amendo

User manual

The POS system (ProTouch)

VERSION 1. 10 | ENG

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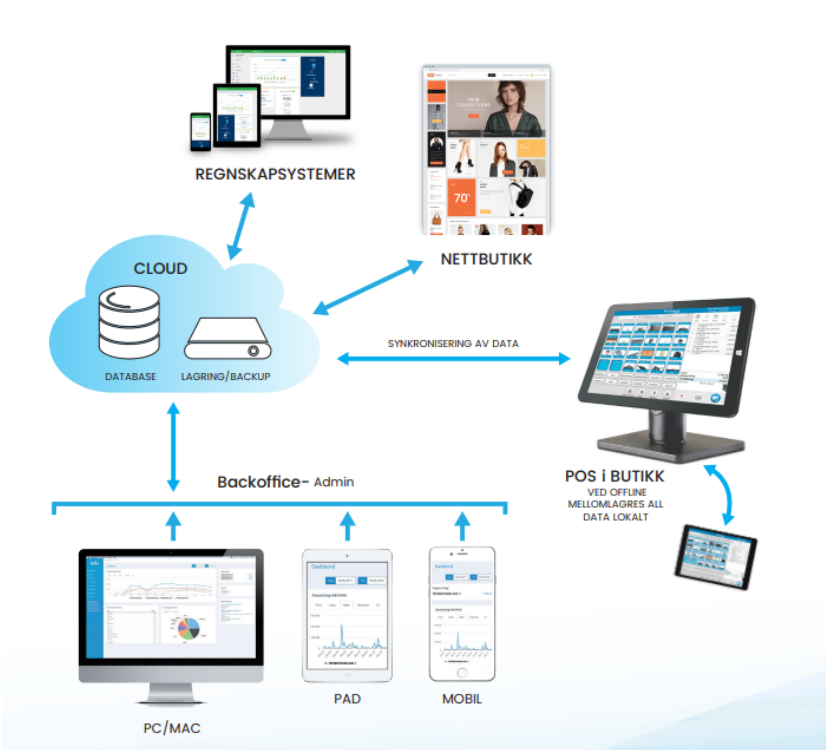
Get started with the POS system

