

POS PORTAL Training Reference



	Main Screen				
	💱 Pos Portal System - Version 4.25			_ 8 ×	
	Active PLU	Sale Total	\$0.00	Fast One Shots	
	PLU	Tender		mirror accessori	
	Description Price	o render	7 8 9		
	Quantity 1.000	⊠ <u>V</u> oid	4 5 6		
	Value	Clear -	4 5 6		
	Desc Price Qty/kg Total	Find _	1 2 3		
			0 X		
	Items 0 Total \$0.00	PLU _			
		Current Transacti	ons	Toggle Menu	Menu
					a :
				Sign On Sign Off	Sign On /Off
					511, 511
Username —	Cash Draw Jim				
Signed On			_/_^		
	Price Level 1	Operator - None Active		07 August 2005 20:39:57	

Sign On

- 1. Hit the Sign On button on the main screen
- 2. Enter your Username and Password
- 3. Hit the Accept Button
- 4. You should then see your name on one of the user buttons

Sign Off

- 1. Hit your Username
- 2. Hit the Sign Off button
- 3. Your name should not be seen on any user button



	contengent							
	SFunction Sele	ction						×
	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Eunctions	✓ <u>C</u> lose
	<u>M</u> enu							
	Clean	Change Psswd				Print Receipt	Training	View
			Price level					Repeat Item
	Park Sale	Retrieve Sale	Discount editor	Price Chieck				
Handover /	Handover	Advance		Price Change	Qty Change	No Sale	Discount	Reprint
buttons		Petty Cash	Return		Setup Edit	Functions Edit		Labels
				Edit	Explorer	Windows Start	Close Application	Task Manager

Advance

- 1. Hit on your Username (Main Screen)
- 2. Hit the Menu button (Main Screen)
- 3. Hit the Advance button
- 4. The Advance screen will then show

Advance Screen

Advance Data Capture						×
			7	8	9	
Amount			4	5	6	
		\$0.00	1	2	3	
			0	0	0	
	<u>C</u> ancel	Accept		&CI	ear	

- 5. Enter the amount in the amount field
- 6. Hit Accept if its correct and you want to process the advance OR
- 7. Hit Cancel



Handover

- 1. Hit on your Username (Main Screen)
- 2. Hit the Menu button (Main Screen)
- 3. Hit the Handover button
- 4. The Handover screen will then show

Handover Screen

ender Group 1				
CASH EFT Debit		7	8	9
EFT Credit		4	5	6
Voucher		1	2	3
		0	0	0
			🥢 CI	ea <u>r</u>
\$0.00	\$100 \$50 \$20	\$10		\$5
H&ndover	\$0.00		Α	cept

- 5. Enter the amount in the correct tender field
- 6. Hit Accept if its correct and you want to process the handover OR
- 7. Hit Cancel





- 1. Select User
- 2. Scan Item/s
- 3. Hit Tender The tender screen will then be displayed



Tender Screen

CASH EFT Debit		7	8	9
EFT Credit		4	5	6
Voucher		1	2	3
		0	0	0
			# a	ear
\$54.00	\$100 \$50	\$20 \$10		\$5
ales Total	\$54.01		_	
Sub Total	\$0.00 Cancel	Discount	A	сөр

- 4. Select payment option
- 5. Enter money given
- 6. Hit Accept
- 7. Give customer change if any





- 1. Hit the Void button
- 2. There should now be no items listed

	Delete Pos Portal Sys		ion 4 25	2							_ & ×
	⊢Active PLU		011 4.2.5		Sale Tot	al 📃	_	\$	129.01	-Fast One	
	PLU Description				Tende	er	7	8	9	mirror	accessori
	Price Quantity	1	.000	L.	× <u>D</u> elet	te –	<u>′</u> 4	<u> </u>	9 6		
	Value				🖌 Clea	<u> </u>	4	2	3		
1→	Desc Operator Ji L'oreal Se	Price m \$54.01	Qty/kg	Total \$54.01	<u> </u>	<u> </u> -	י 0	2	<u> </u>		
	Delorenzo	\$75.00	1.000	\$75.00	PLU		U				
	Items 2		Total	\$129.01	Current Ti Jim	ransacti	ons	s	129.01	Toggle	<u>M</u> enu
					-					<u>S</u> ign On	Sig <u>n</u> Off
	Cash Draw			Jim							
Pi	rice Level 1	۲. ۱		J01010 k		ator - Jim				12 August	2005 12:27:27

