSV** button to generate a csv file format report.



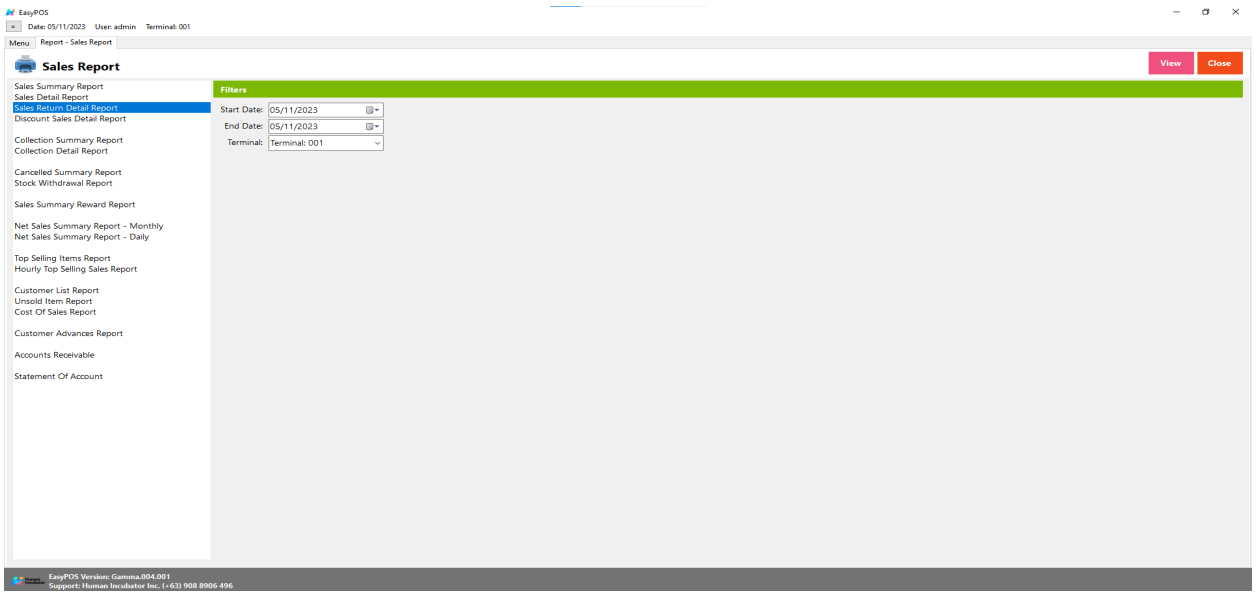
Sales Detail Report



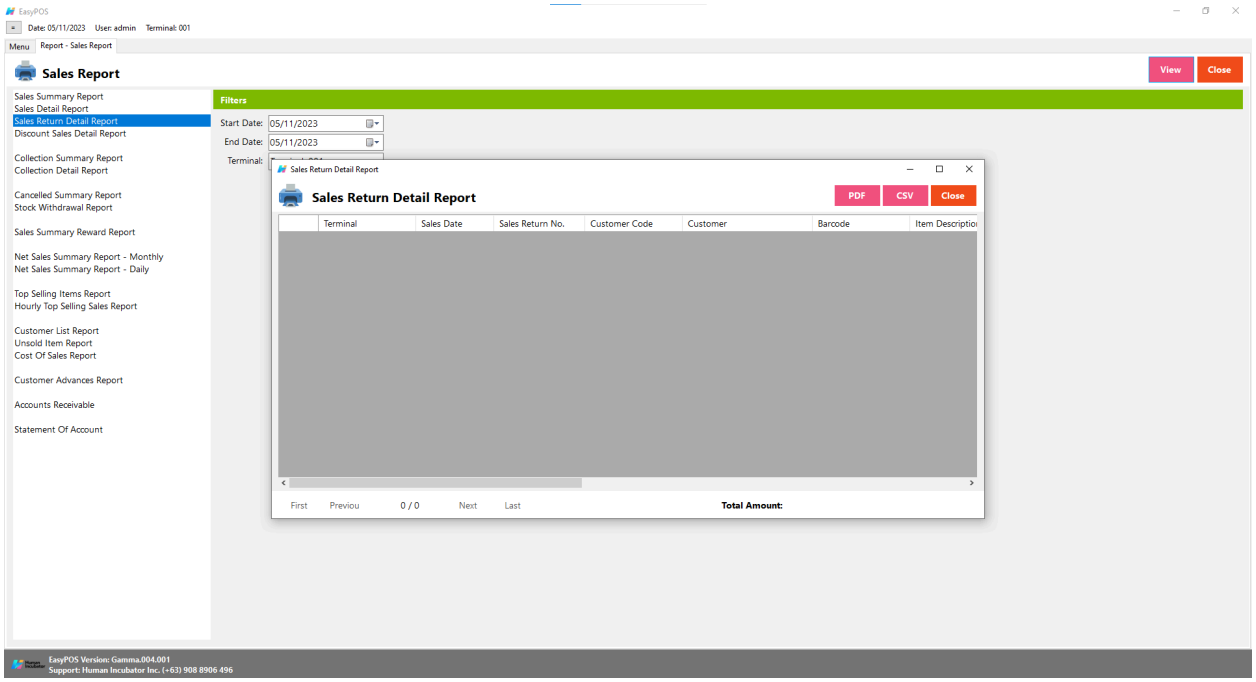
- Select start date and end date.
- It can also filtered by Terminal, Customer, Sales Agent
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



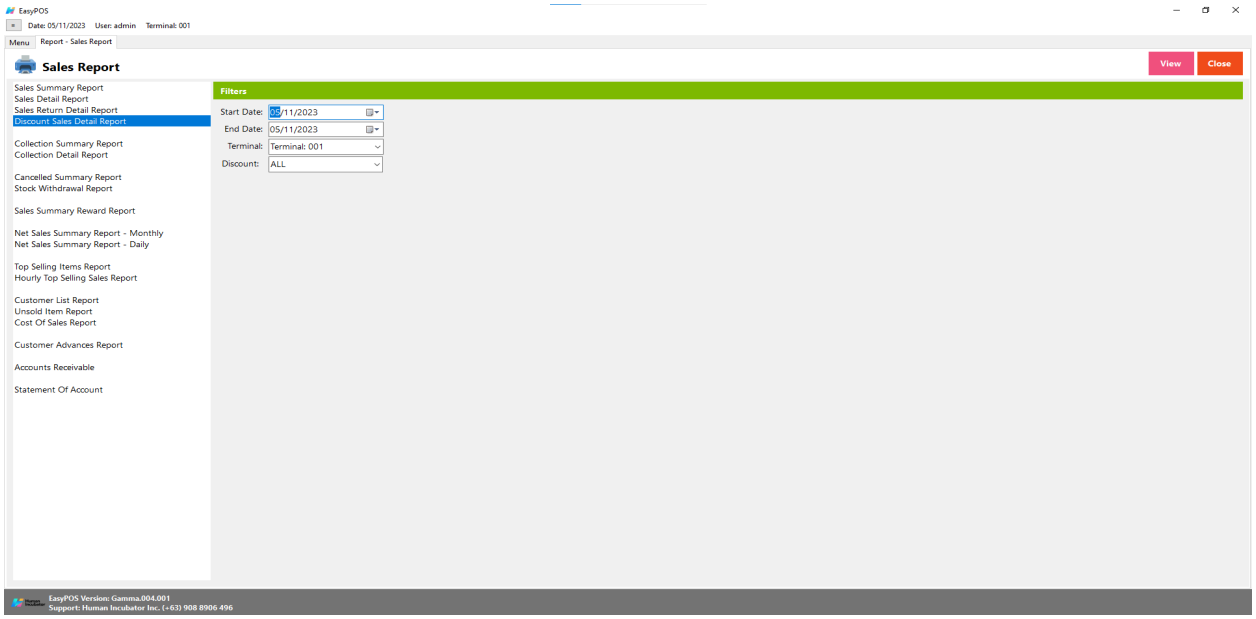
Sales Return Detail Report



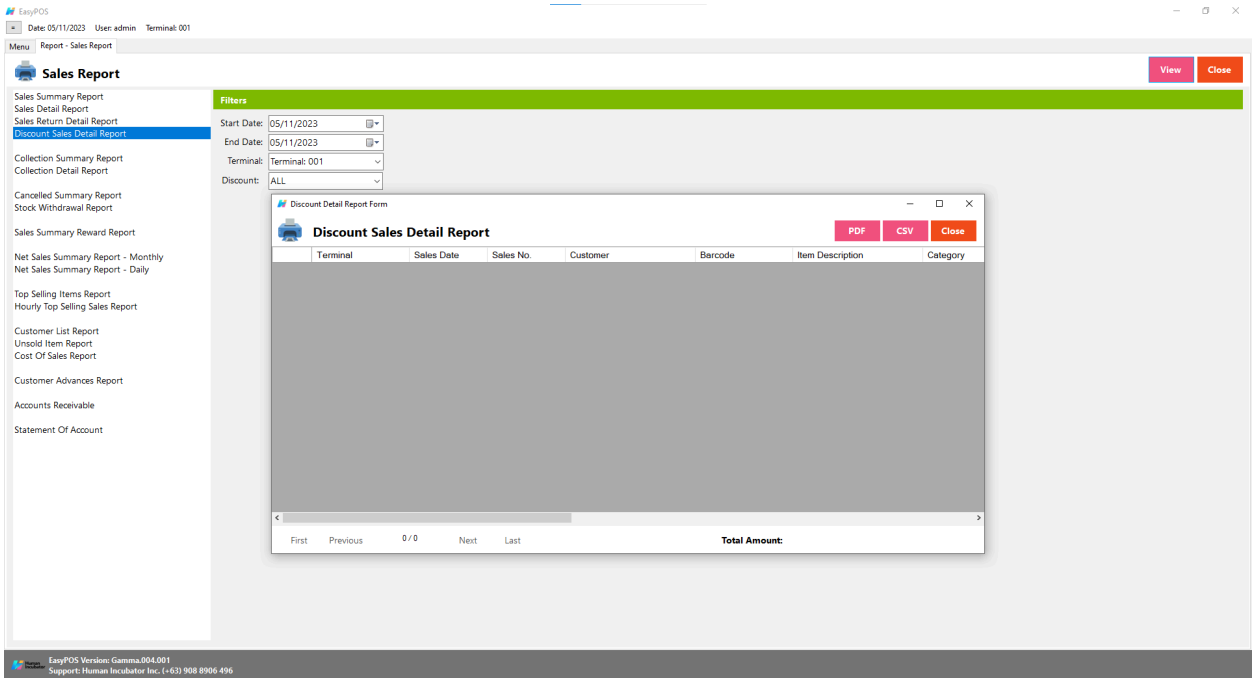
- Select start date and end date.
- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



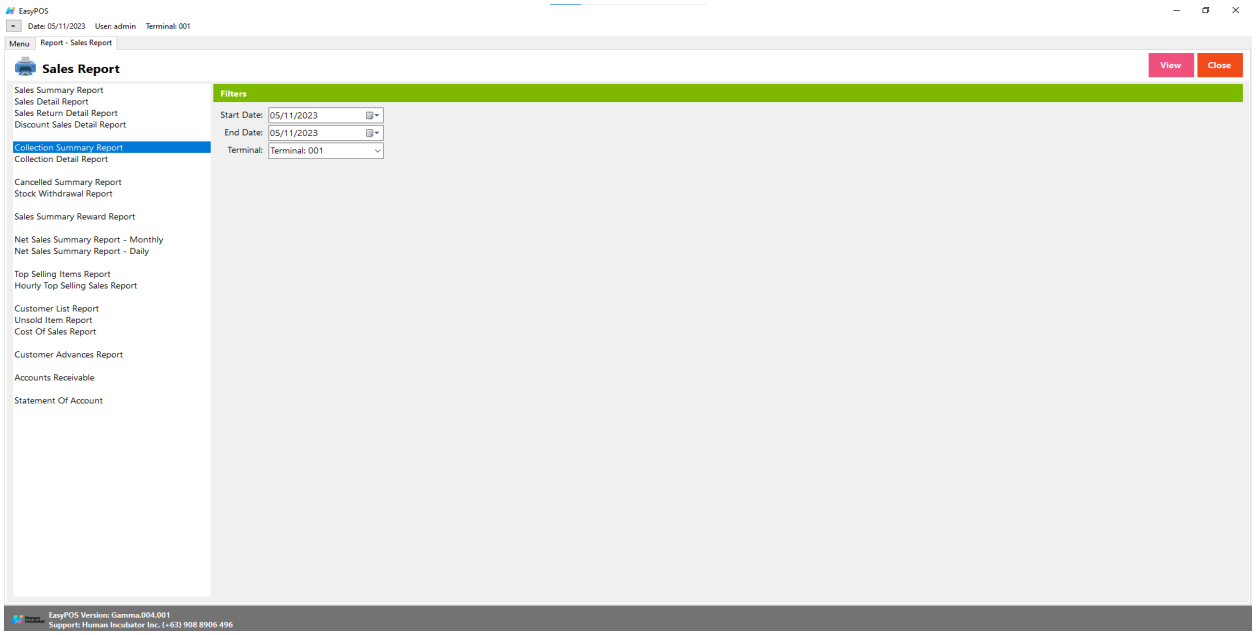
Discount Sales Detail Report



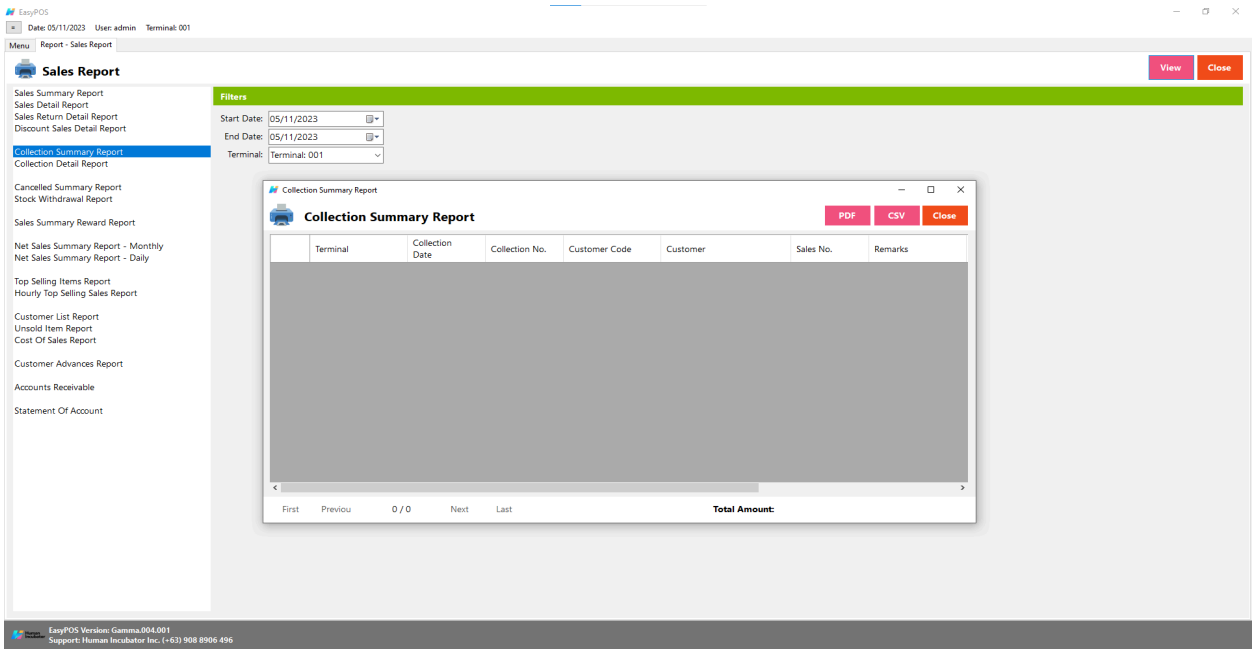
- Select start date and end date.
- It can also filtered by Terminal and Discount
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



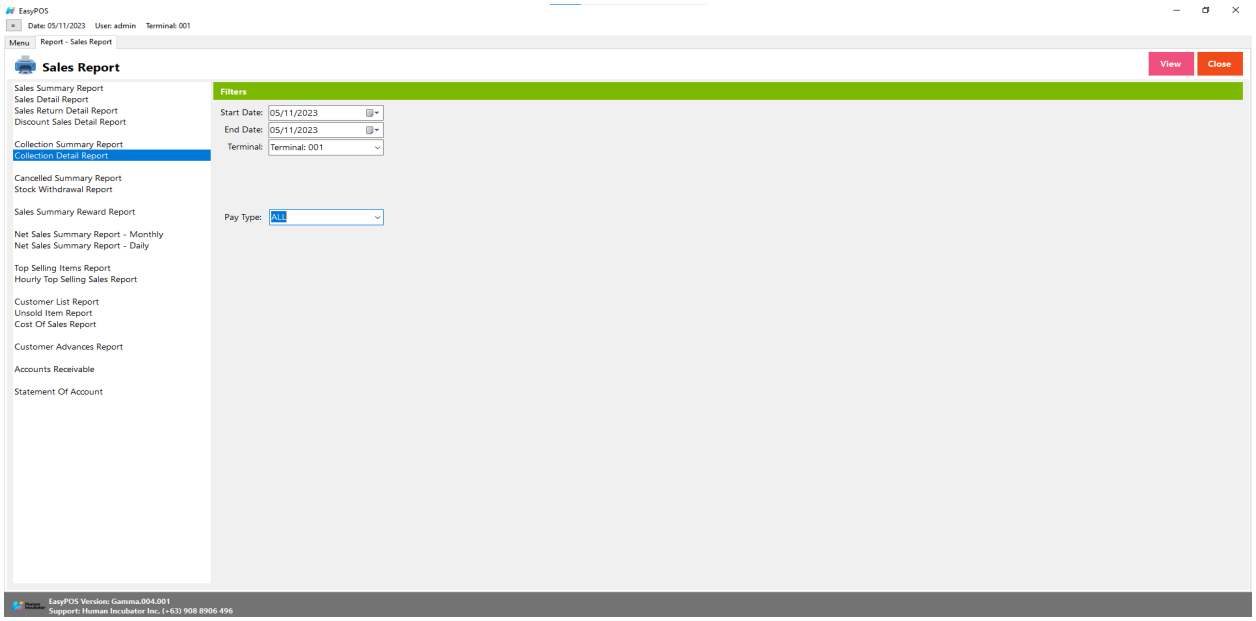
Collection Summary Report



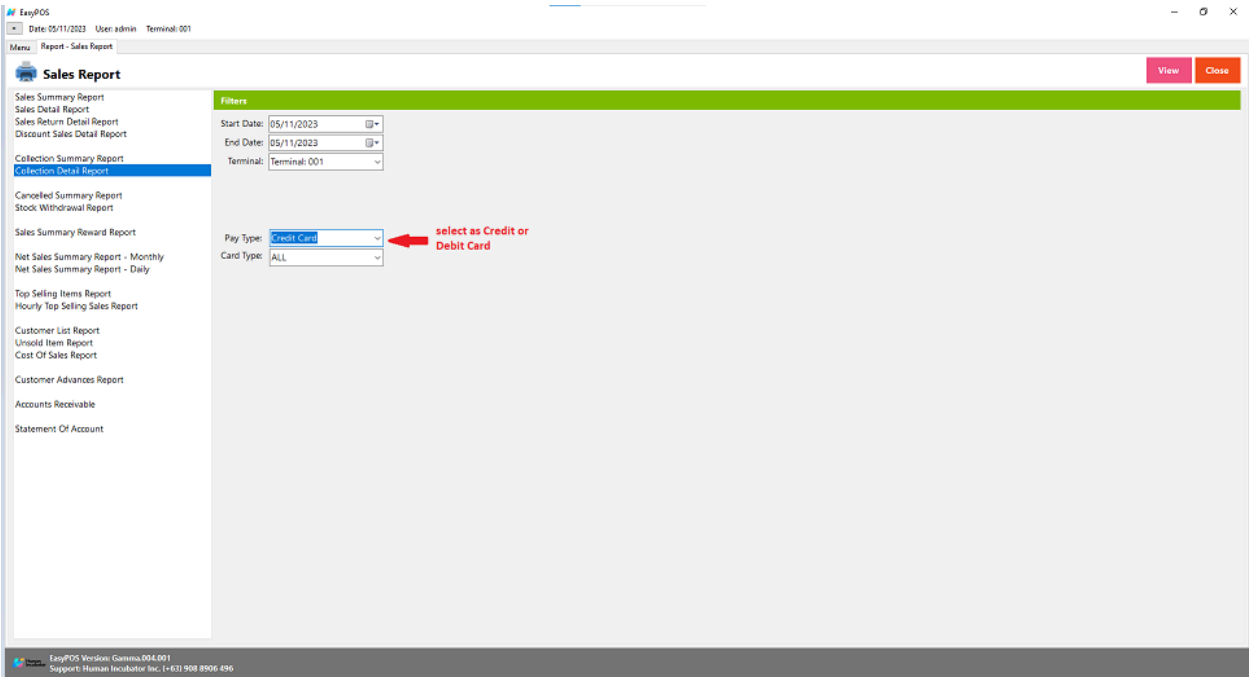
- Select start date and end date.
- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



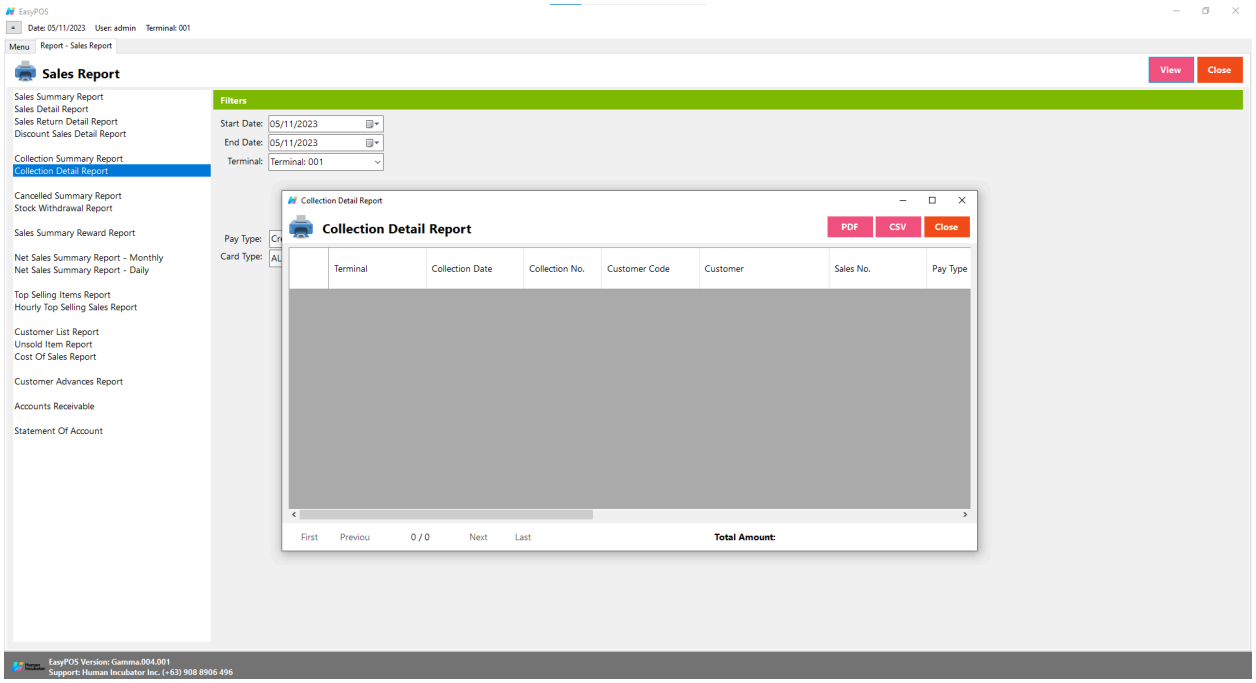
Collection Detail Report



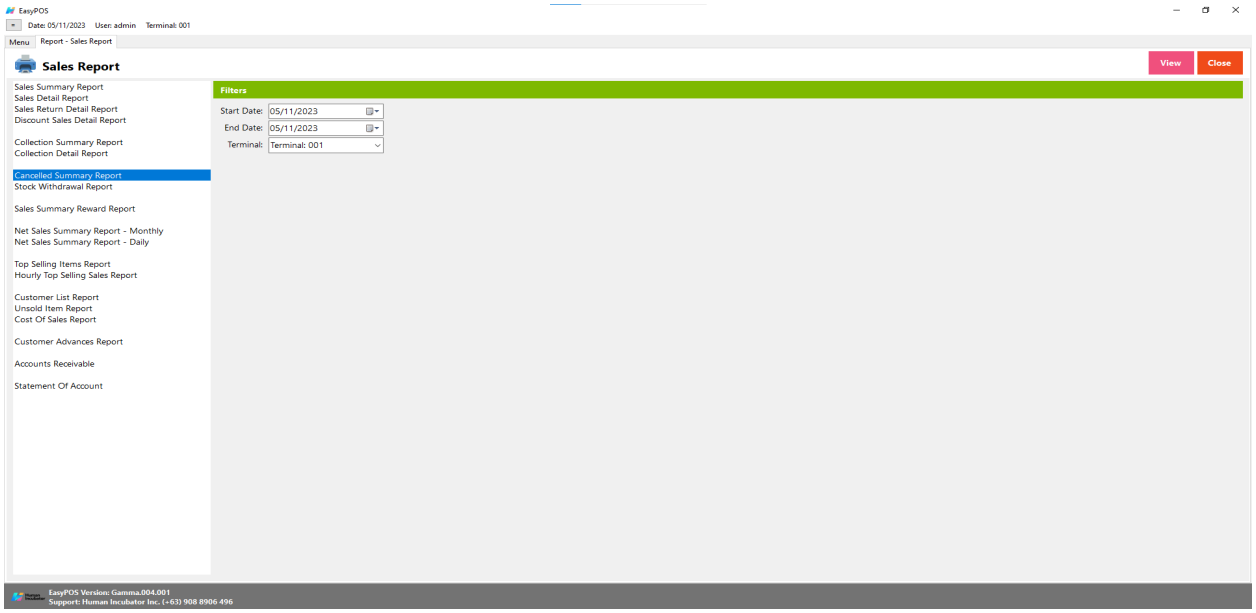
- Select start date and end date.
- It can also be filtered by Terminal and Pay Type. When the Pay Type filter is selected as Credit Card or Debit Card, the Card Type filter will display.



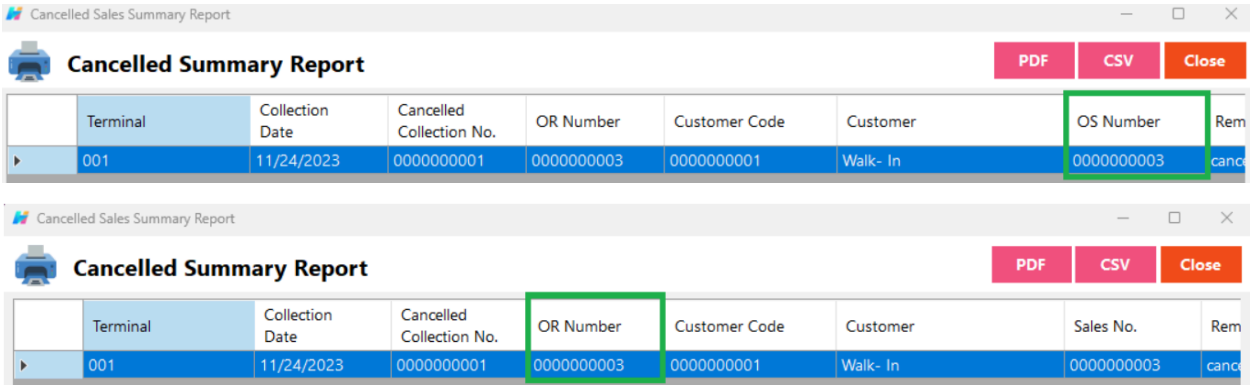
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



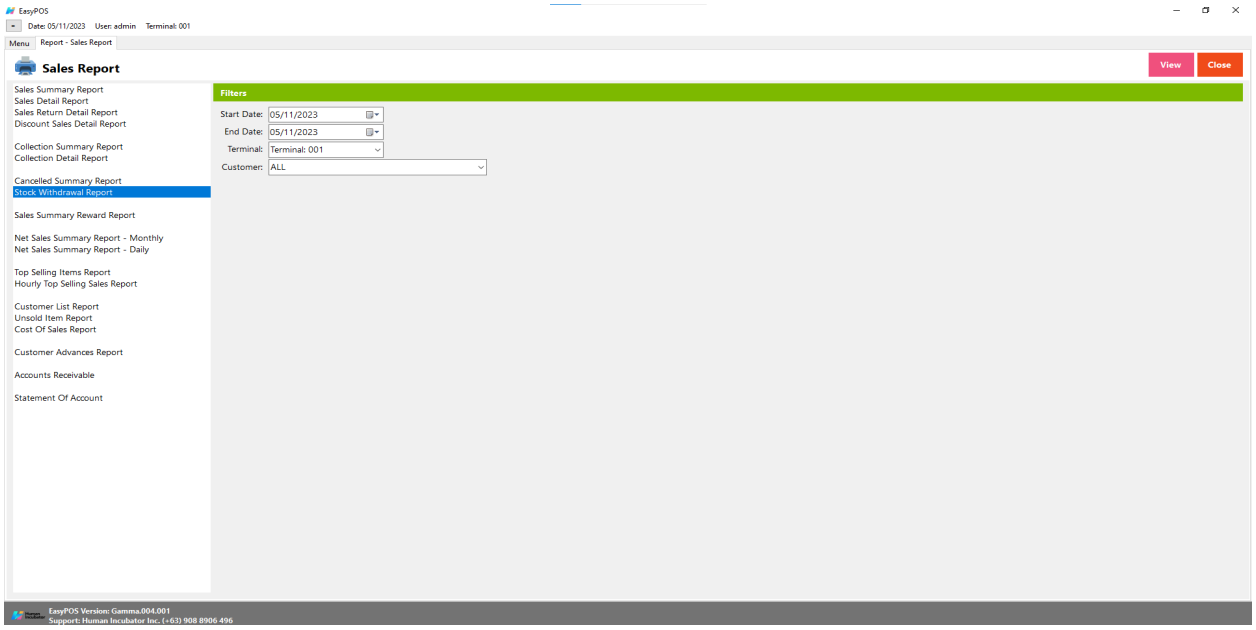
Canceled Summary Report



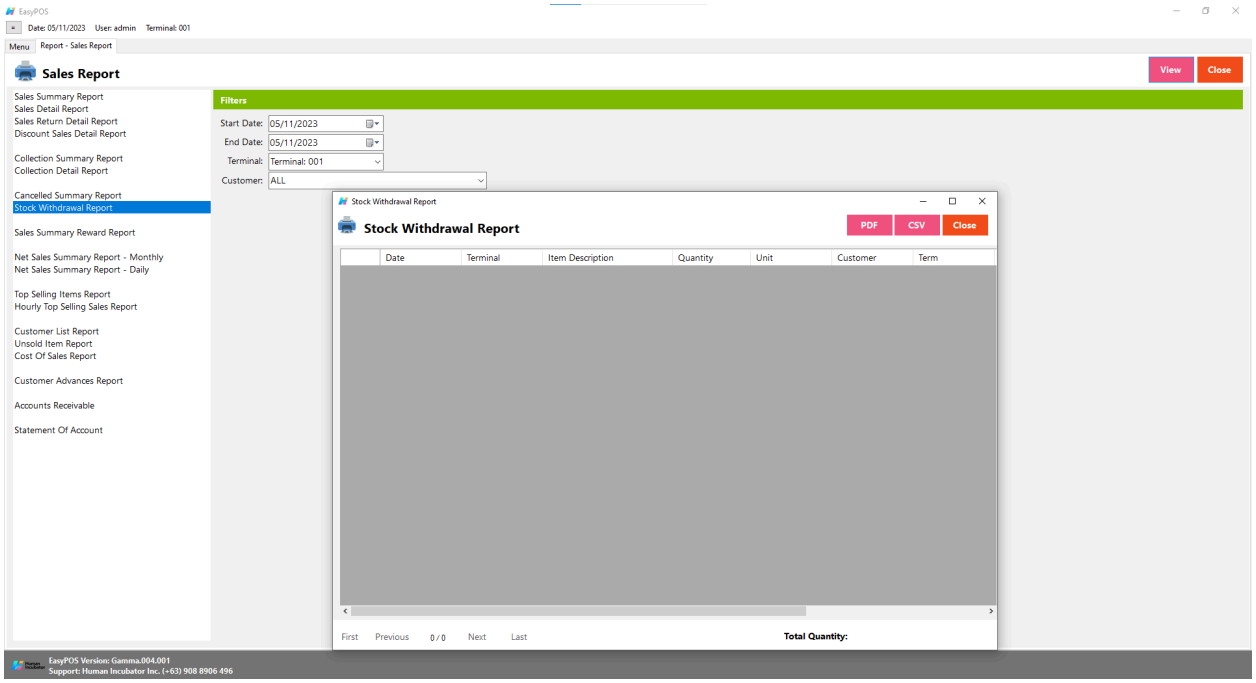
- Select start date and end date.
- It can also filtered by Terminal
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.
- Sales number change to OS Number
- Collection number change to OR Number



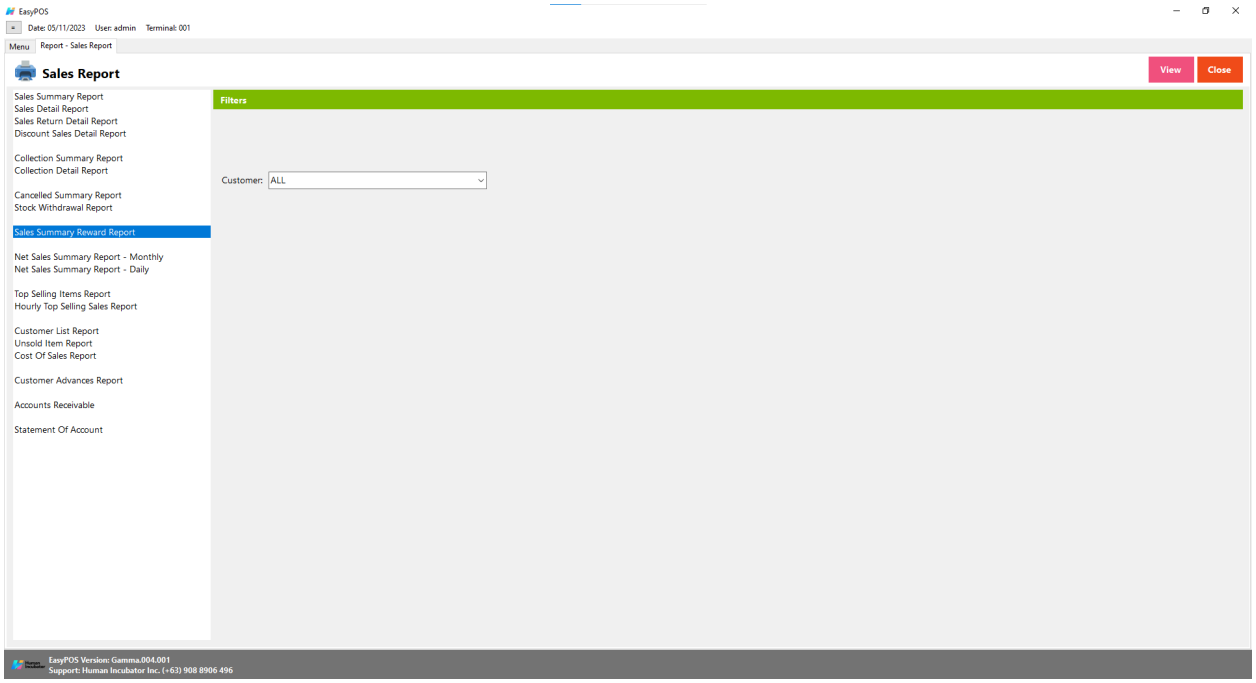
Stock Withdrawal Report



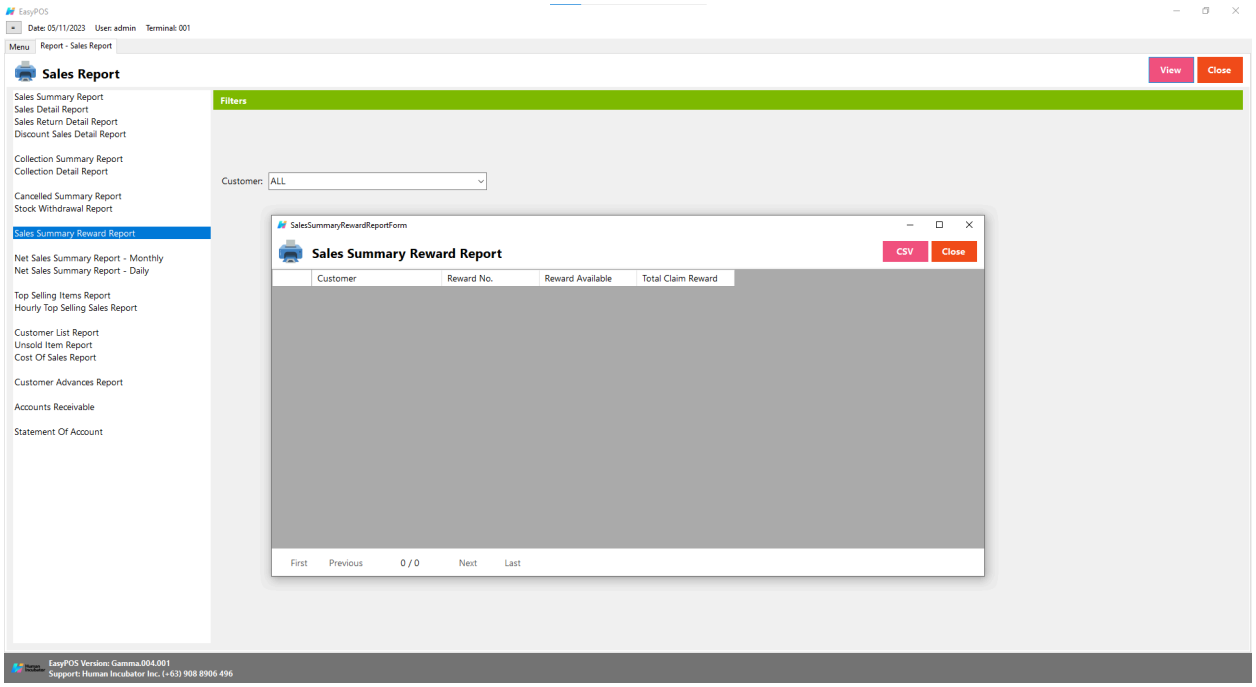
- Select start date and end date.
- It can also filtered by Terminal and Customer
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



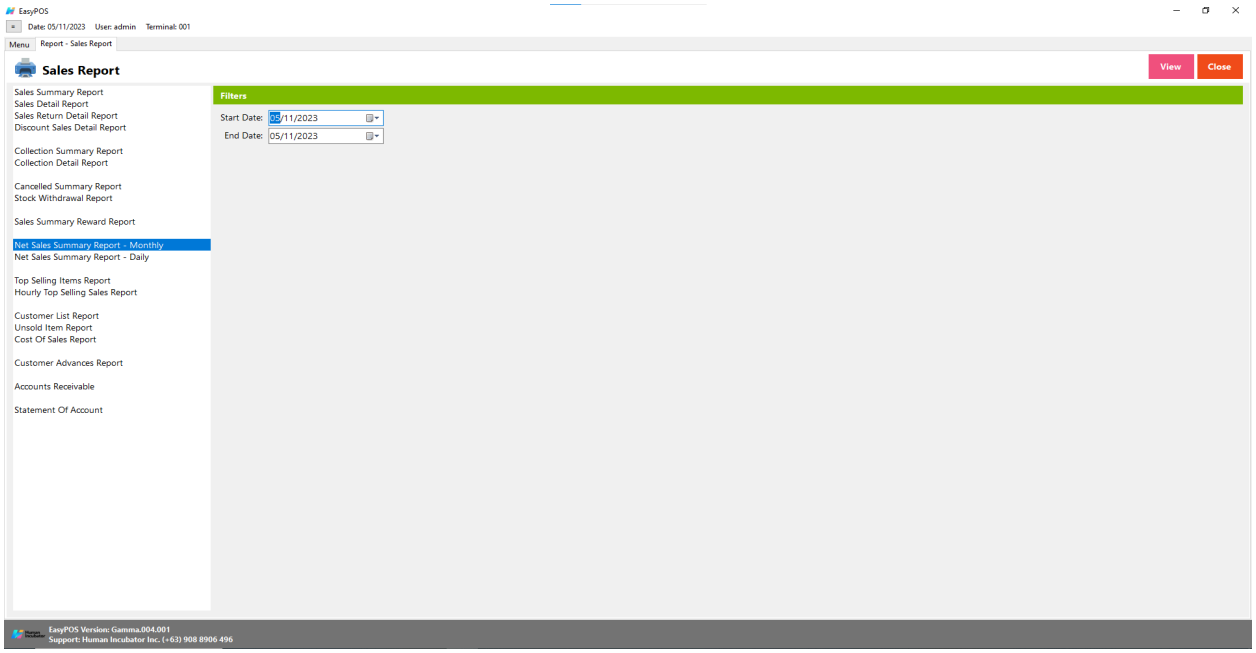
Sales Summary Reward Report



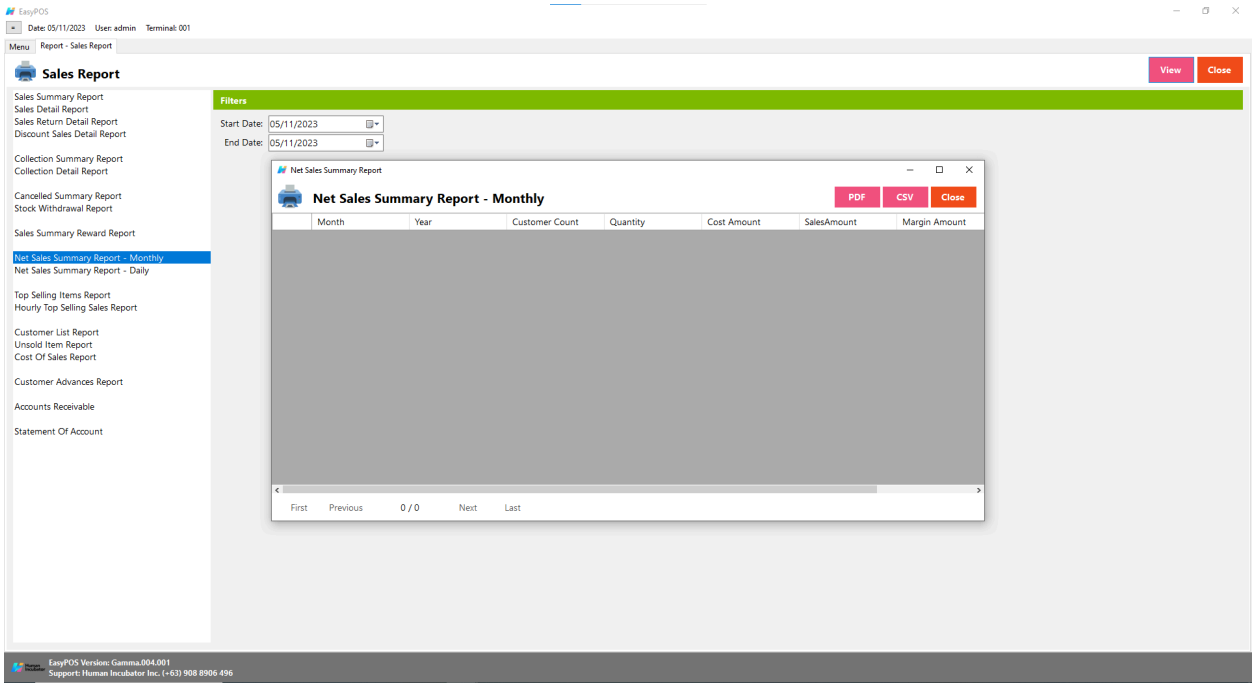
- Select a Customer
- Click the **View** button to view the report
- Click the **CSV** button to generate a csv file format report.