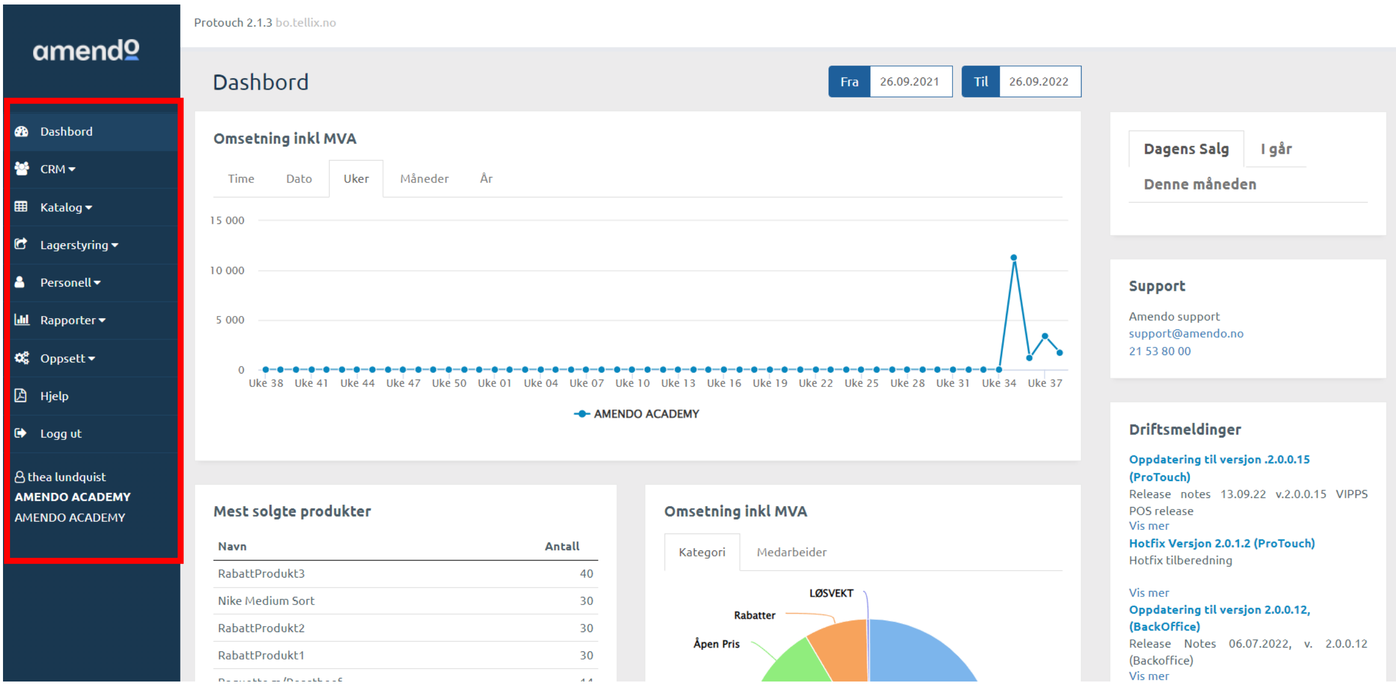


The POS system consists of two parts: ProTouch and BackOffice (Area https://bo.tellix.no).

Protouch Is the sales program that is installed locally on the checkouts, and runs regardless of whether the checkouts are connected to the network or not. ProTouch and Backoffice are synchronized regularly. If the network goes down, the checkout will still work as usual and synchronize when the internet is back. **The maximum time** for offline mode is 30 days. For a deeper explanation of what syncs, go to chapter **2.6.1 ProTouch syncs with the Backoffice at fixed intervals.**

Backoffice is our powerful cloud-based management tool where all content for the checkout / checkout points is managed. That is, it is accessible from any device that has access to the internet. It is required that javascript is enabled and that cookies are allowed. We recommend always using the latest version of Google Chrome or Mozilla Firefox browsers.

The checkout should be freed up to only make sales and receive payment, but it can also be logged into the BackOffice from the checkout. Inside the website there is a dark blue tab on the left side, this is the menu. Here you will find everything you need in terms of settings and reports as well as an overview of turnover, sellers, users, etc.



Where to find help?