3. The Void an item screen will then be displayed



- 4. Select the item you want to Delete
- 5. Hit the Delete button OR
- 6. Hit Cancel to close the screen

The item should now be removed from the transaction



- 1. Scan Item/s
- 2. Hit the Menu button (Main Screen)
- 3. Hit the Return button on the Menu Screen
- 4. The return screen will then be displayed



- 5. Select the item to be returned
- 6. Hit the Return button OR
- 7. Hit the Cancel button to close the screen



- Open Internet Explorer
- Go to Favorites at the top of the page and select Cashup



or type <u>http://wrappings.eposportal.com/PosCashupLogin.php?site=</u> here place your site code number in the address bar

Note: This process cashes up a cash drawer. Each cash drawer is configured as a USER with a USER ID & a PASSWORD. Ask your supervisor for details. DO NOT use your operator id and operator password.

Once you have done that the login screen seen below should load.

Cashup Login	
Site: 1	
User(2)	
Password 3	
AMC Ok (4)	

- 1. Enter your site code in the site field if it is blank or incorrect
- 2. Enter the CASH DRAWER number you are cashing up as your User.
- 3. Enter the password associated with this CASH DRAWER user.
- 4. If all the details are correct press the Ok button to proceed

	Report Options		
	Site: Hair I)	
	Selection Of Cashup		
Rate +	Selection Of Cashup <u>Nome</u>	Shift	Lagin
\sim		shift 1	Login
07-Aug-2005	Name	shift 1	Login 1

- 5. Check that your are on the correct site
- 6. Select the date you wish to cashup



	Cashup for Cash Draw on	18-Aug-2005	
	Site: Hair 💌		
	Employee: Cash Draw Employee ID: 1		
	Cashup date: 18-Aug-2005		
	shift 1		
		Discrepancy:	
CASH:	← 7)	Reason:	
EFT Debit:	92.95	Reason:	
EFT:		Reason:	
:		Reason:	-
Master Card:		Reason:	
:		Reason:	-
		Reason:	_
		Reason:	=
		Reason:	=
		Reason:	_
			_
:		Reason:	_
:		Reason:	
:		Reason:	9
:		Reason:	Ť Ť
:		Reason:	
:		Reason:	_ ↓
			8 Cashup Reset
			U

- 7. Enter the amount you are declaring in each tender e.g. Cash, EFT
- 8. If the amounts are correct press the Cashup button
- 9. If you would like to reset all the fields on the page to blank press the Reset button

	CASH does not balance within \$5.00, plea Suggest Floats or Handovers an		
	Error - Cashup NOT C Cashup for Cash Draw on	ompleted 19-Aug-2005	
	Site: Hair 💌		
	Employee: Cash Draw Employee ID: 1 Cashup date: 10-Aug-2005 shift 1		
		Discrepancy:	
CASH:	2000.00 (11)	Reason:	
EFT Debit:	54.01	Reason:	Ũ
EFT:		Reason:	
:		Reason:	
Master Card:		Reason:	
:		Reason:	

- 10. If the amount/s you entered were incorrect by ± 5 you will receive an error at the top of the page for each tender that is incorrect
- 11. You can change the amount in the tender field if you wish AND OR
- 12. Type a reason next to the incorrect tender field and press the Cashup button



13. If the tender amounts where correct within ± 5 (*configurable*) or you left a reason next to the incorrect tender/s you should see the above screen with message

"Cashup completed successfully"



INTENTIONALLY BLANK





PORTAL ASP QUICK REFERENCE MANUAL



Login / Logout

Write your company number

Site Map convergent *I* Site Map АМС Sales Menu convergent IT Welcome to the Wrappings Retail Portal. This site provides information and tools to assist you Franchise in running your business and is available to all subscribing users. Please enter your login details Gift Voucher - 1 Company: Please Enter Your Username & Password Inventory Username: 2 - 3 Creditors Password: Point Of Sale Ok Sites Email For more information about this site, please contact Bob Bird Logout 5

Portal URL address: <u>http://wrappings.eposportal.com/Login.php?company</u>=____

- 1. Type the name company and your company number in the company field. E.g. company 1.Please note if you have entered the URL address as shown above with the correct company number you will not have to perform this step.
- 2. Type your user name
- 3. Type your password
- 4. Click the Ok button
- 5. On the side Menu shown above click on the Logout button to logout. This should always be done when you are finished using the Portal.