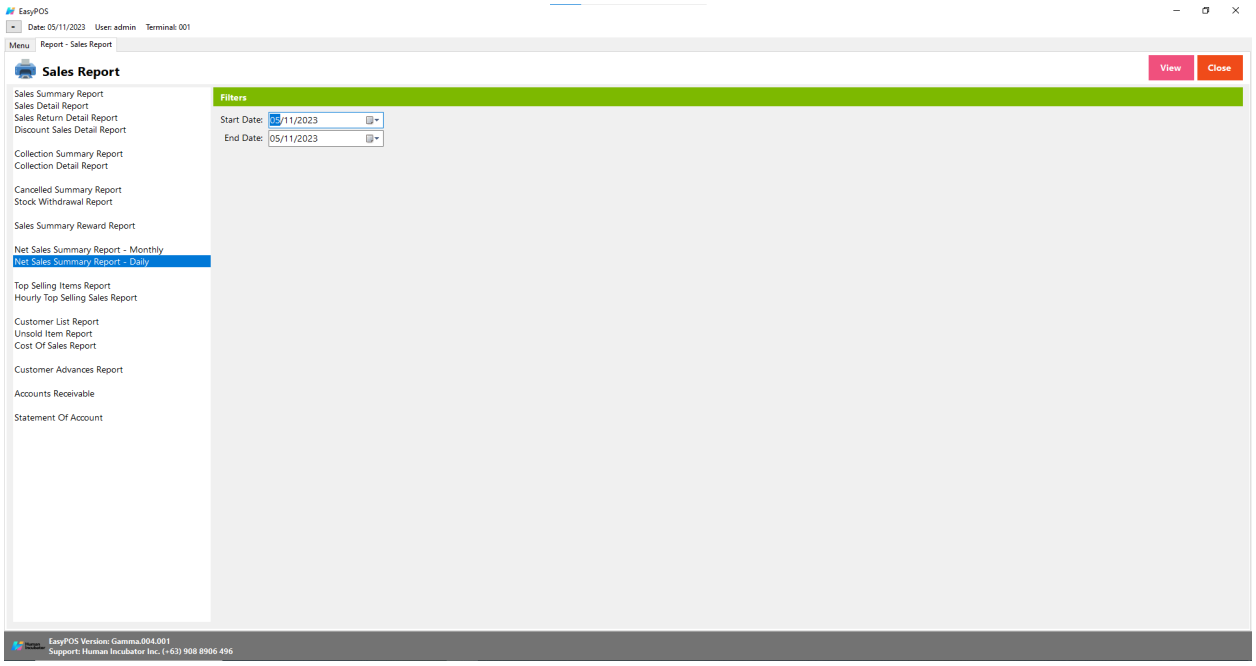
Net Sales Summary Report - Monthly



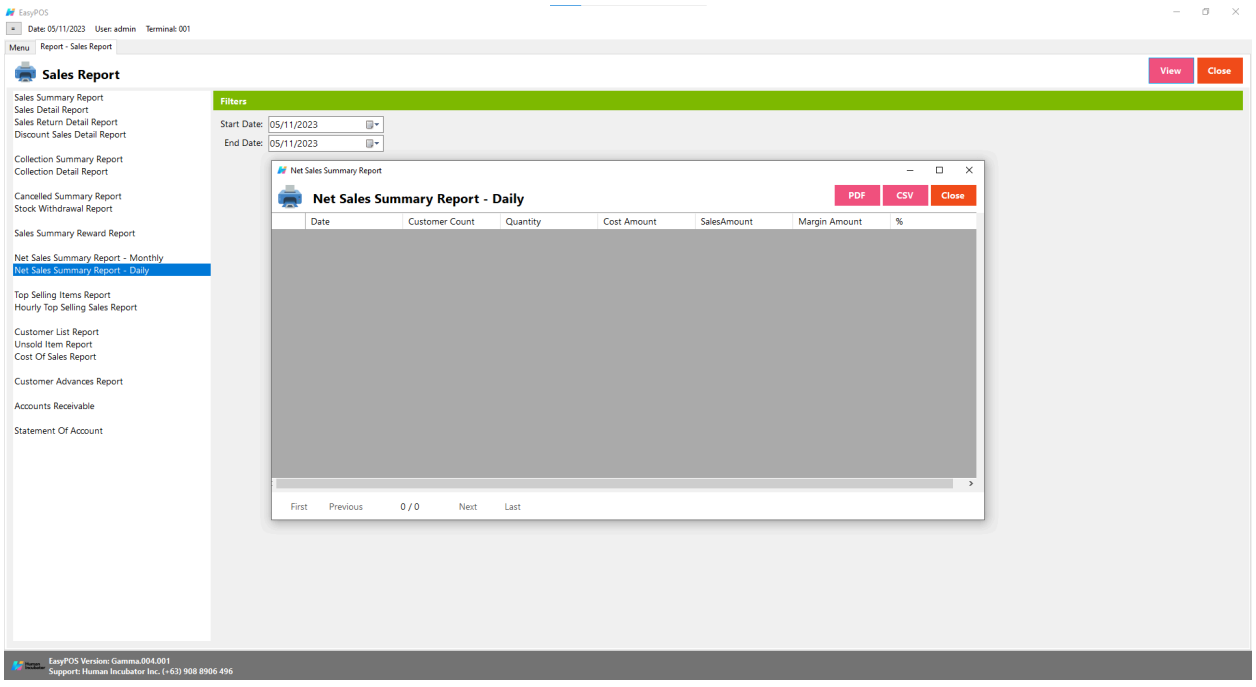
- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



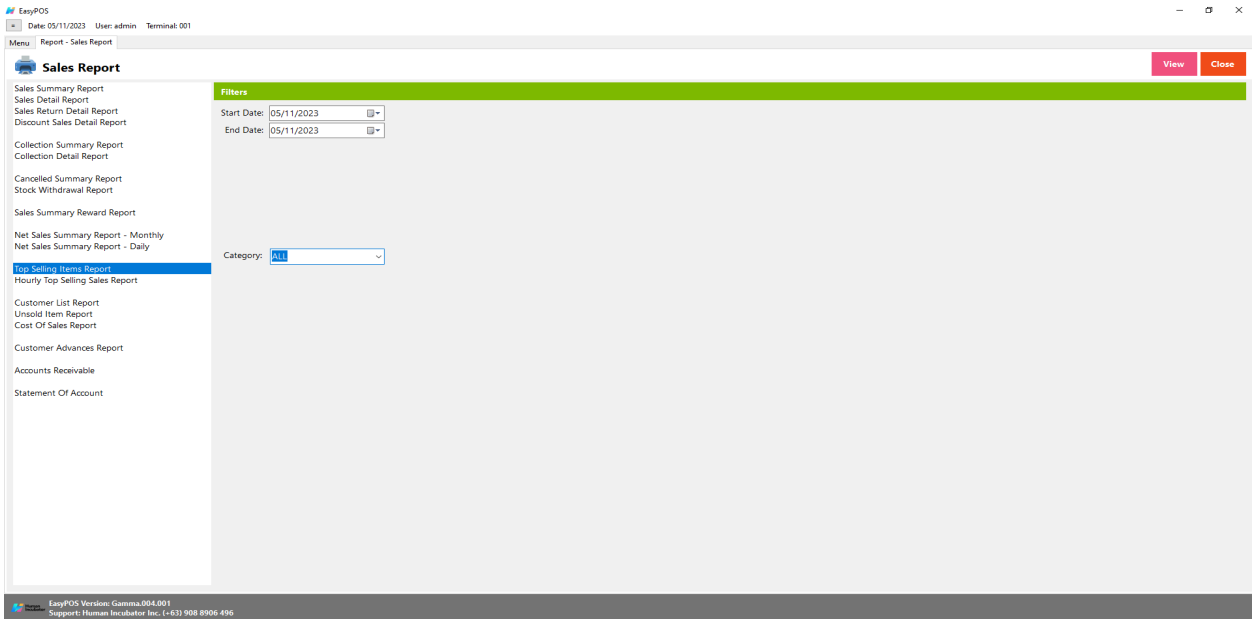
Net Sales Summary Report - Daily



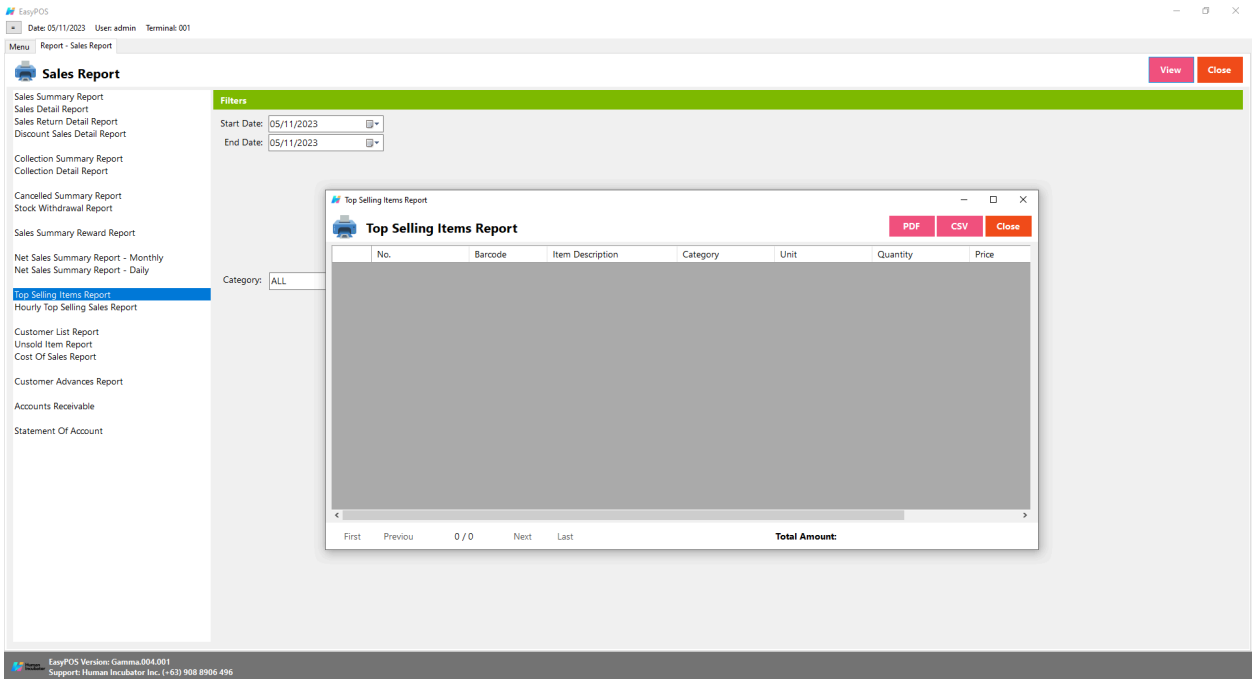
- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



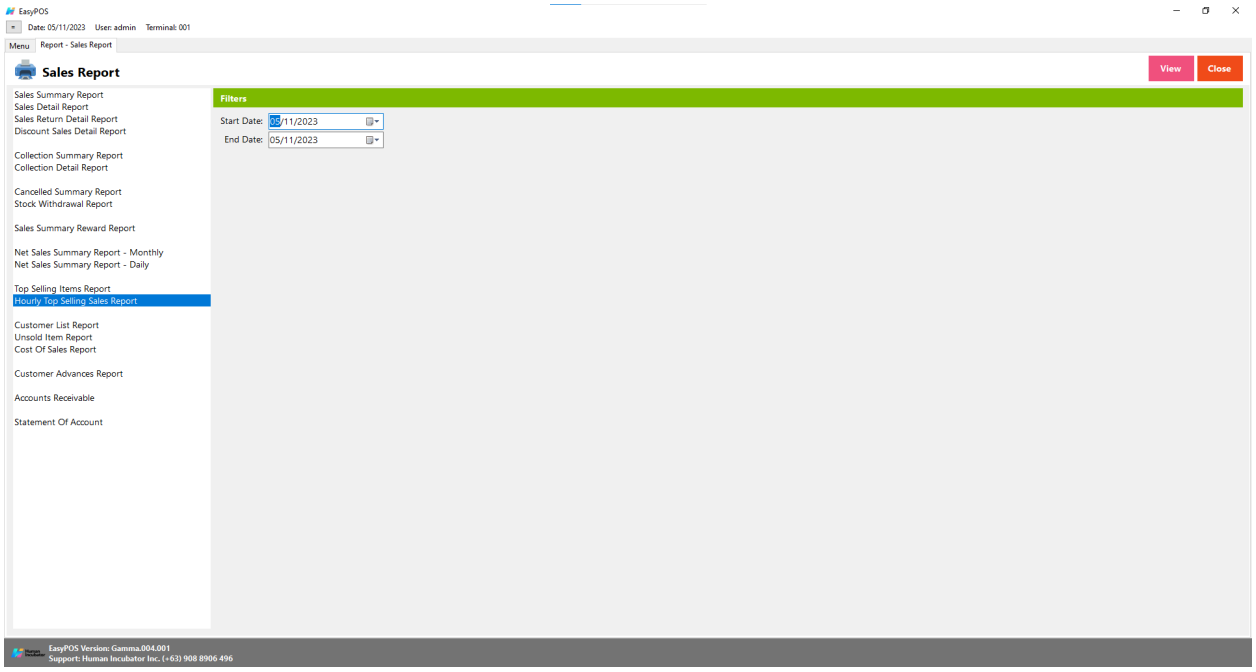
Top Selling Item Report



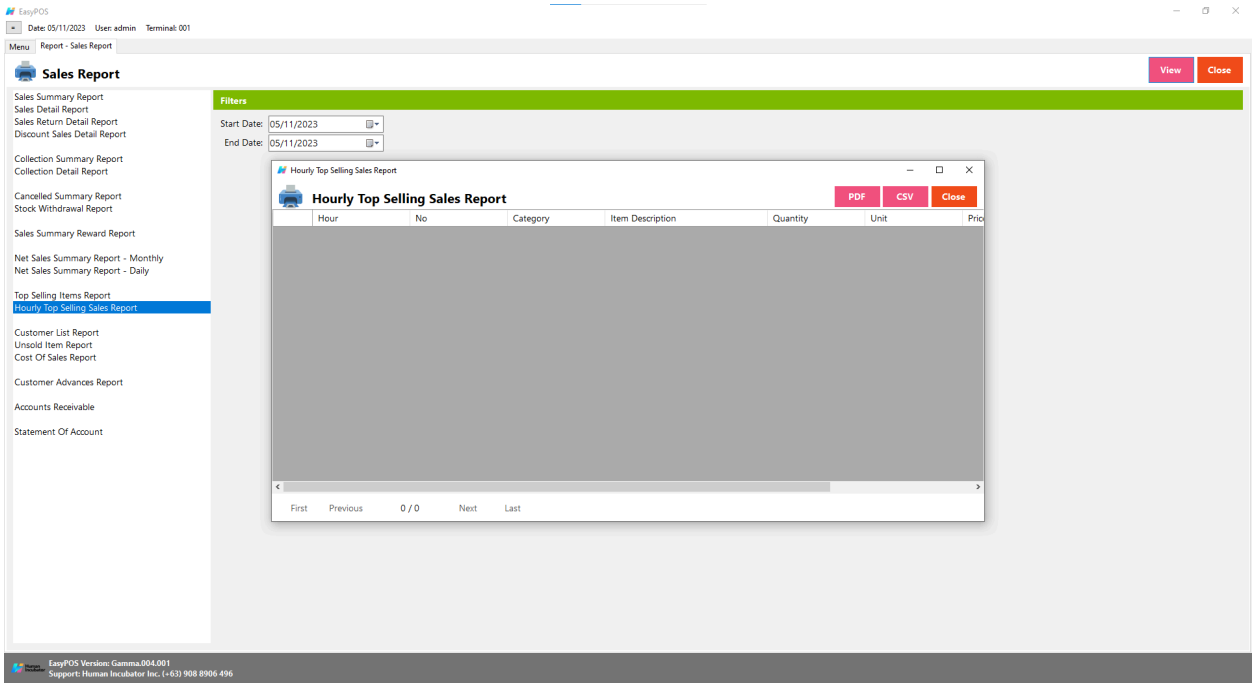
- Select start date and end date.
- It is filtered by Category
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



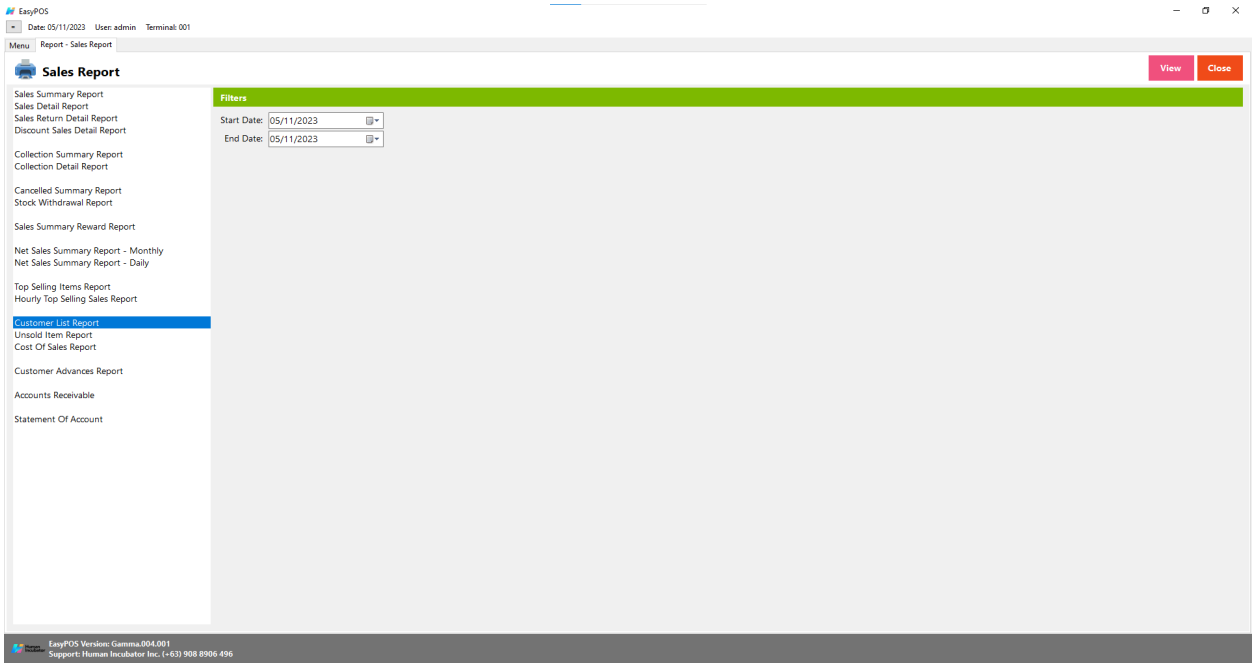
Hourly Top Selling Sales Report



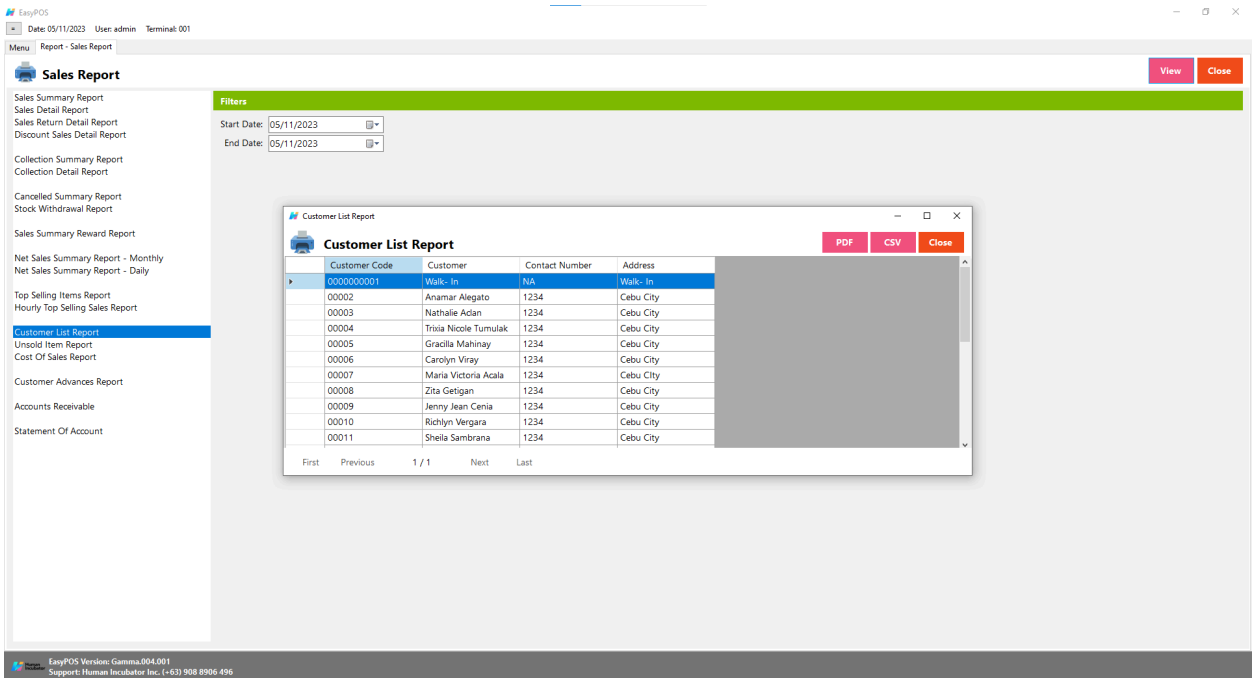
- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



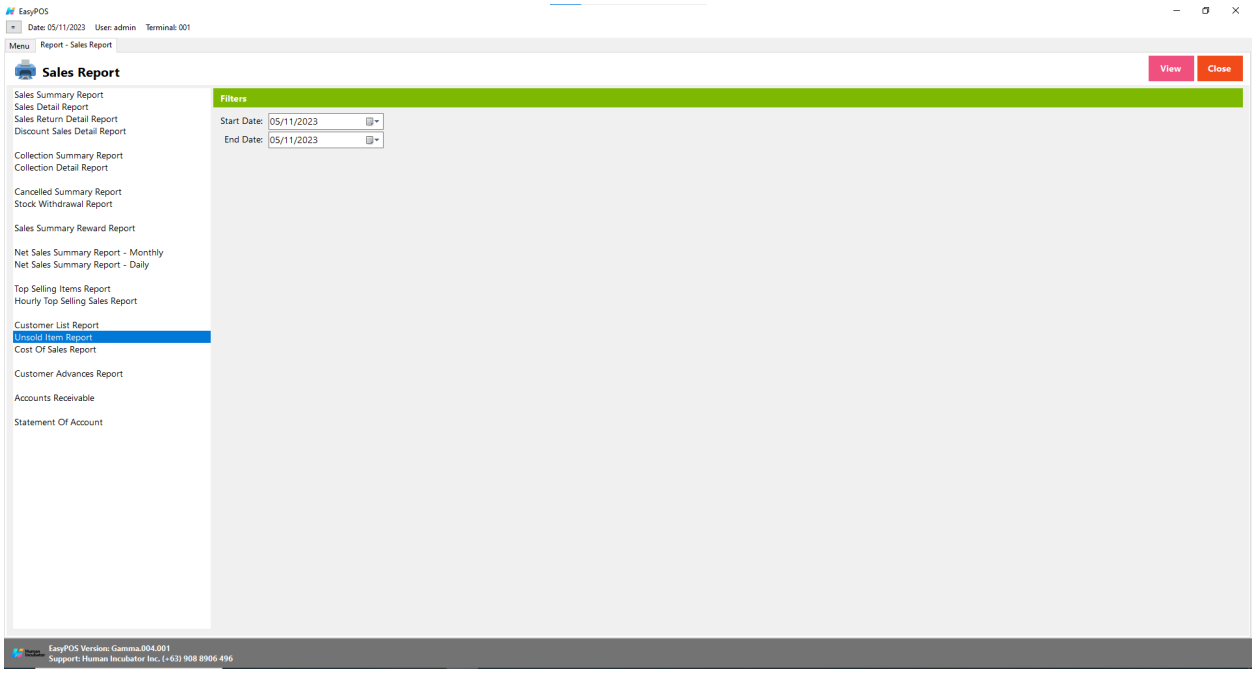
Customer List Report



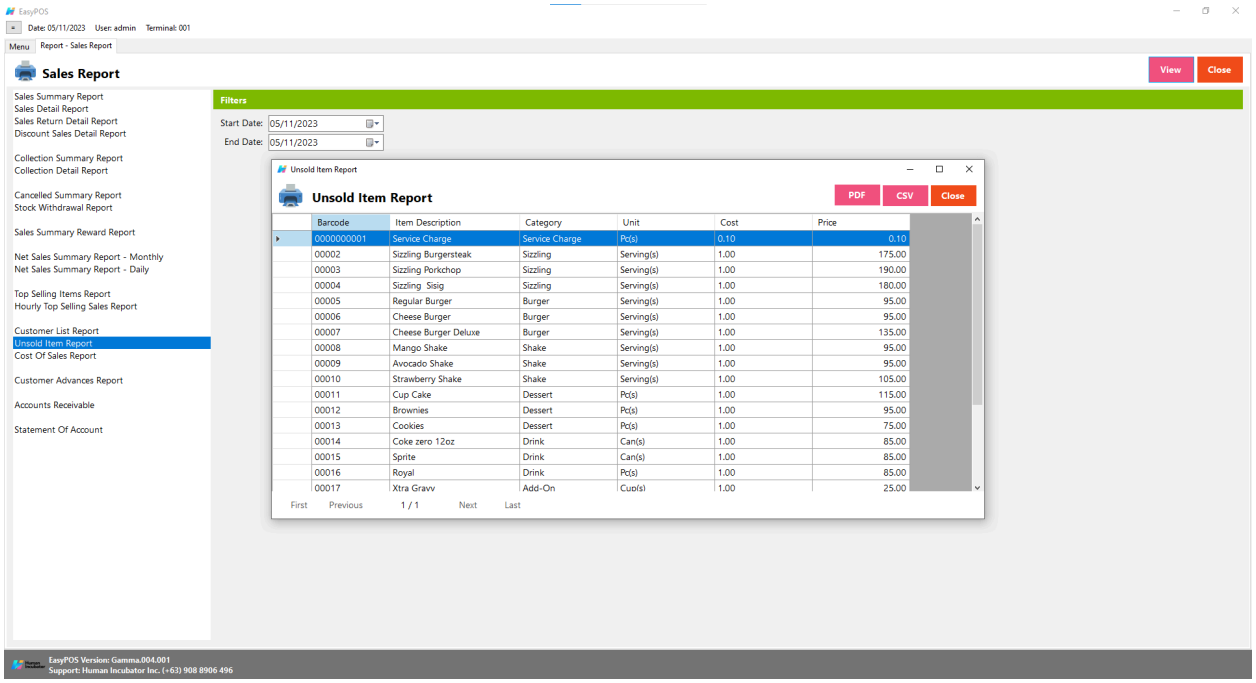
- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



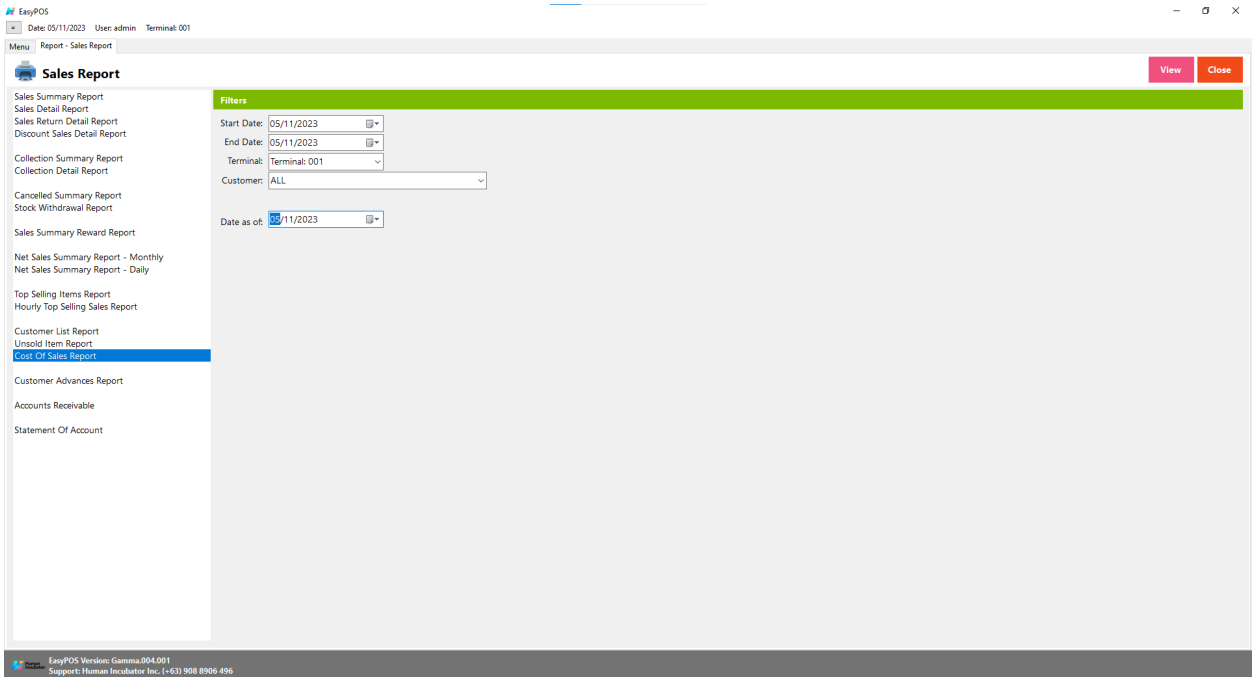
Unsold Item Report



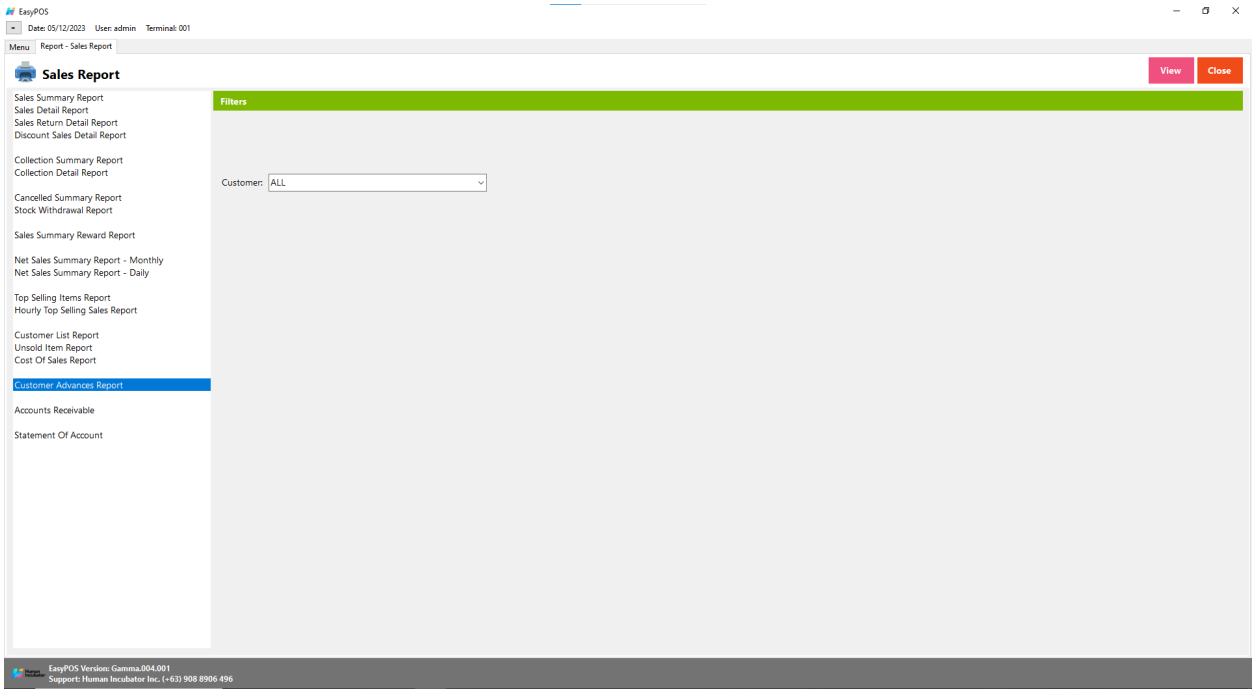
- Select start date and end date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



Cost of Sales Report

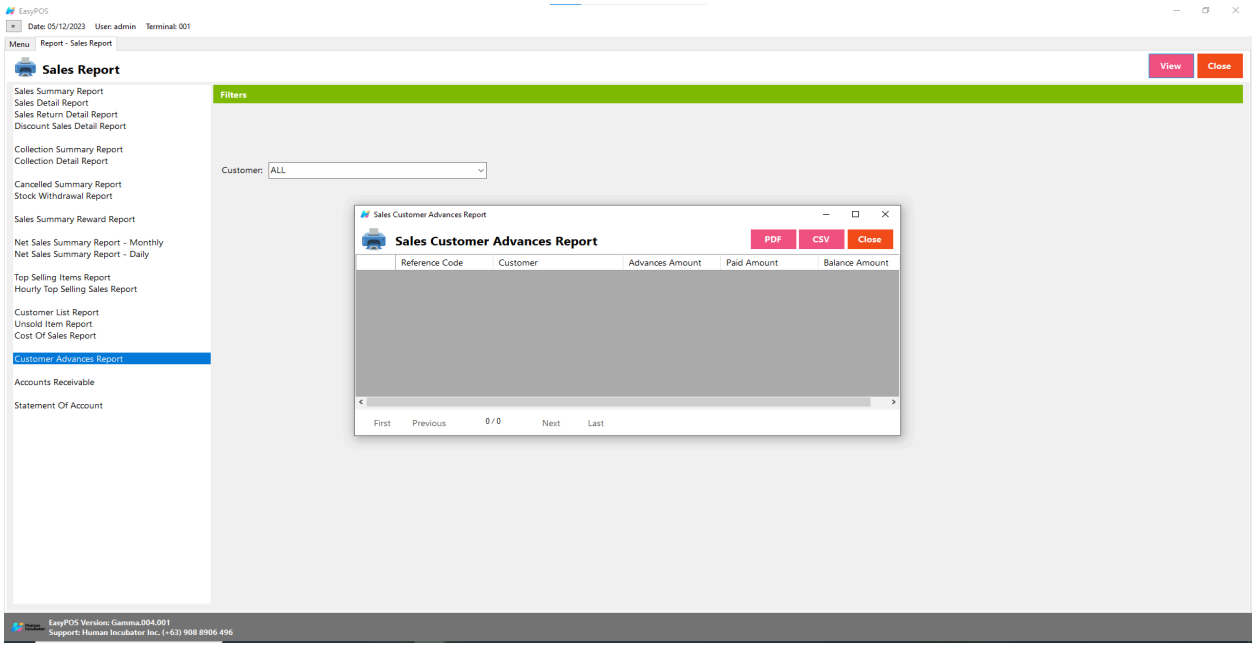


Customer Advances Report

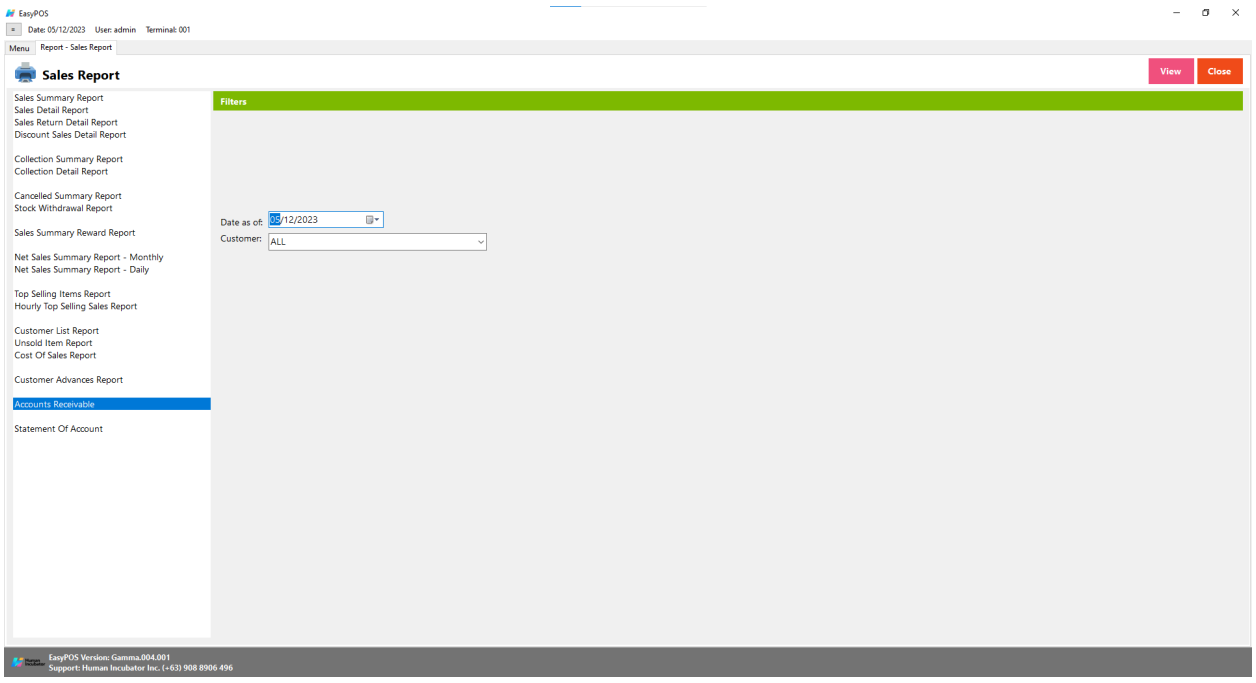


- It is filtered by Customer
- Click the **View** button to view the report

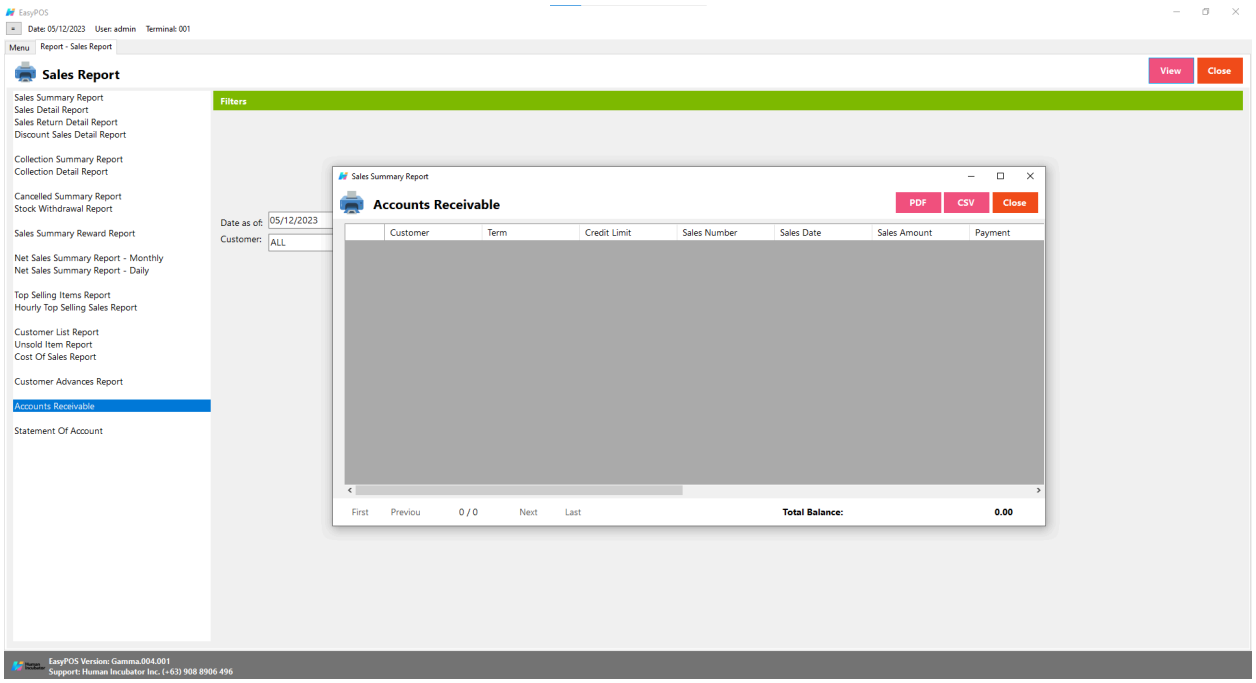
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



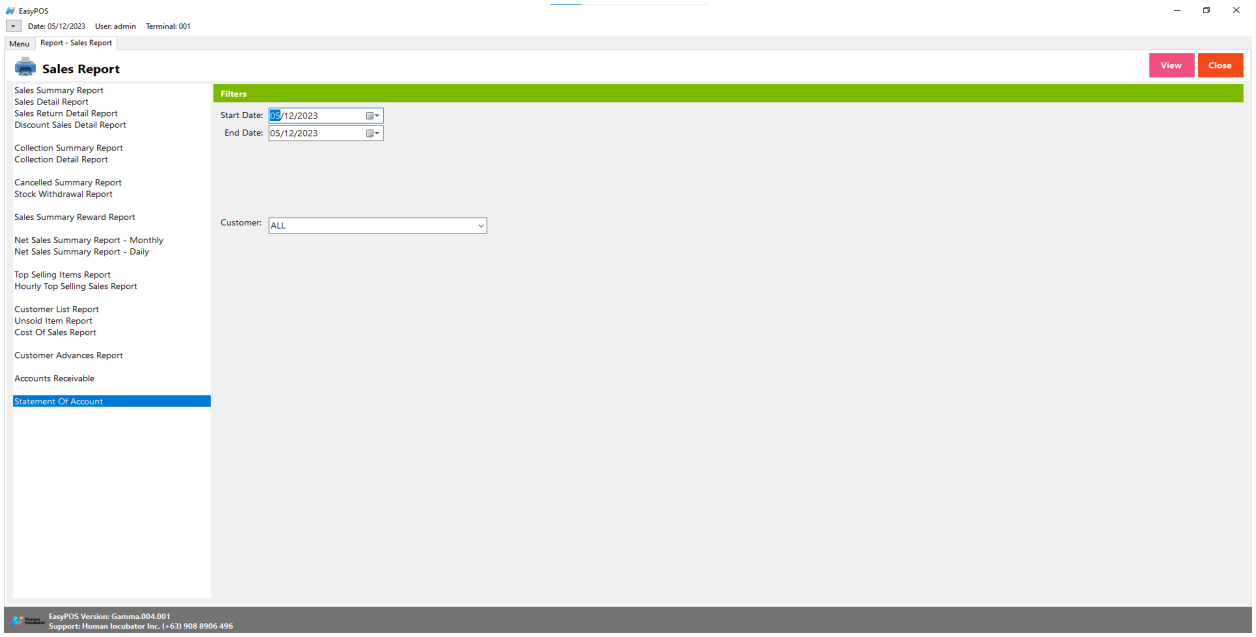
Accounts Receivable



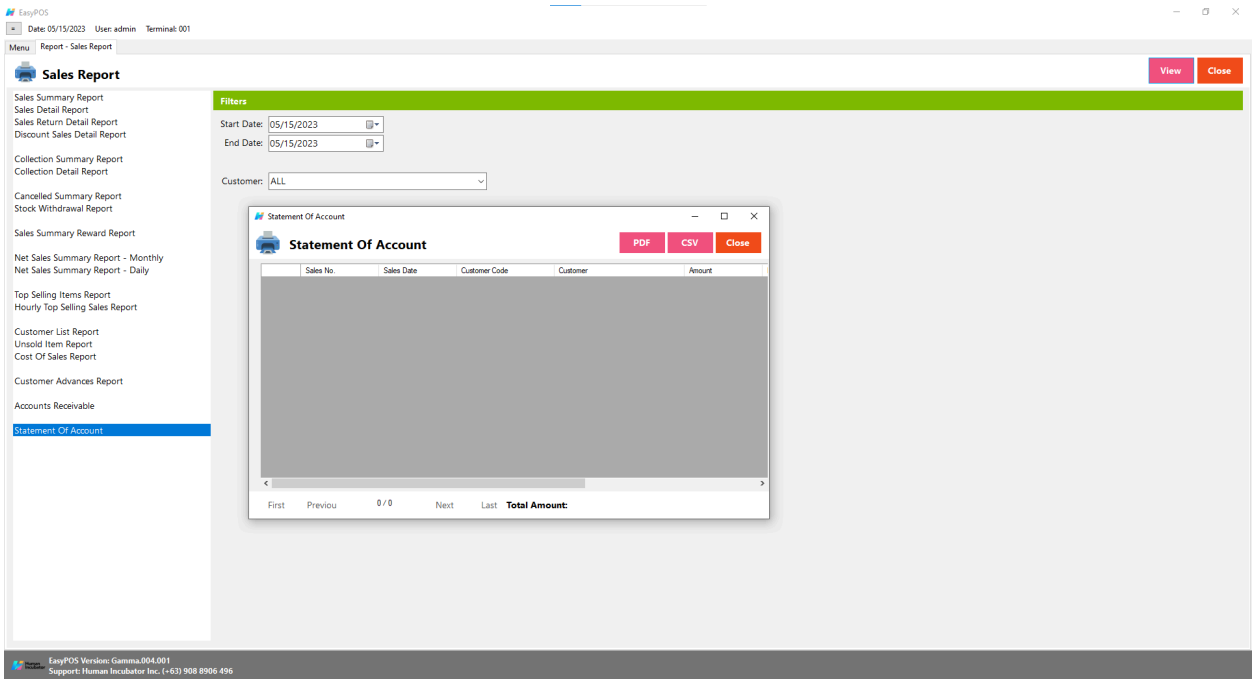
- Select Date as of and Customer
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.



Statement of Account



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



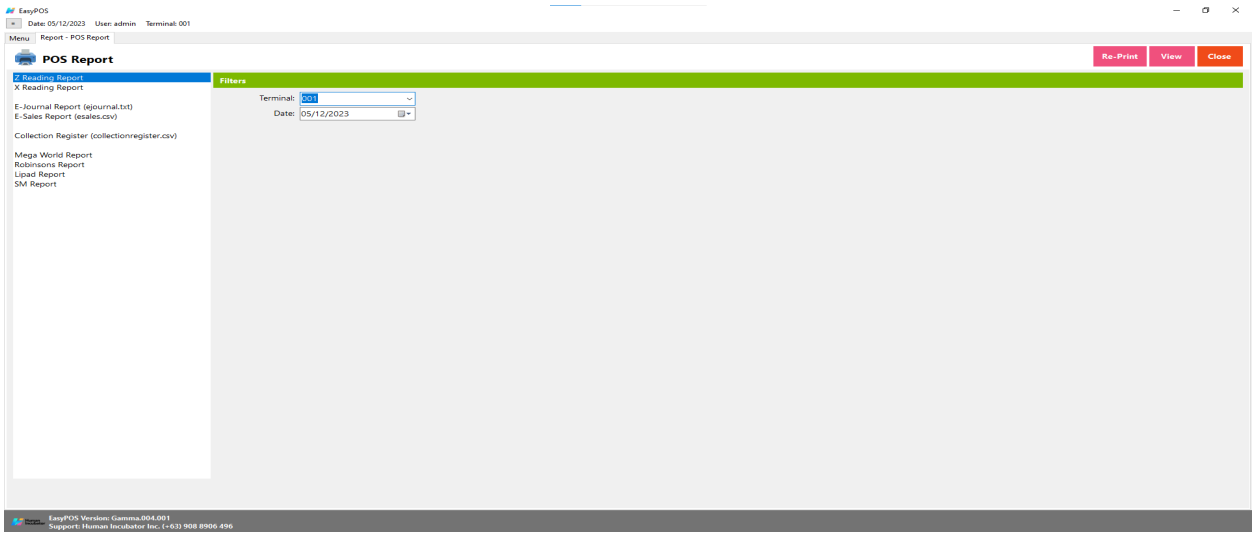
- Click **PDF** button to print pdf file report
- Click the **CSV** button to generate a csv file format report.

POS Report

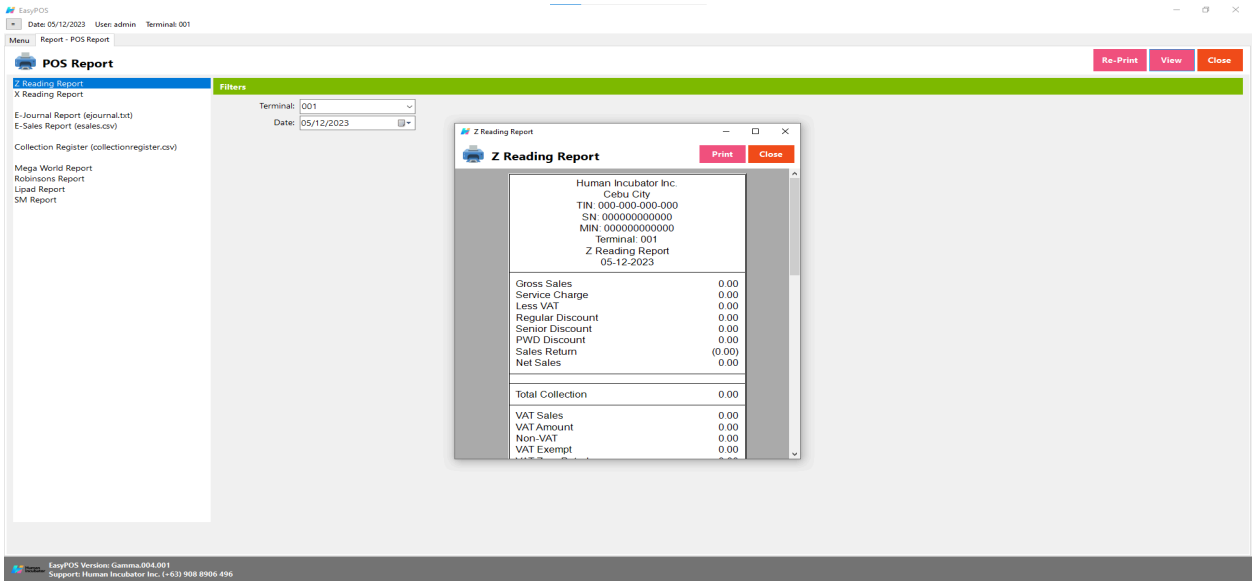
Overview

- **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.