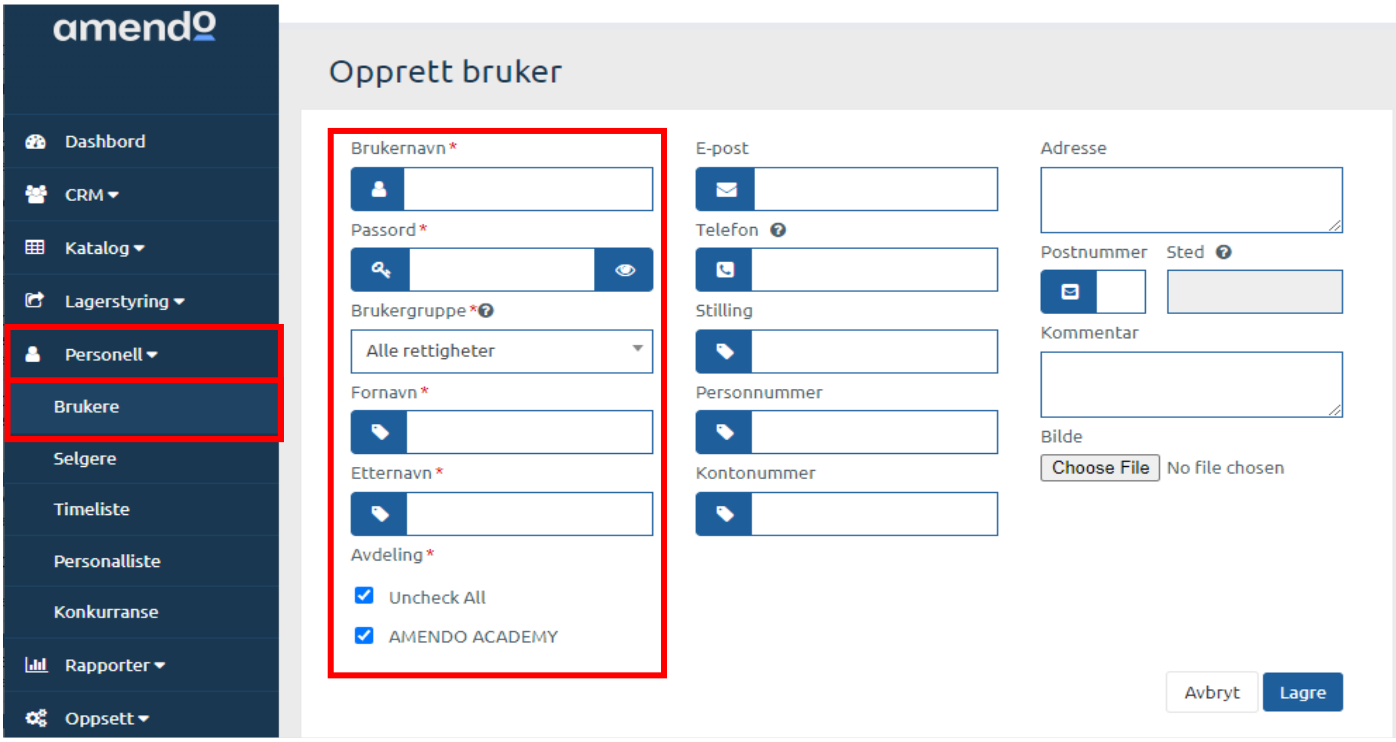
Everything in this document can also be found on our support page **support.amendo.no** (We recommend adding this as a favorite in your browser). For assistance with invoice, payment and licenses contact **bt@amendo.no** and **salg@amendo.no** for sales.

1. Backoffice

1.1Create users for the Backoffice

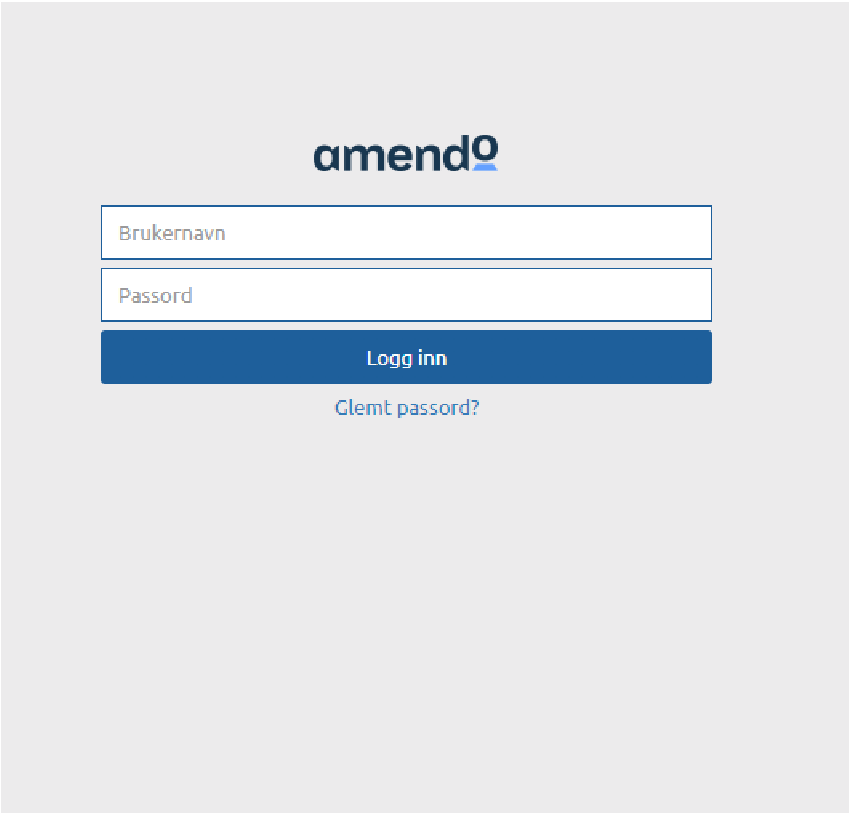
Go to **bo.tellix.no > Personnel > Users** – Here you can see which users already exist. You can change existing users by clicking on them, or click on "**Create user"** to create new user who will use Backoffice.