Users

Portal User

.

Site Map Sales Menu Franchise Restaurant		Converger Portal User User Report (Portal) Employee Méñus Legout)		
Users 🗲						
Loyalty Customer On	ders	1.	Click on	Users on the sid	e Menu	
Lay Buy		2.	Click on	Portal User		
Home Deliver	γ					
Inventory		3.	Click on	User Report (Po	rtal)	
Debtors						
Creditors						
Point Of Sale						
Point Of Sale Sites						
Sites Email Logout	ndelmene Bitte			Partial lines Reset: - Conserve A		tione > Co
Sites Email Logout MAMC onvergent IT	identen Park	Bathang	a latera la	Partial User Report - Campery S	Gets Chansel	isone > fr Linticopy
Sites Email Logout			Jacom 1		Gate Channel	

This report allows you to create a new portal user, view and edit existing portal users

4. To create a new Portal user click on Create New Portal User. Once you have done that the screen below will load.

Inversent // Legenlaine5	
FistName Saname	
Paulan Paulan	
Plane Fac	
Highly Hi	
Enal Enal	
Bases Date: 28 Aug 2006	
Mite Logice (10 (Minuted) (2) Quarthamme	

5. Enter a Login name for the new user; you can also fill in the details below if applicable.

AMC		
contra la	SSR (2018) Part of thus Mandmanna	Horne 5 Diffalliner 5.1
Convergent /7 Partel Gan Lean Reset Several Employee Renue Lean#	Lingh Name: Trane Drink 6 User Type: Hegod Azzee: 44 # Permission Lavel: 110 Partiel Azzees # Default: 110 Partiel Azzees # Default: 110 Partiel Azzees # User Passweret 7 User Passweret 8	

- 6. Click on the security Tab. This page allows you to set the rights the user will have on the portal.
- 7. After you have set the rights. Click on the Current Password field and enter YOUR PASSWORD
- 8. Then click on the User Password field and type a password for the user
- 9. Click Save. You will now be able to see the user in the Portal User Report.

Employee

	S AMC	TUDA MADA ATAK				4 Klattons			10	0# > 905.Jue		
	convergent (77 Partial littler	38 III	2		Sefection Financia							
<u> </u>	Argenere -				Part of Sa	lei üser Repart						
@—	Erripke vers Resport	Lauit =	Name	User Lavel	Supervisor	Bost Dage	fed fage	Paultine	Annard	Salary		
	Login Report	Create New Employee	(3)									
	New Timesheet	90	ăm 💙	1		Hill Not Expire	05-Aug-2005		Hourly Rate	9		
	Timesheets	2	Supervisor			Will Not Expire	26-Aug-2005		Hourly Rate	0		
	New Rother	1	Cash Draw	99		Will Not Expire	051-Aug-2005		Roufly Rate	a		
	Rostews											
	Cartsup											
	Henud											
	Logout											

- 1. Click on Employee on the side Menu
- 2. Click on Employee Report

This report allows you to create a new employee, view and edit existing employees. These users are for the point of sale.

3. To create a new employee click on Create New Employee

AMC	#fly		alarme Namberson for the	Hatte > R	25.Vaec > 1935.Vaec.Merct
	Tenserti Serrit A				
	(5)	Login Name:	4		
	(7)	POS Name: Portal Name:	• 6		
Report.	0			Fed [New] [Delete	Save Deset

- 4. The system will generate a system number which you don't need to edit
- 5. Enter a Login name. This is usually a number as it is quicker and easier for the user when they a signing onto the point of sale system. ****PLEASE NOTE** User 1 and 9 cannot be used as they are already reserved by the system for use as CASH DRAWERS.
- 6. Enter a POS name. This name will be seen on the point of sale system