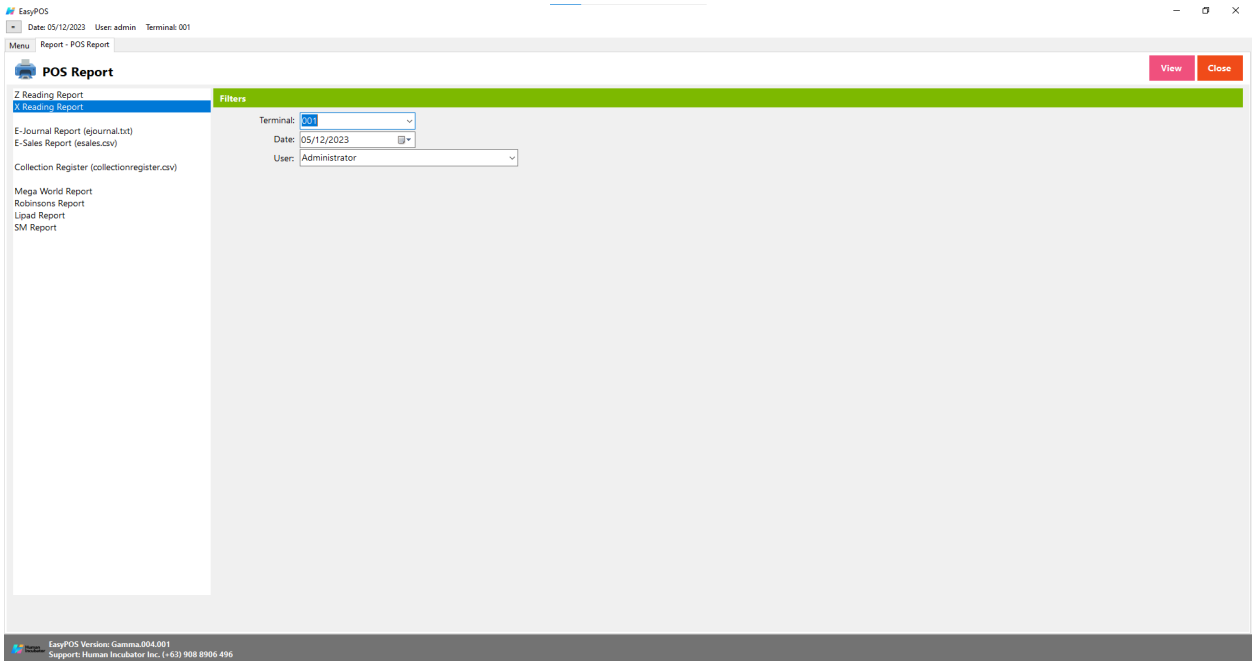
Z Reading Report



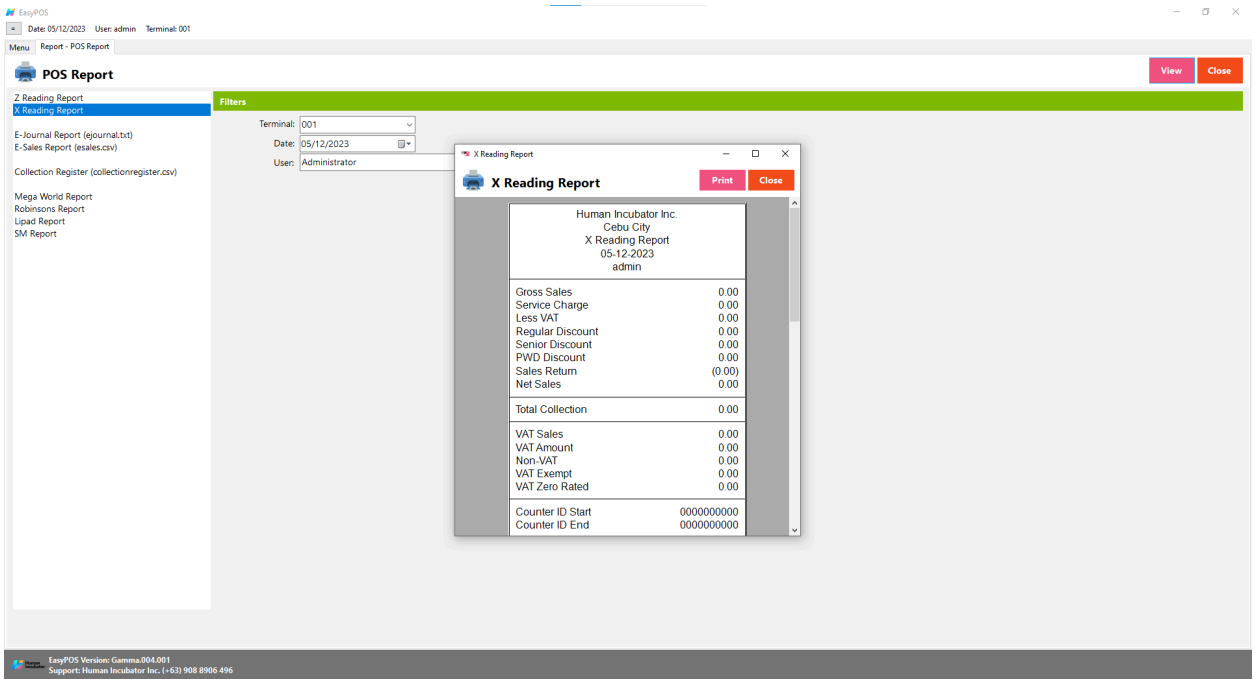
- Select terminal and date.
- Click the **Re-Print** button to automatically print the end of day report
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



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 **Print** button to print pdf file report
- X Reading coudln't be printed if lapse date

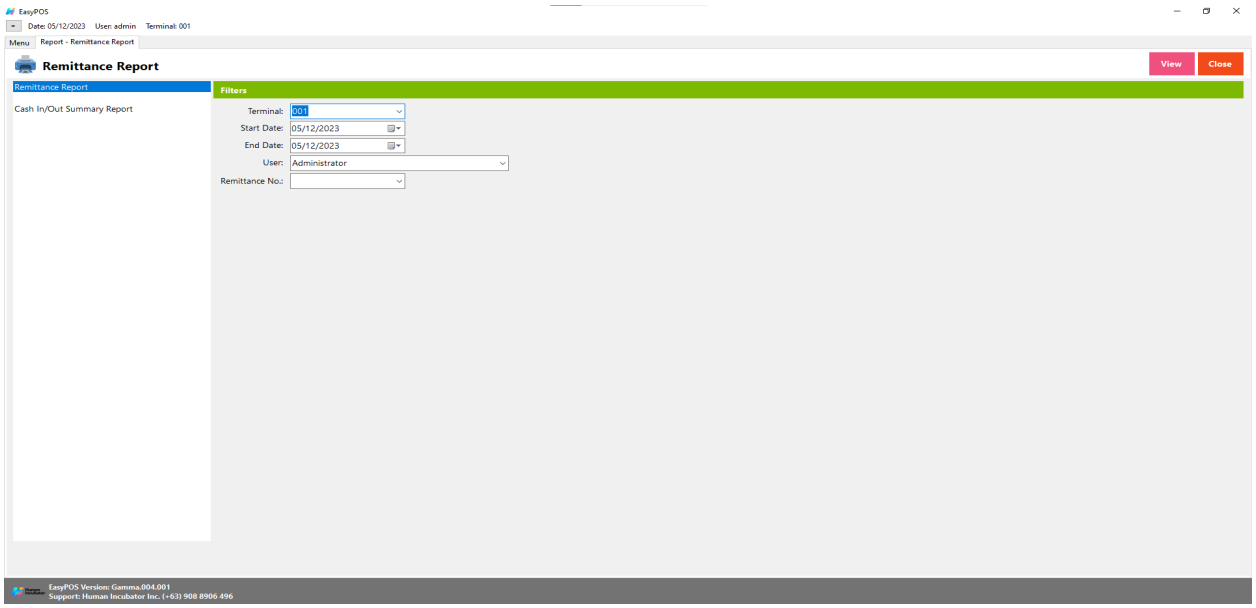


Remittance Report

Overview

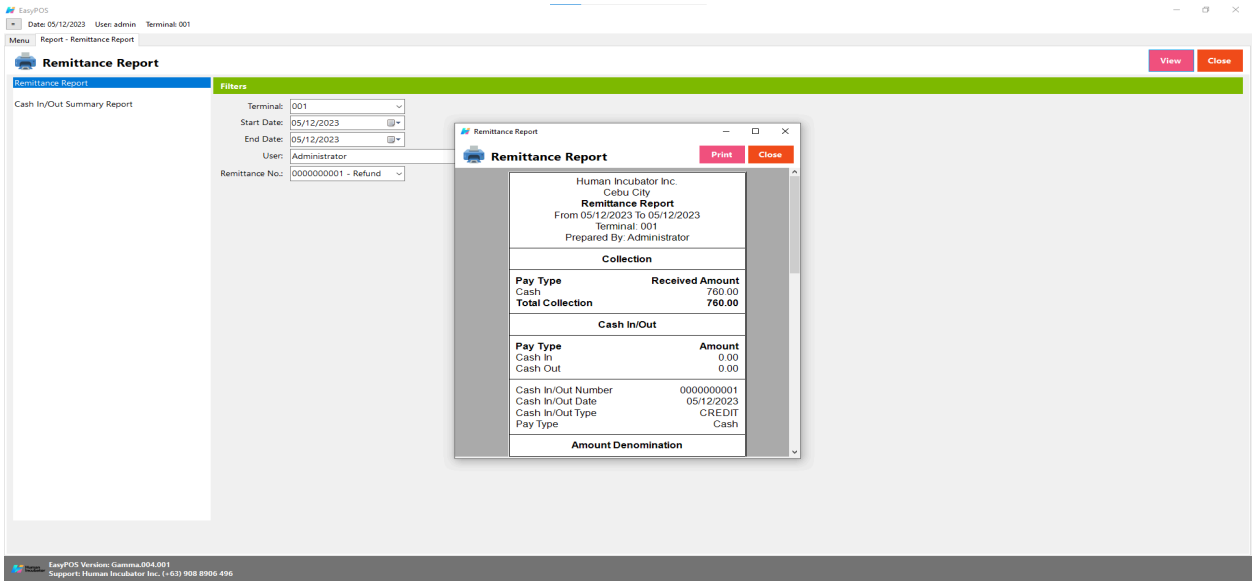
- **Remittance Report** is where users can see the reports for Cash/In Out with the Remittance report.

Remittance Report

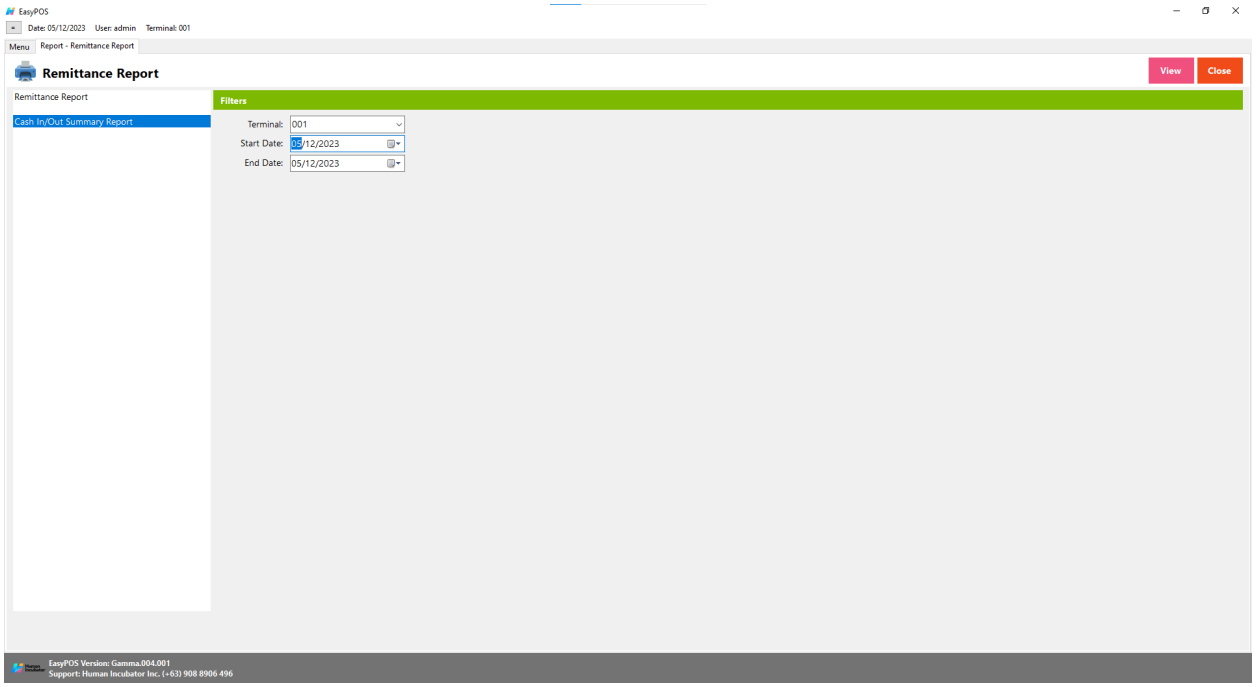


- Select Terminal, start date, end date, User and Remittance No..

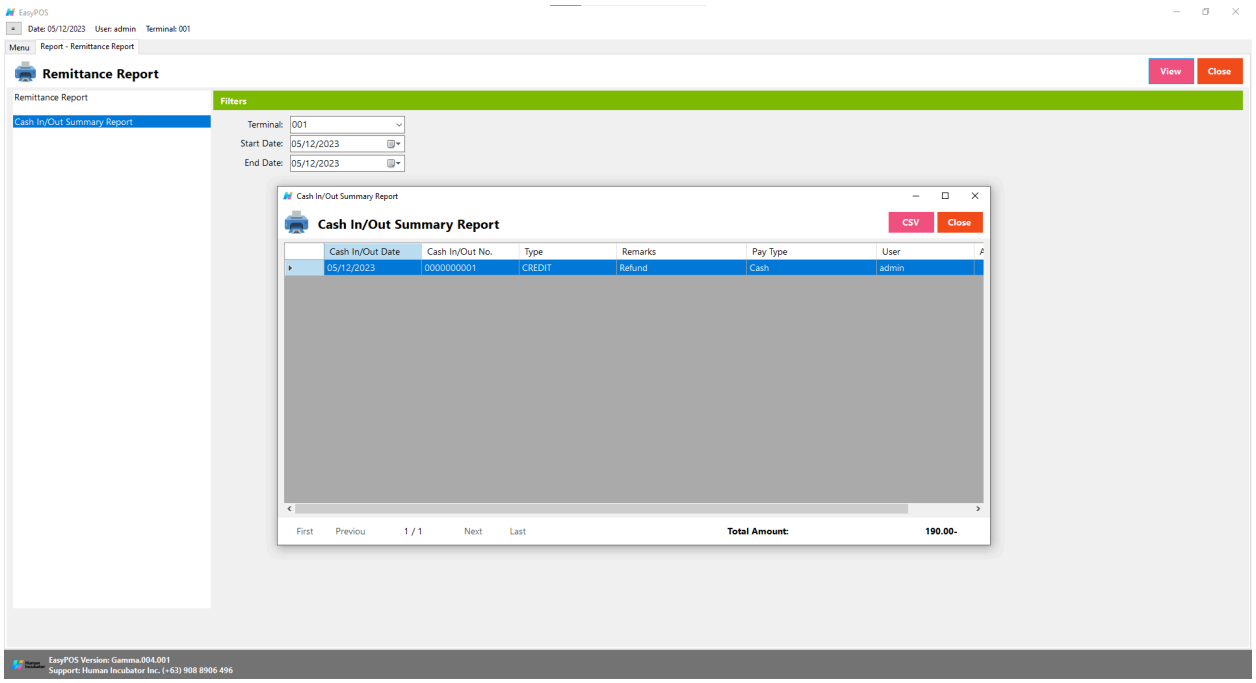
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



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

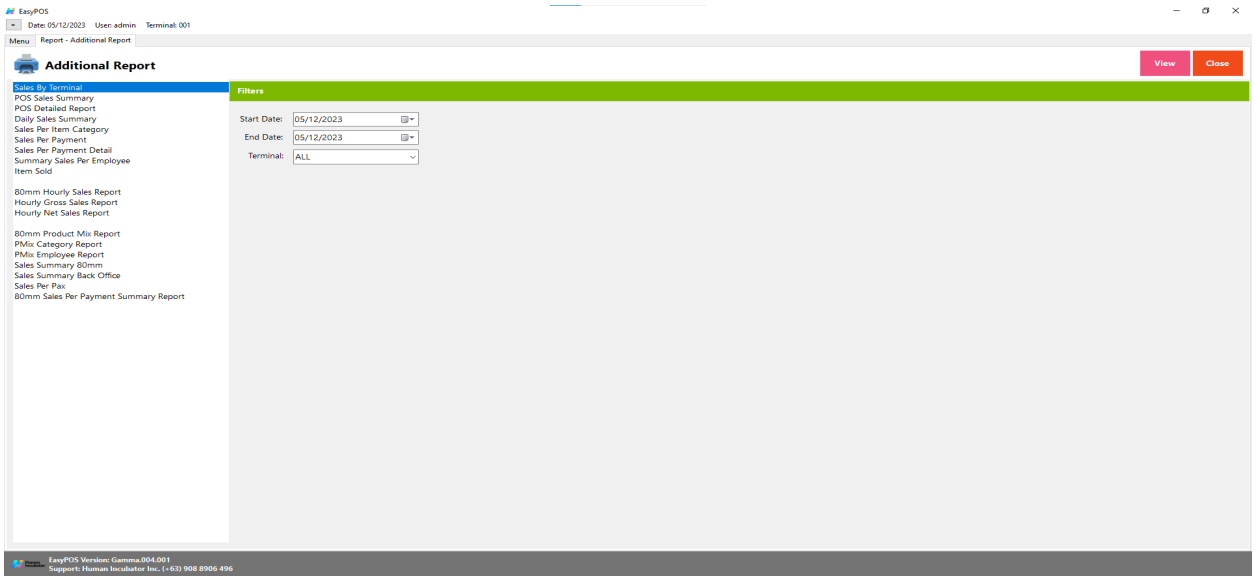


Additional Report

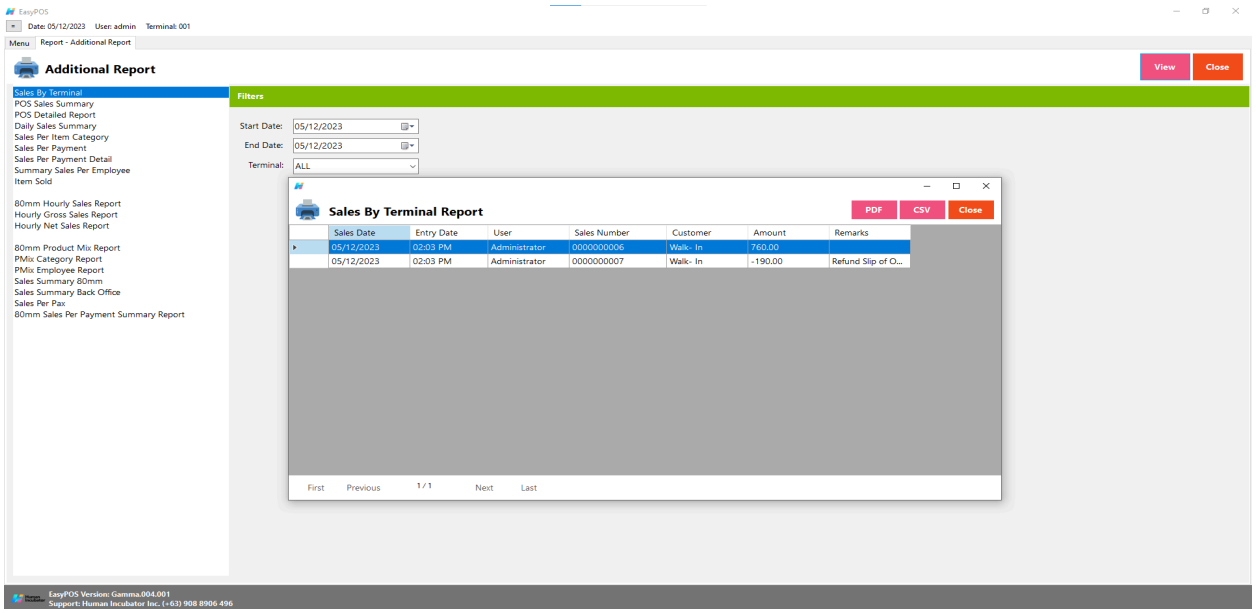
Overview

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

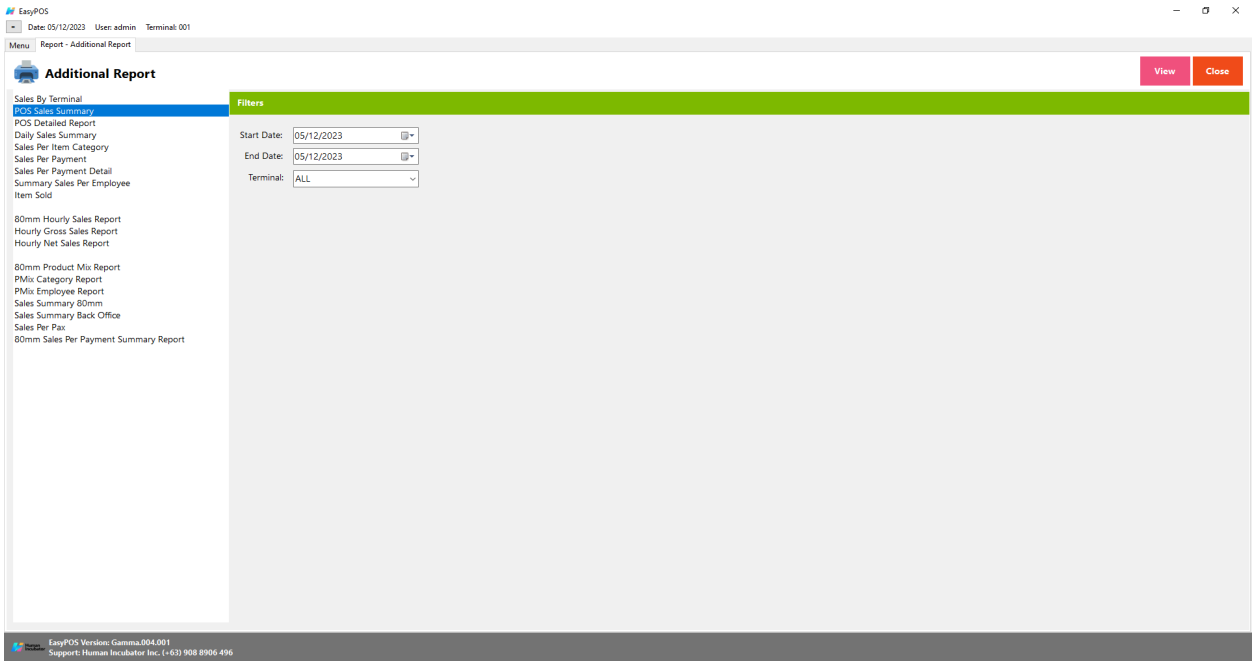
Sales By Terminal



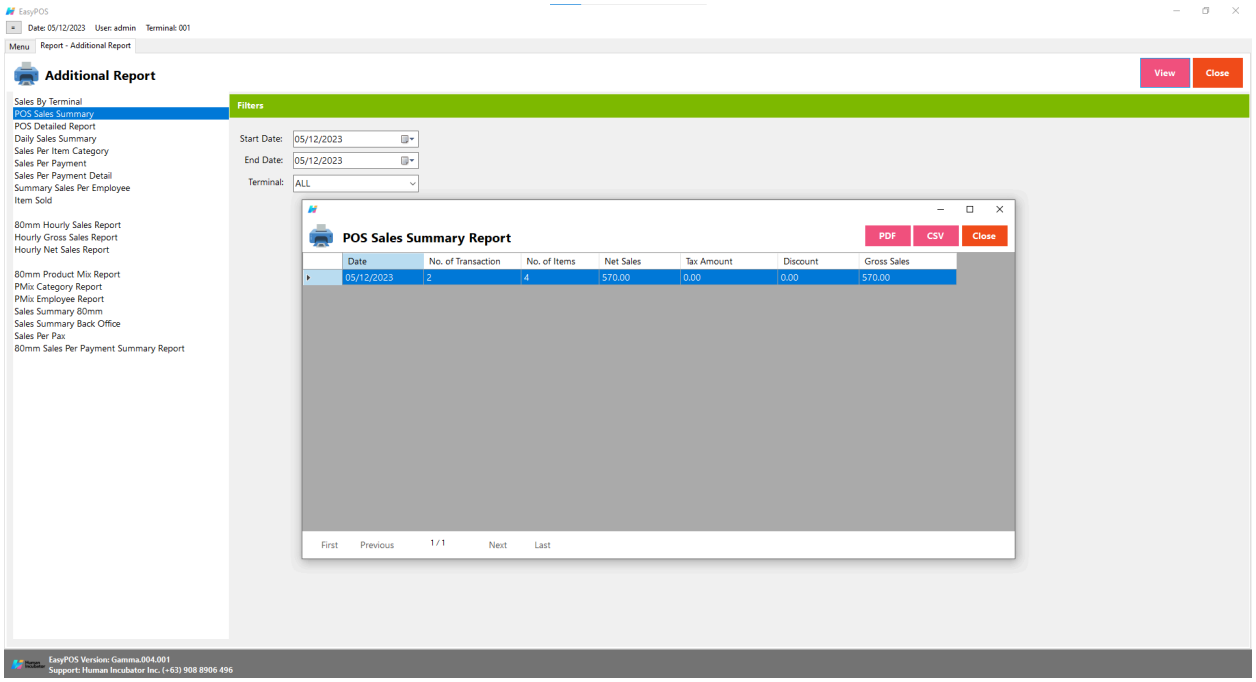
- Select Terminal, Start Date and End Date.
- Click the **View** button to view the report
- Click **Print** button to print pdf file report
- Click **CSV** button to print csv file format report



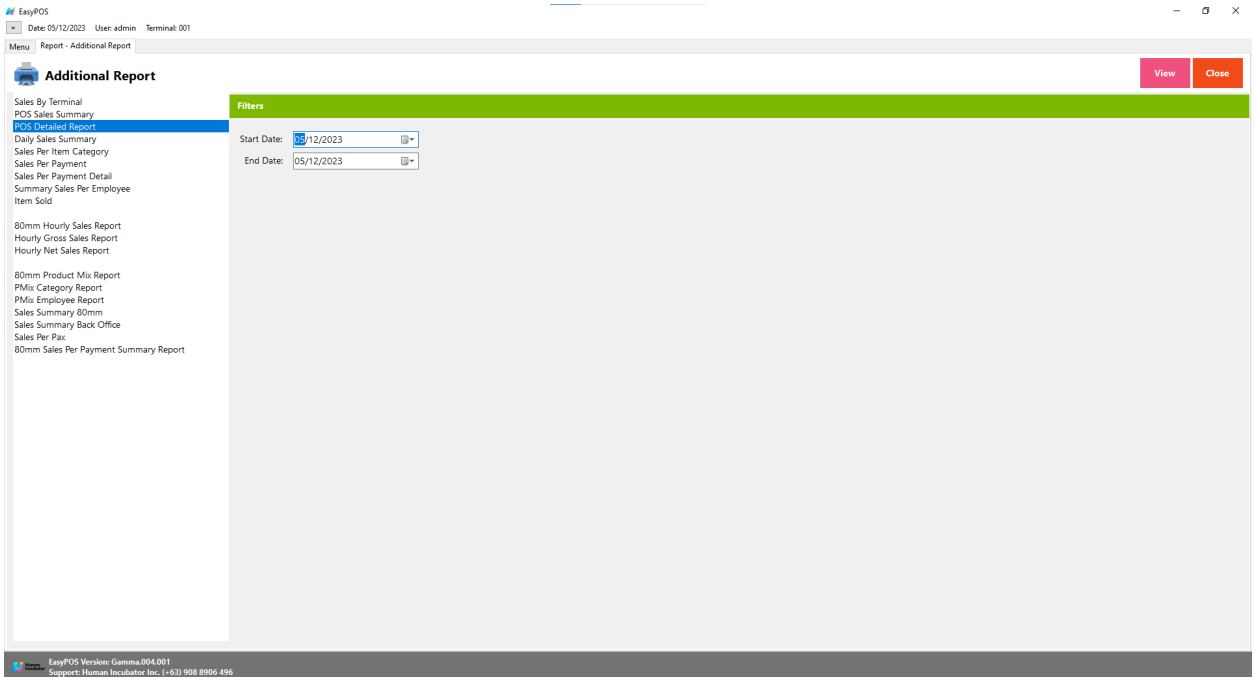
POS Sales Summary



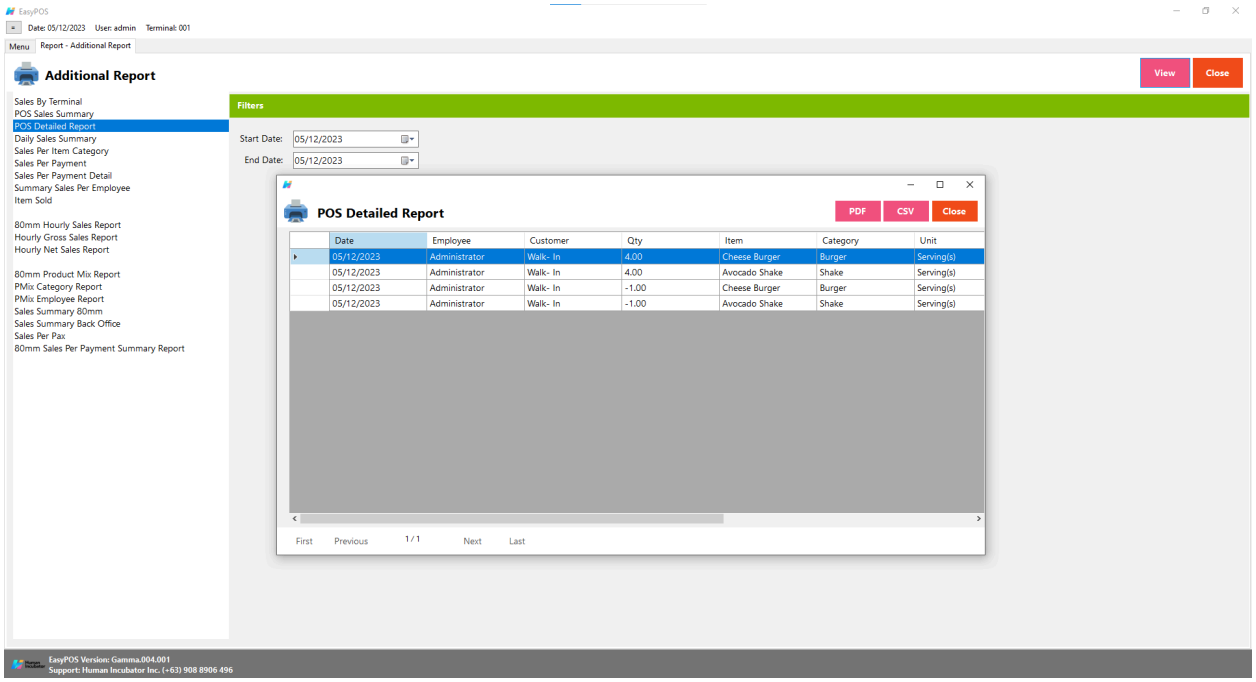
- Select Terminal, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



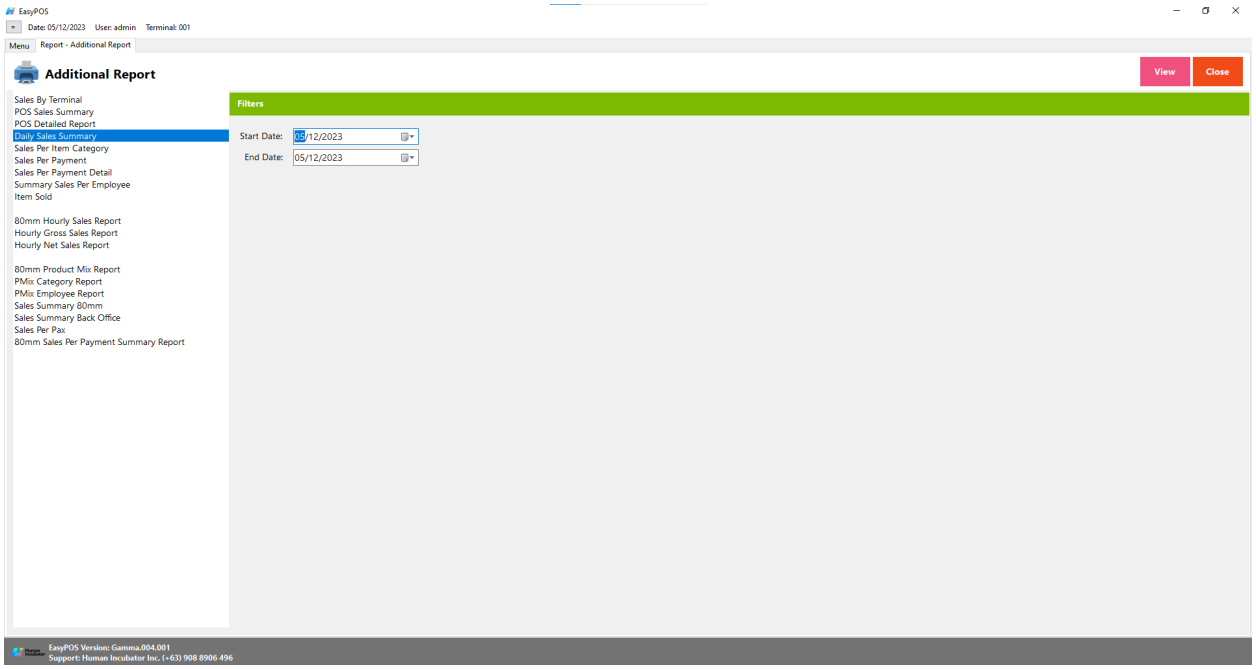
POS Detailed Report



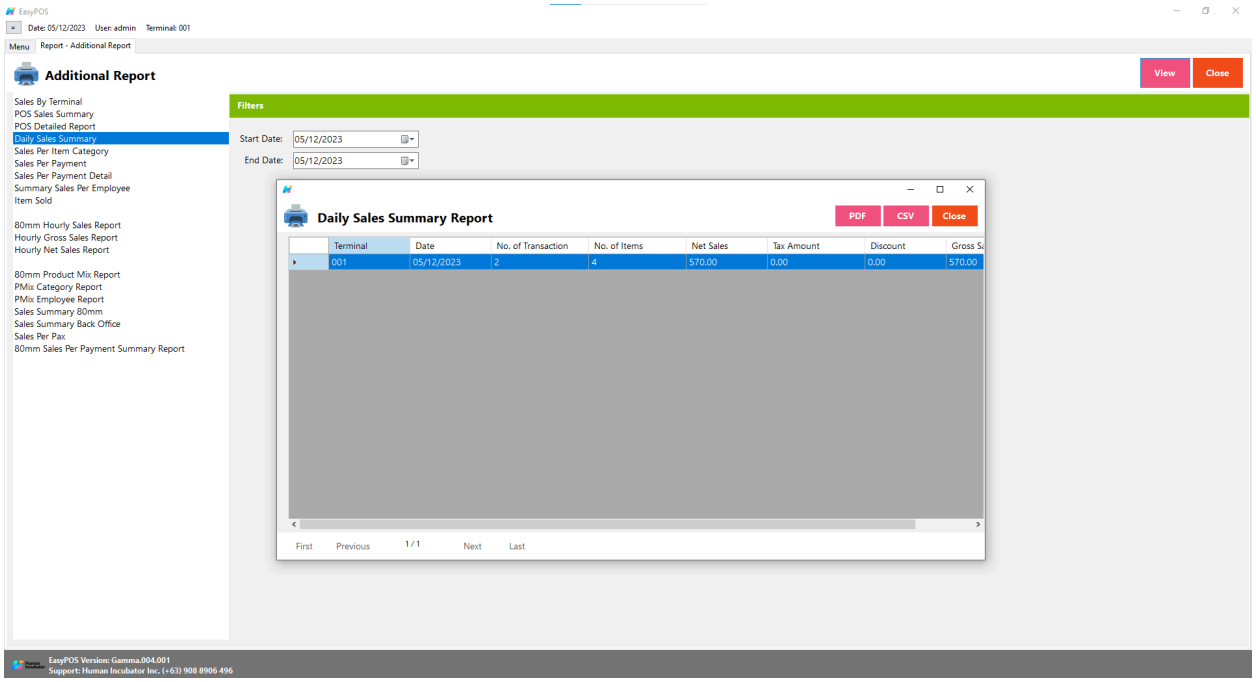
- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



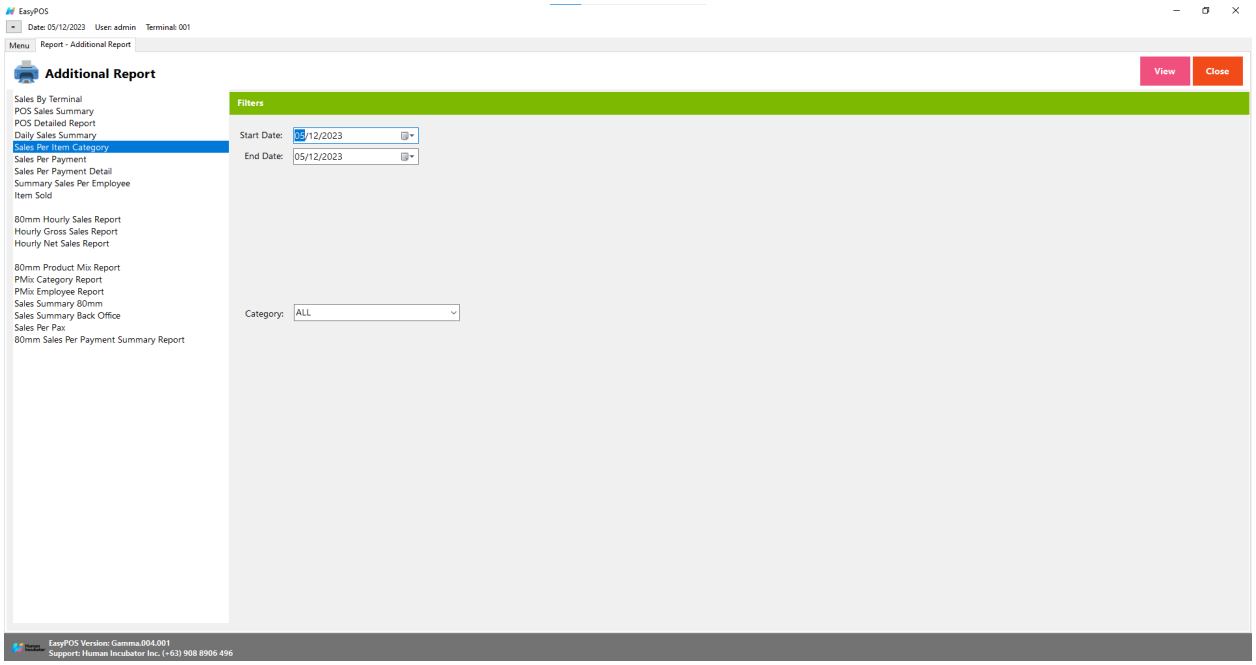
Daily Sales Summary



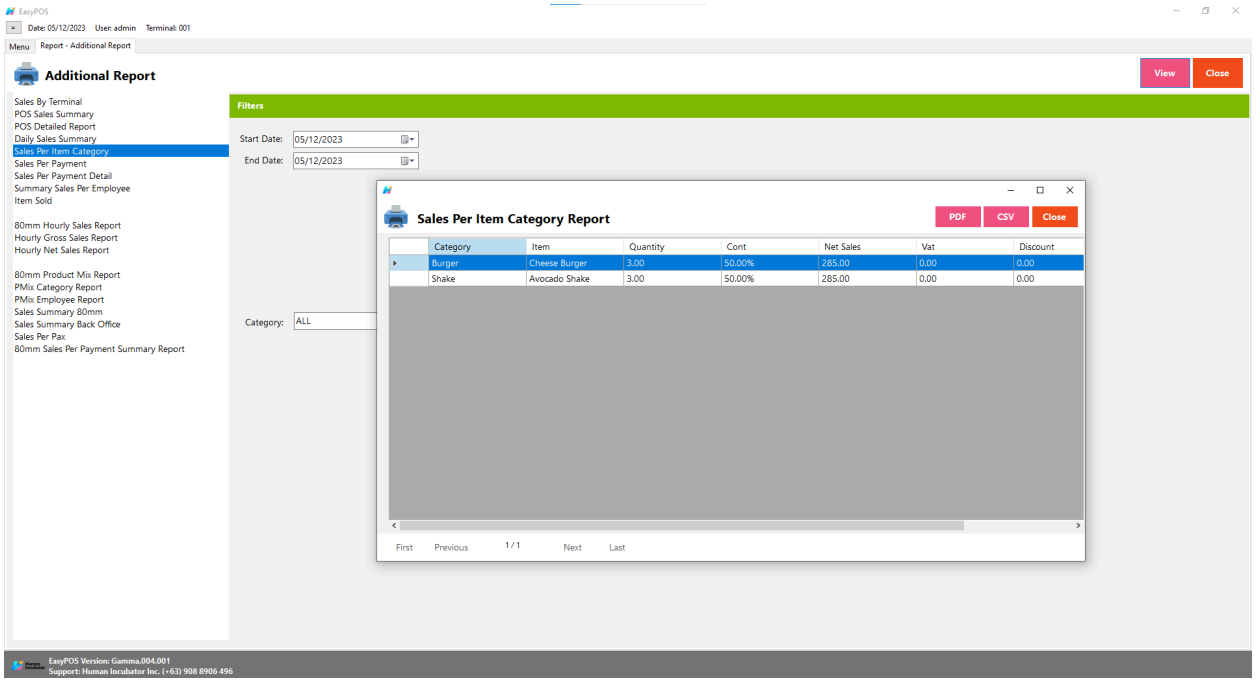
- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



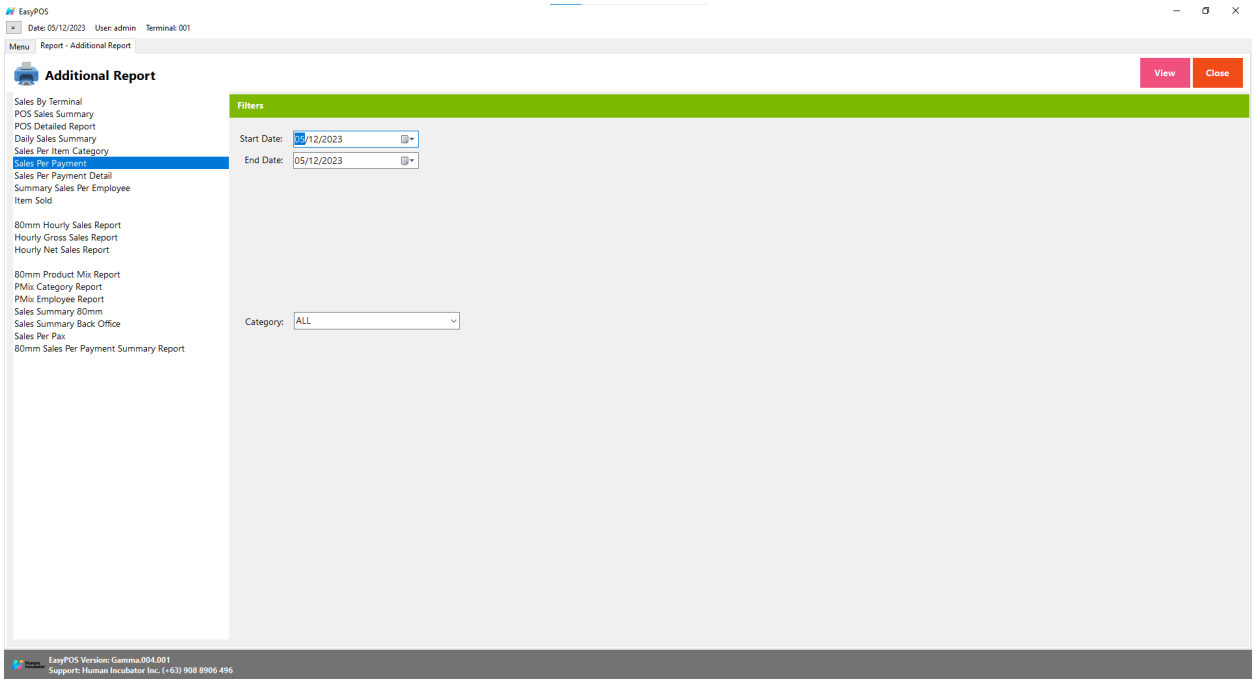
Sales Per Item Category



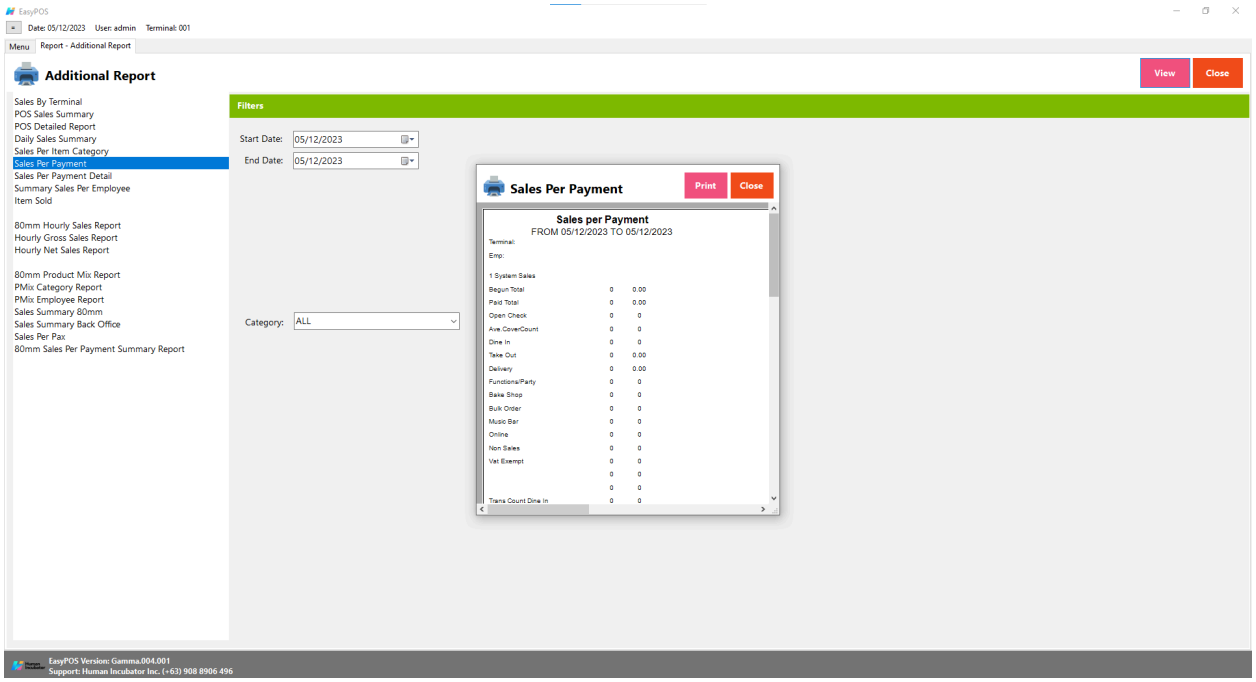
- Select Category, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to print csv file format report



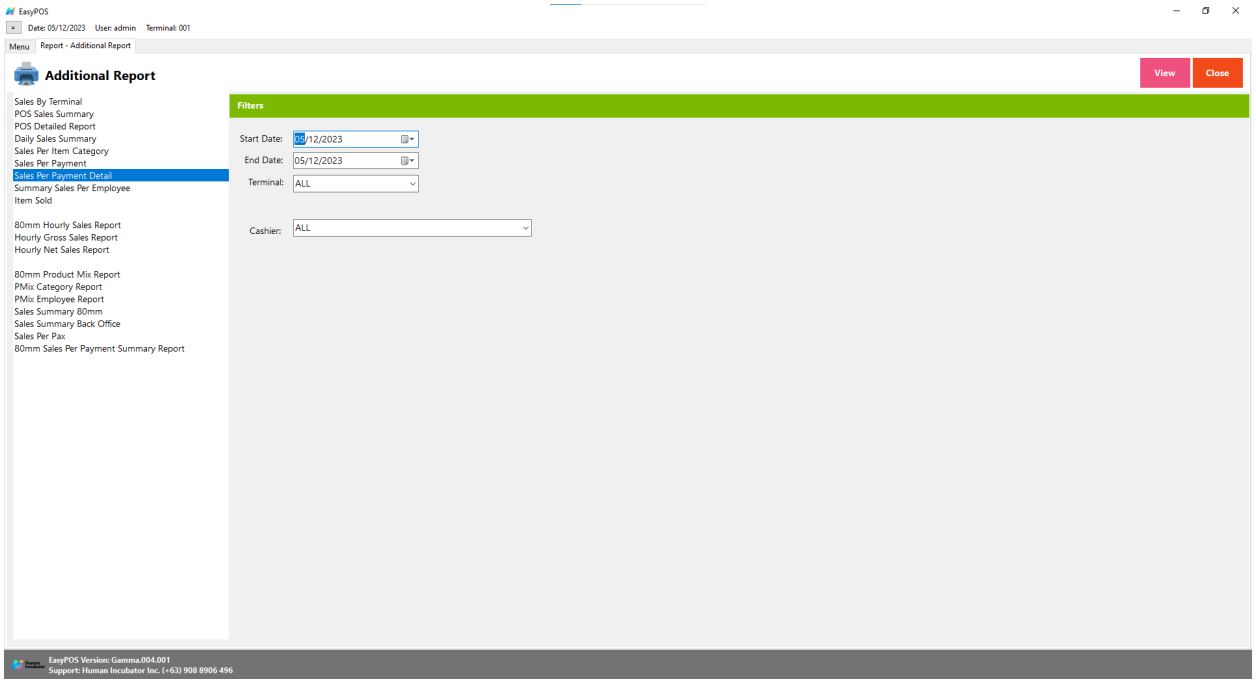
Sales Per Payment



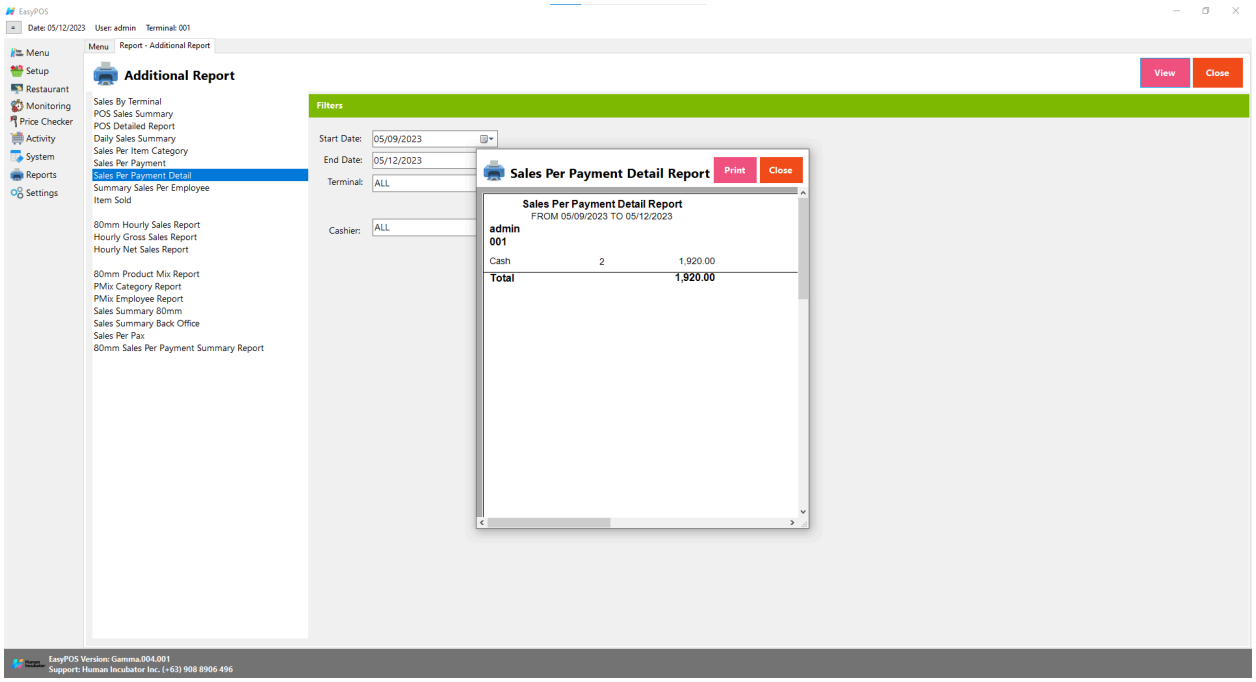
- Select Category, Start Date and End Date.
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