In "**Create user"** there are six fields that are required to be filled in: Username, password, user group, department, *first name, last name and department.*



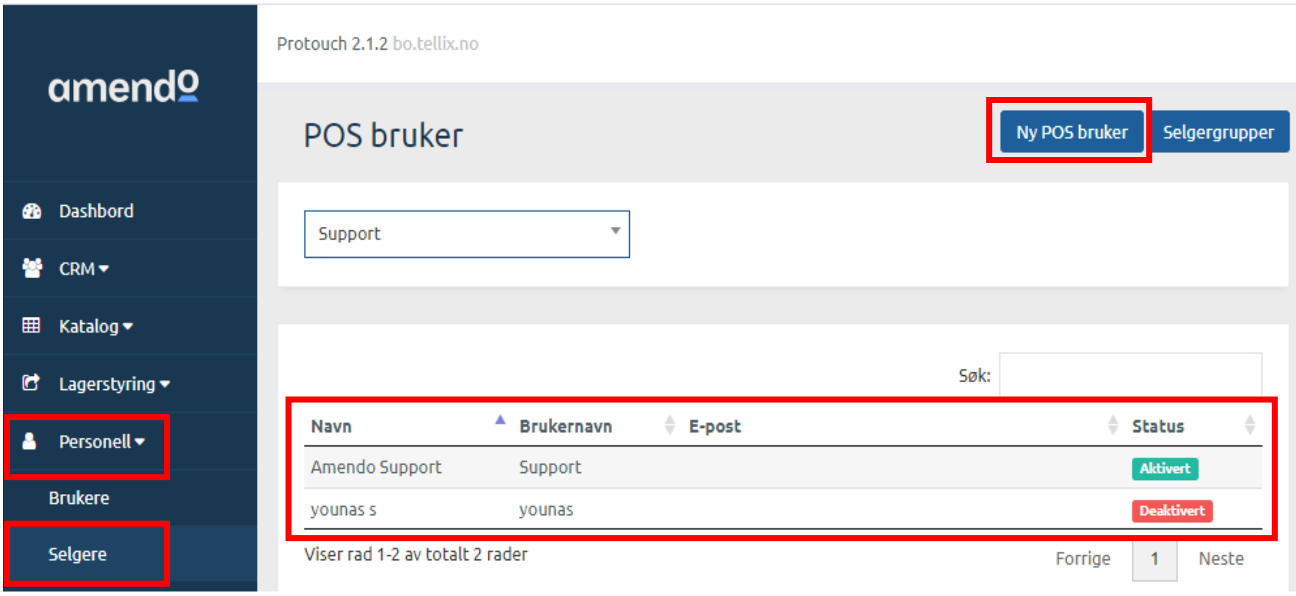
Enter the desired username and password, the password must contain at least 8 characters, minimum one uppercase letter and minimum one number. Enter the first and last name of the user, then select which department the user belongs to. When you are finished with the user, select **"Save".**