Locar Menu	B	toose > PO1.Juer > PO1.Juer Hard
AMC	Insployee Vanifestate Far Har	Contraction of the second s
convergent/T	In a Received County (source) with	0
Partial liber	Passward	(9)
Erestowe .	Paramet required: [1.4	
Averally .	Allow Charge Pastword: Fain +	
Bitspinson Registry	Force Change Password: [ratio +]	
List Report	Force Unique Passwork: [rain +]	
THE TRUNCTOR	Passward Life Span: 10	
Transformer Dana Maretter	Link Grane Lupine: [raine +]	
Burders.	GraceLogin Number: a	
tang	Remaining Grace Login: 4	
Hereit	Personal Expire: [28 Nov 1001	←
Line #		Fiel Ites Debte Sove Recet

7. Enter a Portal name. This name will be seen on the Portal.

- 8. Click on the Passwords tab
- 9. Enter a password for the user. This is usually four numbers e.g. 2323
- 10. Change the Password Expiry by clicking on the field

Convergent IT Potal User	Hide menu Menue processo	Tangloyee Statistics and for Har Society Tecones Statisty User Security Level: Tes Potal Access	Hona > POS User > POS User Mark
Englopee Avards Brycissee Report Lagis Report Pow Timesheet Smesheets		POS Price Edit: [raite <u>v</u>] POS Supervise: [raite <u>v</u>] Access to POS Setup: [raite <u>v</u>] Frid	New Delate Save Raset
Texe Restor Forturs Contrup Histop Logout	11. 12.	Click on the security tab. On this page you can set user. Click Save. You will now be able to see the user i Report.	C



Inventory



Inventory Menu	Hide.menu				•••••	Home > Item Search
AMC		Find Item				
convergent/7	Searching for items at Wrappings Highpoint		Department:	All	•	
Item Maintenance						
New Item	Custom A B C D E E G H I I X L M N Q E Q E S I U X W X X Z					
Edit Item	Please of	hoose a field to search on				
Inventory Report						
Bulk Discounts	Description: z					
Specials	Item code:					
Promotions	Barcode:					
Price Change	Cross Reference:					
Bulk Price Change	CTUSS Reference.					
Group Report	1	Items containing 'z'				
Style Report						
Department	Beach Rendesvouz Wilframe (U10228) Bronze Fairies (12) (ULP7839)	Kiwiana Nz Lifestyle Core (9300728451063) Leonardo First Prize (ULP6964)				
Procurement	Bronze Floral Fairies (3) (U56237) Bronze Glass Fairy Box (12) (ULP7841)	Lizard Box W/pendant (U10574) Mday Zest (9300728425491)				
Menus	Bronze Man With Best Friend (G56799)	Mday Zest (9300728425507)				
Logout	Bronze Sea Life Chimes (4) (G94319) Bronze Sunflower Fairy (U56367)	Middle Size Manager Scene (U11195) Mini Bronze Elephant (U56449)				

Once you have performed a search either by alphabetical order or custom, a list will generate as shown in the diagram above

7. Click on the item you wish to edit



ent//		Investory Autologance		111 000111
item Code: Item Description:	9003803 Packer Adva Express Conditione	·	Site: 10 Oute of Lent Champe: 10	and the
And and a second s	The second second second second second second	CONTRACTOR OF AN	10000	
1	Pers Descriptions Region Adva Express Carching	oner.		
6/10	Silver y		-8	
(9)	Packi 1		U	(10)
	Department Dept 10	0.000		Ŷ
		<		
ant .	and the second se		TRANSPORT DESCRIPTION	+
40.07	Printed Planter		First New York	Save Herr R

- 8. On the details page you can edit the description and the department the item is associated to
- 9. To change the price of an item click on the Pricing tab and change the Retail Price
- 10. If you are a franchise operation there may be an INDUSTRY REF or CROSS REFERENCE tab, this is where, if used, <u>you</u> <u>must</u> set up the *franchisor cross* reference for the item. If in use, you cannot save a changed item until this is set up. To obtain the franchise cross reference number consult the Portal under Franchise Menu then Xref.
- 11. Once you have finished editing the item Click the Save Item button.