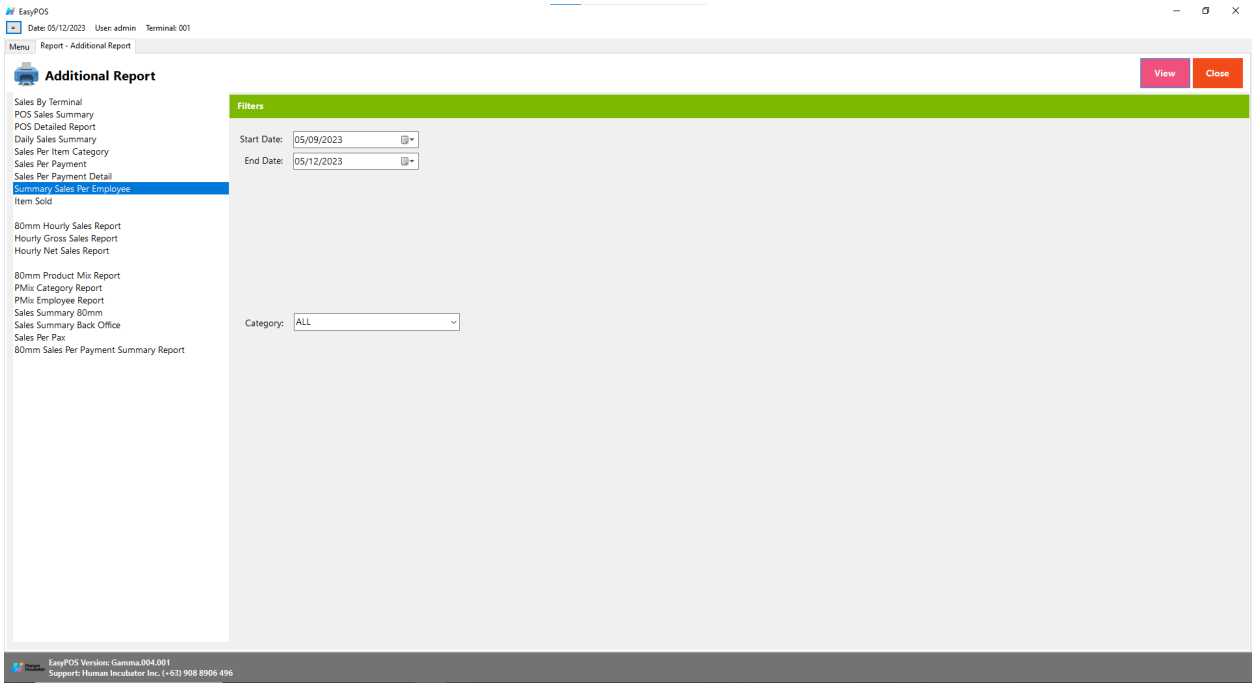
Sales Per Payment Detail



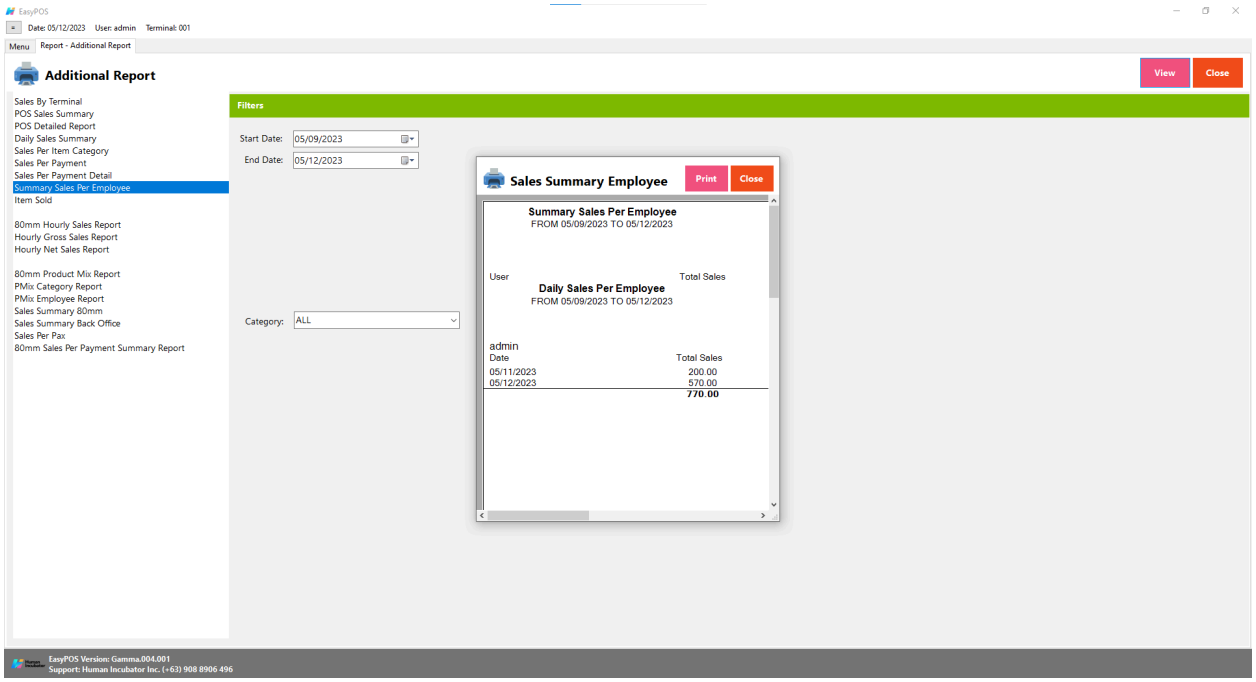
- Select Cashier, Terminal, Start Date and End Date.
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



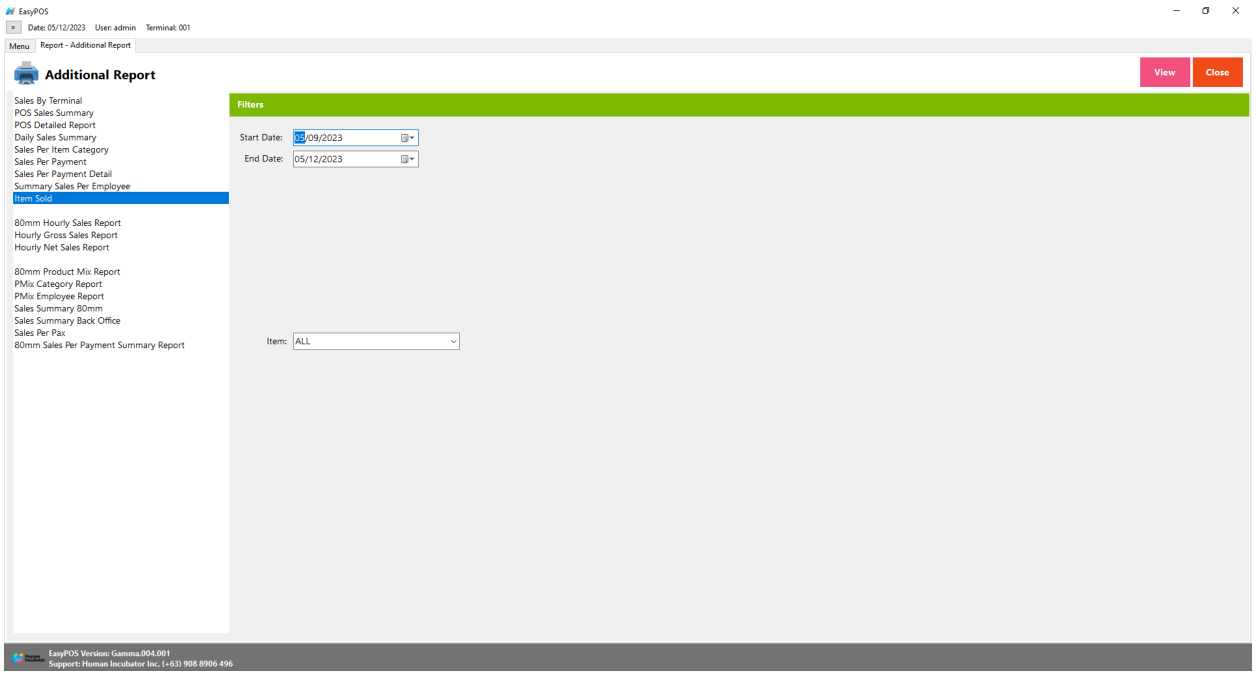
Summary Sales Per Employee



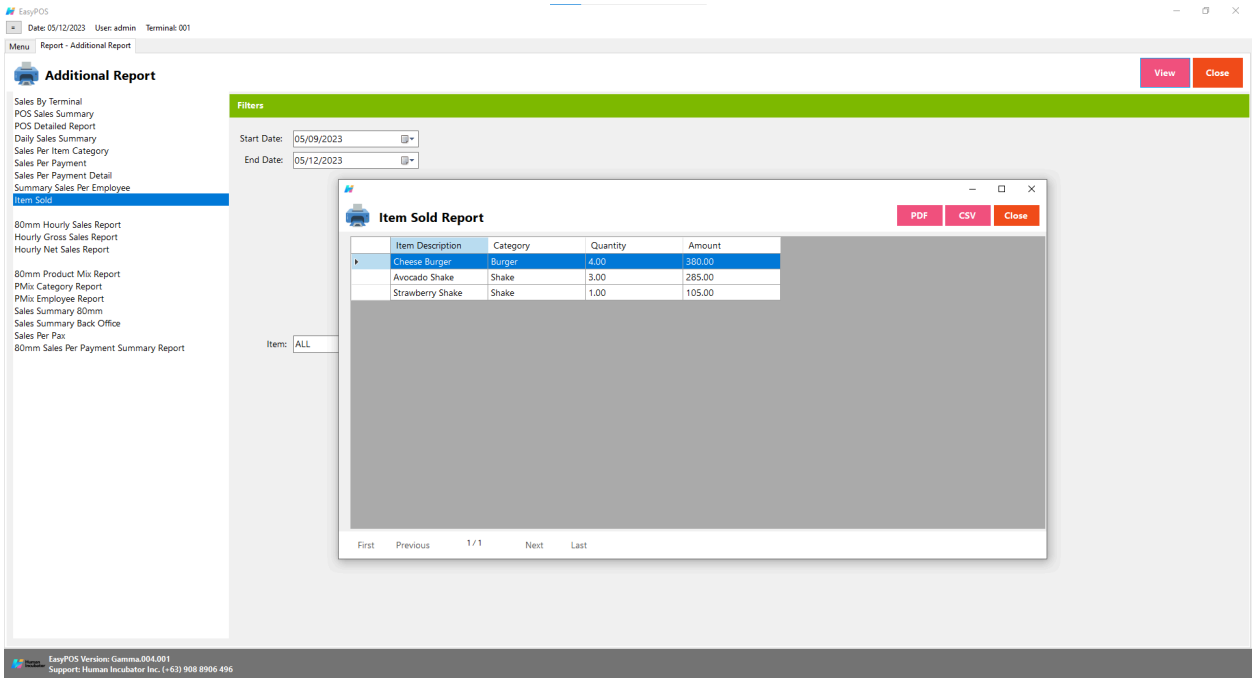
- Select Category, Start Date and End Date.
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



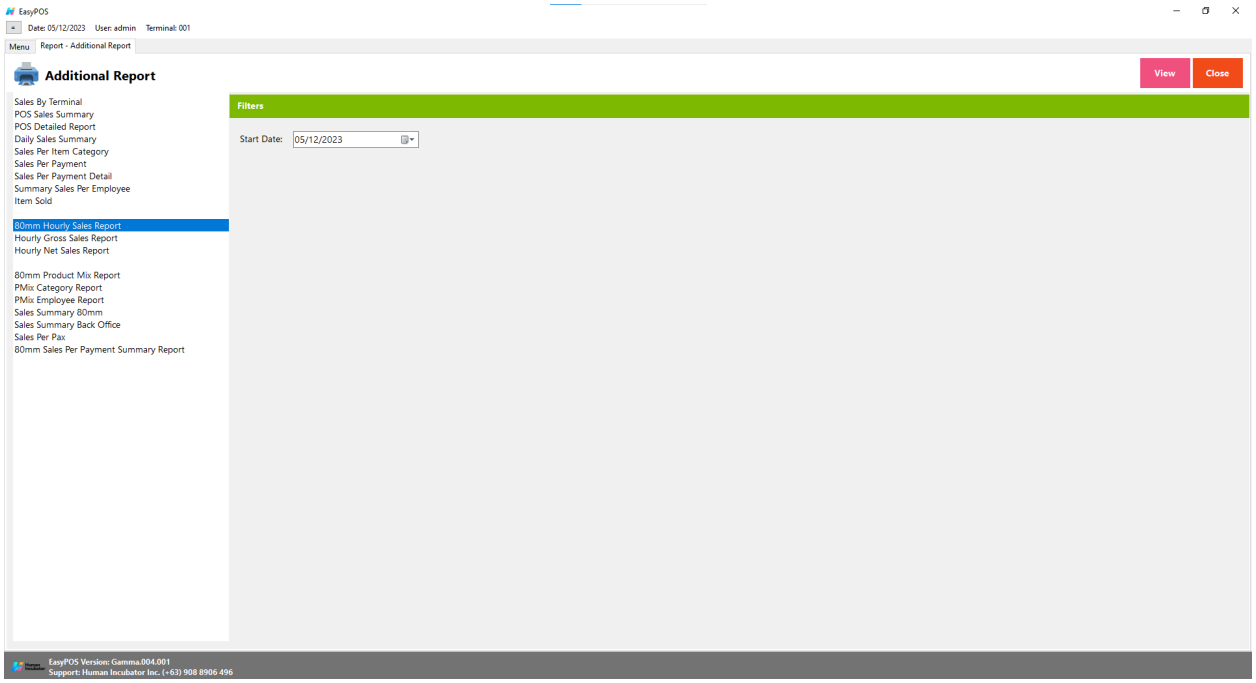
Item Sold



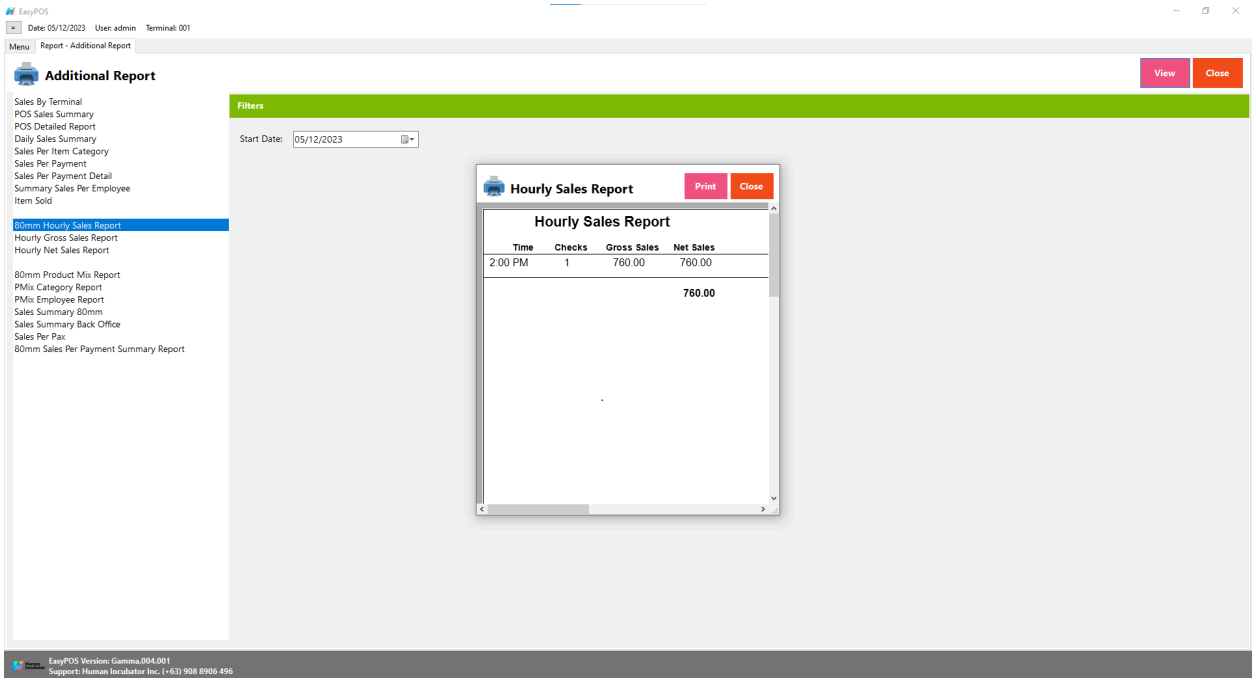
- Select Item, Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



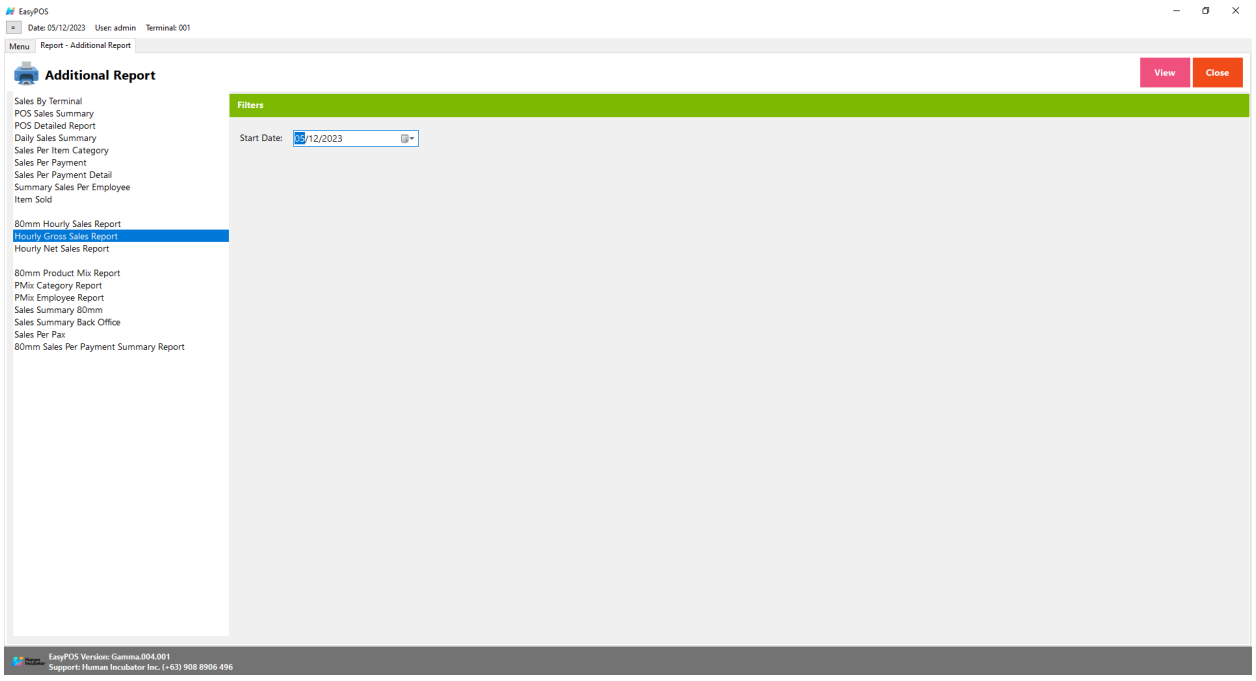
80mm Hourly Sales Report



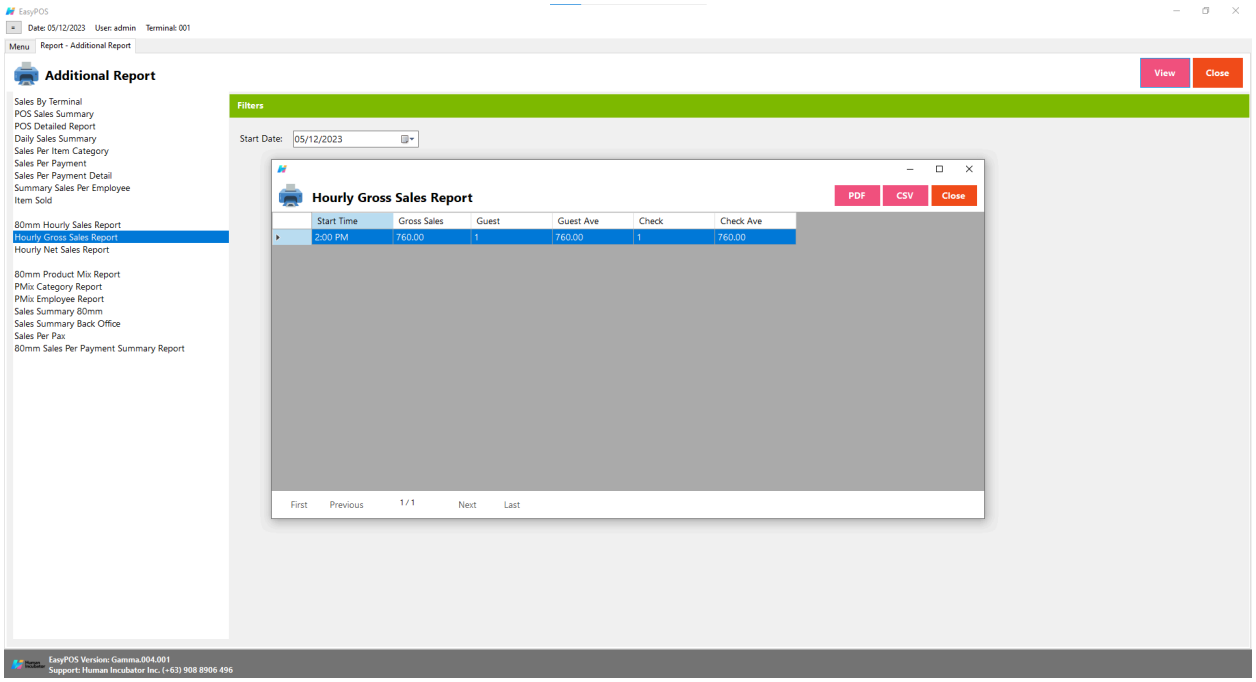
- Select Start Date.
- Click the **View** button to view the report
- Click **Print** button to print pdf file report



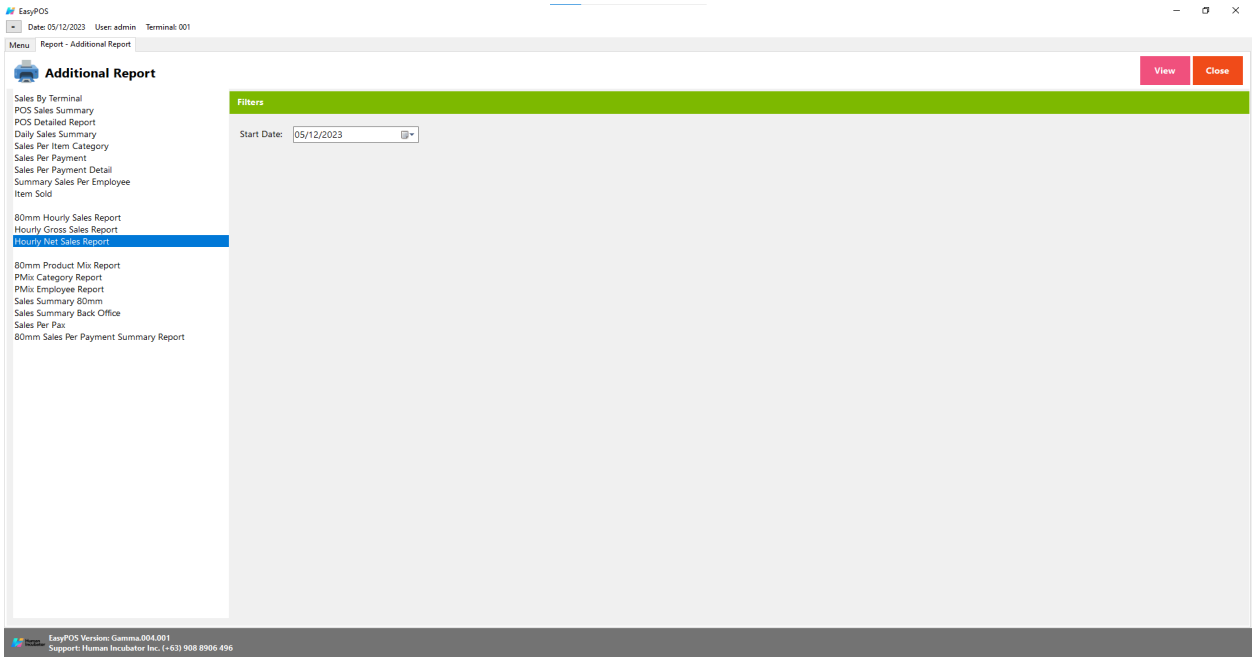
Hourly Gross Sales Report



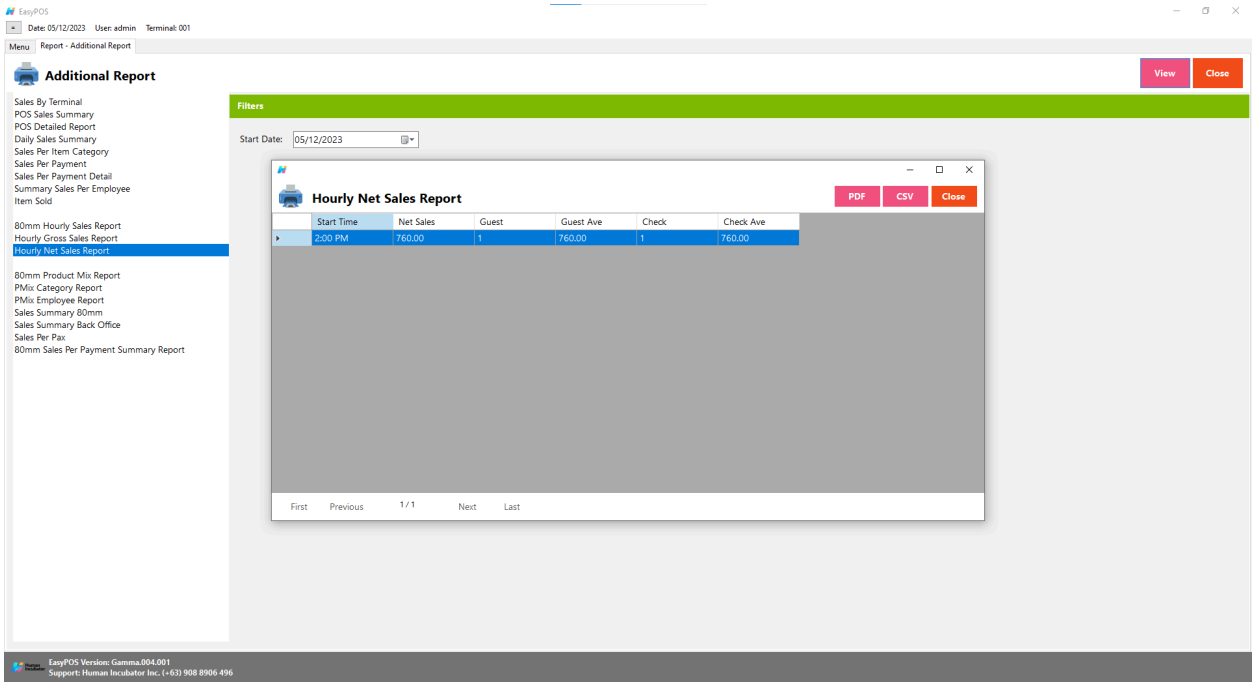
- Select Start Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



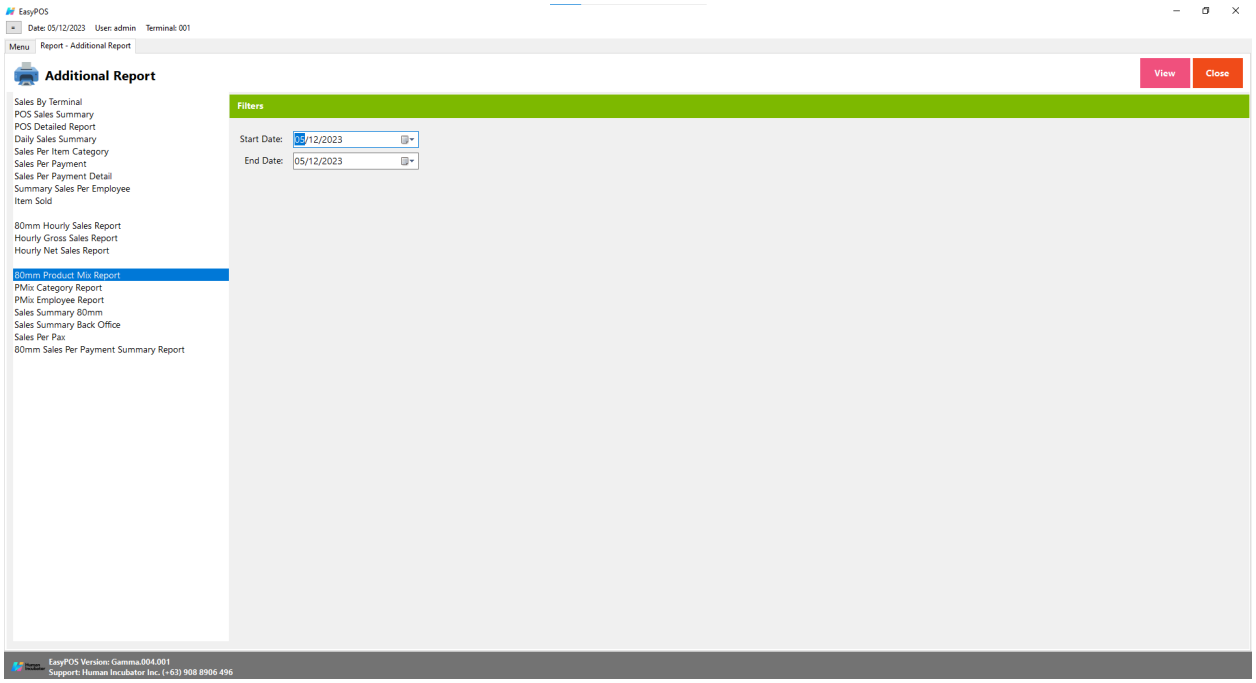
Hourly Net Sales Report



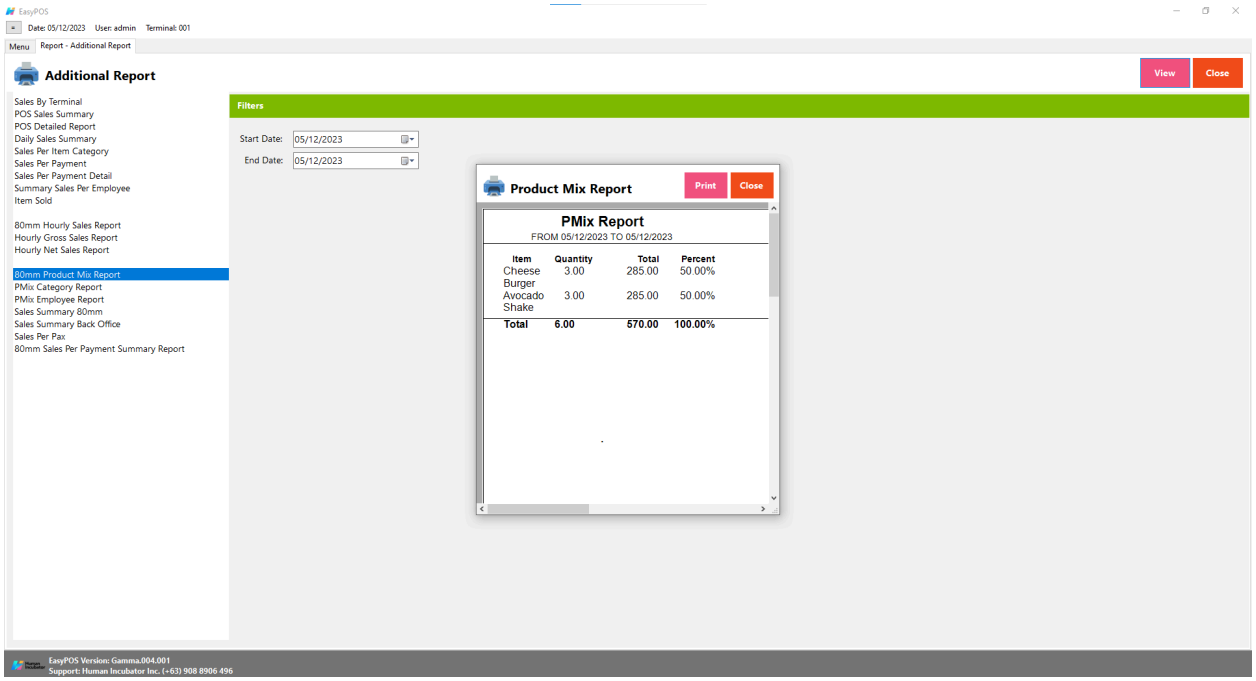
- Select Start Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



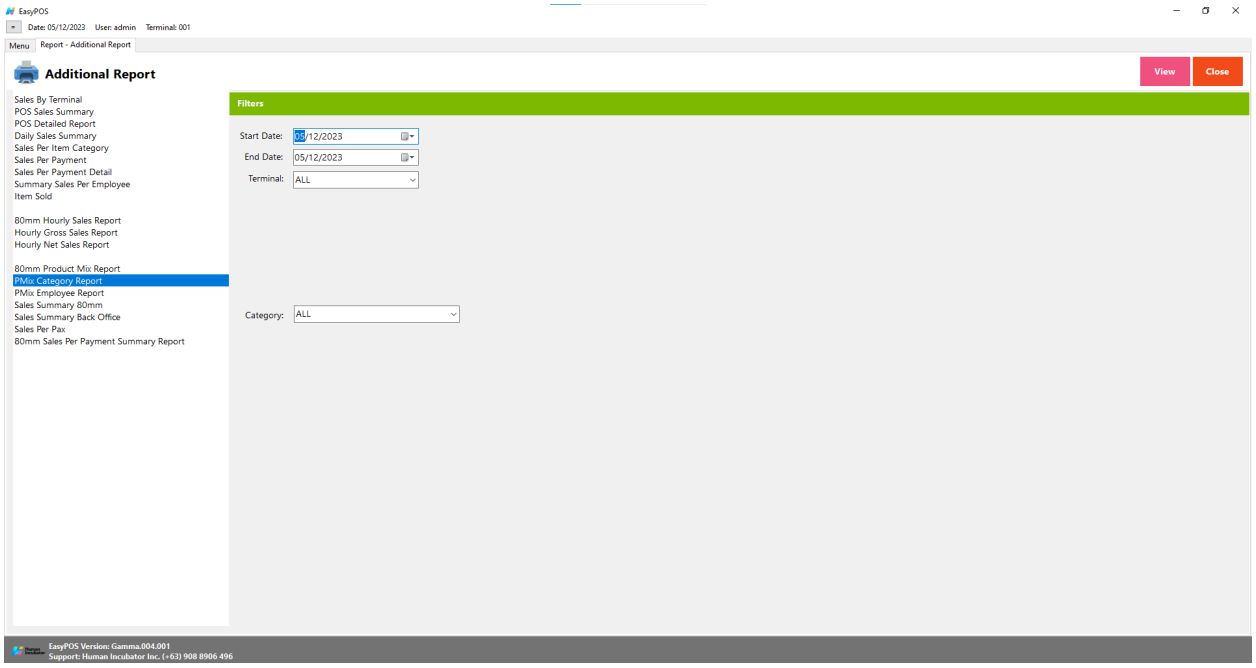
80mm Product Mix Report



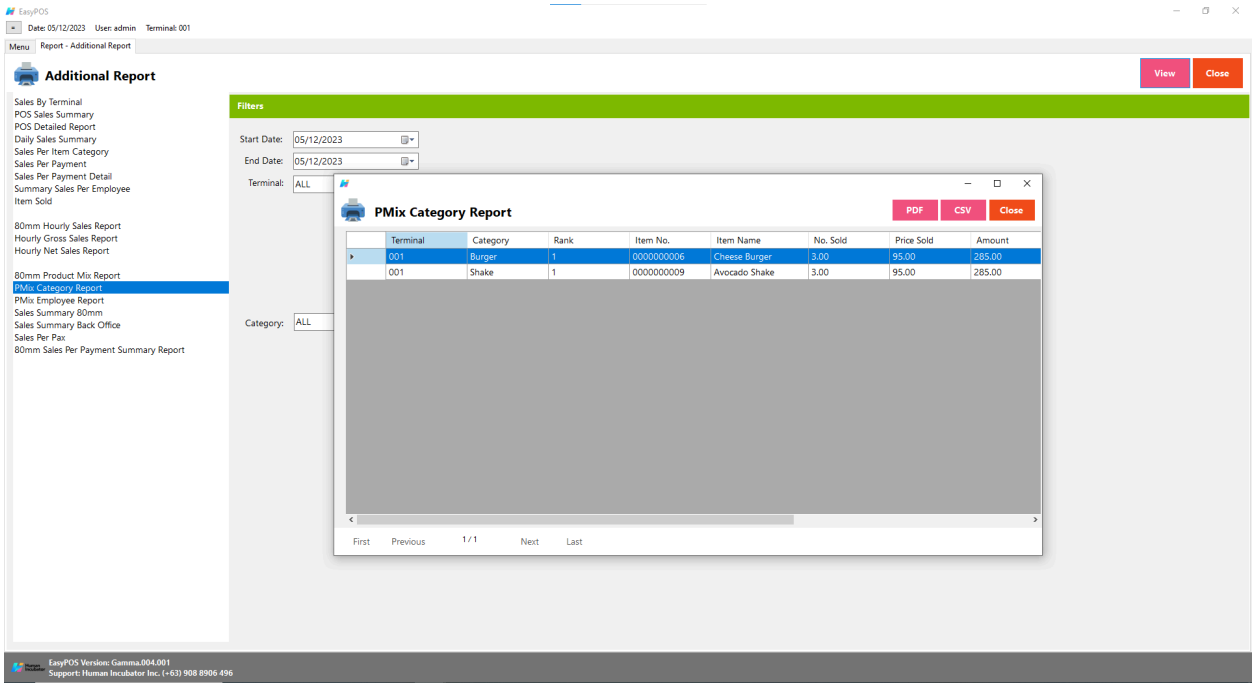
- Select Start Date and End Date.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



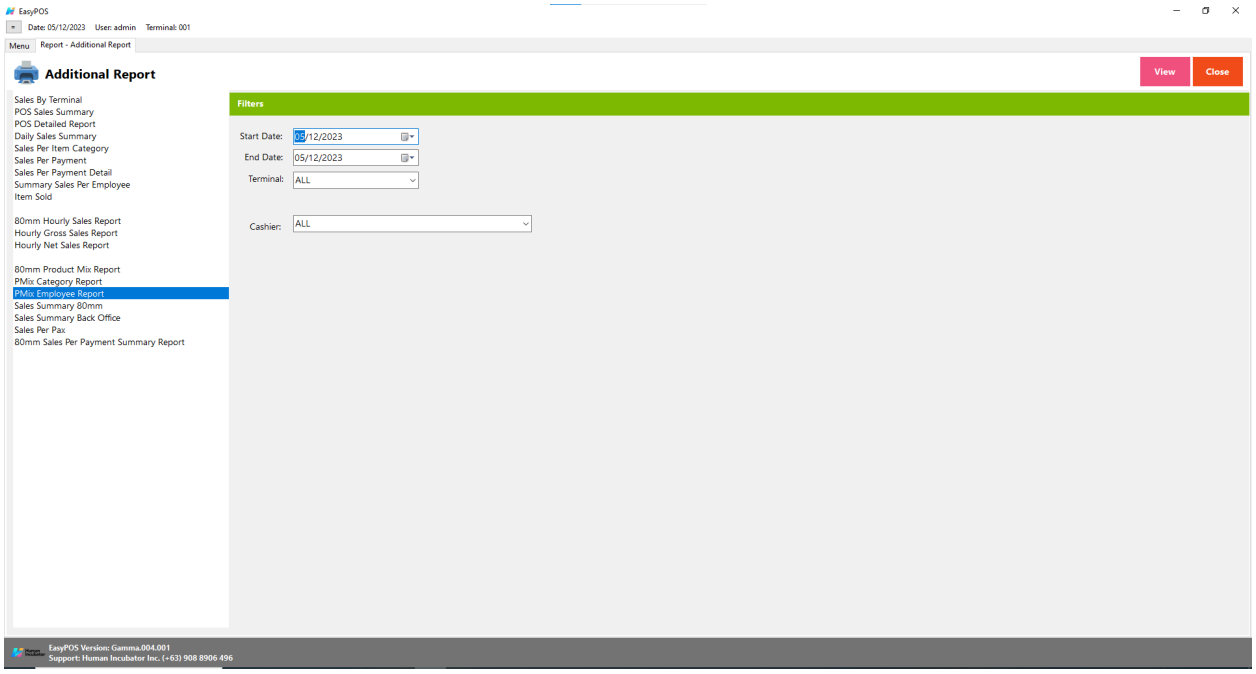
PMix Category Report



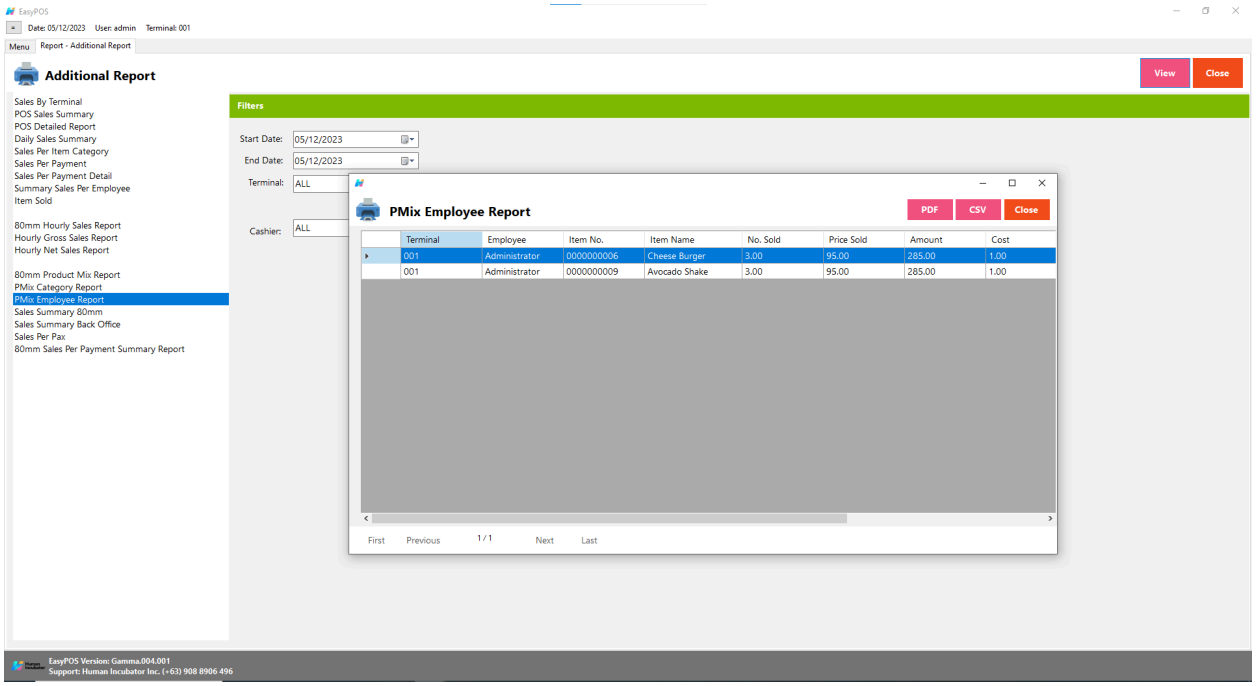
- Select Start Date, End Date, Terminal, and Category..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



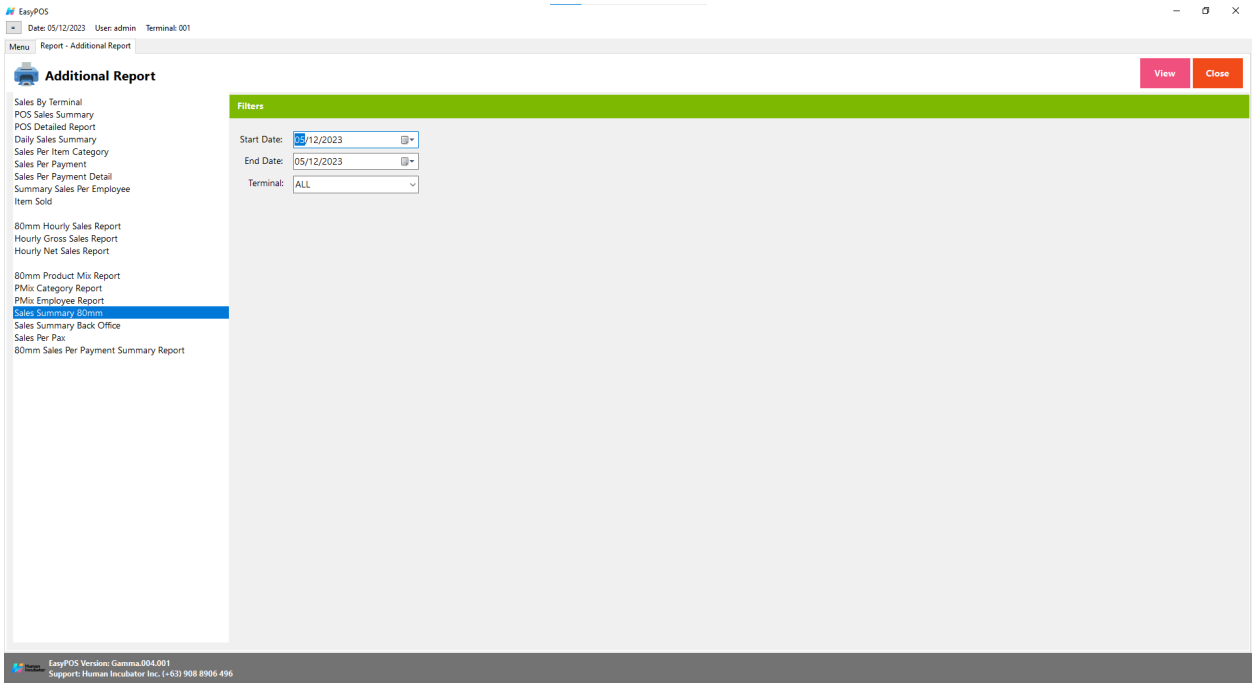
PMix Employee Report



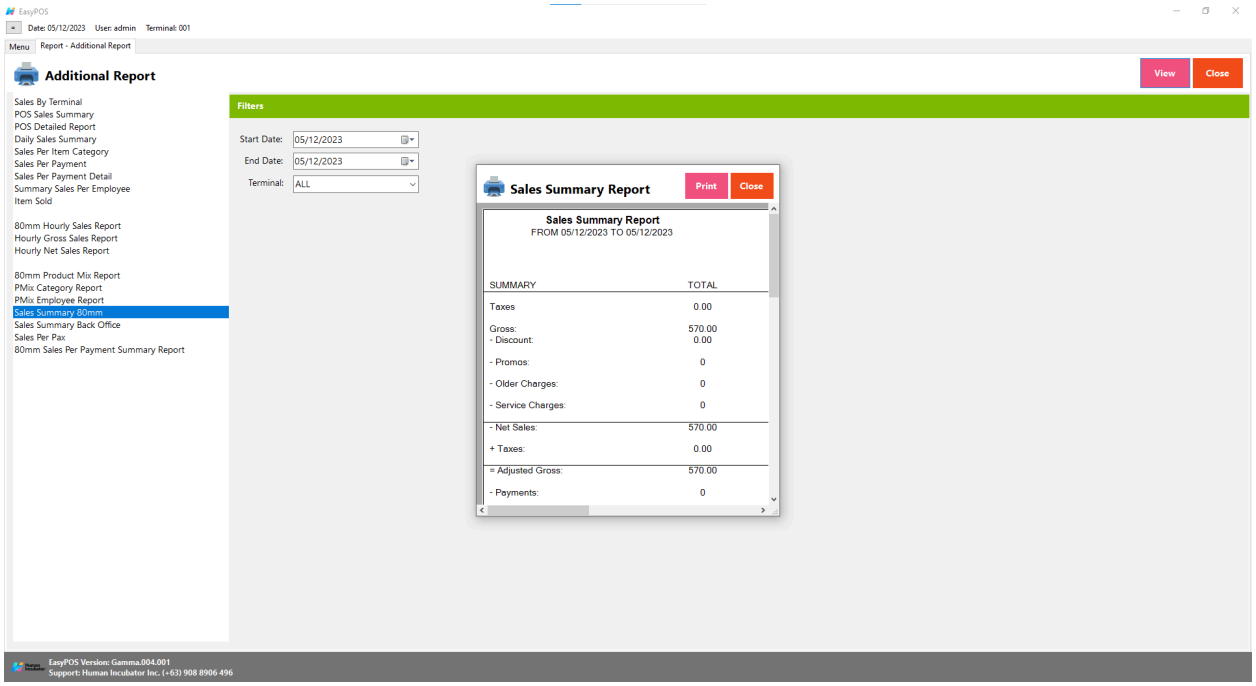
- Select Start Date, End Date, Terminal, and Cashier..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