1.1.1 Login to the Backoffice



1.2 Creation of Sellers for the POS system

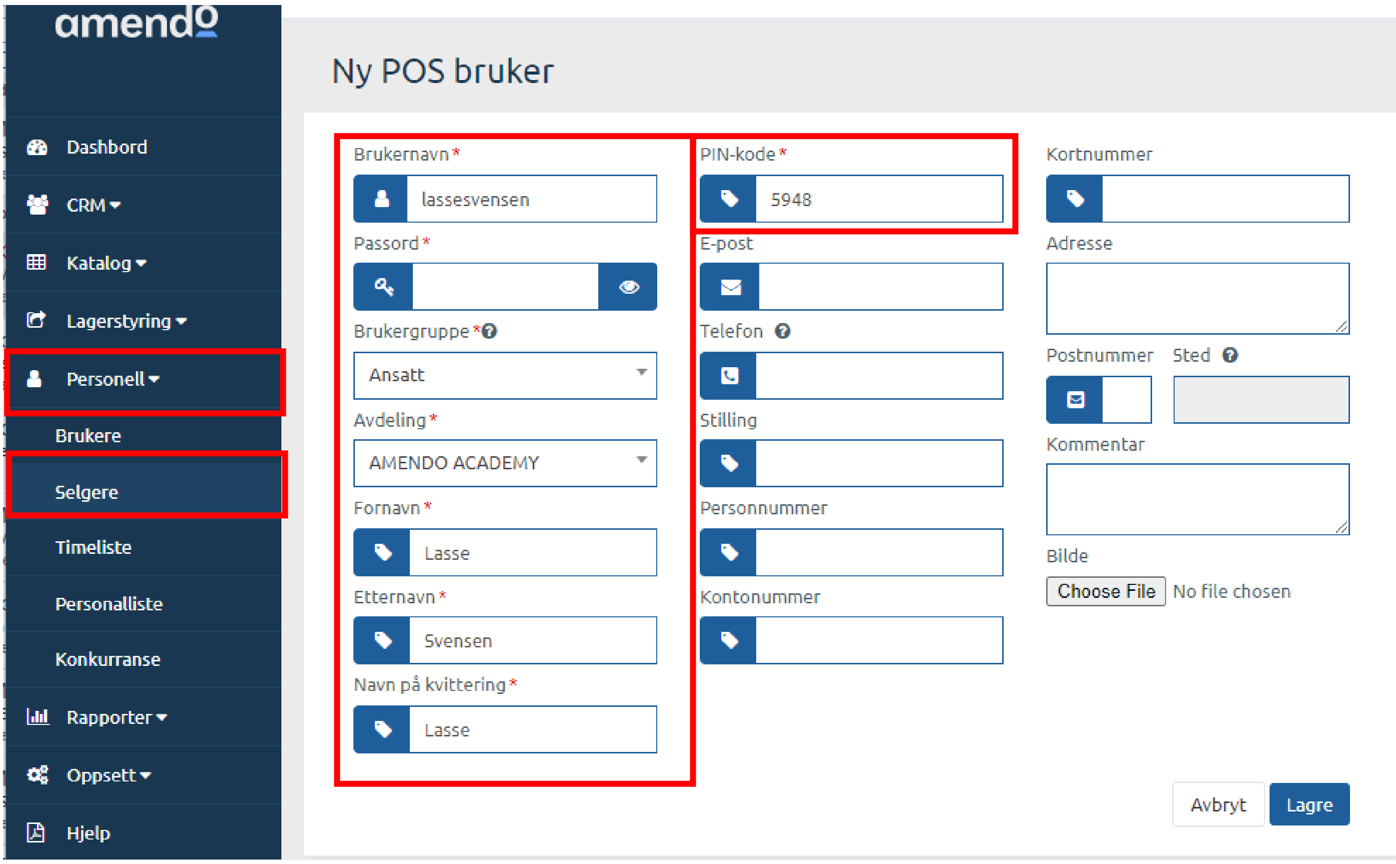
Visit **bo.tellix.no > Personnel > Salespeople** – Here is an overview of which sellers already exist. It's possible to edit existing sellers, or tap "New POS user" to create a new seller who will use the checkout. The menu for this can be found on the left side, In blue field.



Inside " **New POS user"** there are eight fields that are required to fill in, these are marked with a red asterisk:

Username, password, user group, department, first name, last name, name on receipt and PIN.

The username is first and last name in lowercase and in one word.