Balance Reports

	Inventory Menu	AMC	Holemens Brit			Report Options				Home > balance
	Convergent/T	Convergent ///	-(4)	vi 2005 🔶 🤆	D		Display As	Table 🔳		
	Item Maintenance	Site Cashape Site Bankoy Site Journals Larger Balance	ita • Incola	Mandas 11.JM-2005	Detailer 10-36-2015	Mailtender 13-3al-2003	Daratas 14-14-2015	11-34-2101	Saturdan 18-30-2015	Intel
	Procurement	Sales Reports Special Reports	Support Site Tanal		8248.21 8248.25	\$1.123.50 \$1 1 23.50	81,391,09 81,391,09	\$424.05 \$424.05		\$3,198,45 \$3,198,45
$\begin{array}{c} 1 \rightarrow \\ 2 \rightarrow \end{array}$	Menus Site Nap Sales Menu Franchise	GBT Reports Control Reports Hernus Löpput				6				
	Restaurant Users Loyalty Customer Orders Lay Buy Home Delivery Debtors Creditors Point Of Sele Sites Email Logout	 Click Click Click Click Click Select Click 	on Menus on Sales Menus on Balance Rep on Site Balance the date you w on the underlin refer to the bel	oorts s ish to view ed figure to	view full	l report.				

converge	ent					20			
farm 3	tudemenu. Etxx					ttams > l	latance > Site Bat		
IMC I			Report	thatterne					
ent/T	Sile: Support St.	**		Date 13.3xt 2905					
neet 1									
ingen in	B	teres		-	Tendore				
-	Reference Customers	Tales	Debrt Tatal	Takinge	Amount	male Tonal	Total Credit		
-	Dask10 47	\$2,096.92	\$2,096.82	GASE	81115.00				
			10	stt	\$7.00				
and the second second				Other Voulter	\$15.00				
				Assount Customers	8496.30	\$3,123.00			
10 4444				Pending	\$963.71				
parts.				Pounding -	\$0.00	\$963.73	\$2,016.8		
		nation		S					
	Peterama	Castemers	Amount		Banking / C		Amount		
	Stark Custometra		Det .	Manay Bankad: - Not Dalla					
	Publicia per Customeri		\$20.64						
	Late mate.		8307.26	Daily Dem / Department Sa	ies.		\$2.094.00		
	Sharm Mandai.		\$31.07	net Balan (Kalan - Discourt)			\$2,010.0		
	Between		46.36	Next Takings			81,313,4		
	Party and a second s		and the second se	Poursing.			\$1.0		

To examine in detail any area of interest, click on the figure of interest (if underlined) and the supporting information is shown.



Control Reports

Time Hour

AMC	Options (Climita)			Hep	ort Optices				
Convergent //	Site: ALL	-	By Der	-	Date 11	W 2005	Display As	Table •	
Sales Reports		100	- 1025		100	tely send		tent a 15	-
Specials Reports	-			Transaction	to per Hour by Day				
GST Reports	Time	Sandar 10-Jul-2005	Mondler 11-34-2005	Tuendar 12-34-2005	Wednesday 13-34-2005	Thursday 14-Jul-2005	Friday 15-34-2005	Saturday 18-Jul-2015	Total
Control Reports	9:00 - 9:59				8	8	4		2
Discounts	10:00 - 10:59				3.4	1	2		1
Customers	11:00 - 11:59			3	5	з	1		1
Time Hour	12:00 - 12:59			1.2	5	4	10		3
Translations -	13:00 - 13:09			4	3	- 2			3
Hittarto	14/00 - 14/09			3	4	2			
North	15/00 - 15/59								1
Petty Cash	36:00 - 36:58			- 6	11	2			3
Low Value Talwa	17:00 - 17:59				4				
Gam Harry Sales	20:00 - 20:59			1	1				
Tingle Stern	21:00 - 21:59				L				
Pill marie	Tutel:			37	59	32	29		1