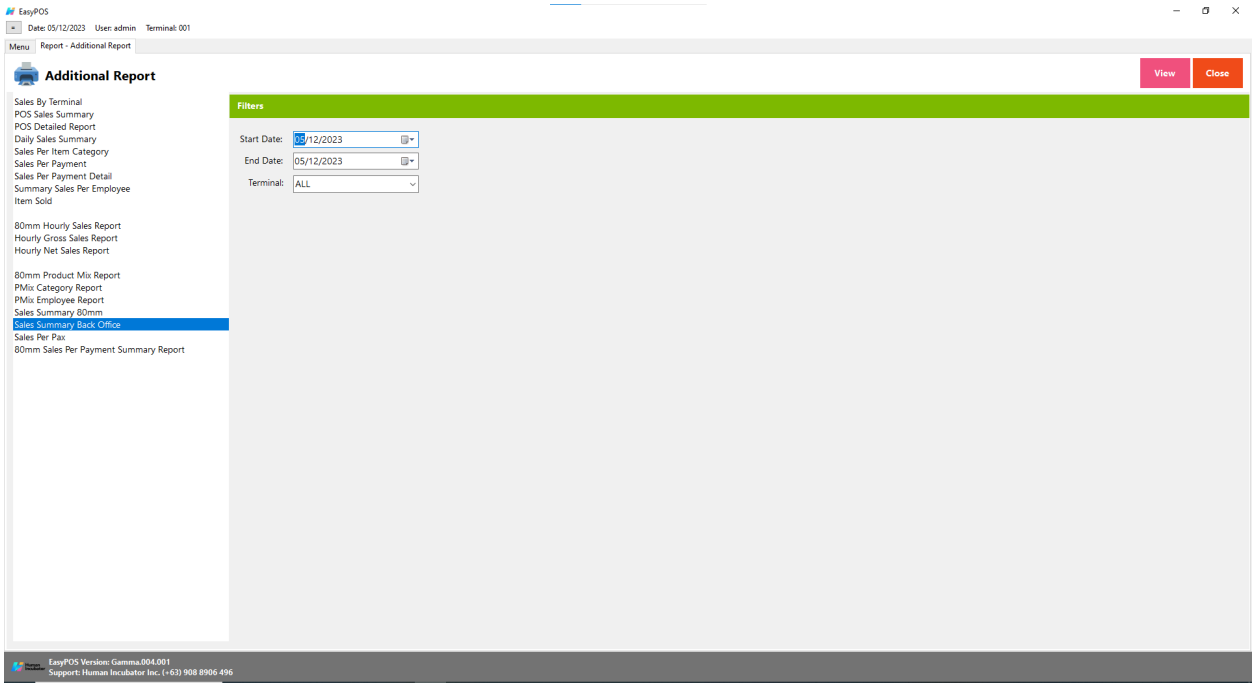
Sales Summary 80mm



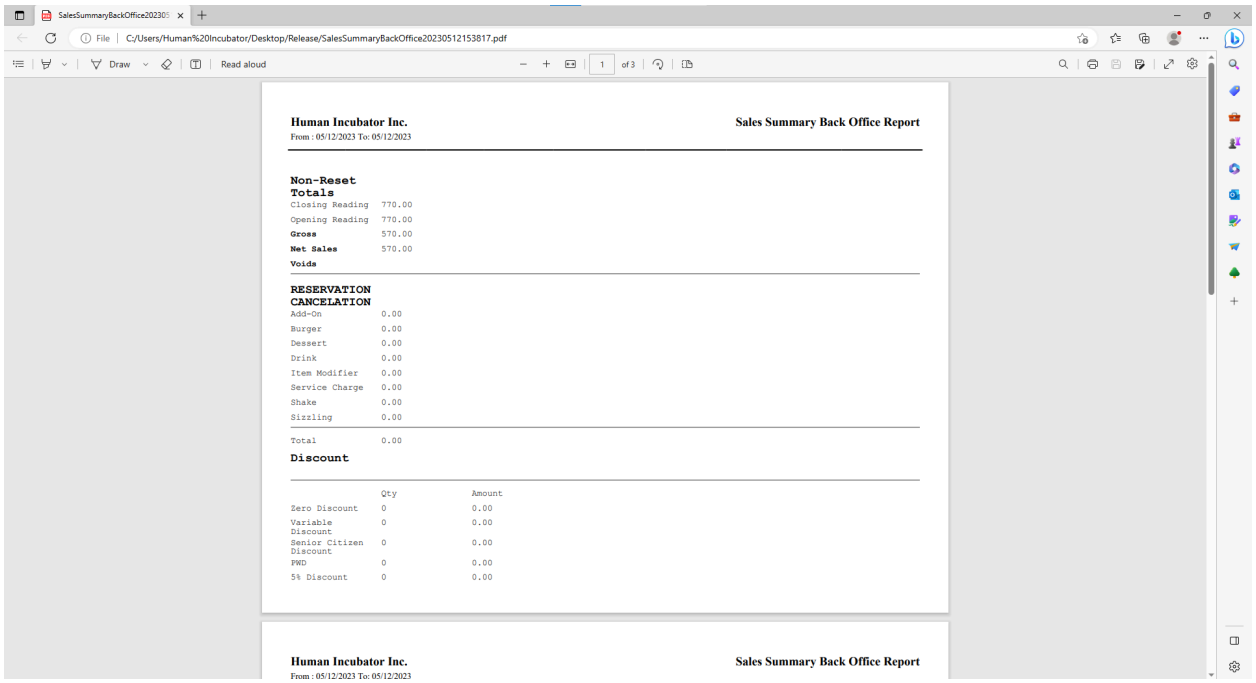
- Select Start Date, End Date, Terminal..
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



Sales Summary Back Office



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



Human Incubator Inc.
From : 05/12/2023 To: 05/12/2023

Sales Summary Back Office Report

Non-Reset Totals

Closing Reading	770.00
Opening Reading	770.00
Gross	570.00
Net Sales	570.00
Voids	

RESERVATION CANCELATION

Add-On	0.00
Burger	0.00
Dessert	0.00
Drink	0.00
Item Modifier	0.00
Service Charge	0.00
Shake	0.00
Sizzling	0.00
Total	0.00

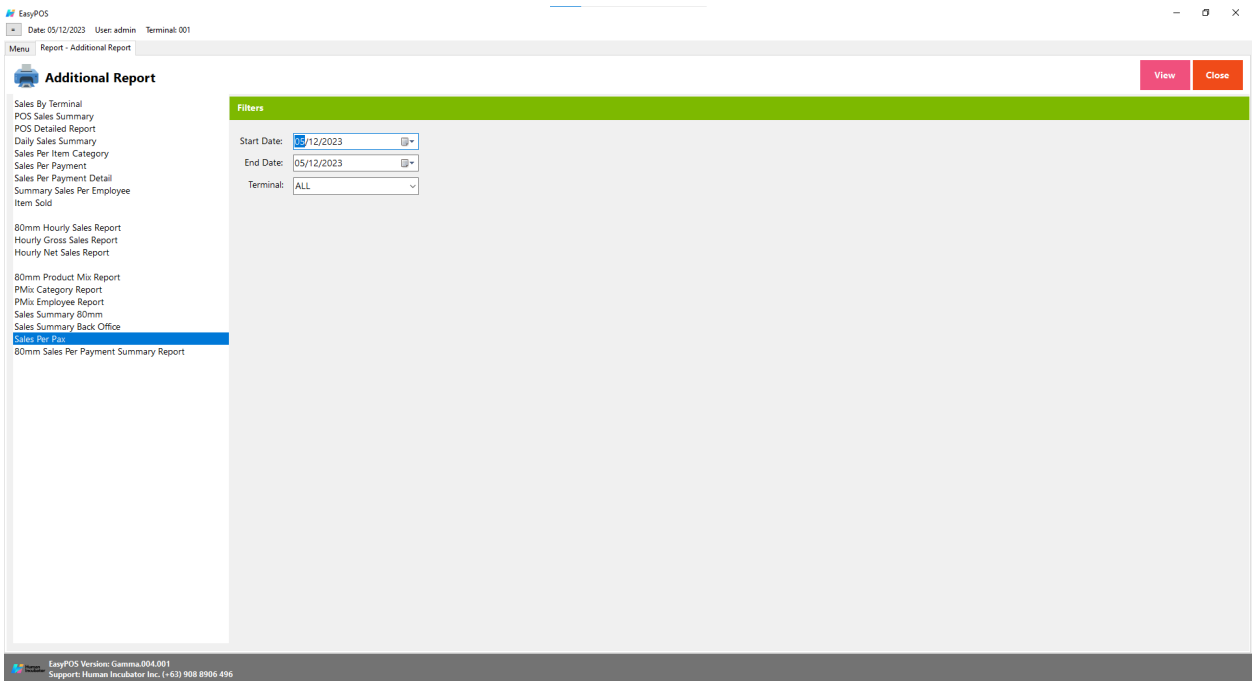
Discount

	Qty	Amount
Zero Discount	0	0.00
Variable Discount	0	0.00
Senior Citizen Discount	0	0.00
PWD	0	0.00
5% Discount	0	0.00

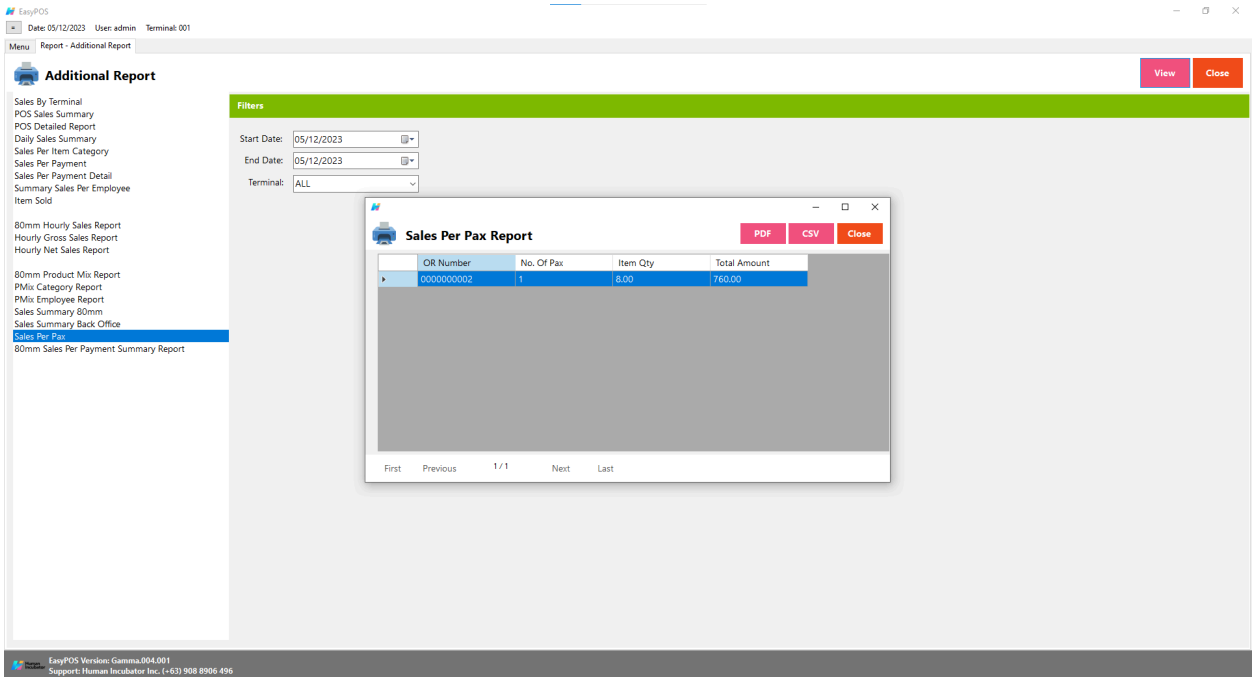
Human Incubator Inc.
From : 05/12/2023 To: 05/12/2023

Sales Summary Back Office Report

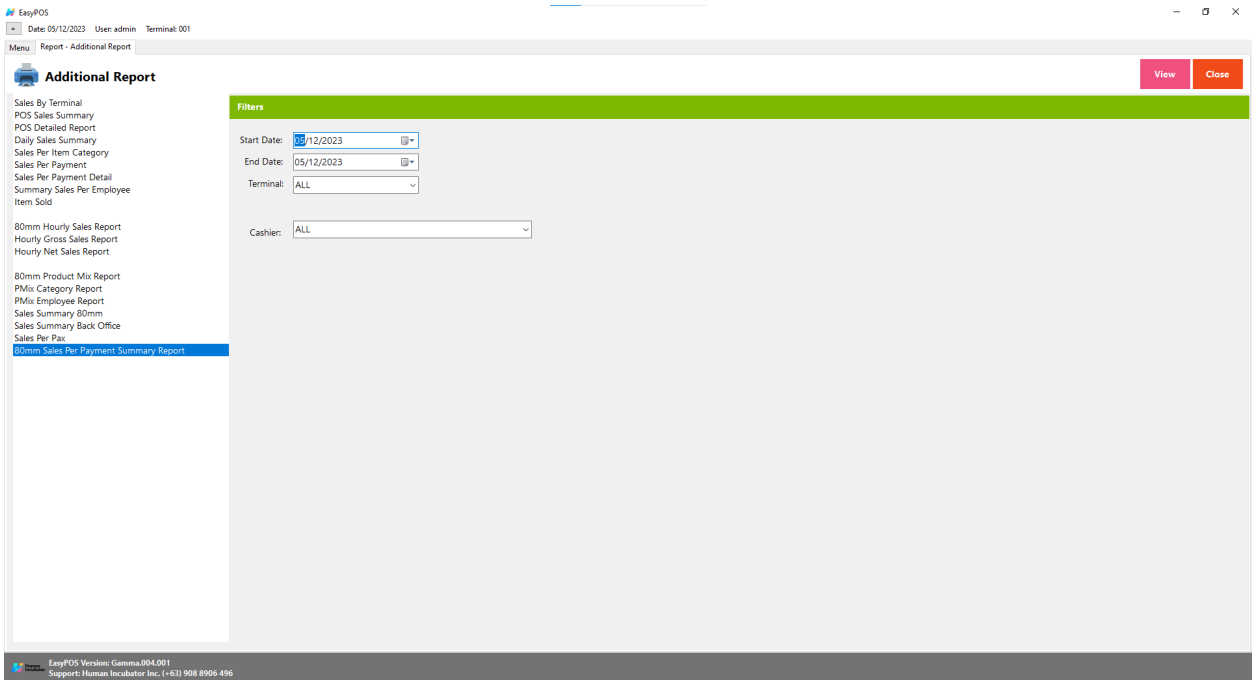
Sales Per Pax



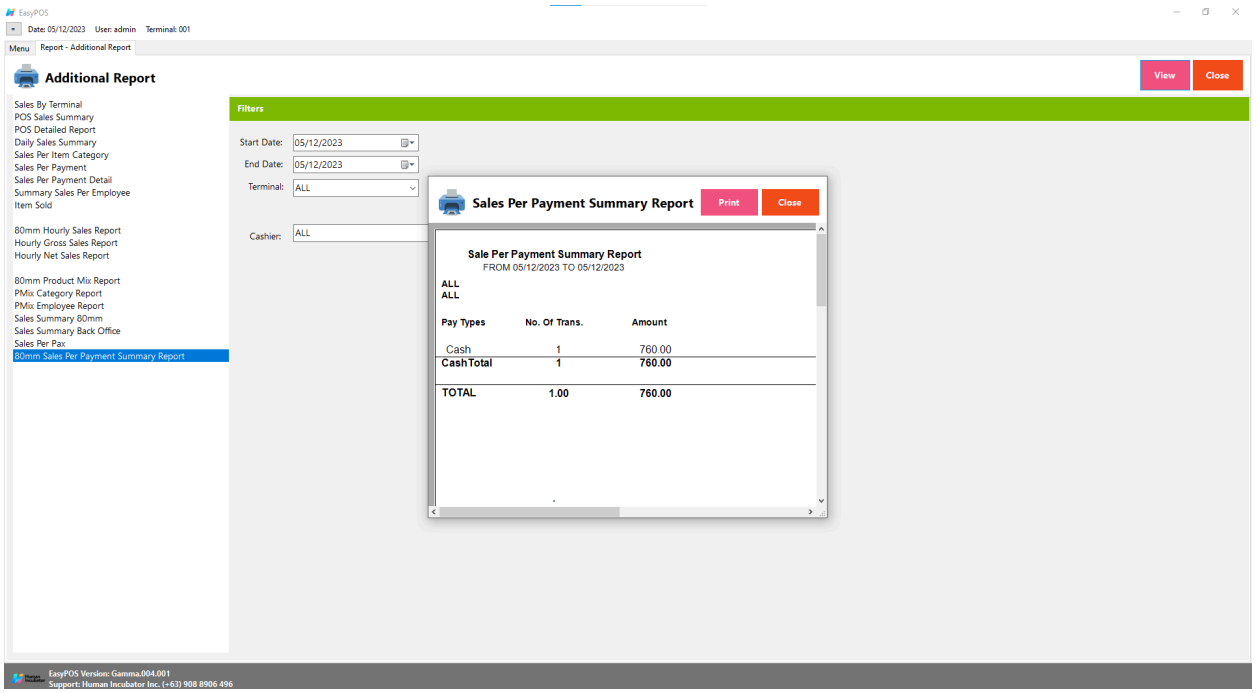
- Select Start Date, End Date, Terminal.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report
- Click **CSV** button to generate csv file format report



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

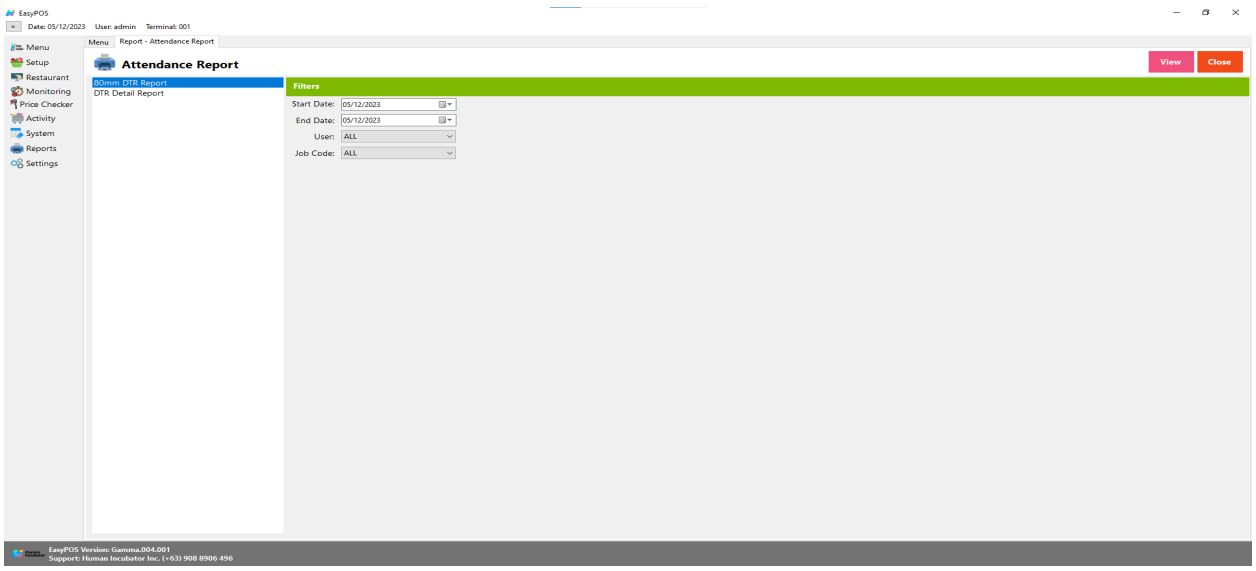


Attendance Report

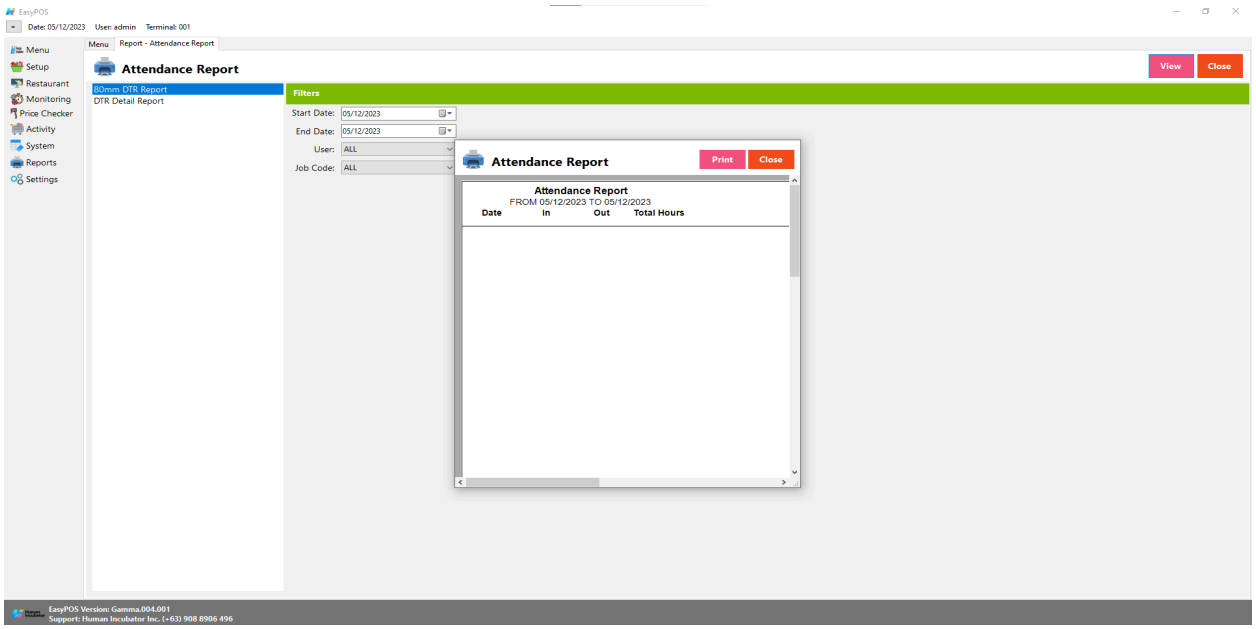
Overview

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

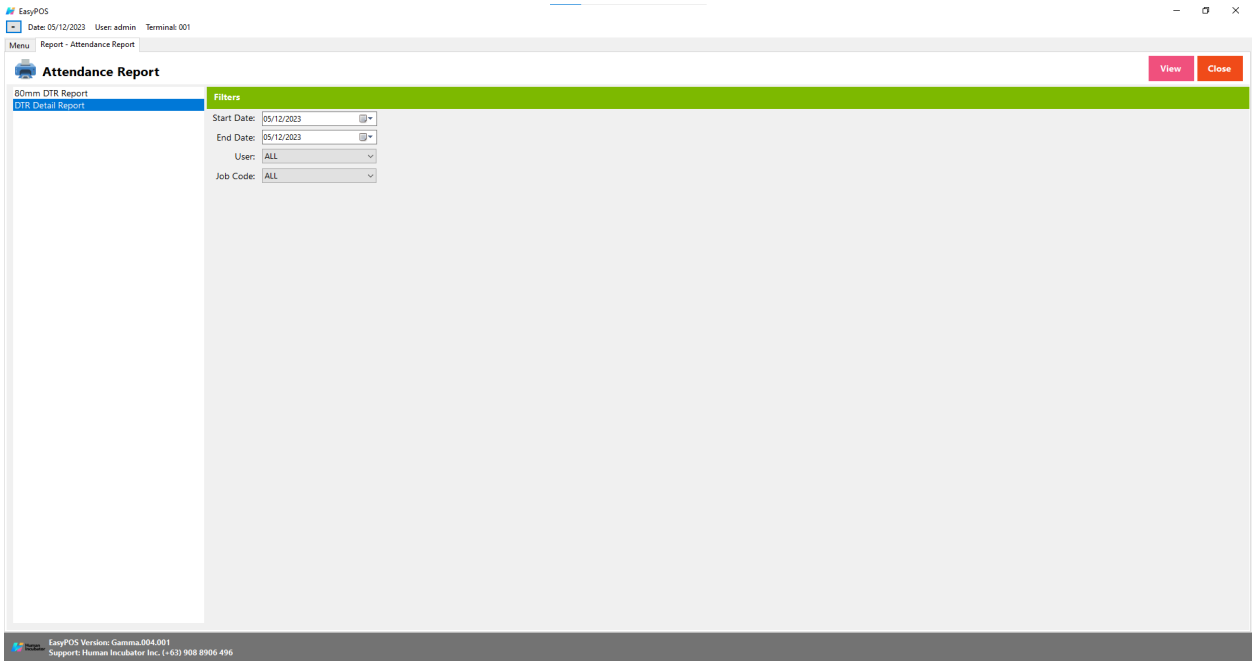
80mm DTR Report



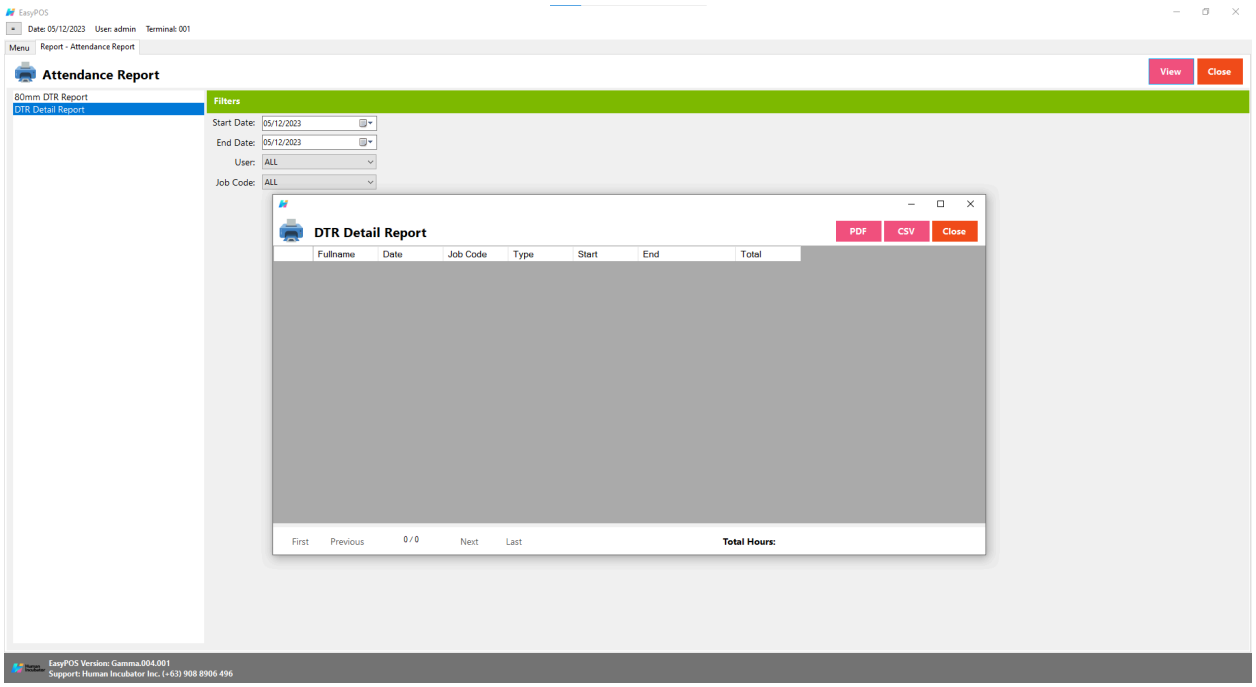
- Select Start Date, End Date, User and Job Code.
- Click the **View** button to view the report
- Click **PDF** button to print pdf file report



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



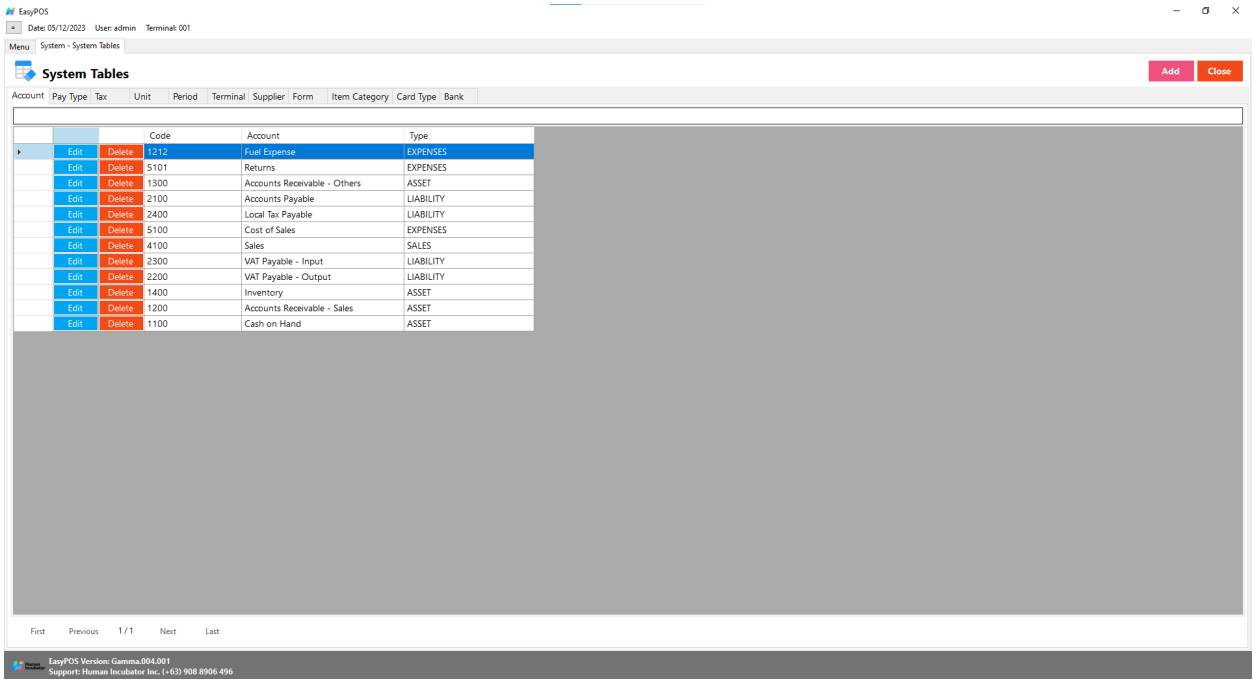
X: System

System - System Tables

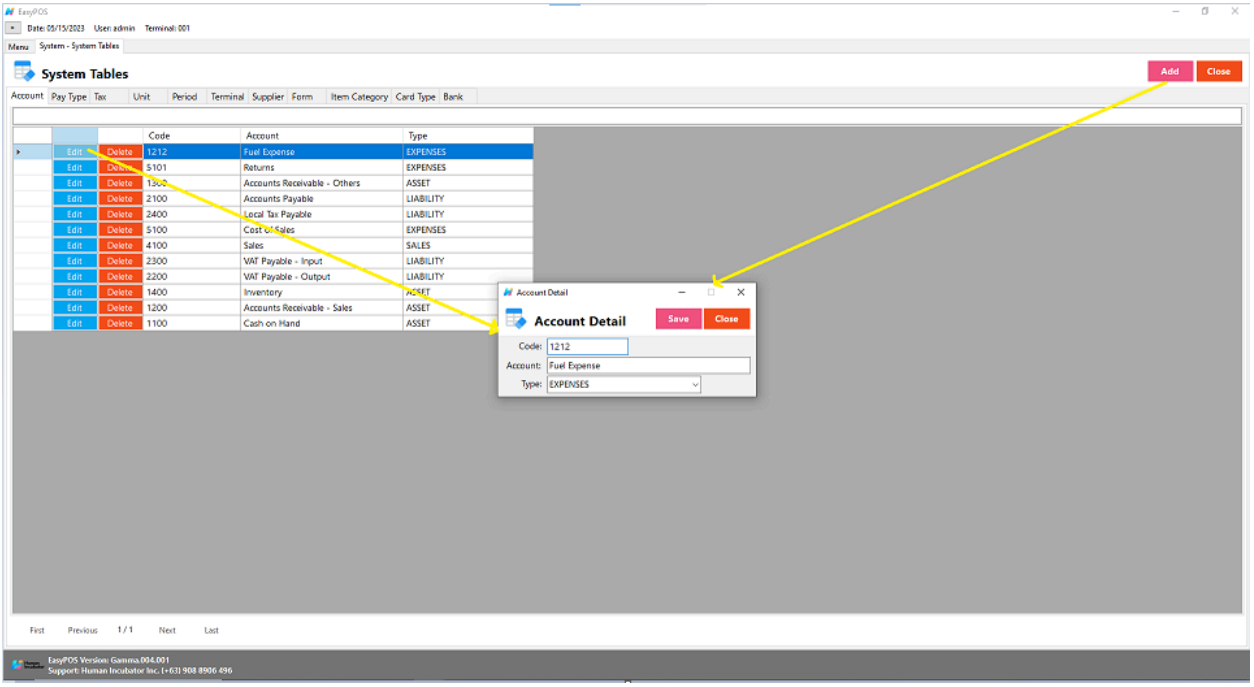
Overview

- **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

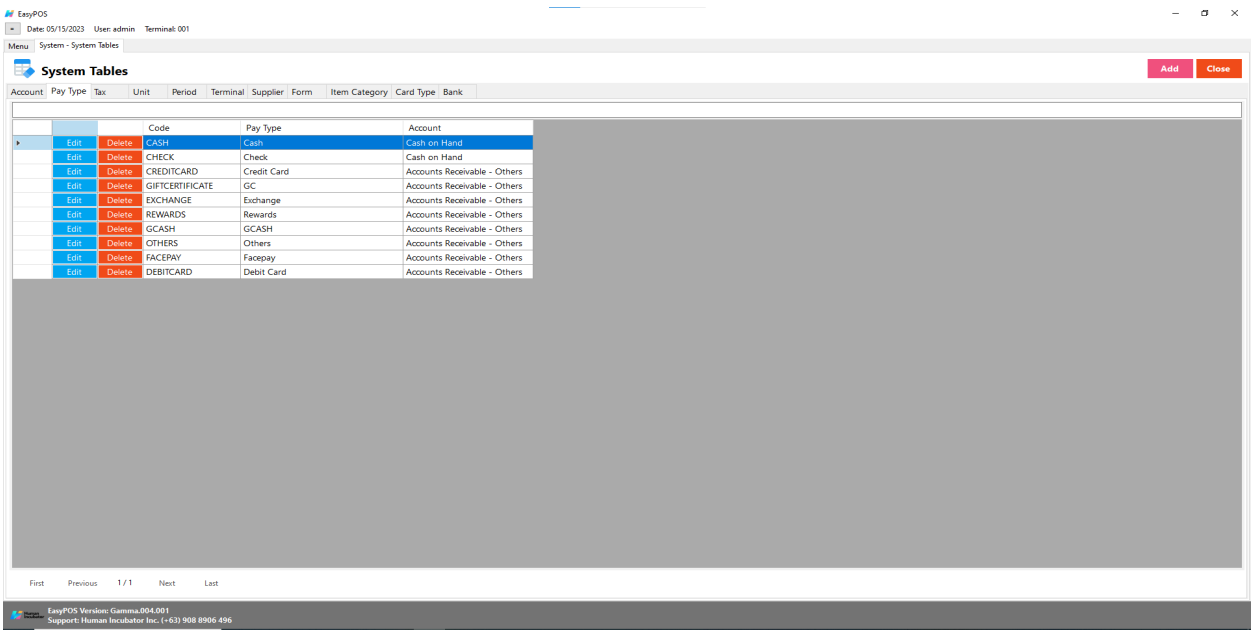


- Shows the list of all added accounts.
- Delete button will proceed to deleting account details.
- Edit button will proceed to updating account details.
- Close button will proceed to closing the system table module.



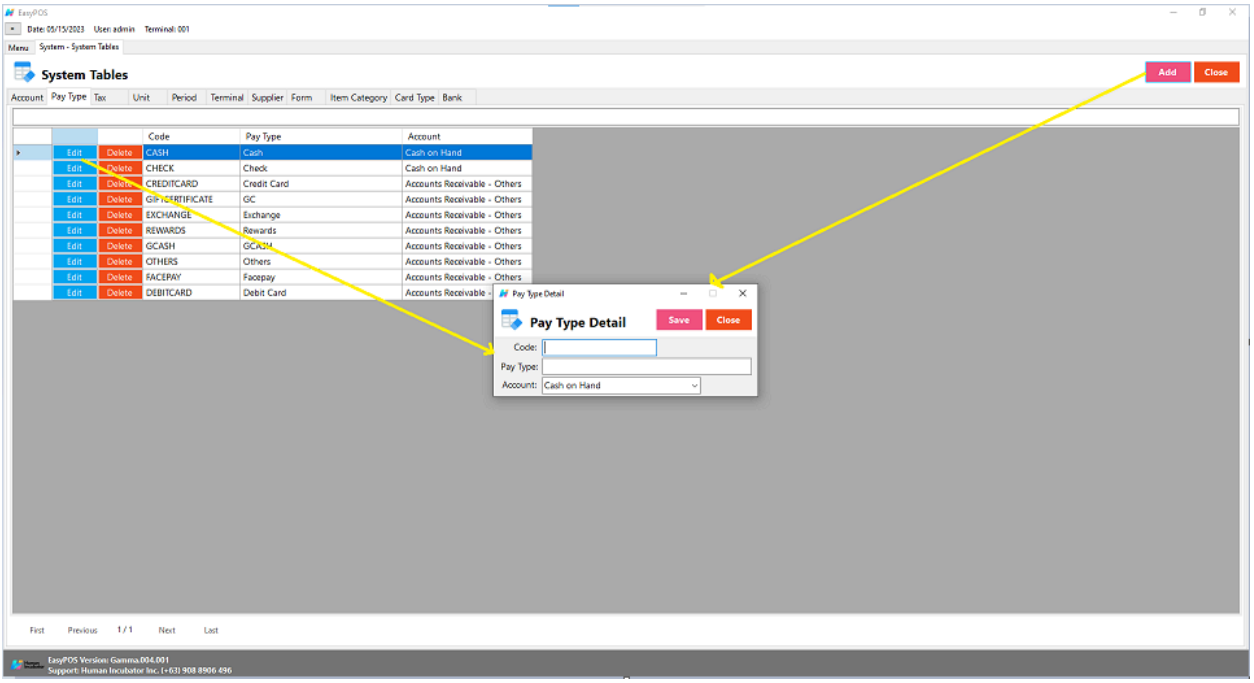
- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
  - Code, Account and Type
- Click the Save button to save account details.

Pay Type



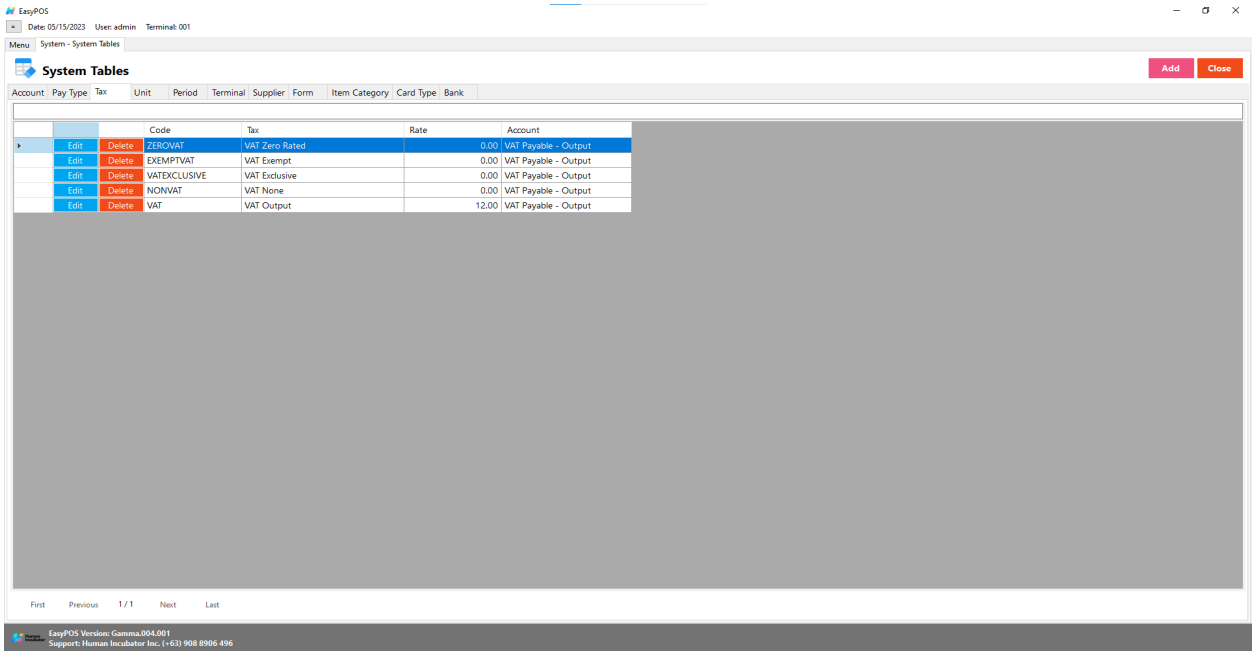
- Shows the list of all added pay types.

- 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.

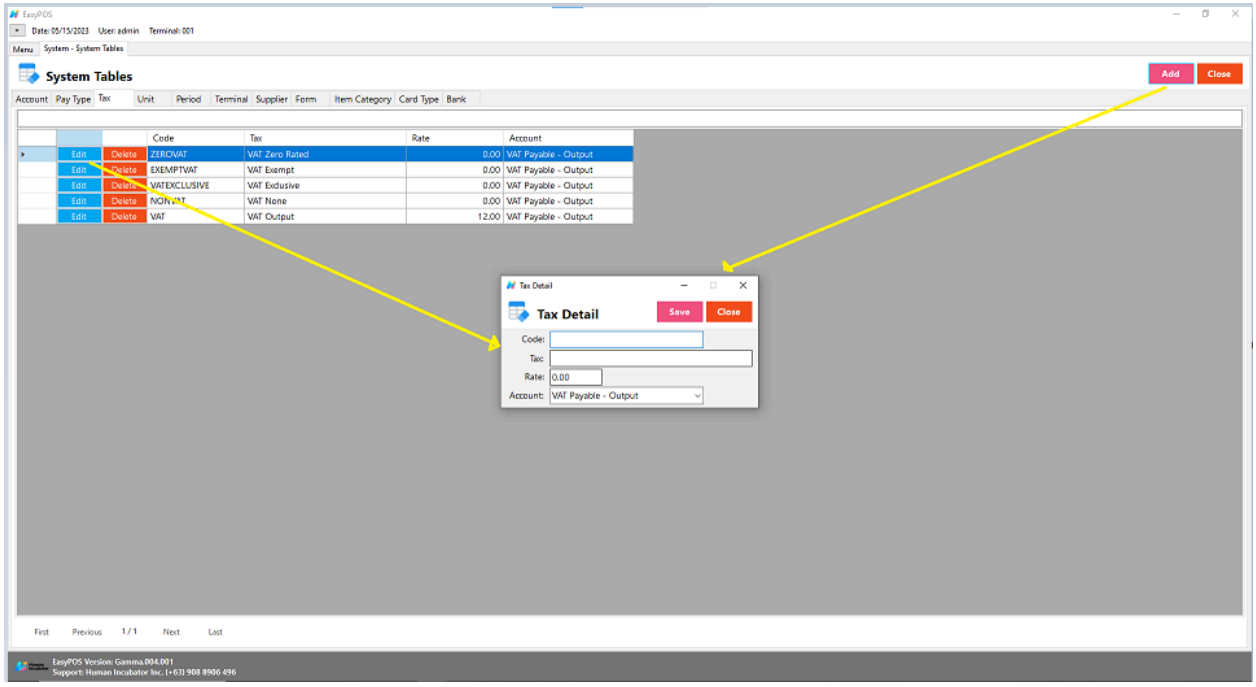


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Code, Pay Type and Account
- Click the Save button to save pay type details.

Tax



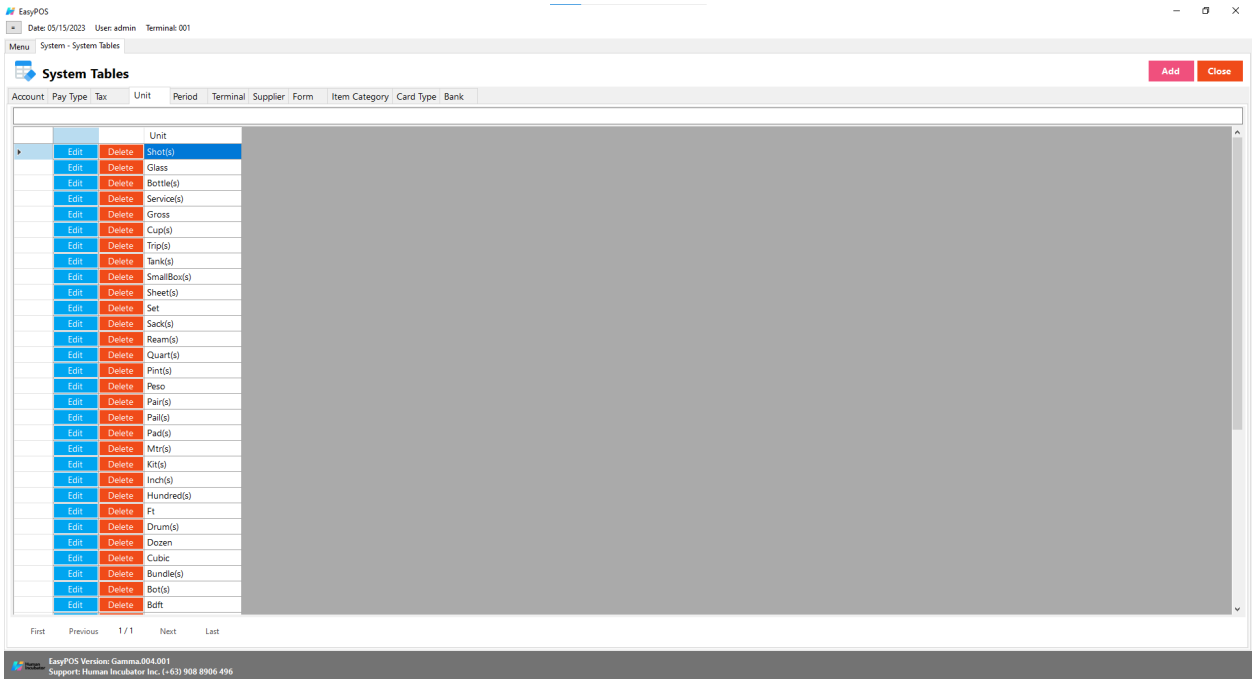
- Shows the list of all added taxes.
- Delete button will proceed to deleting tax details.
- Edit button will proceed to updating tax details.
- Close button will proceed to closing the system table module.



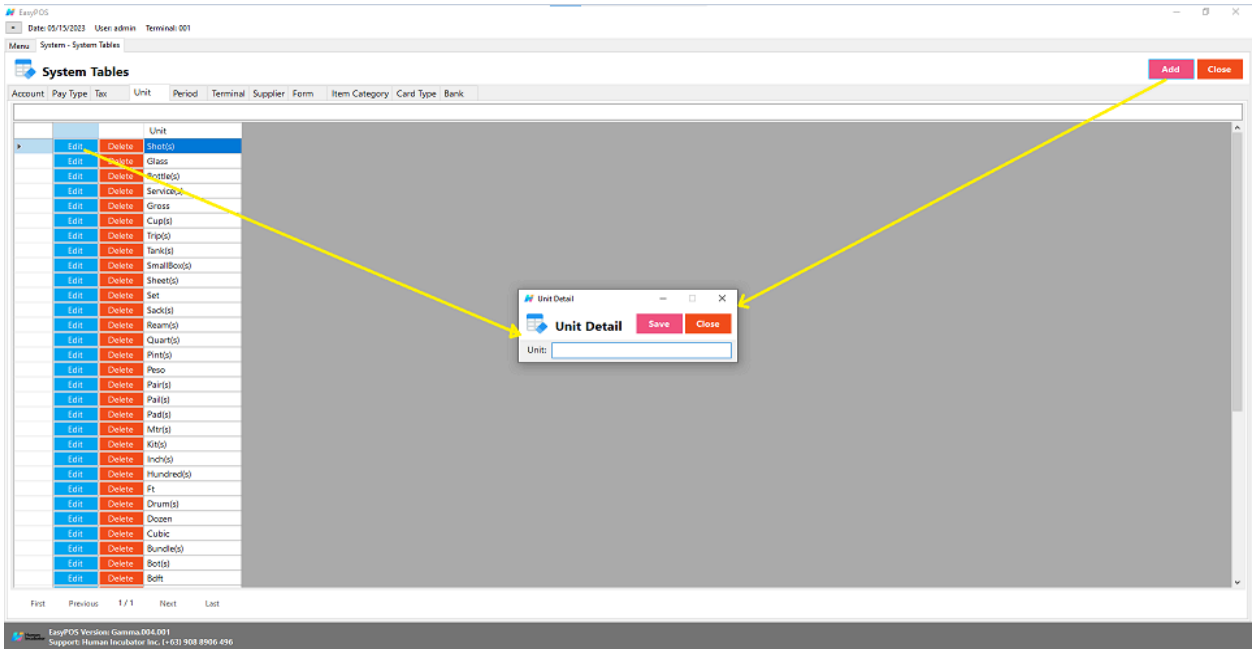
- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.

- Fill up all the necessary information like:
    - Code, Tax, Rate and Account
- Click the Save button to save tax details.