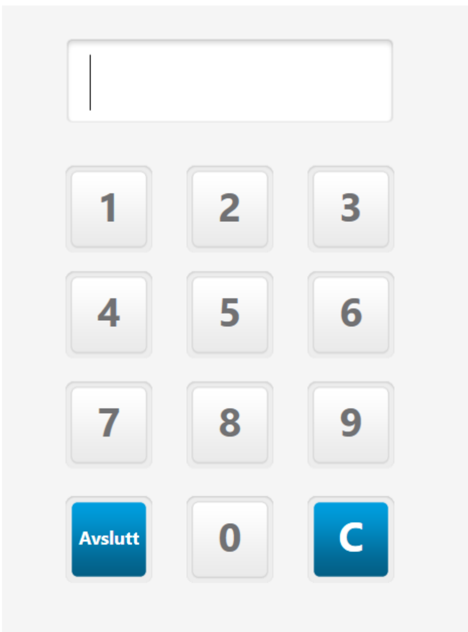
In ProTouch you can change whether employees either use a password or PIN code to log in to the checkout. Therefore, save a password that is easy to remember. However, it is recommended to stick to PIN as this is easier to remember.

The password must contain a minimum of eight characters, a minimum of one uppercase letter and a minimum of one number.
Enter the first and last name of the seller, " **Name of receipt"** will be automatically filled in with the first name unless otherwise specified in the field.

User group/Salesperson group is for specifying rights to the salespeople at checkout.
The default values that can be selected here are All Rights and Employee. Feel free to contact support if you need help with this.

1.2.1 Login to ProTouch (Cashier)

When logging in, you will get the following picture in the cash register system.



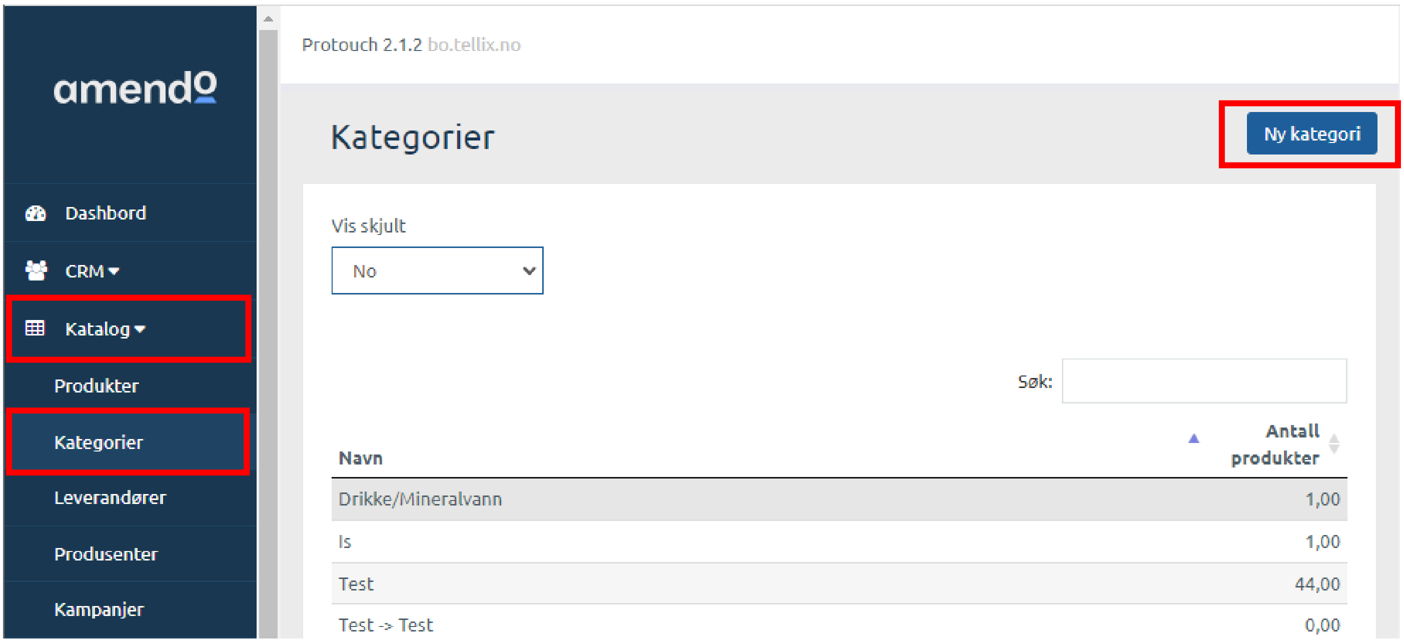
When logging in for the first time , we have created a user with a PIN code. This can be found in the welcome email we have sent when ordering the equipment.
If you want to create more sellers for the cash register program, you can read how to do it in the chapter above.
When creating a seller, you also decide which PIN code they should have. This can be 1-6 digits.
There is also the option to log in with

1. Employee card to drop pin code
2. Username/password for more stringent requirements.

1.3Creation of Category

All products **must** be categorized in the system. Before the product is created, a category must be created to which the product should belong.