**Please note we are still in Sales Menu

- 1. Click on Control Reports
- 2. Click on Time Hour
- 3. To view sales between each hour Click on the Filters tab

vergent ///	Column likers		+						
rca Reports		Typ	pe Sales						
i teporta	·								
als Reports					peer Hour by Day				
	Tima	Sunday 10-34-2005	Monday 11-Jul-2005	Tuesday 12-34-2005	Wednesday 13-34-2005	Thursday 14-34-2005	Pridaer 15-AJ-2005	Saturday 16-34-2005	Total:
laparta	9.01 - 9.59				4250.16	\$2299.00	\$127.80		\$175.4
ol Reports Number	10:00 - 10:59				\$246.97	\$45.00	\$1,12,49		\$104.4
normana Namara	11/88 - 11/89			\$54.73	\$7.00	\$45.00	\$212.75		\$135.
i Pesur	12:00 - 12:59			015.76	82.44.00	\$120.00	\$323.24		0000.0
4	13:00 - 13:59			\$99.26	\$04.00	\$501.74	\$49.05		\$725.
sactors	14:00 - 14:59			\$1.15.76	\$2.77.00	\$142.00			\$434.
etter 15	15:00 - 15:59			\$1.92.00	\$69.00	\$1199.20			\$403.
e Cart	16:00 - 16:59			\$7.80	\$208.00	\$59.70			\$125.
Vallue	17/88 - 17/89				\$627.00				8627.
	20100 - 20159			\$35.00	\$35.00				\$21.
Stave Sales	21:00 - 21:59				\$49.00				\$49.3
de Ettern 16	Total :			\$577.31	\$1,096.01	\$1,082.64	\$924.93		\$4,102.3
Journal									

4. Click on the Type drop down menu and select Sales

The sales will then be displayed between each hour as shown above.



Clerk Transactions / Users

	ST AMC	lickmens first dans > Sta Cast										
	convergent //	She: Jack	1	Type Trav	ratory 1	By	[lay <u>*</u>]	De	e [13.542965	1		
	Salas Esports	Siles Elanis Report Summary - Transactions										
	Specials Reports	chek =	Bunday 10 Bunday	Mandau	1. Depility	Krenita	.Deffis	1. Colum	-Bittle	200		
	GETRepote	1000	10.561.2518	11.36.203	10.503Bls	and a second second		ALC: NOT THE OWNER	And Address	and the second se		
	Cartes Sugarty	ADMINISTRATOR	0		36		10	29		150		
	Customers	Total				64	15	25		164		
1-	Televit Tesse Citri Traceactions Pottor Cash Nettor Cash Law Value Stats Law Value Stats Law Value Stats Law Jace Sales Single (hern Easter Potto Journal)	1. 2.	Click on Click on Once you shown be	the empl	loyee you icked on	wish to the empl	oyee a re	eport wil	l load a	s		
	Manar Lagest	3.	To view	the trans	action Cli	ick on a	journal n	umber				

S AMC	Home First Home > Site Clerx > Dath Jins										
	Report Options										
Convergent 77	SHE: [Support Star			Chefk: Usari +			Date 13.34 2965				
Caller Records											
Spinouts Taplants	Transactions for User11 - Trapport Mir										
ILT Pepets	Incid.+	54rdar 10-64-7915	Mundar 11-04-2025	12-lia-2005	Wednesday 13-lul-2005	19u45dat 34-34-2005	25-34-2005	041a10er 16-34-2005	Tonei (
Sector Reports Descents Construints Cardinates Cardinates Cardinates Addaring Addaring Addaring Addaring Addaring Addaring Addaring Addaring Addaring Addaring Cardinates Cardin	1					$\begin{array}{c} 137.07 \\ 127.07 \\ 128.08 \\ 127.08 \\ 128.0$		⊢ 3	94204		

Voids



- 1. Click on Voids
- 2. The void report will then be displayed outlining the total voids by each employee



Convergent // Salaws Ruperts Salaw										
Sales Department by Sales Hair Copyright Examples Examples Plannings Plannings <th>G., Footag</th>	G., Footag									
Terre Sales Gaussiant 16500-2015 15-000-2000-2000-2000-2000-2000-2000-200	U. Franker									
Ten San Annual Annual Instill	100 1000 +									
Test and a second secon	\$109.4									
Arrest State State	\$30 s									
	81-15.5									
1. Click on Sales Reports										
2. Click on Department Sales. This will display the to	1 1 2									
for each department.	ui bui									

To view item sales click on Item Sales below Department Sales.

Franchise Report



AMC	24
Notes:	