Unit

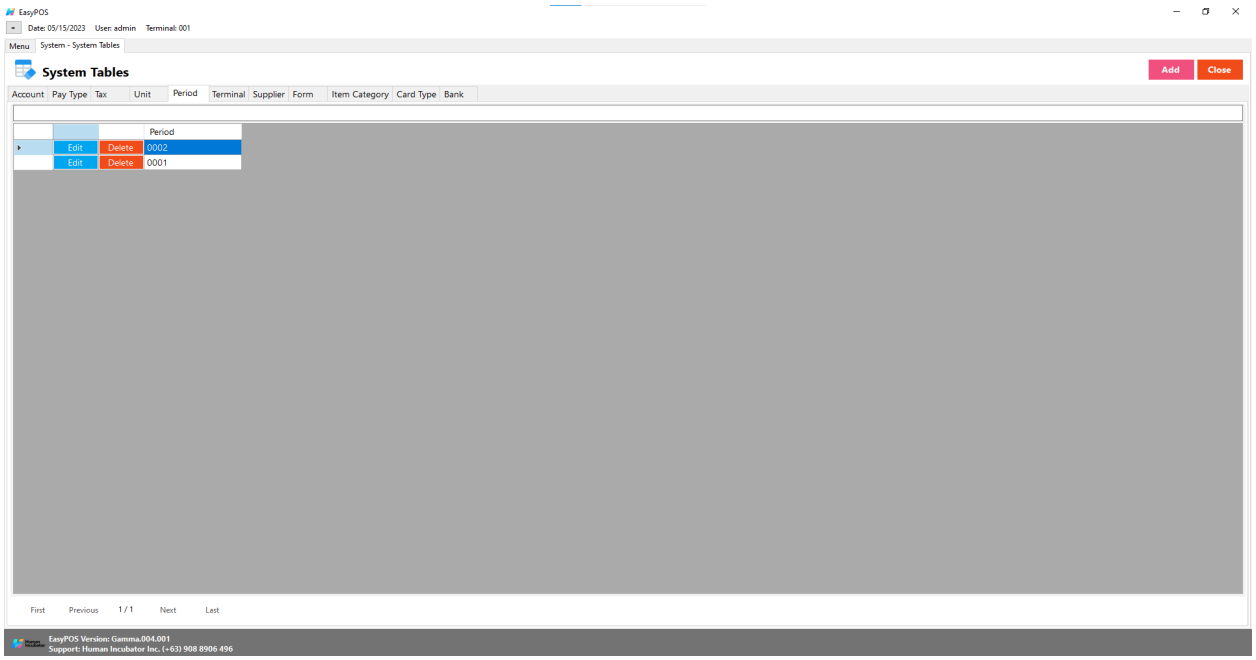


- Shows the list of all added units.
- Delete button will proceed to deleting unit details.
- Edit button will proceed to updating unit details.
- Close button will proceed to closing the system table module.

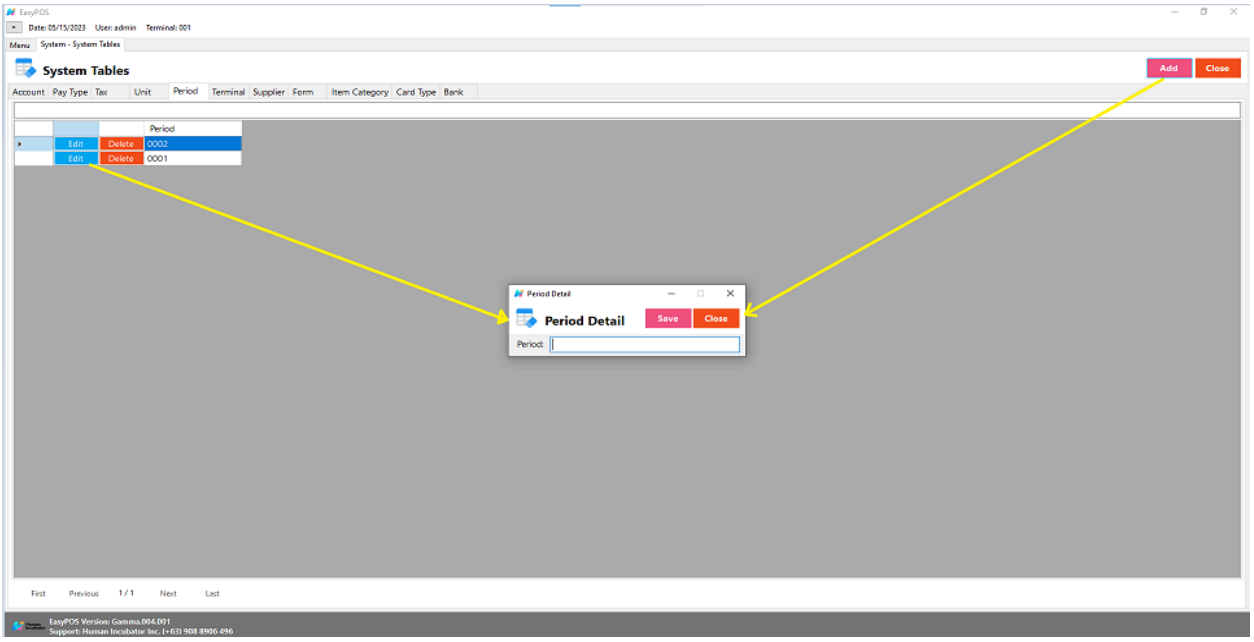


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
  - Unit
- Click the Save button to save unit details.

Period



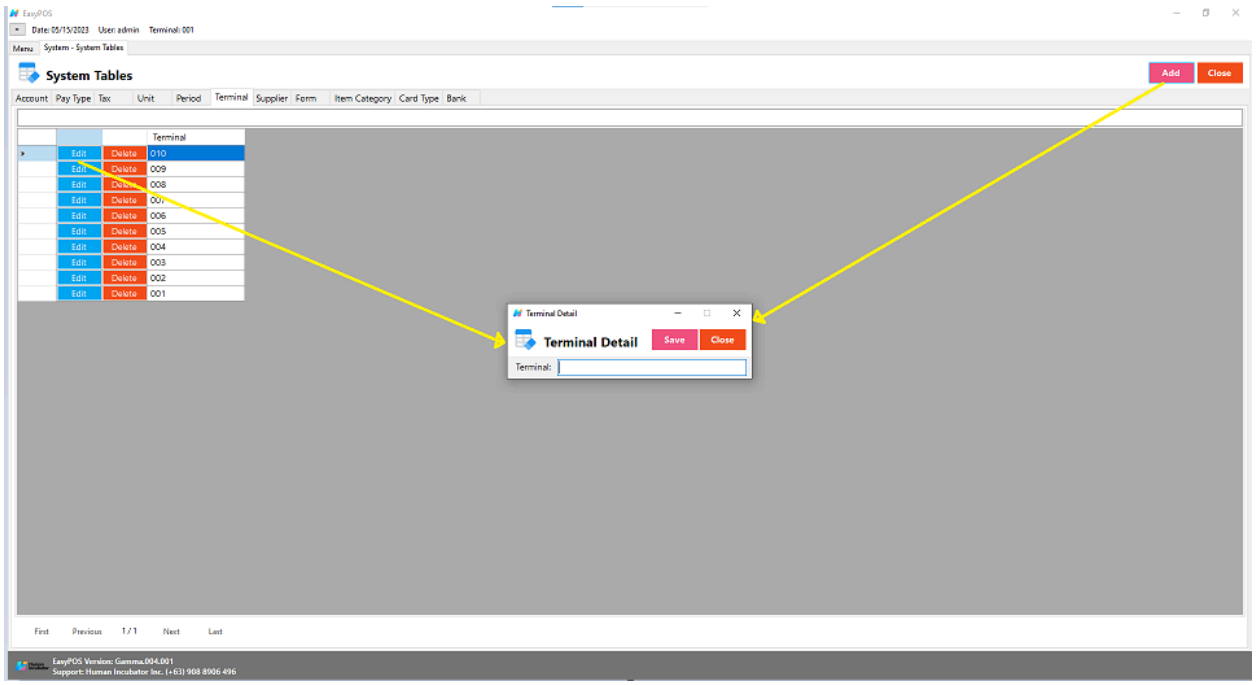
- Shows the list of all added periods.
- Delete button will proceed to deleting period details.
- Edit button will proceed to updating period details.
- Close button will proceed to closing the system table module.



- **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

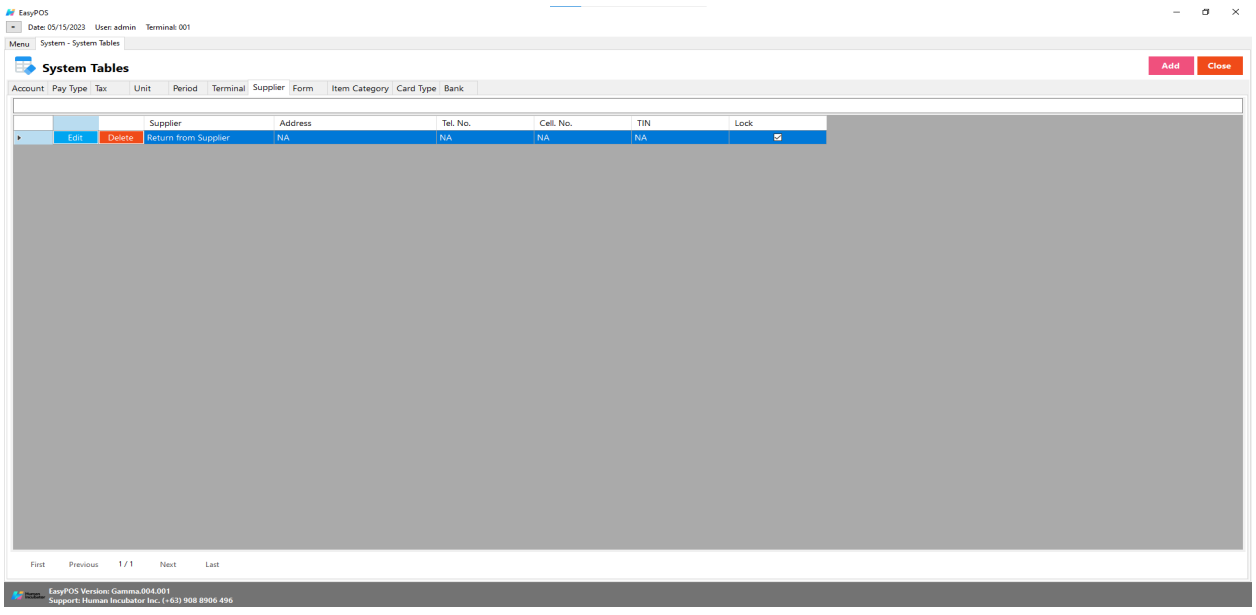
- Shows the list of all added terminals.
- Delete button will proceed to deleting terminal details.
- Edit button will proceed to updating terminal details.
- Close button will proceed to closing the system table module.



- **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.

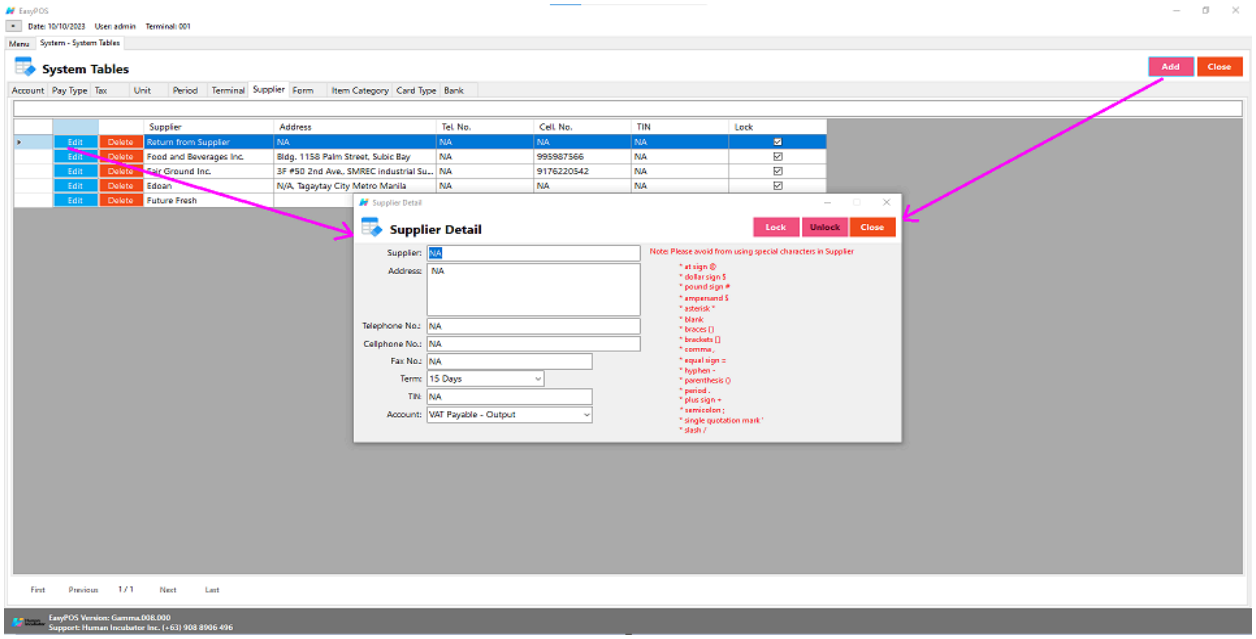
Supplier

*Take Note: If the **EasyPOS** has an **EasyFS Integration,** the setting of supplier or adding of supplier should be done in the EasyFS system. Make sure that the "**Term**" list in EasyPOS and EasyFS should be the same.*



- Shows the list of all added suppliers.
- Delete button will proceed to deleting supplier details.
- Edit button will proceed to updating supplier details.

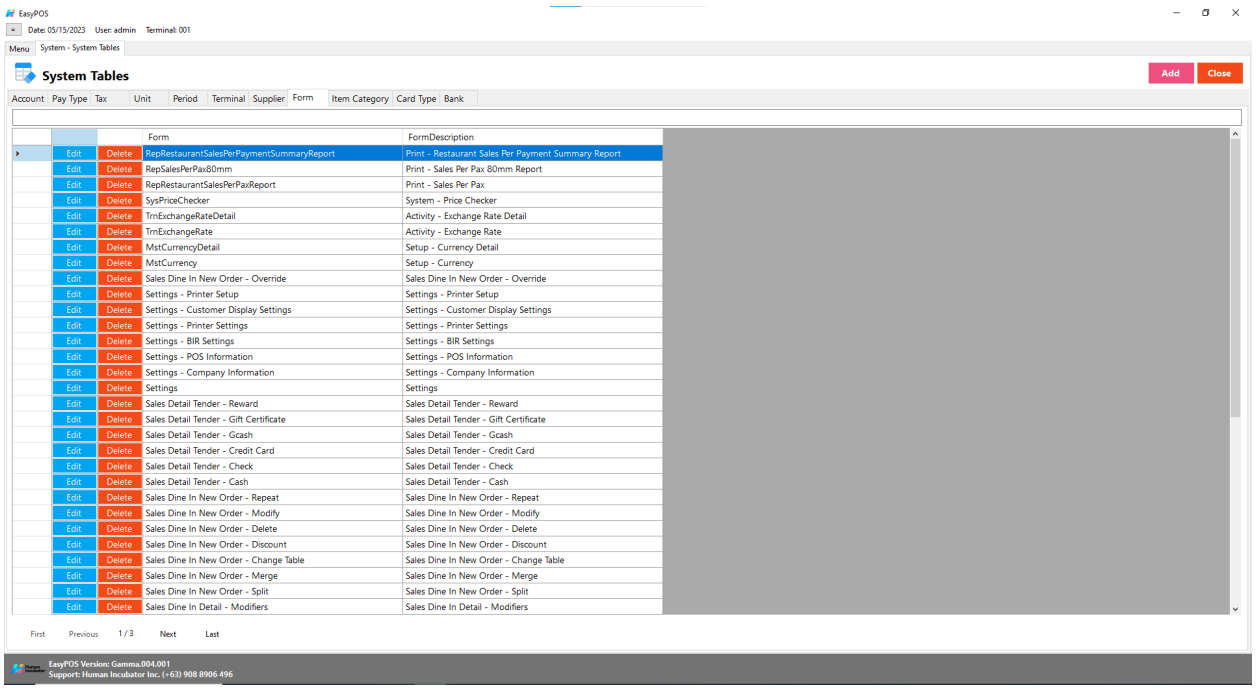
- Close button will proceed to closing the system table module.



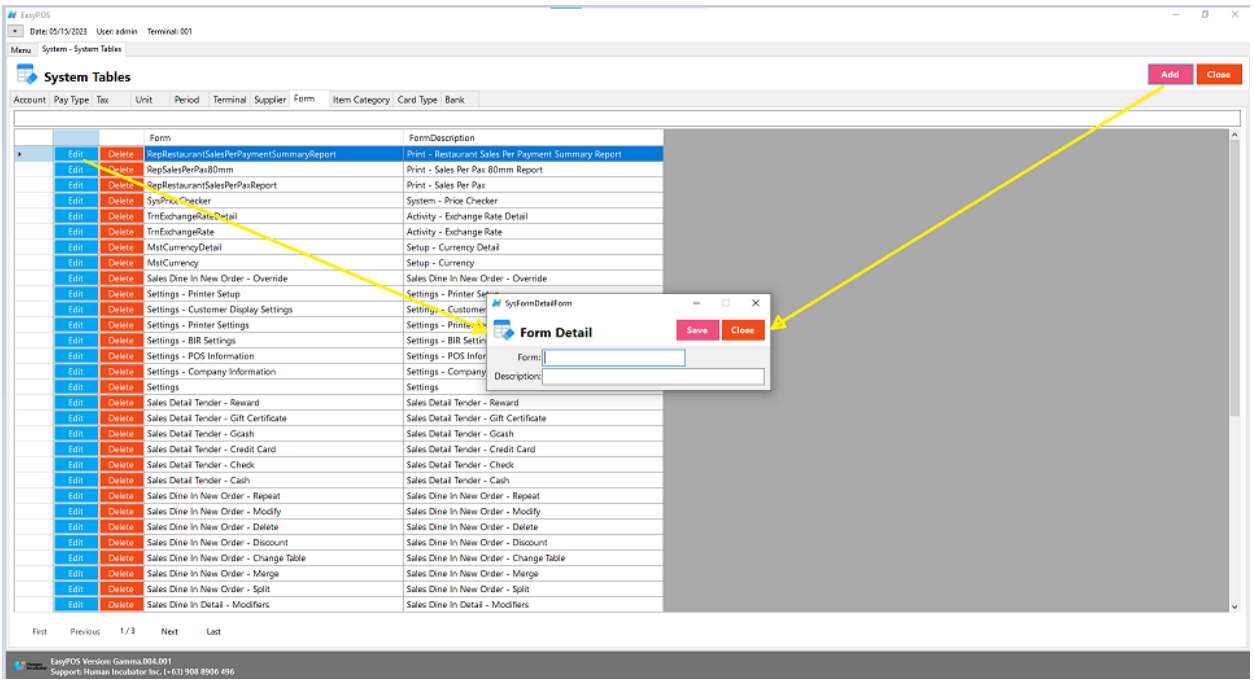
- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Supplier, Address, Telephone No., Cell Phone no., Fax no., TIN, and Account
    - *It has a maximum limit with 100 characters for supplier and 255 for the Address*
    - *Avoid using special characters except ampersand (&) and percent (%) in All Fields of the Supplier Details like: at sign (@), dollar sign ($), pound sign (#), asterisk (*), blank () , braces ({ }), brackets ([ ]), comma (,), equal sign (=), hyphen (-), parenthesis ( ), period (.), plus sign (+), semicolon (;), single quotation mark ('), slash (/) and etc.*
    *Special Characters: ~ ` ! @ # $ ^ & * ( ) - _ + = { } [ ] | \ / : ; " ' < > , .*
    ? À Á Â Ã Ä Å Æ Ç È É Ê Ë Ì Í Î Ï Ð Ñ Ò Ó Ô Õ Ö × Ø Ù Ú Û Ü Ý Þ ß
    - *If some fields have special characters, a prompt message will appear when locking or saving the data.*
    - *Default value: NA and 0.00*

- Click the Save button to save supplier details.

Form

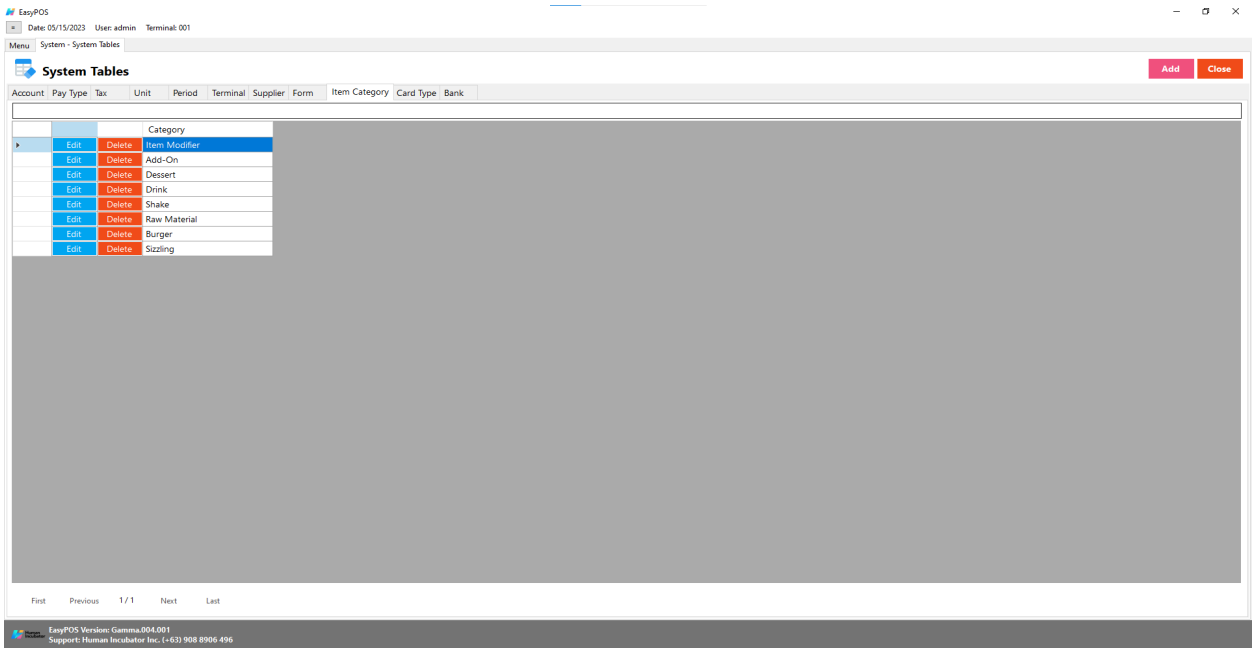


- Shows the list of all added forms.
- Delete button will proceed to deleting form details.
- Edit button will proceed to updating form details.
- Close button will proceed to closing the system table module.



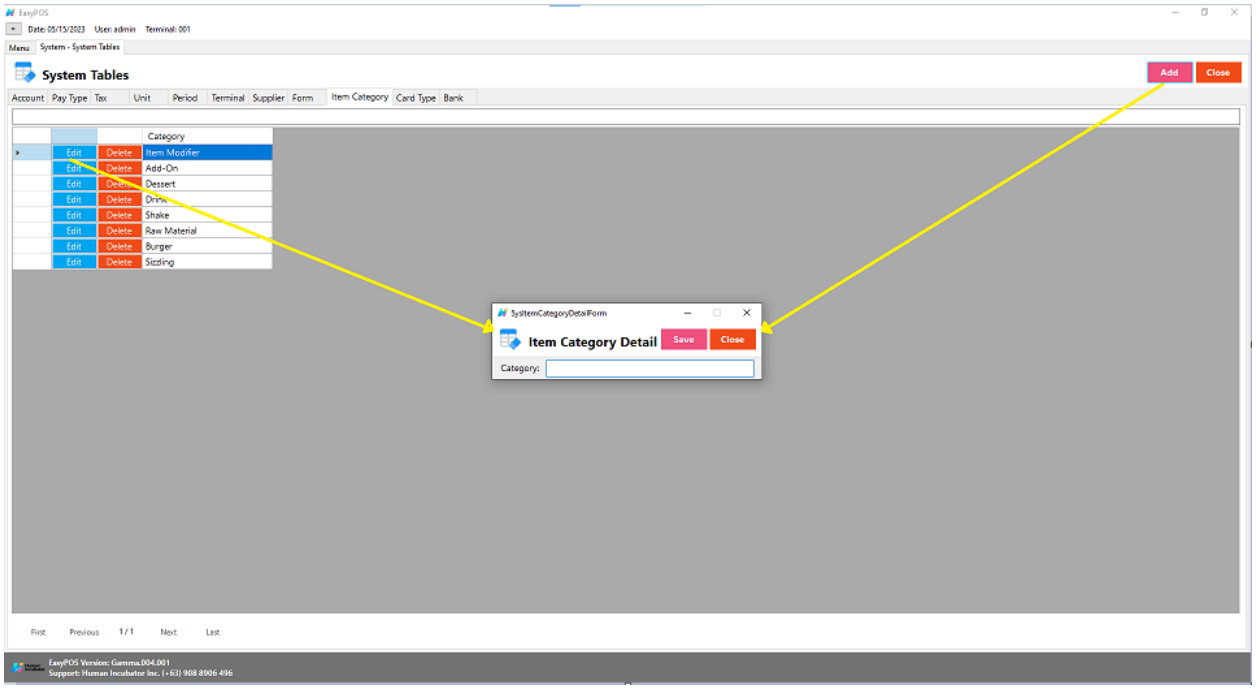
- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Form and Description
- Click the Save button to save form details.

Item Category



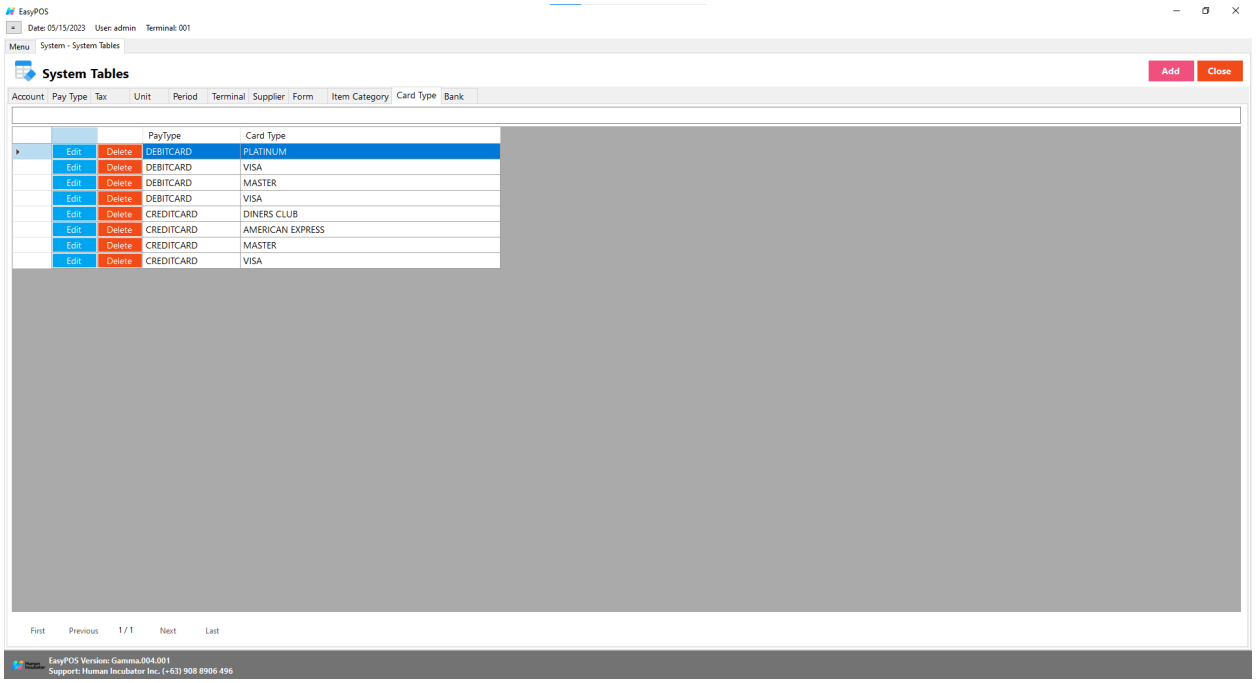
- Shows the list of all added Item Categories.

- 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.

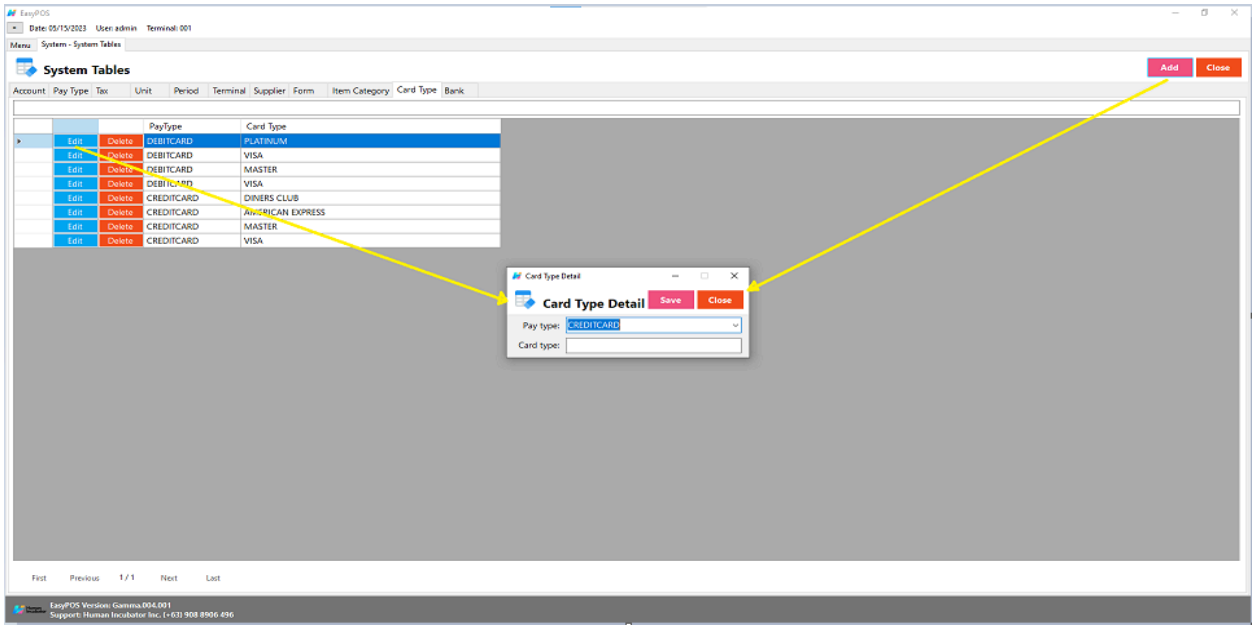


- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.
- Fill up all the necessary information like:
    - Category
- Click the Save button to save item category details.

Card Type



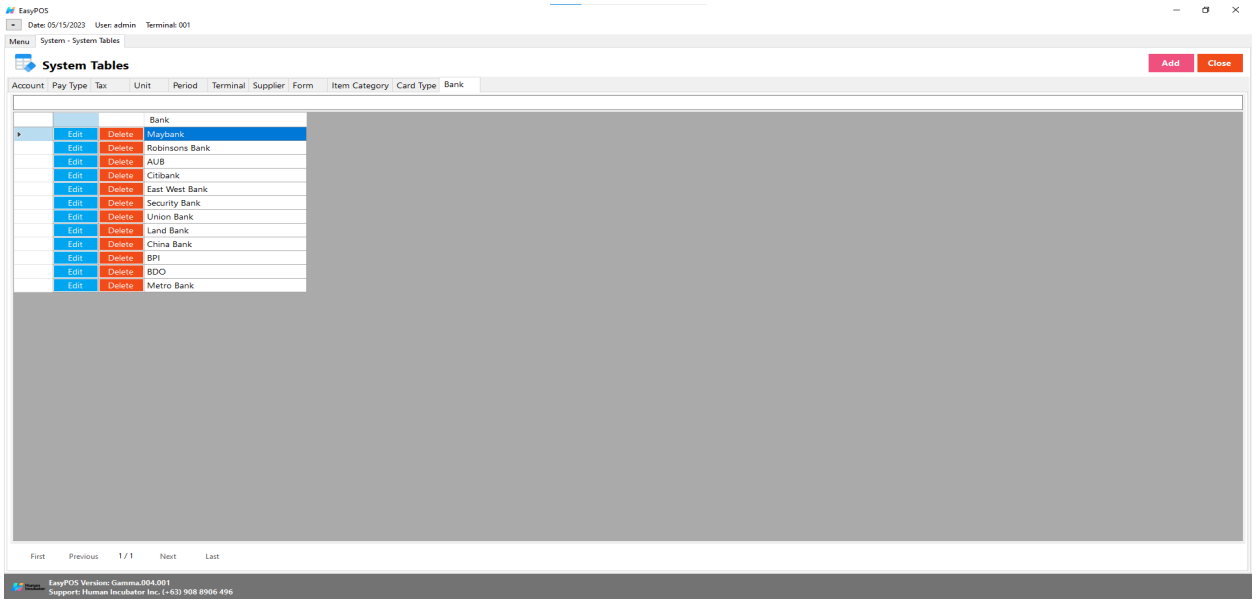
- Shows the list of all added card types.
- Delete button will proceed to deleting card type details.
- Edit button will proceed to updating card type details.
- Close button will proceed to closing the system table module.



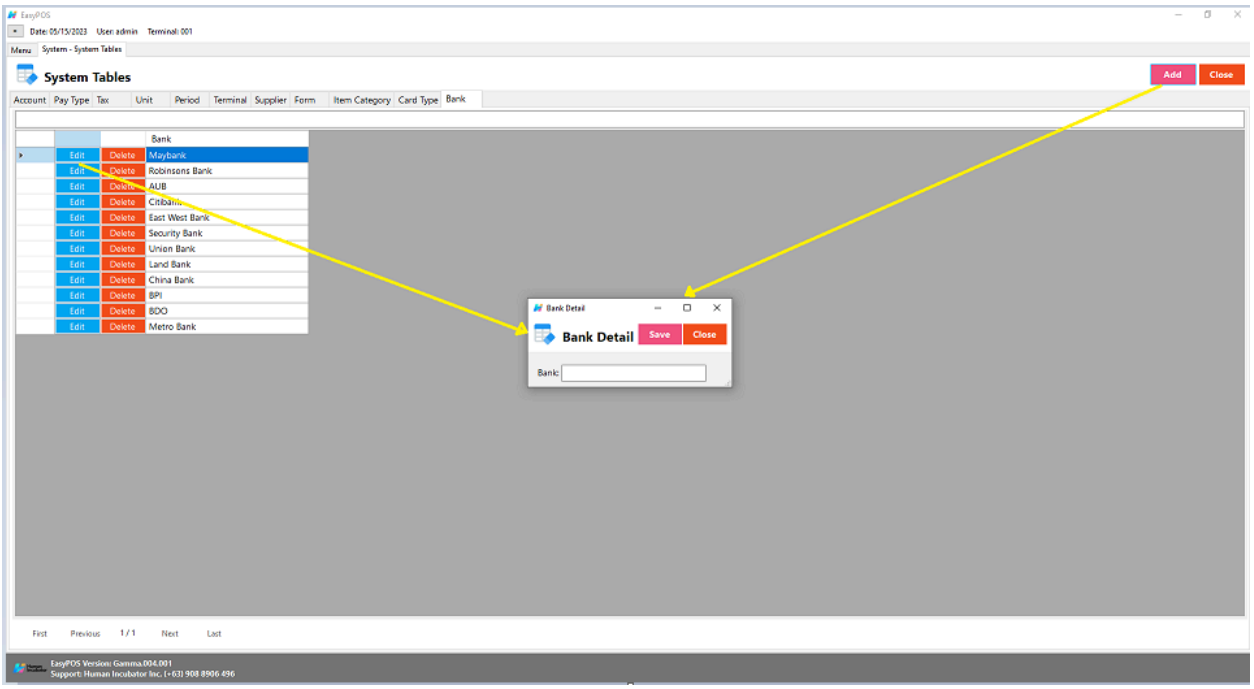
- **Assumption**: **Add** button is already clicked on the upper right corner in the system tables.

- 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.

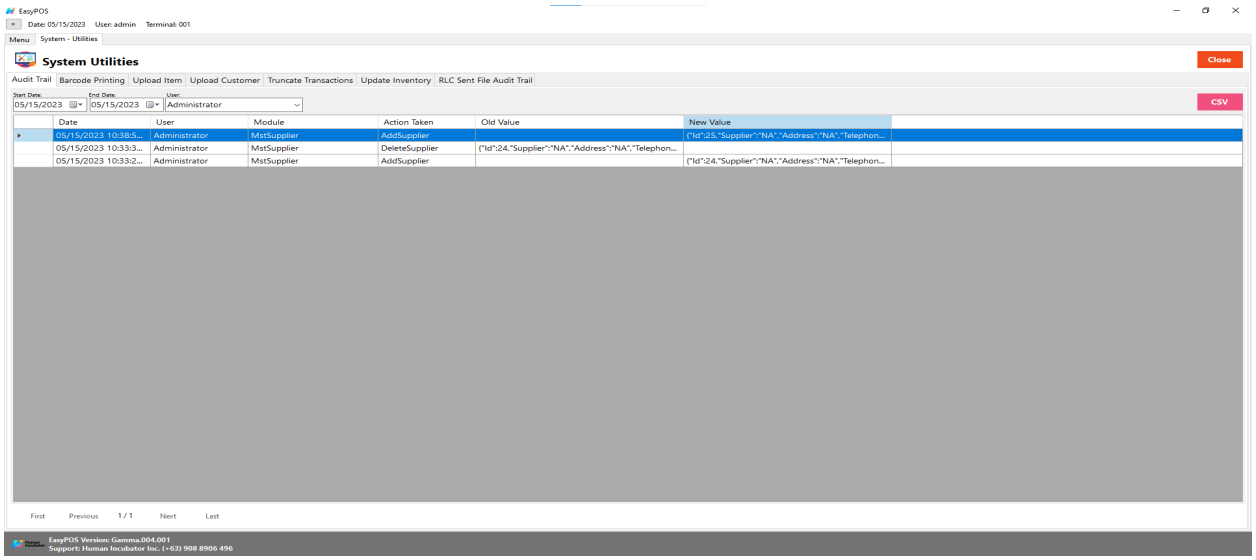
System - Utilities

Overview

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

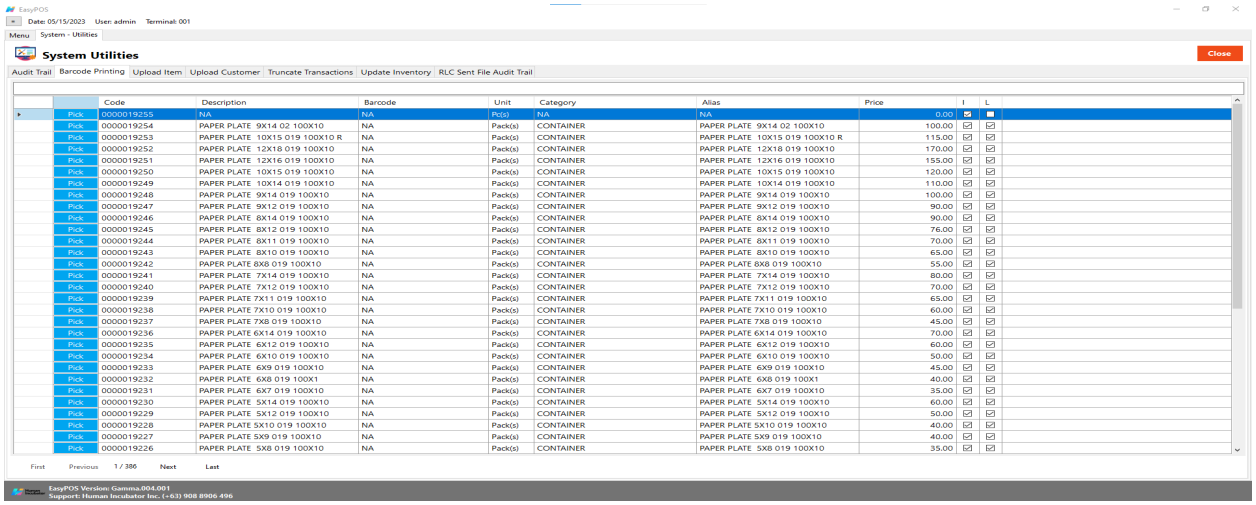
Audit Trail

- 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.

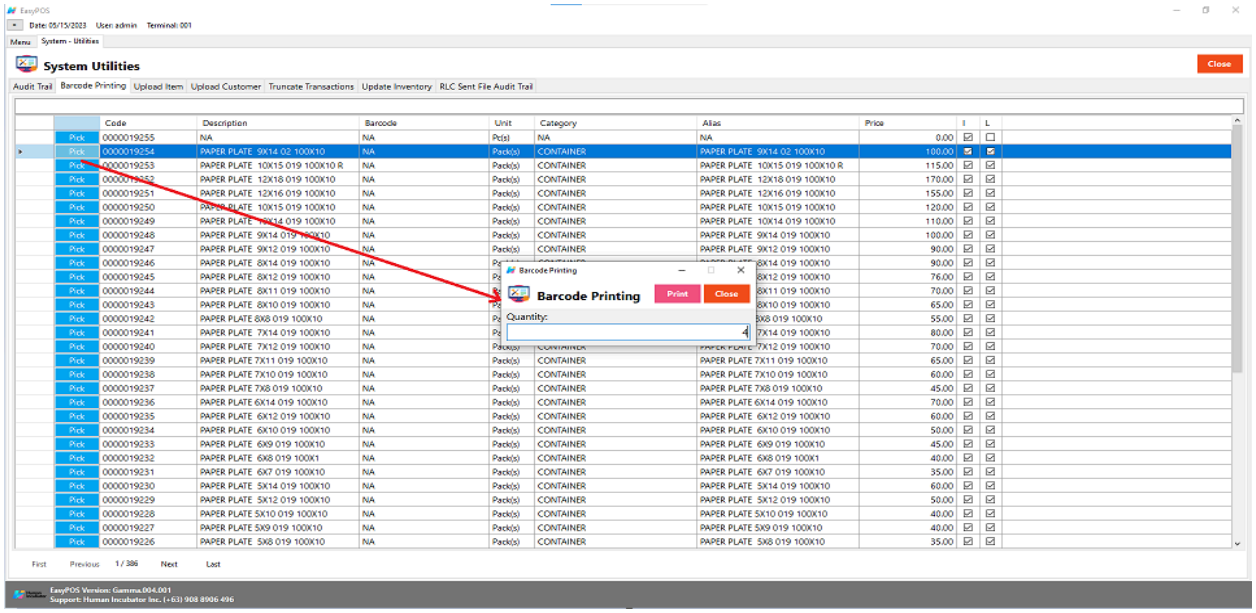


Barcode Printing

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

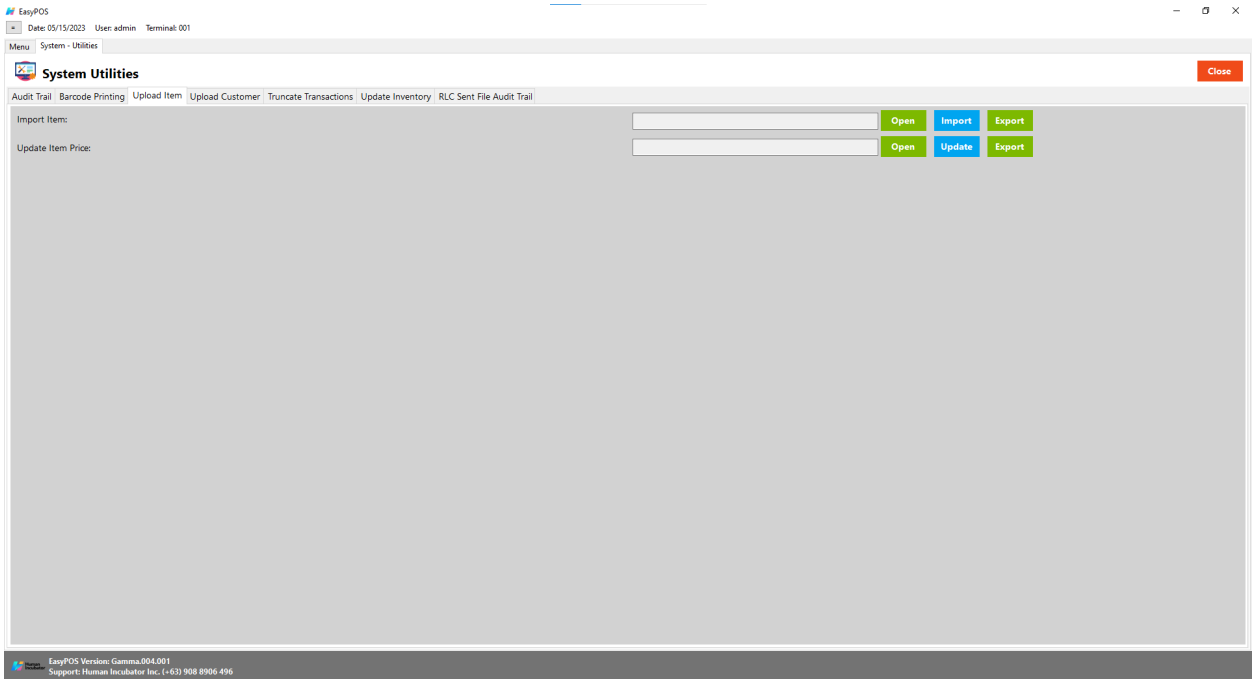


    - Click the **Pick** button to select an item.
    - Input the quantity of the barcode to be printed.
    - Click the **Print** button to print the barcodes.



Upload Item

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

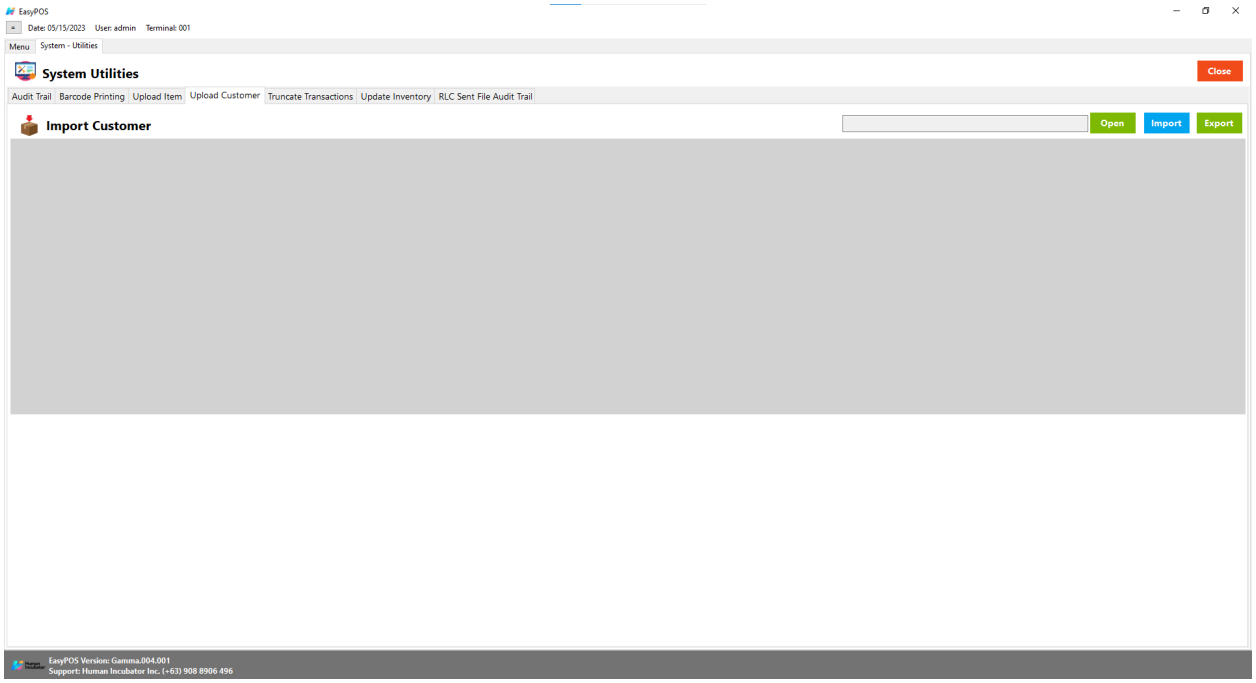


- **Import Item**
  - Click Export button to generate csv file format
  - Click Open button to select the file after inputting necessary information of the item
  - Click Import button to import the file

- **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

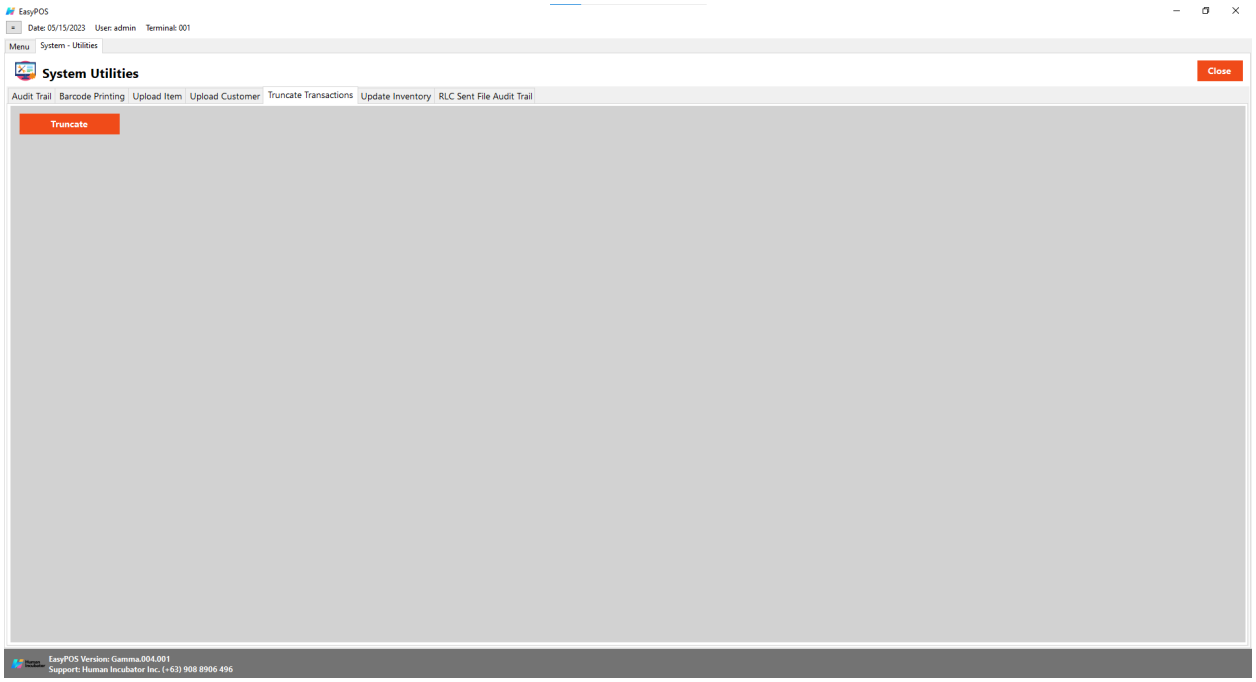
- It is another way to add a list of customers.



  - 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

Truncate Transaction

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


EasyPOS
Date: 05/15/2023 User: admin Terminal: 001
Menu
System - Utilities
System Utilities
Close
Audit Trail
Barcode Printing
Upload Item
Upload Customer
Truncate Transactions
Update Inventory
RLC Sent File Audit Trail
Truncate
EasyPOS Version: Gamma.004.001
Support: Human Incubator Inc. (+63) 908 8906 496

XI: Settings

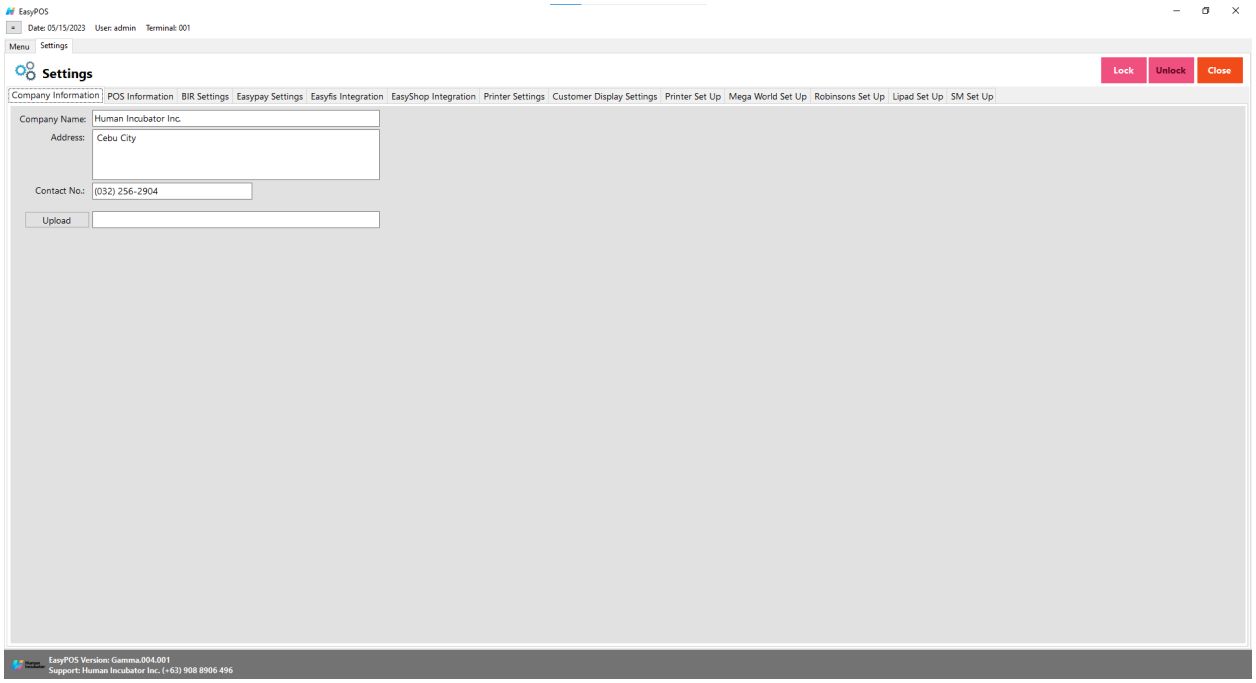
Settings

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.

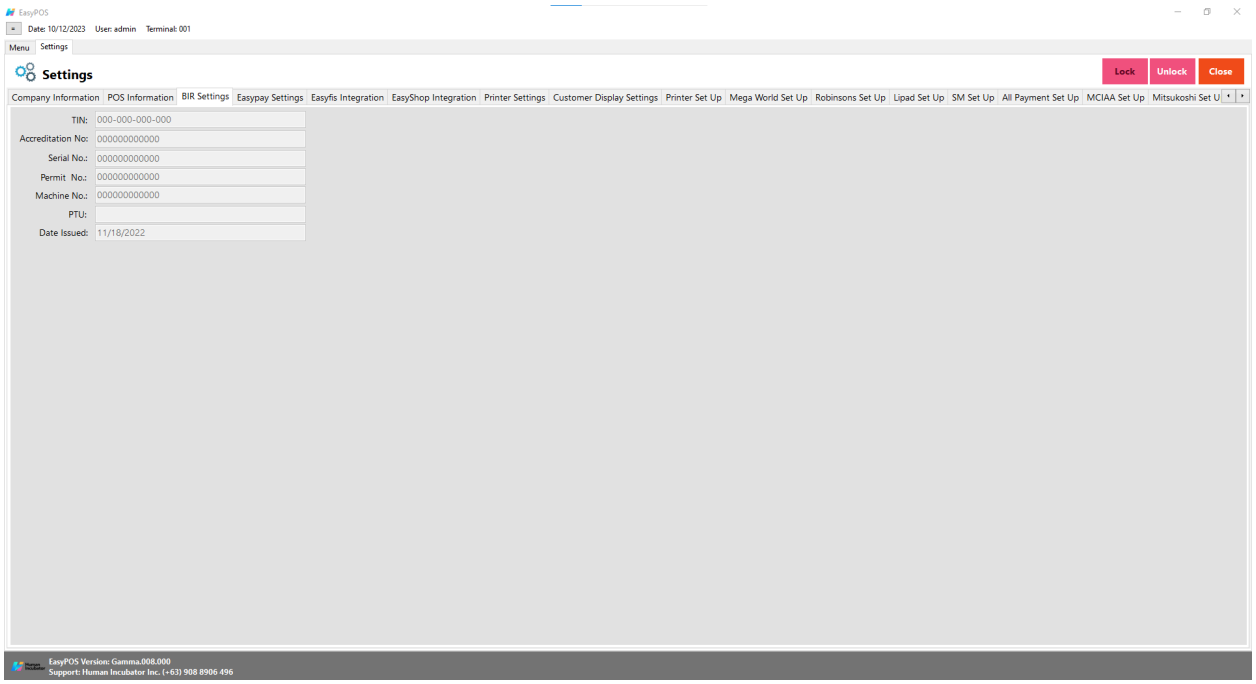
    - Fill up the necessary information like:
        - Base Currency, Tenant Of, etc
    - **Tender Print**
        - Allow the user to enable or disable the print receipt
    - **Barcode Quantity Always One**
        - When this feature is enabled, the user cannot edit the quantity of the item after scanning 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.
    - **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 EasyFS.
- **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**
  - It is applicable for easy pos with easy restaurant setup
- **Prompt Previous EOD Error**
  - Enable the EOD feature

        - 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.
    - **Enable Sticker Printing Process**
        - Allow the user to print sticker
    - **5 Digit Decimal Places in Qty**
        - Allow the user to input 5 decimal places in quantity fields
    - **Enable Print on POS Touch**
        - Enable the print button in POS touch sales detail
    - **Service Charge is vatable**
        - Allow the user to add service charge for company's other income
    - **Enable Background Process**
        - If it is check, it will skip the inventory process every transaction

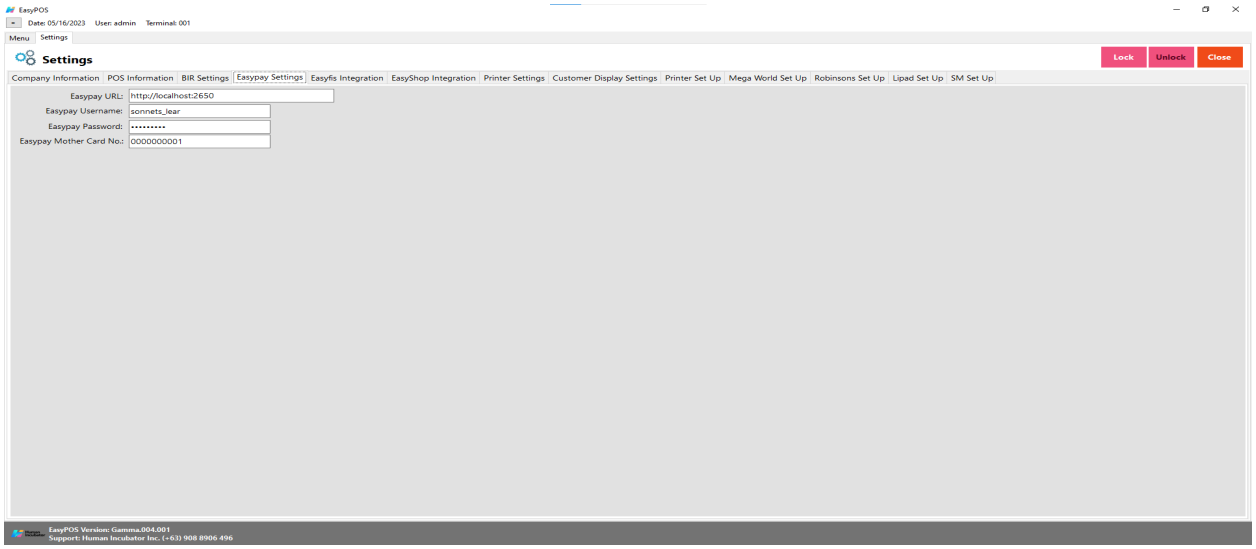
BIR Settings

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



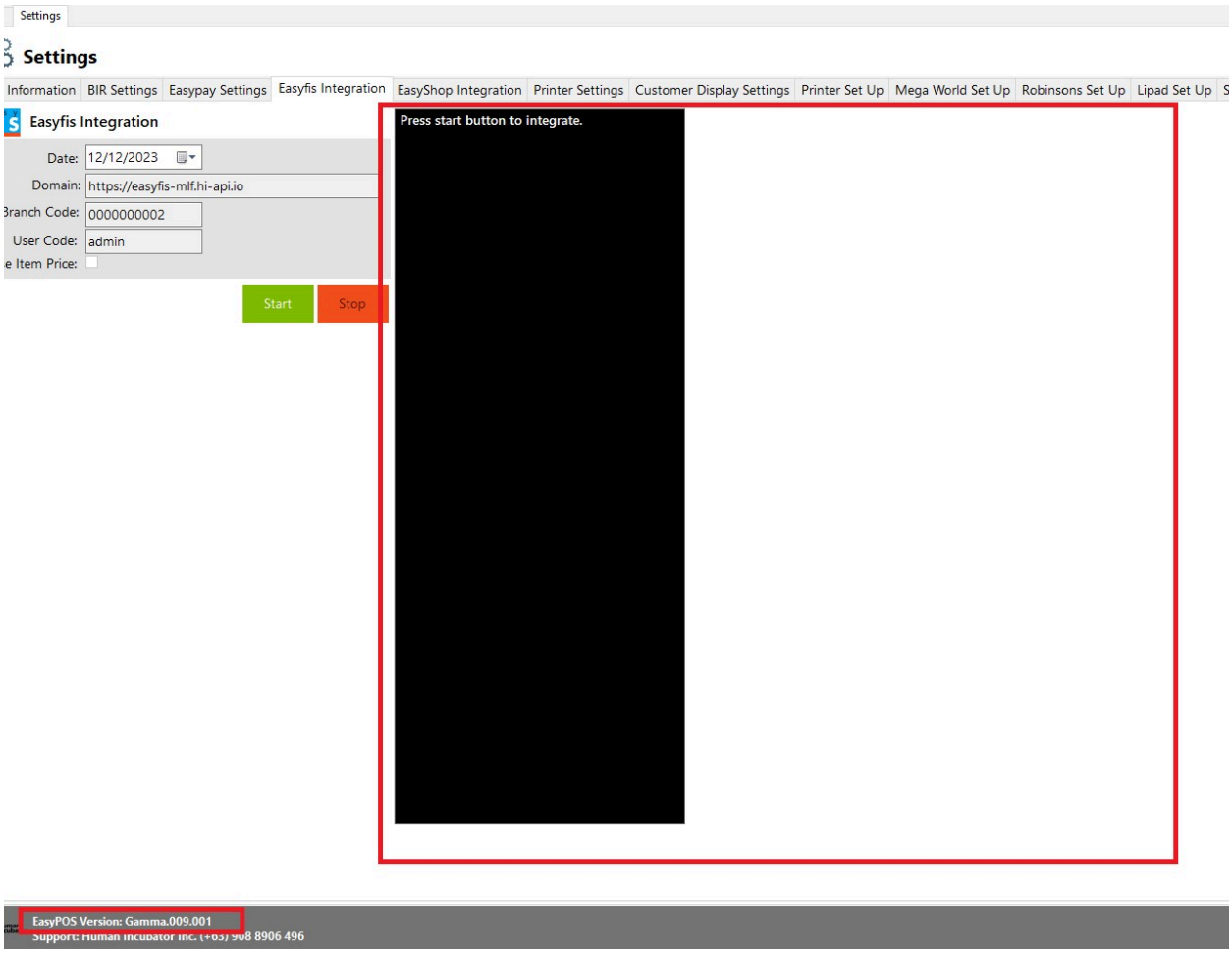
Easypay Settings

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



EasyFS Integration

- This is for EasyFS integration where it is a connection and integration between the EasyFS and EasyPOS product.
- Set up the following in the database (use sql server):
    - Domain(ex: https://easyfs-perrochikoph.hi-api.io)
    - Branch Code(ex: 0000000001)
    - User Code(ex: admin)
- Select date for integration
- Click **Start** button to start the integration
- Click **Stop** button to stop integration
- Don’t shutdown the POS system with integration until synchronization is done

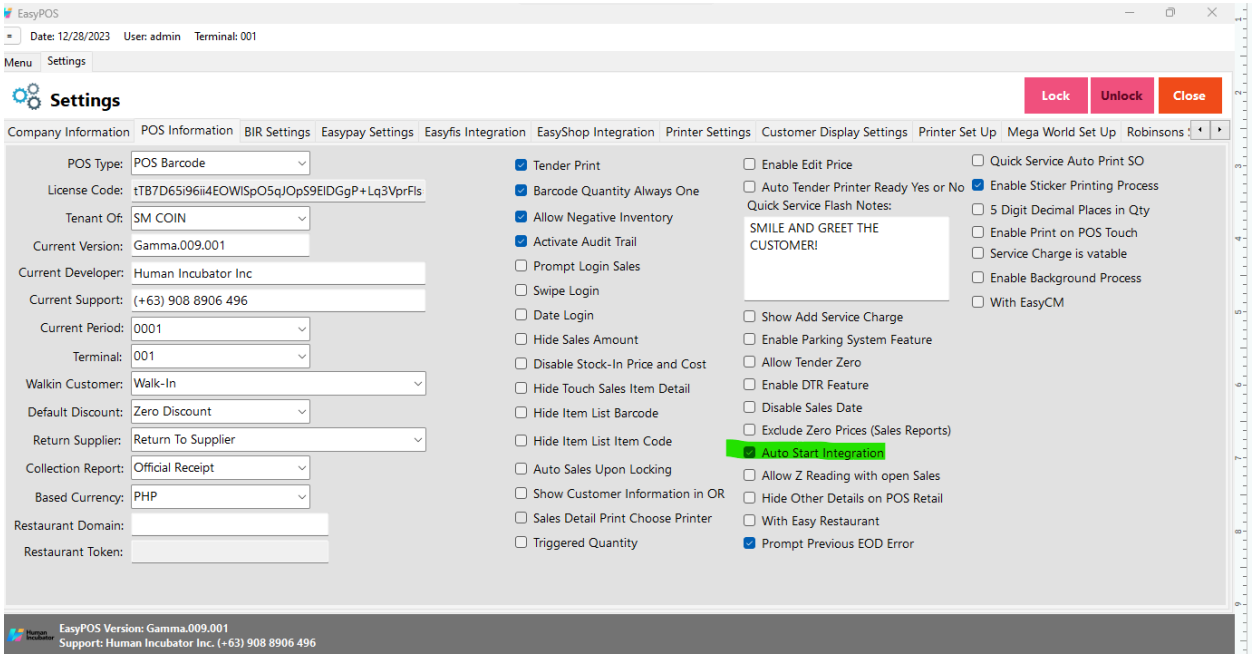


Note: Updating the BARCODE and UNIT in easyFS system will cause duplication of items. Add a new entry for the updated barcodes.

Automatic Integration

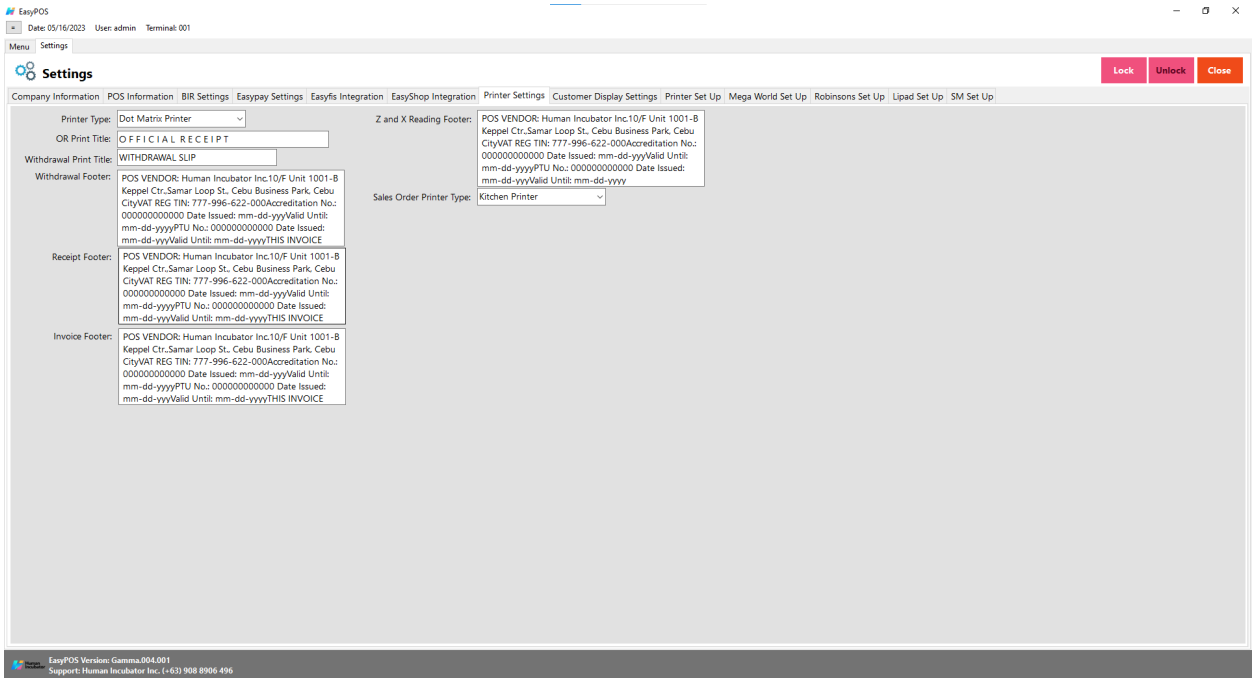
If you want to Automatically start the integration go to

1. Settings → POS Information
2. Click on the Auto Start Integration Check Box



Printer Settings

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



- Bill out footer should be the invoice footer.

Human Incubator Inc.
Cebu City
TIN: 000-000-000-000
SN: 000000000000
MIN: 000000000000
PTU:
Date Issued: 11/18/2022

BILL OUT

Bill #:0000000001

Table No.:05

ITEM	AMOUNT
MILK TEA CARAMEL LARGE	105.00

Sub-total Amount	105.00
Service Charge	0.00
LESS: VAT	0.00
LESS: Discount	0.00
Total Amount Due	105.00
Total No. of Item(s)	1.00

POS VENDOR: Human Incubator Inc.
10/F Unit 1001-B Keppel Ctr.,Samar Loop St.,
Cebu Business Park, Cebu City
VAT REG TIN: 777-996-622-000

Accreditation No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

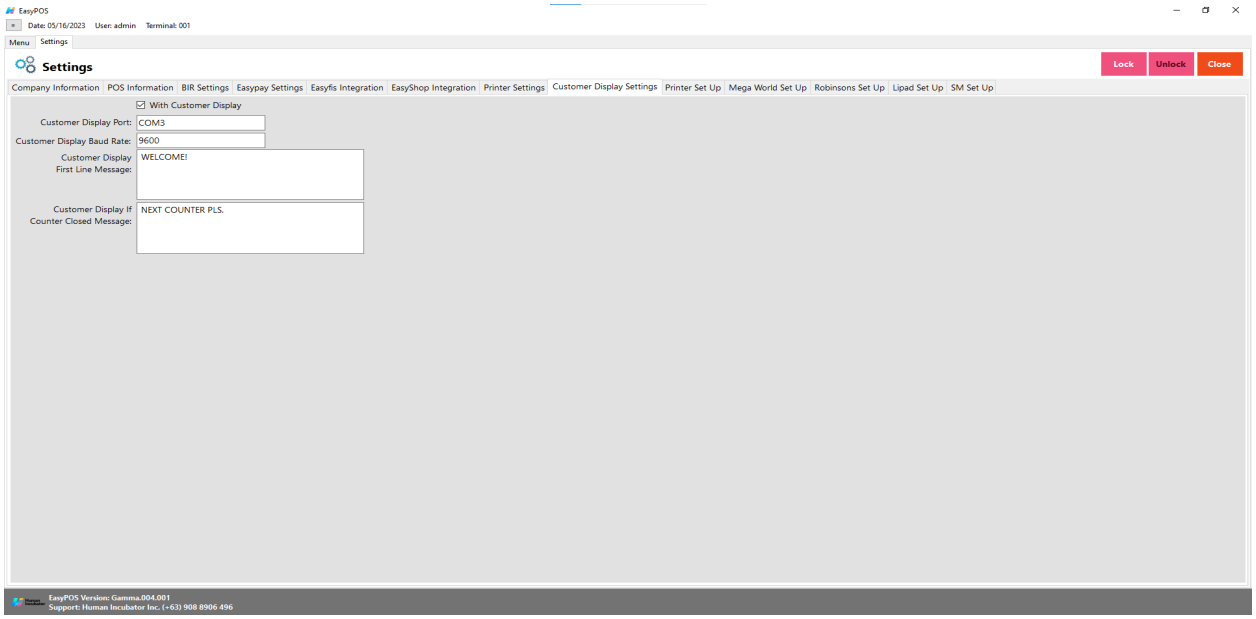
PTU No.: 000000000000
Date Issued: mm-dd-yyy
Valid Until: mm-dd-yyyy

THIS INVOICE SHALL BE VALID FOR FIVE
(5) YEARS FROM THE DATE OF THE

change to invoice footer

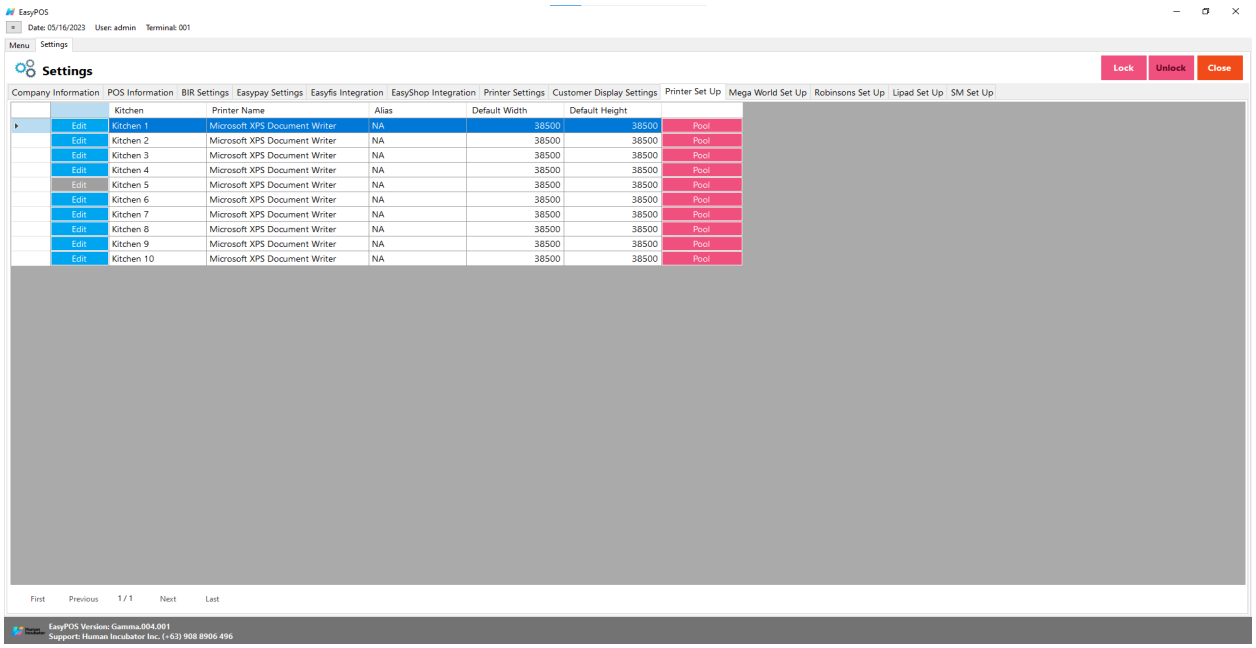
Customer Display

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



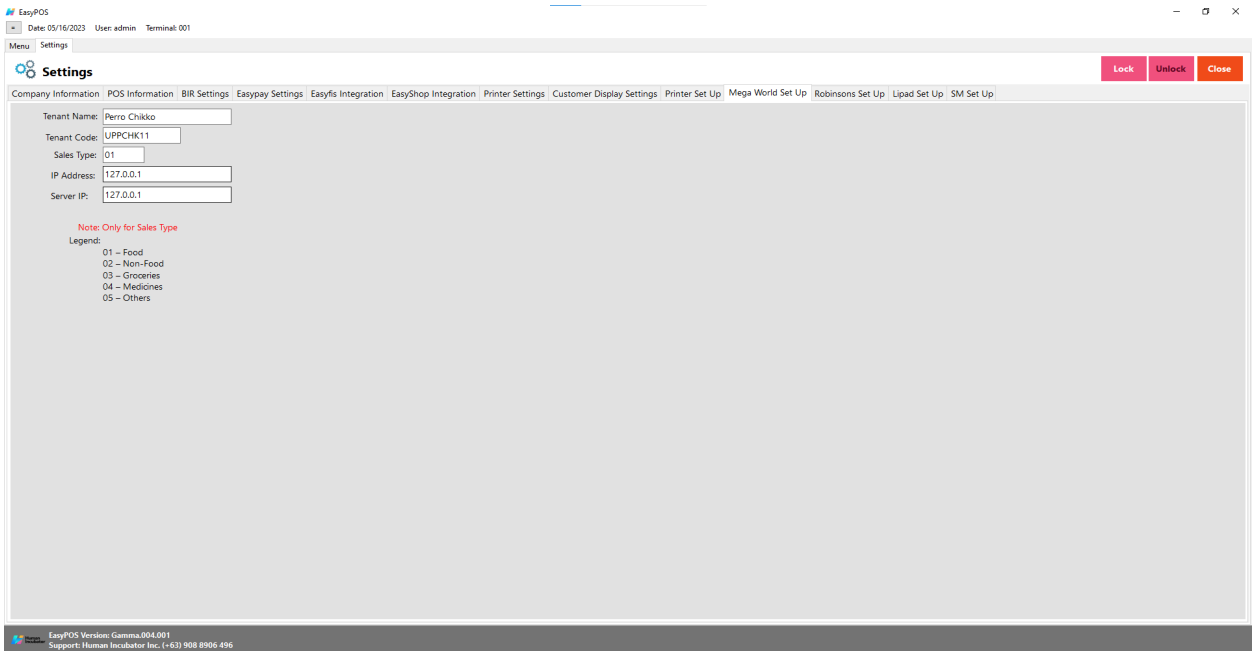
Printer Setup

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



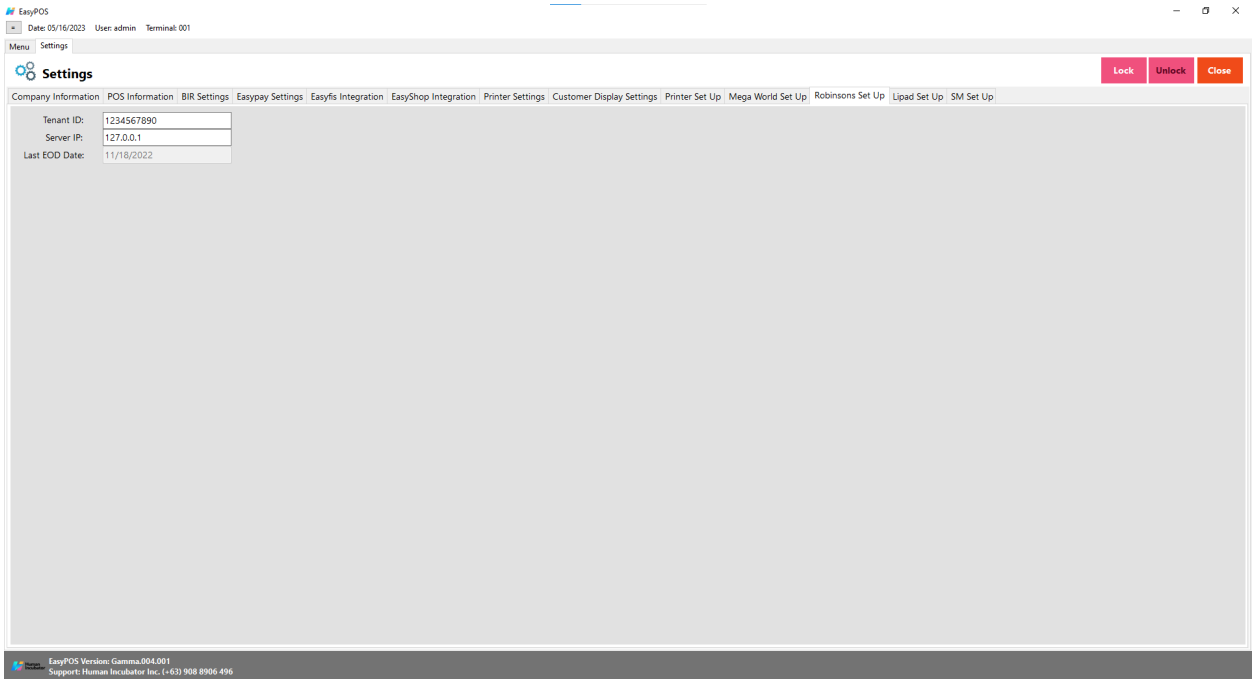
Mega World Setup

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



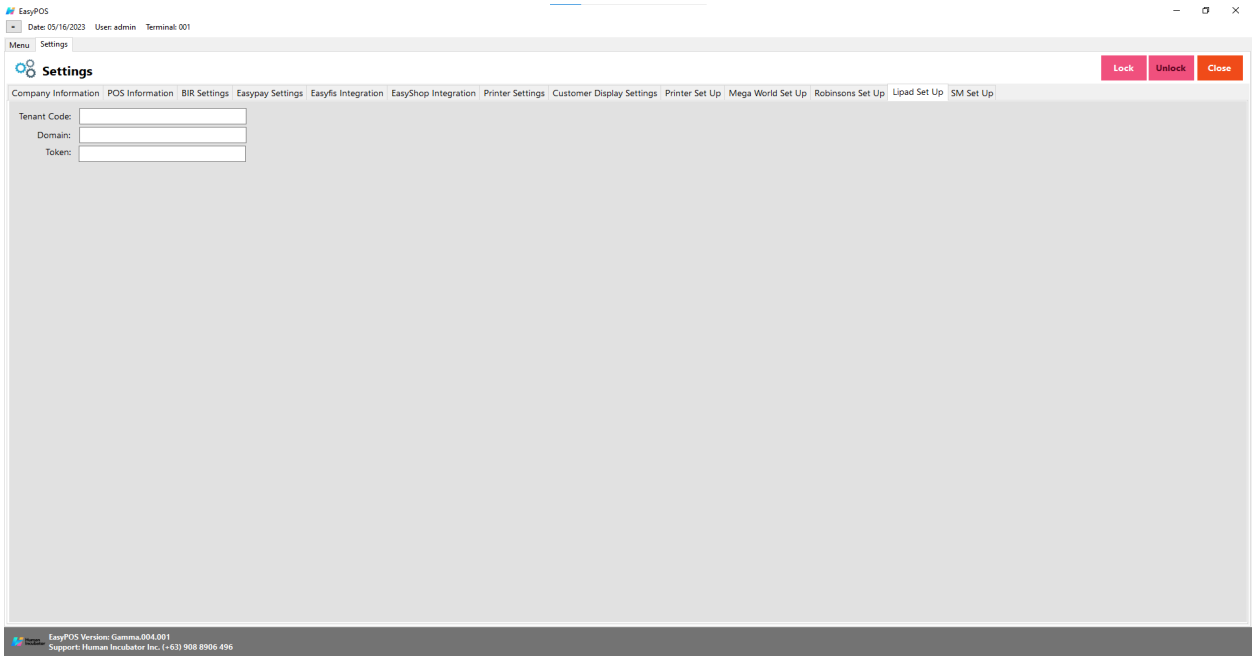
Robinson Setup

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



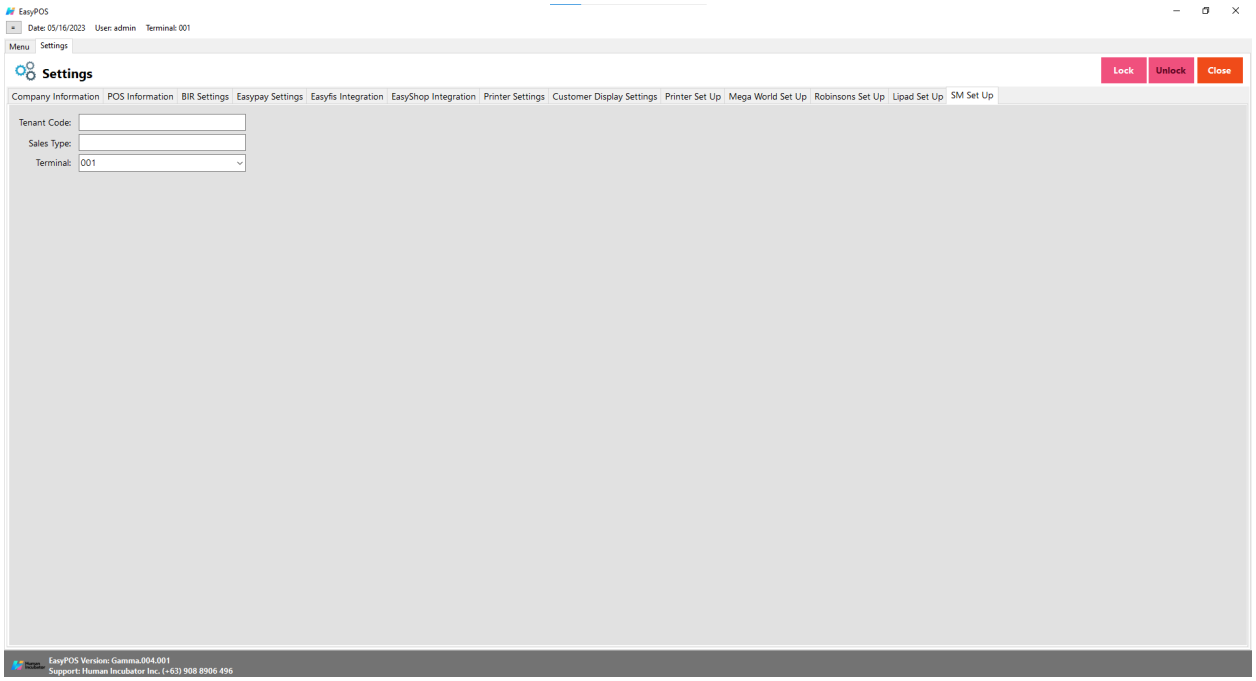
Lipad Setup

- This is where to set up the Lipad integration.



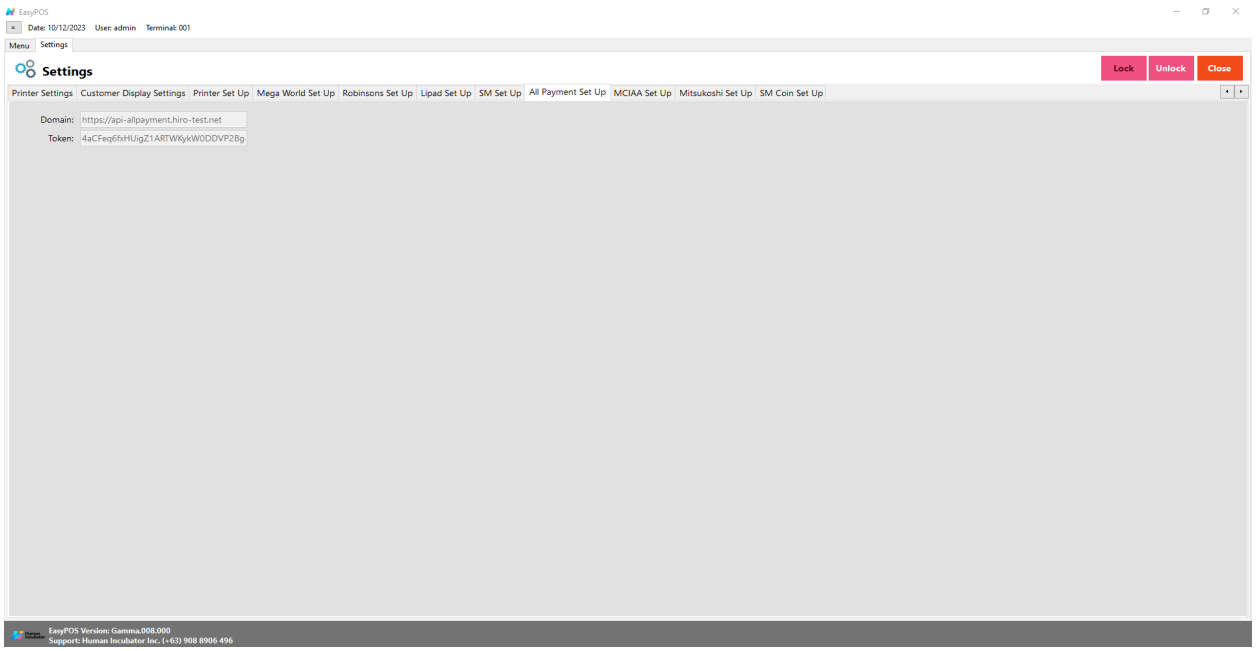
SM Setup

- This is where to set up the SM SIA integration.



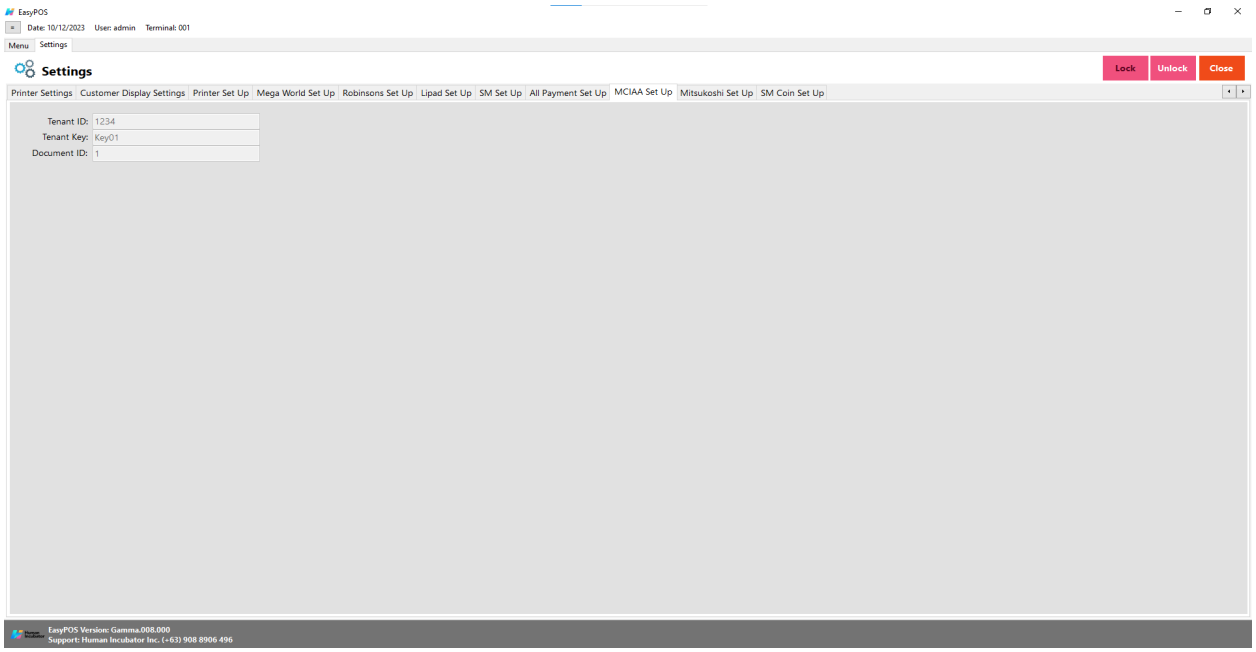
All Payment Set Up

- This is where to set up the all payment integration
- Input the domain for the allpayment.



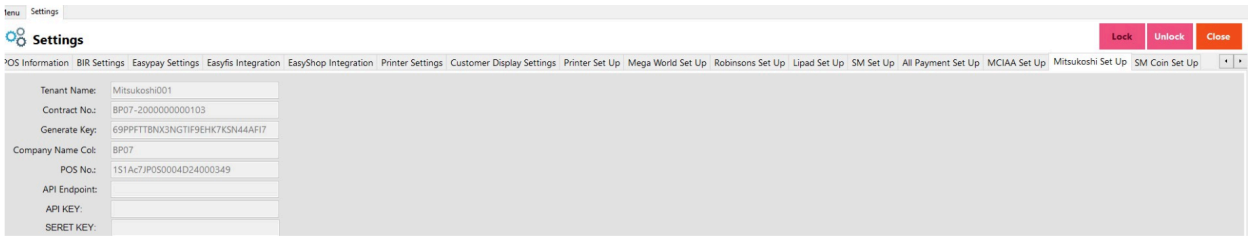
MCIAA Set Up

- Where the user can setup MCIAA integration



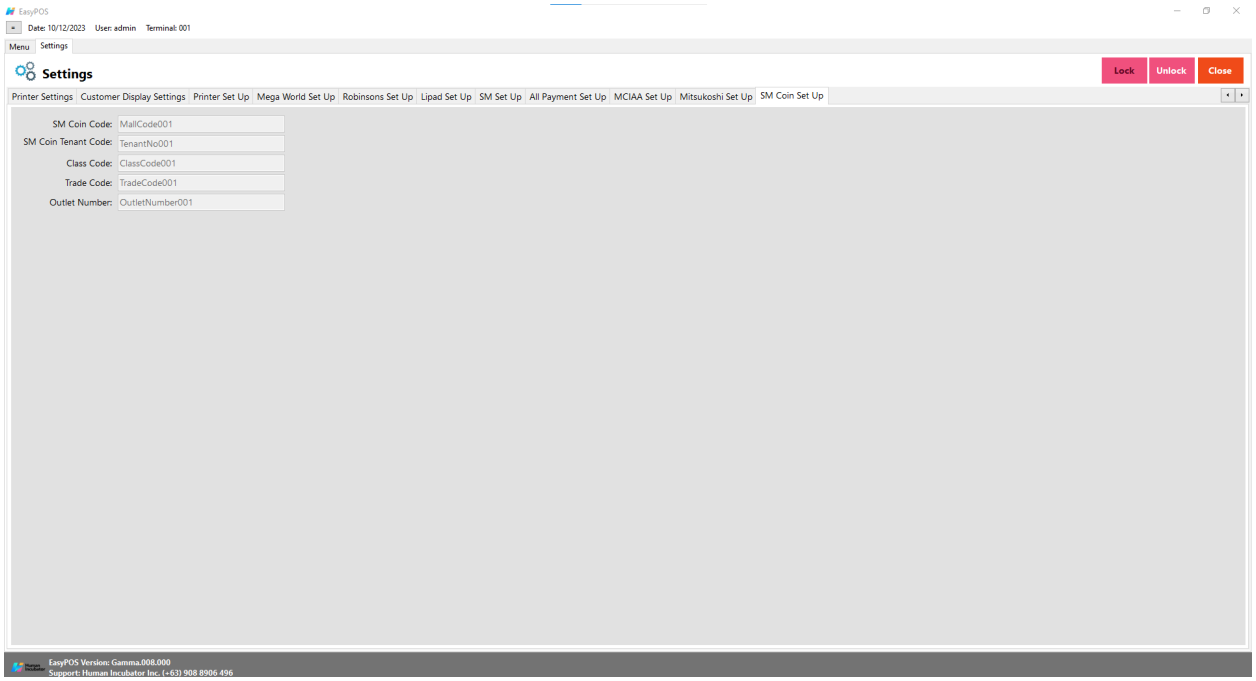
Mitsukoshi Set Up

- Where the user can setup the mitsukoshi integration, Add ApiKey and SecretKey



SM Coin Set Up

- Where the user can setup the SM coin integration



XII: Restaurant

Table Group

Overview

- It is where the user can set up the table group and add tables. It is applicable for restaurant set up.

Table Group List

- Shows the list of all added table groups.

- Delete button will proceed to deleting unlocked table group details.
- The Edit button will proceed to updating table group details.
- Add button will proceed to adding a new table group.
- Close button will proceed to closing the table group list page.

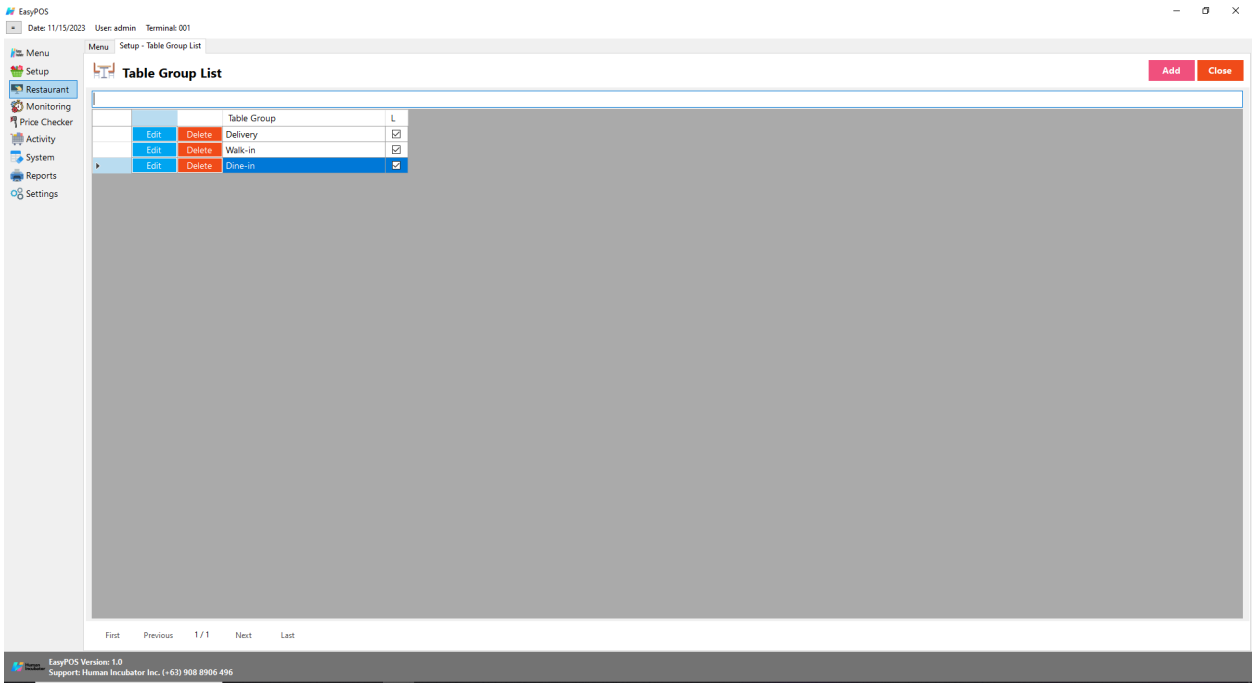
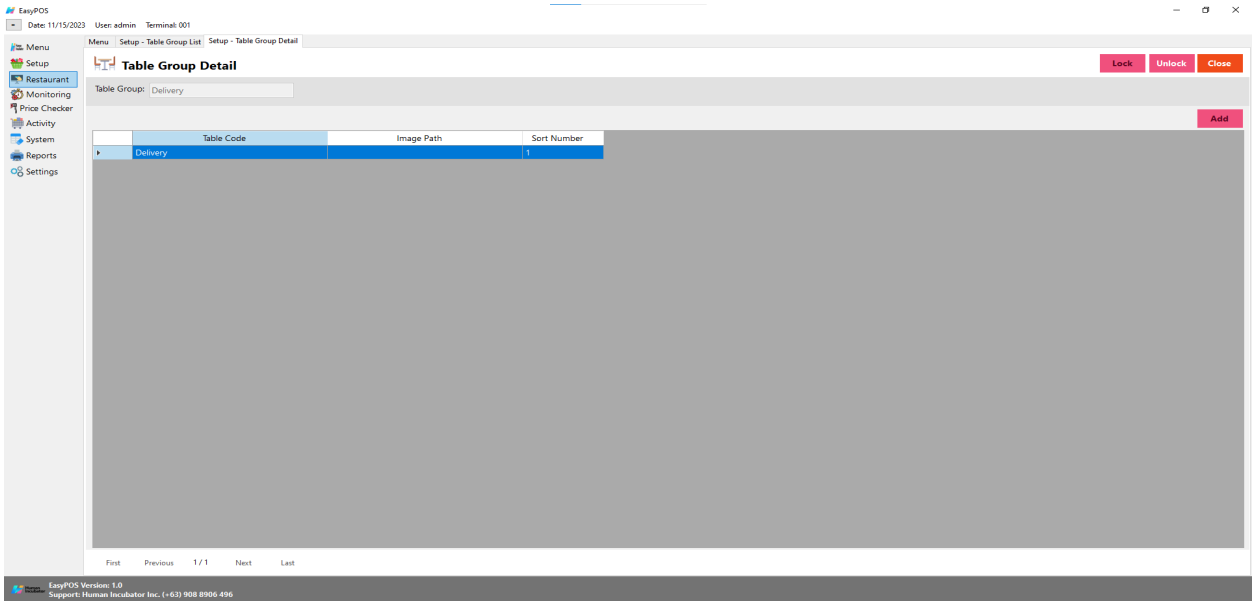
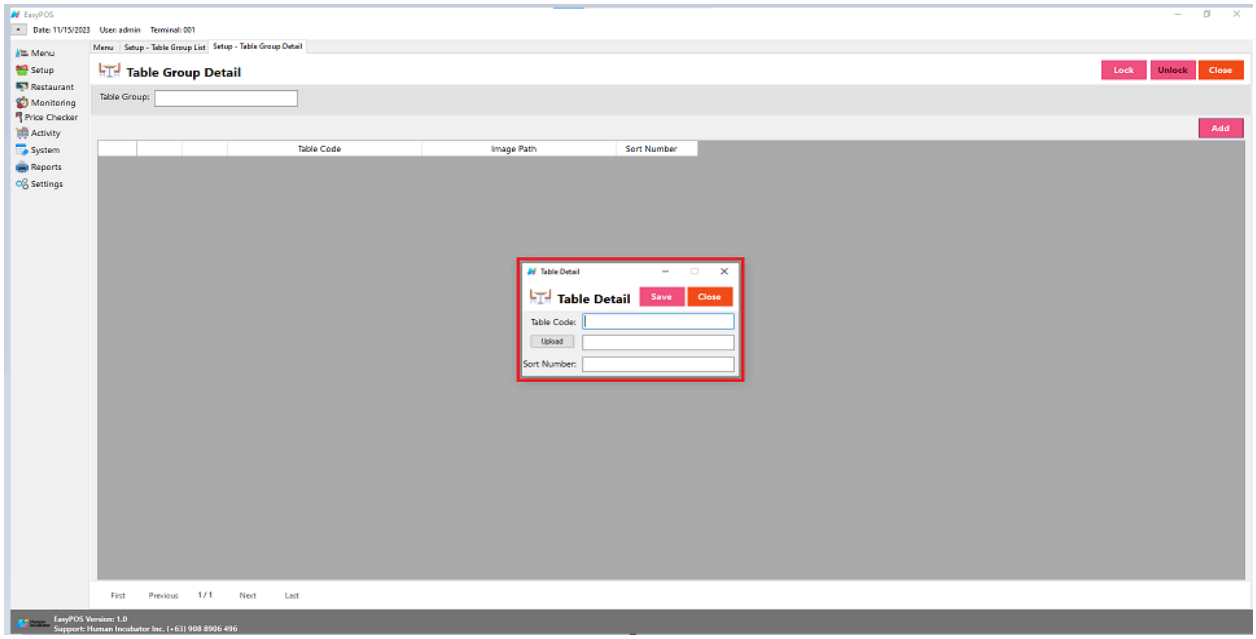


Table Group Details



- **Assumption**: **Add** button is already clicked on the upper right corner in the table group list.
- Fill up the Table Group field.
- Click the **Add** button in the table group detail



- Fill up the necessary fields in the table detail:
  - Table Code and Sort Number
- Click **Save** button to add table in the table group detail.

- Click the **Lock** button to save the table group.
- **Close** button to exit table group detail.

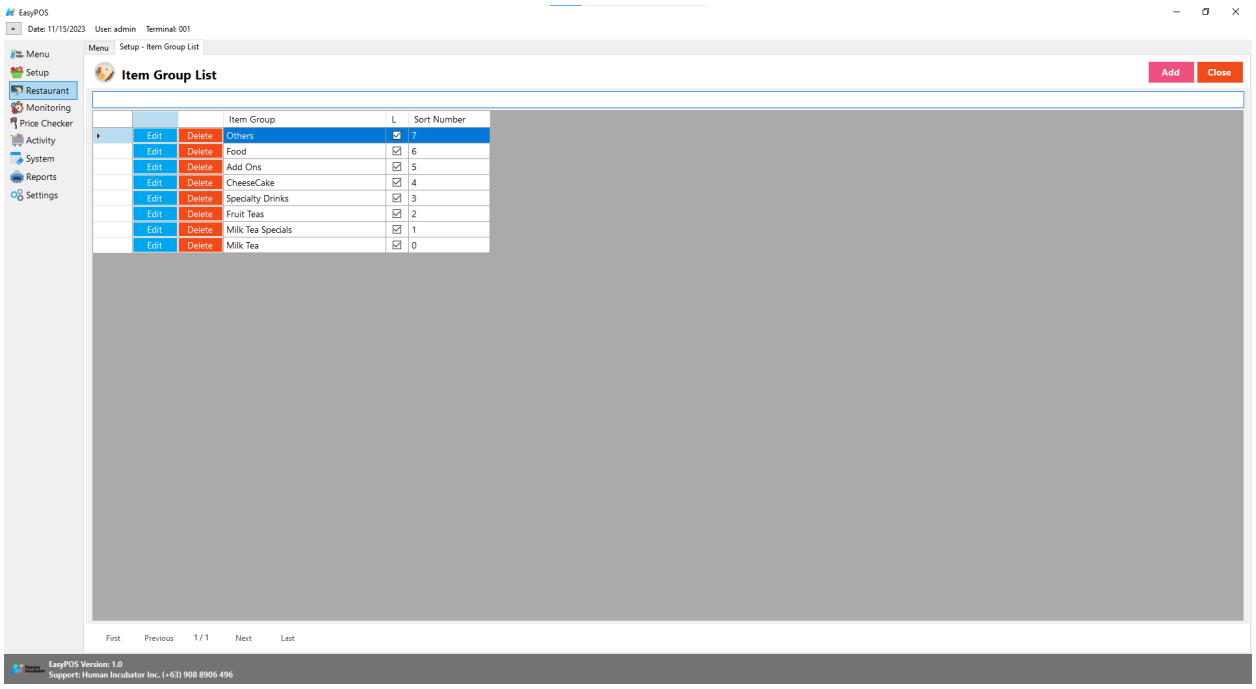
Item Group

Overview

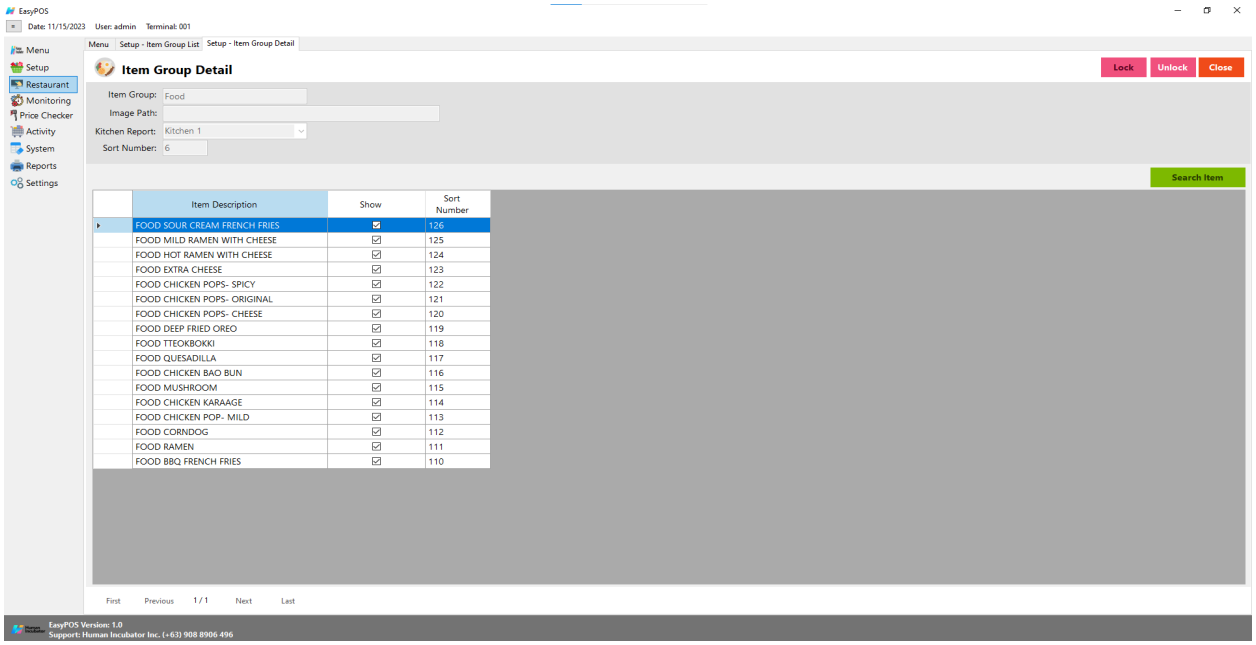
- It is where the user can set up the item group and assign items in the specific item group. It is applicable for restaurant set up.

Item Group List

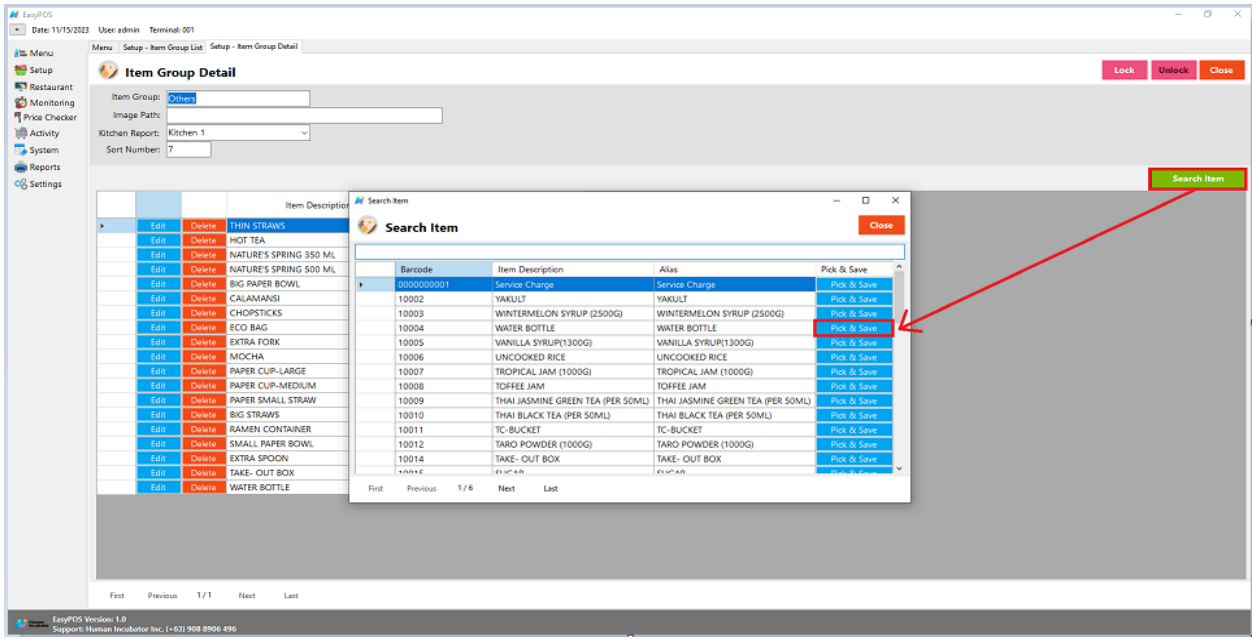
- Shows the list of all added item groups.
- **Delete** button will proceed to deleting unlocked item group details.
- **Edit** button will proceed to updating item group details.
- **Add** button will proceed to adding a new item group.
- **Close** button will proceed to closing the item group list page.



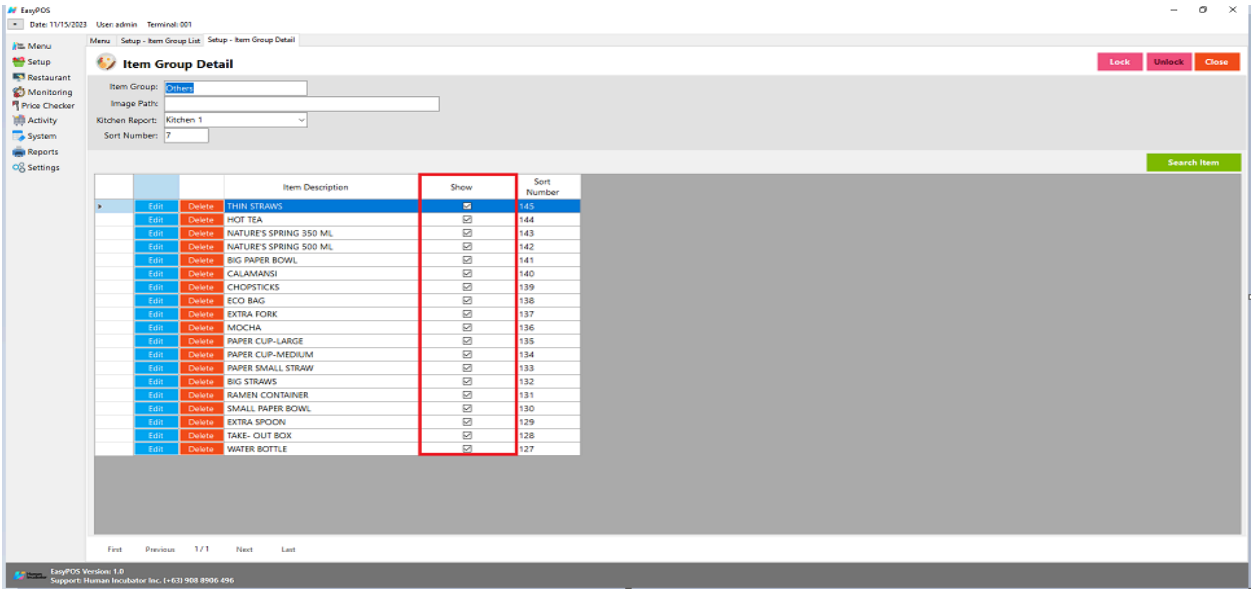
Item Group Details



- **Assumption**: **Add** button is already clicked on the upper right corner in the item group list.
- Fill up the Item Group, Kitchen Report and Sort Number.
- Click the **Search** button to pick and save the item in the item group detail.



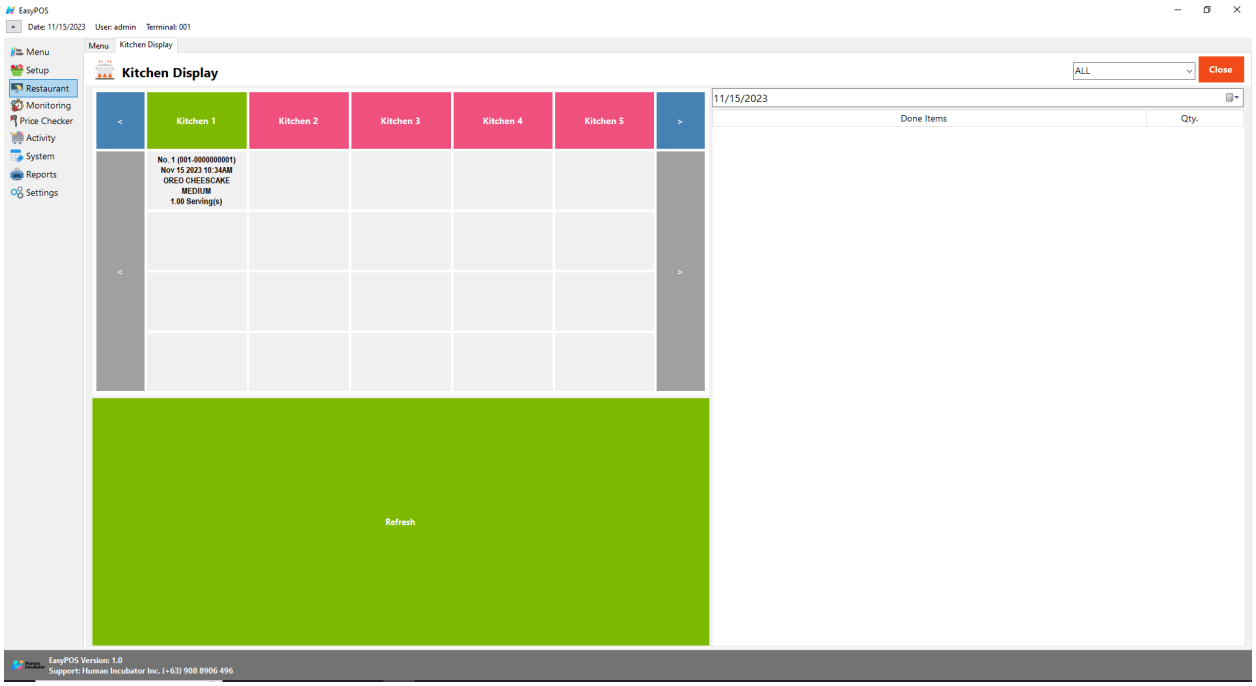
- Check the **Show** column checkbox to display the items in the item group.



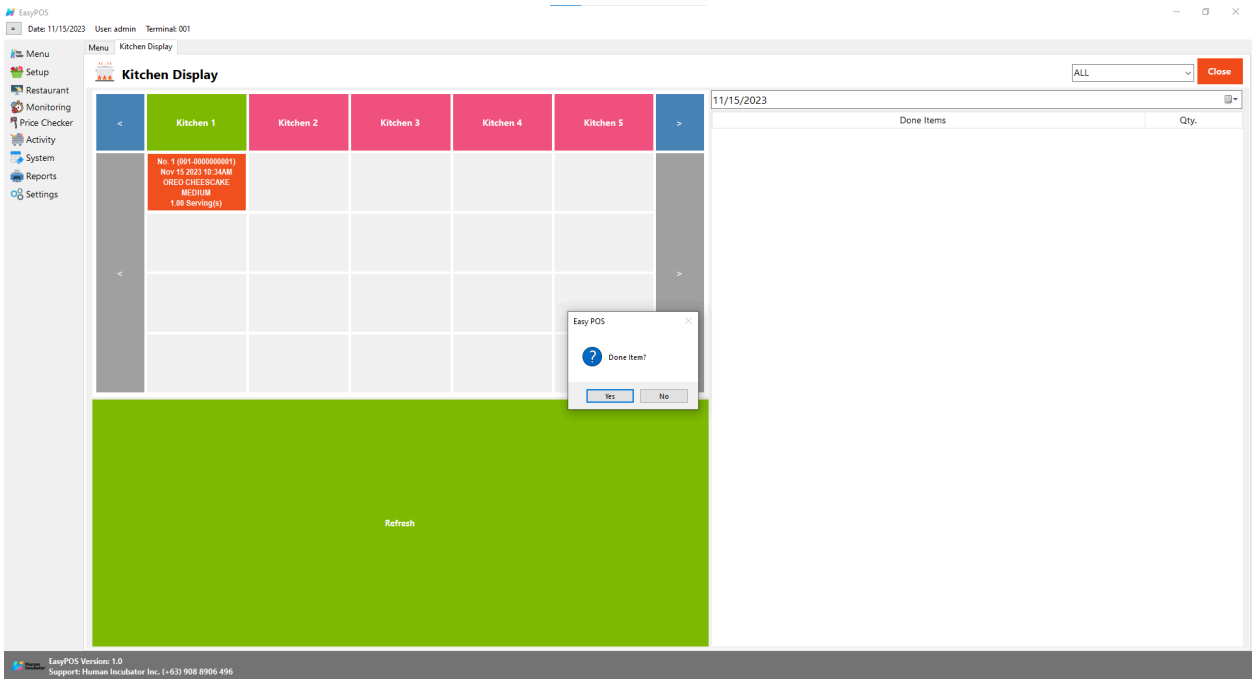
- Click the **Lock** button to save the item group detail
- **Close** button to exit item group detail page.

Kitchen Display

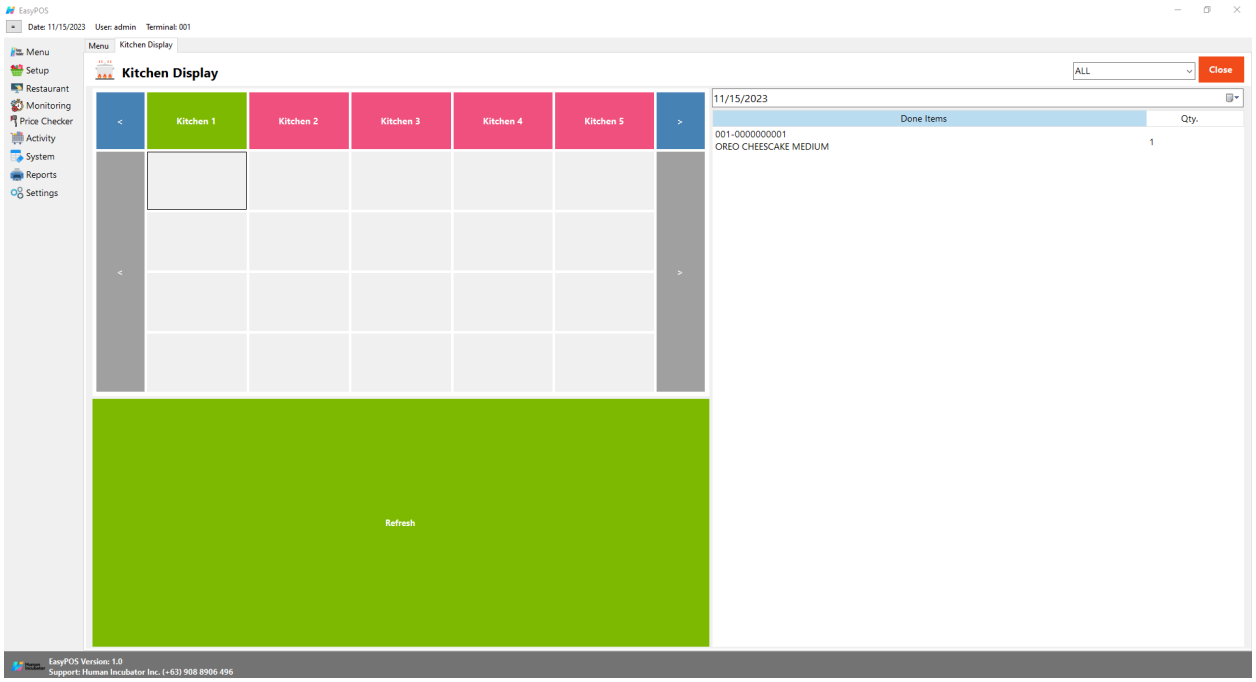
- It is where the user can monitor the orders for preparation.



- Click the item if the preparation is done.
- A prompt message will be displayed

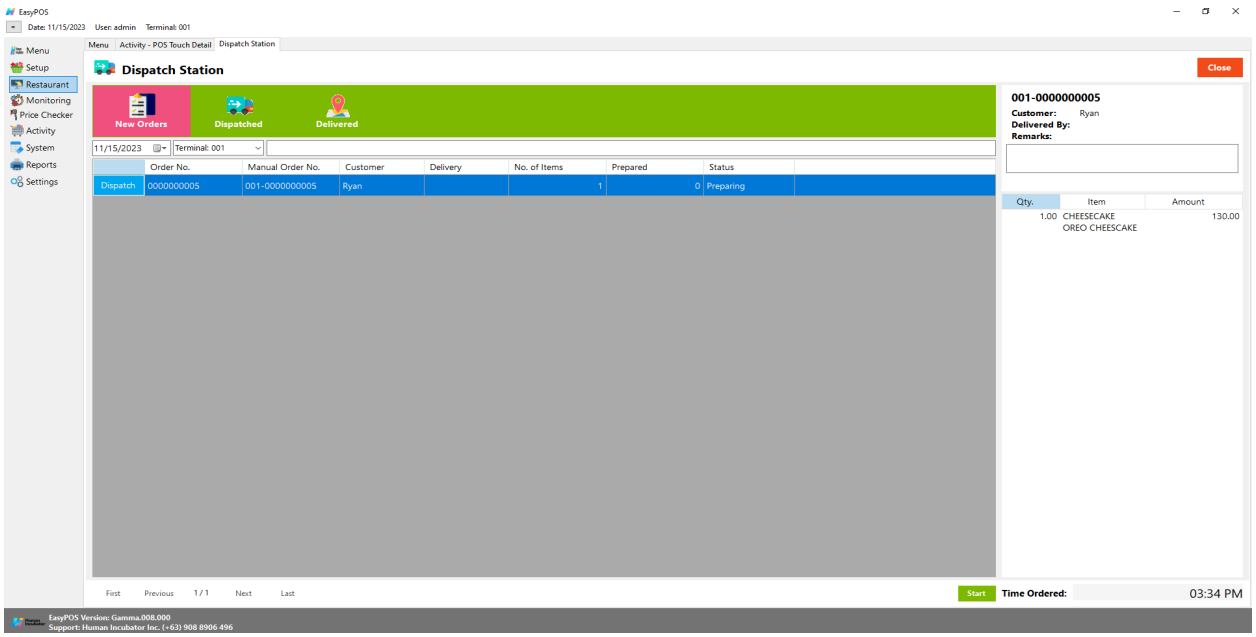


- The item will displayed in the Done Item List in the right side corner

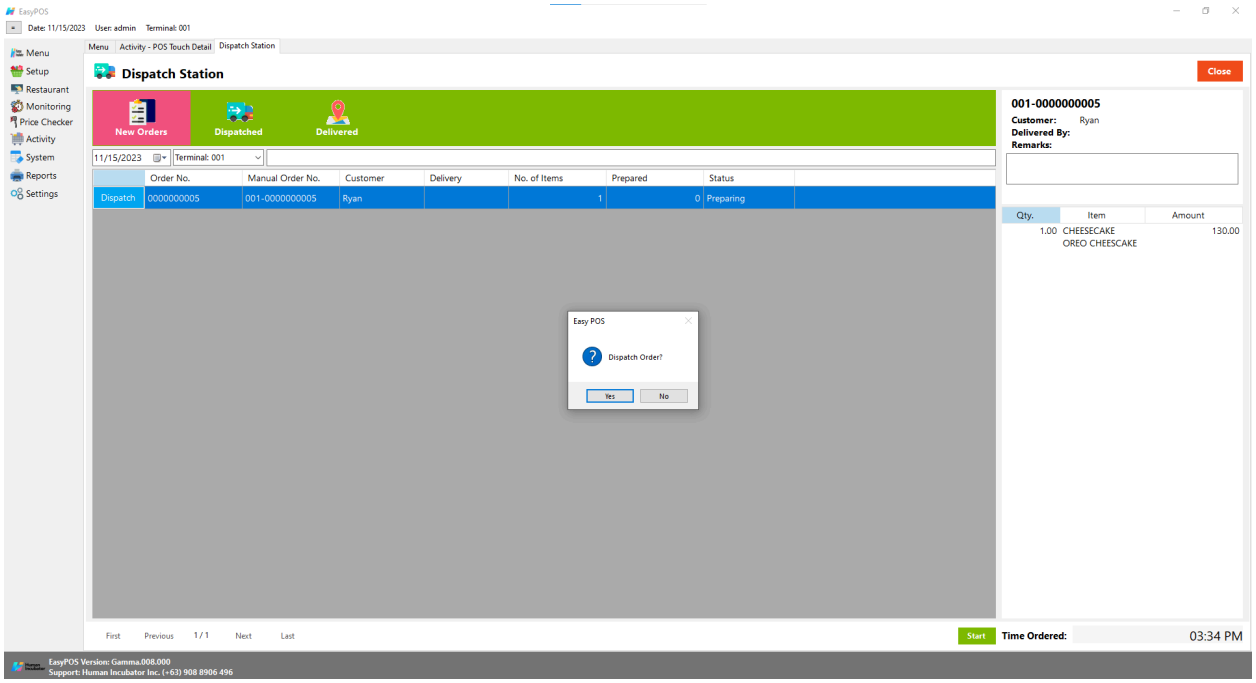


Dispatch Station

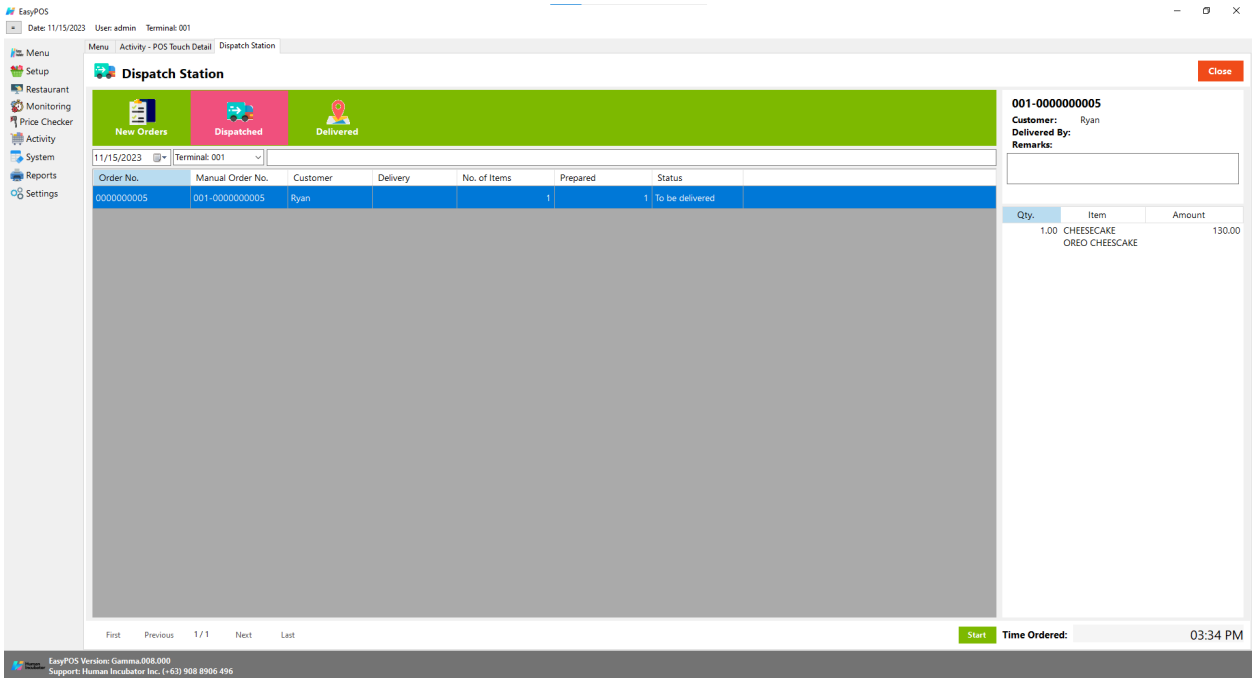
- It is where the user can monitor the delivery orders



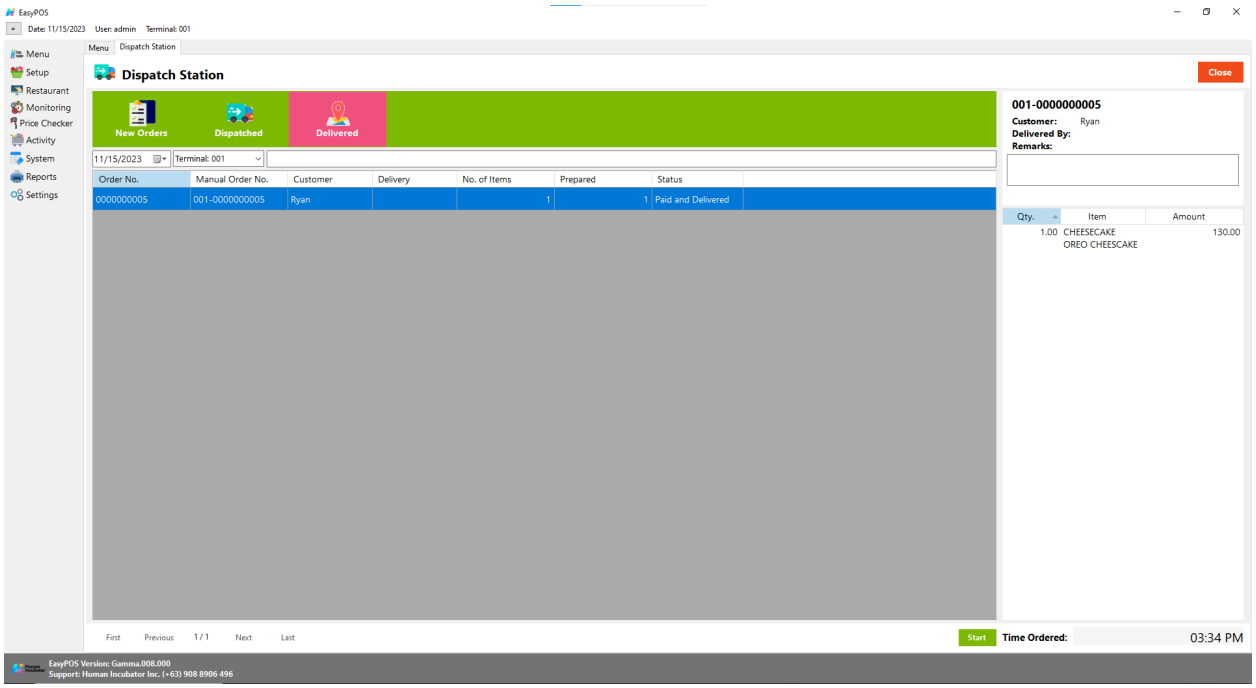
- Click the Dispatch button if the order is already done for preparation in the kitchen display module
- A prompt message will be displayed.



- The ordered item will be transferred to the dispatch tab



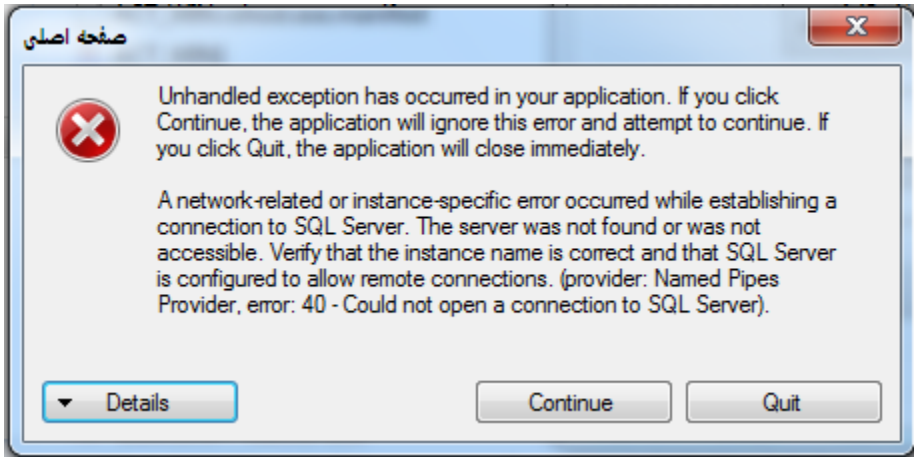
- Once the order is already paid, it will be transferred to the Delivery tab list with the status “Paid and Delivered”.



XIII: Error Code

Error: 40 - Could not open a connection to SQL Server

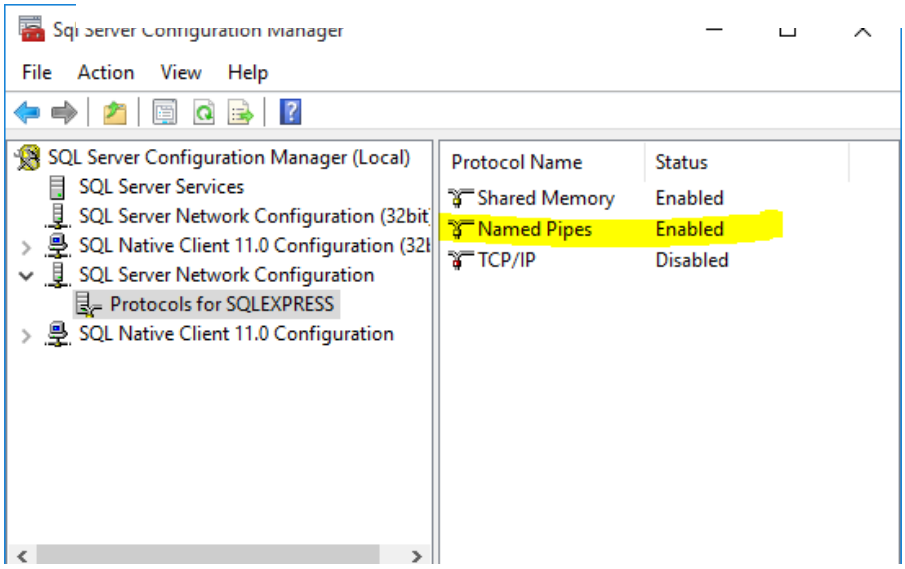
A network-related or instance-specific error occurred while establishing a connection to SQL Server. The server was not found or was not accessible. Verify that the instance name is correct and that SQL Server is configured to allow remote connections. (provider: Named Pipes Provider, **error: 40 - Could not open a connection to SQL Server**)



This error message occurs when you are not able to contact the SQL Server. There are several possible reasons for this: 1) SQL Server is not running. 2) There is a problem with your network connection.

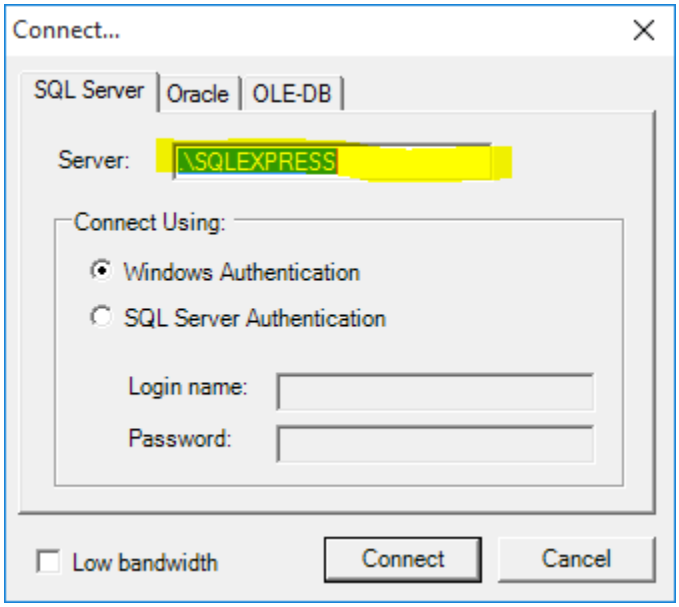
Follow the steps:

- **Enable Named Pipes SQL Config Manager** --> SQL Server Network Config --> Protocols --> Named Pipes --> Right-click --> Restart



Restart the server SQL Config Manager --> SQL Server Services --> SQL Server (SQLEXPRESS) --> Right-click --> Restart

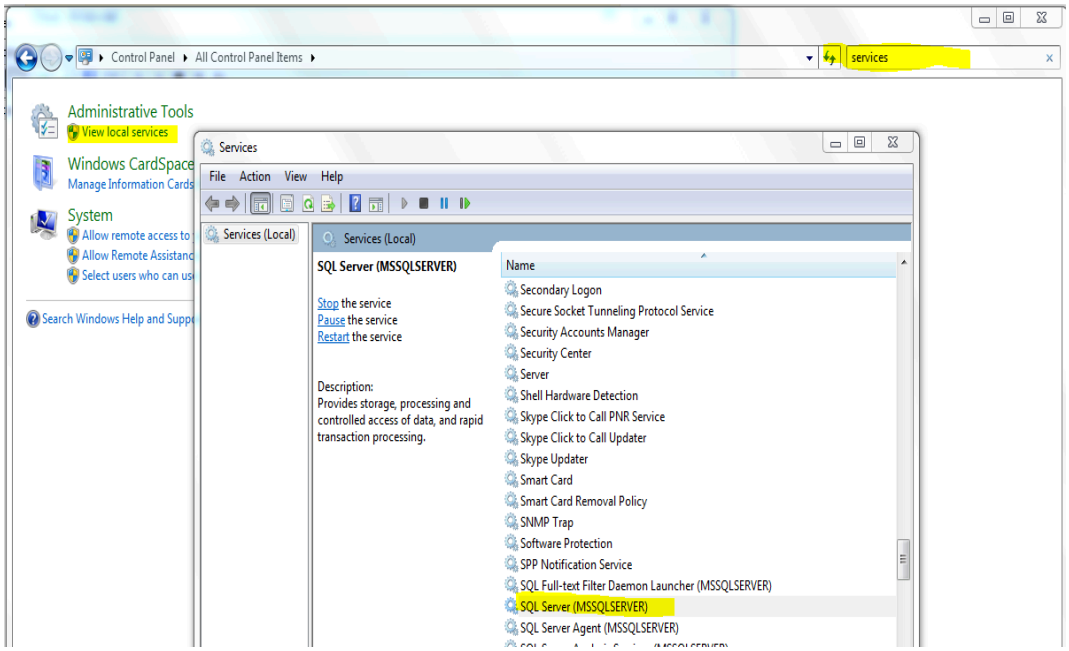
Use proper server and instance names (both are needed!) Typically this would be .\SQLEXPRESS, for example, see the screenshot from the QueryExpress connection dialog.



- **Restart Services**

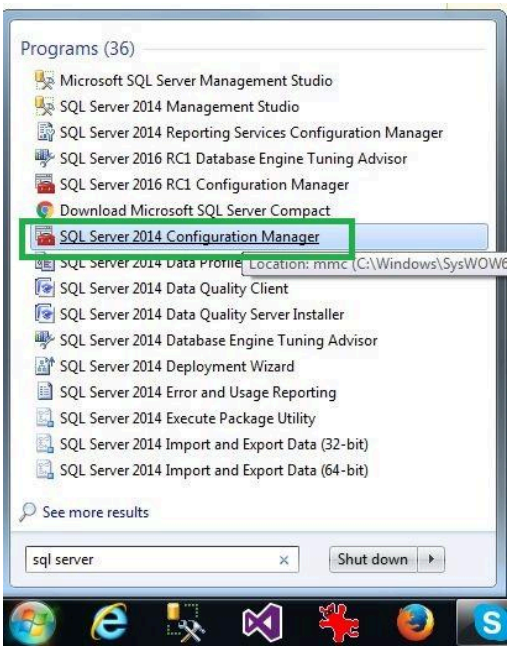
Go to Start -> in search type Services.msc. There you will find services that are available in your system.

There look for -> SQL EXPRESS / SQL Server (SQLEXPRESS) -> Right click on it -> then Start it. If it is already in Start. Just Stop and start or simply Restart it.

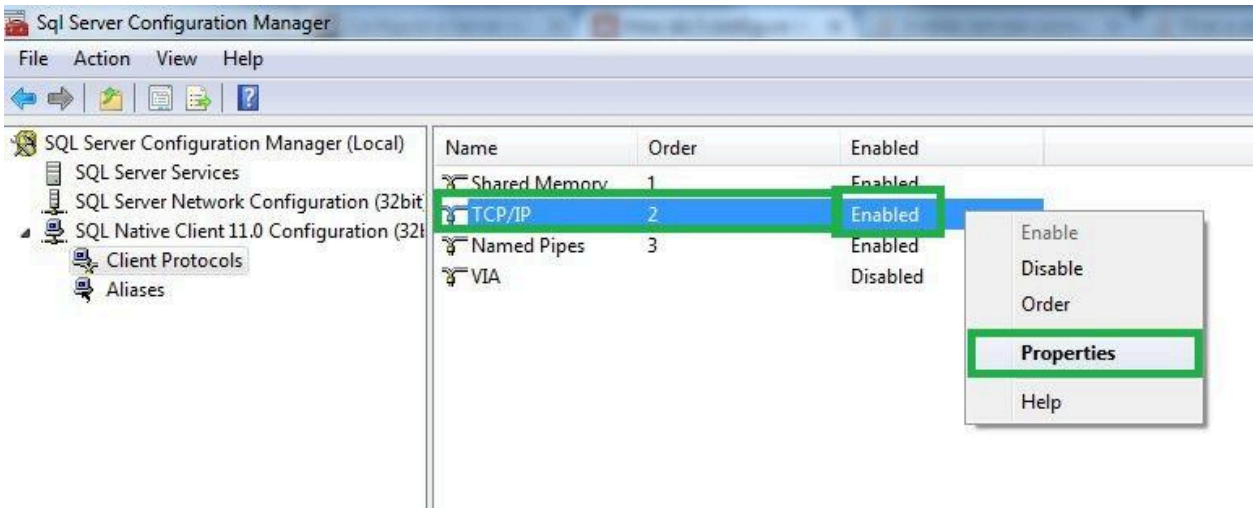
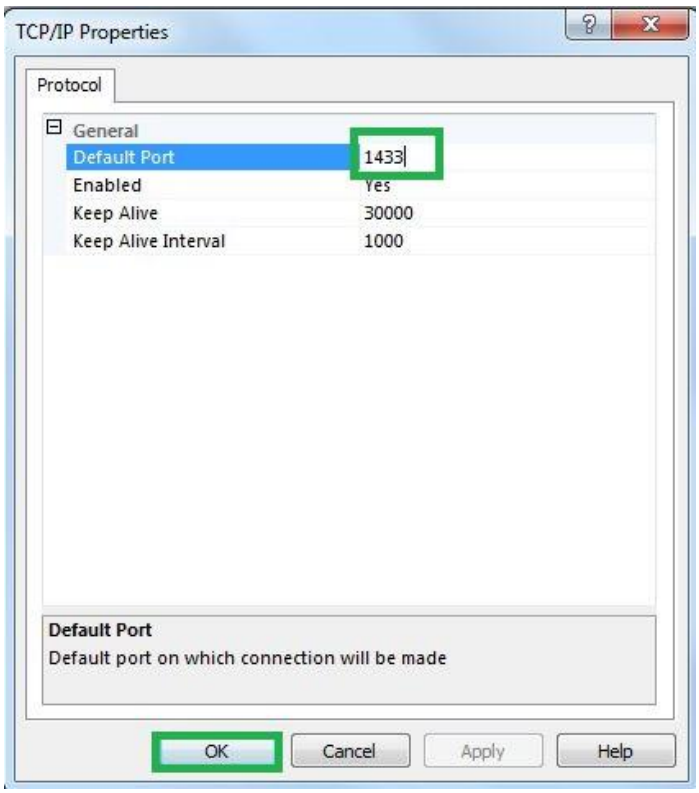


- **Make sure that TCP/IP is enabled**

To make it enabled, follow the steps: Click on Configuration Manager of SQL Server.



Now you can check the TCP/IP port status as Enabled or Disabled. You need to make it Enable and click on status to change port Properties.



Now fill Default Port no 1433 and click on the OK button.