Go to **bo.tellix.no > Catalogue > Categories** – Here we can see already existing categories. To create a new category, tap "**New category".**

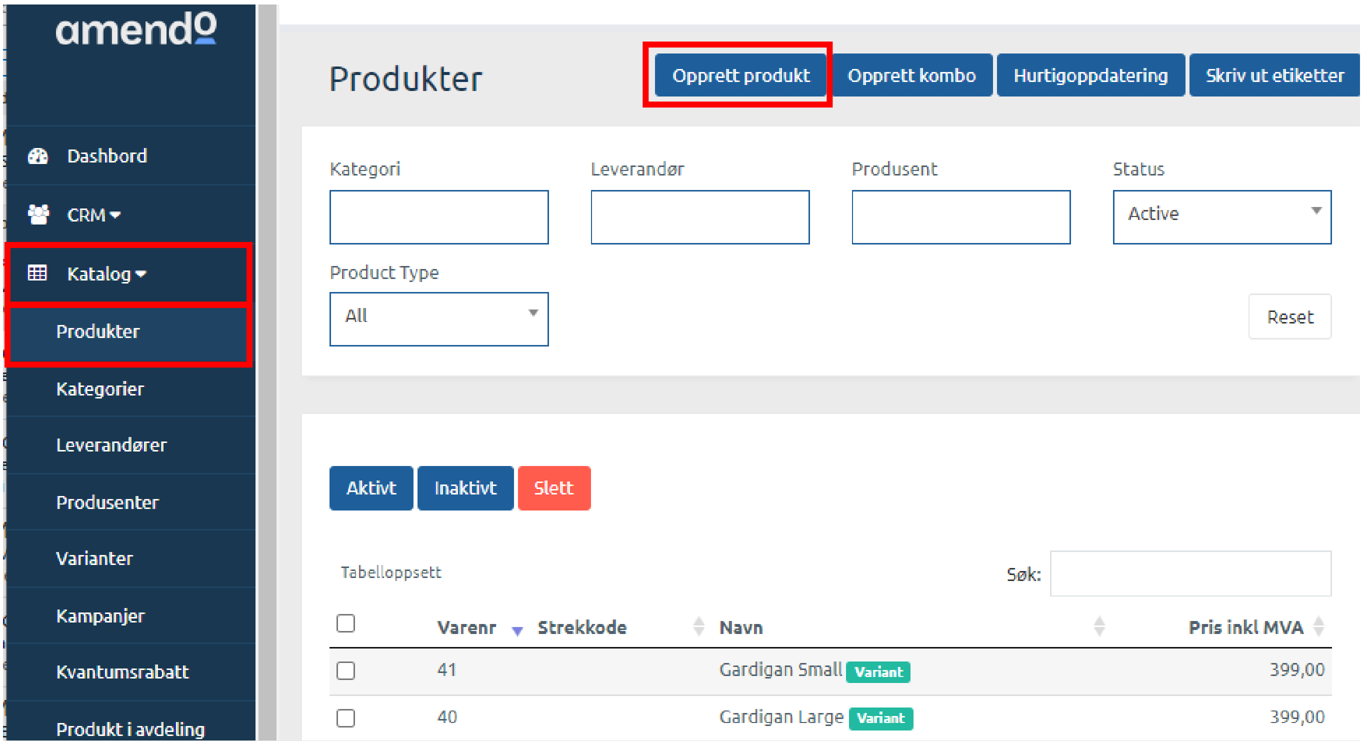


Inside the "**New** category", add the desired name of the category in the "**Name"** field. Press "**Save"** when you're done.

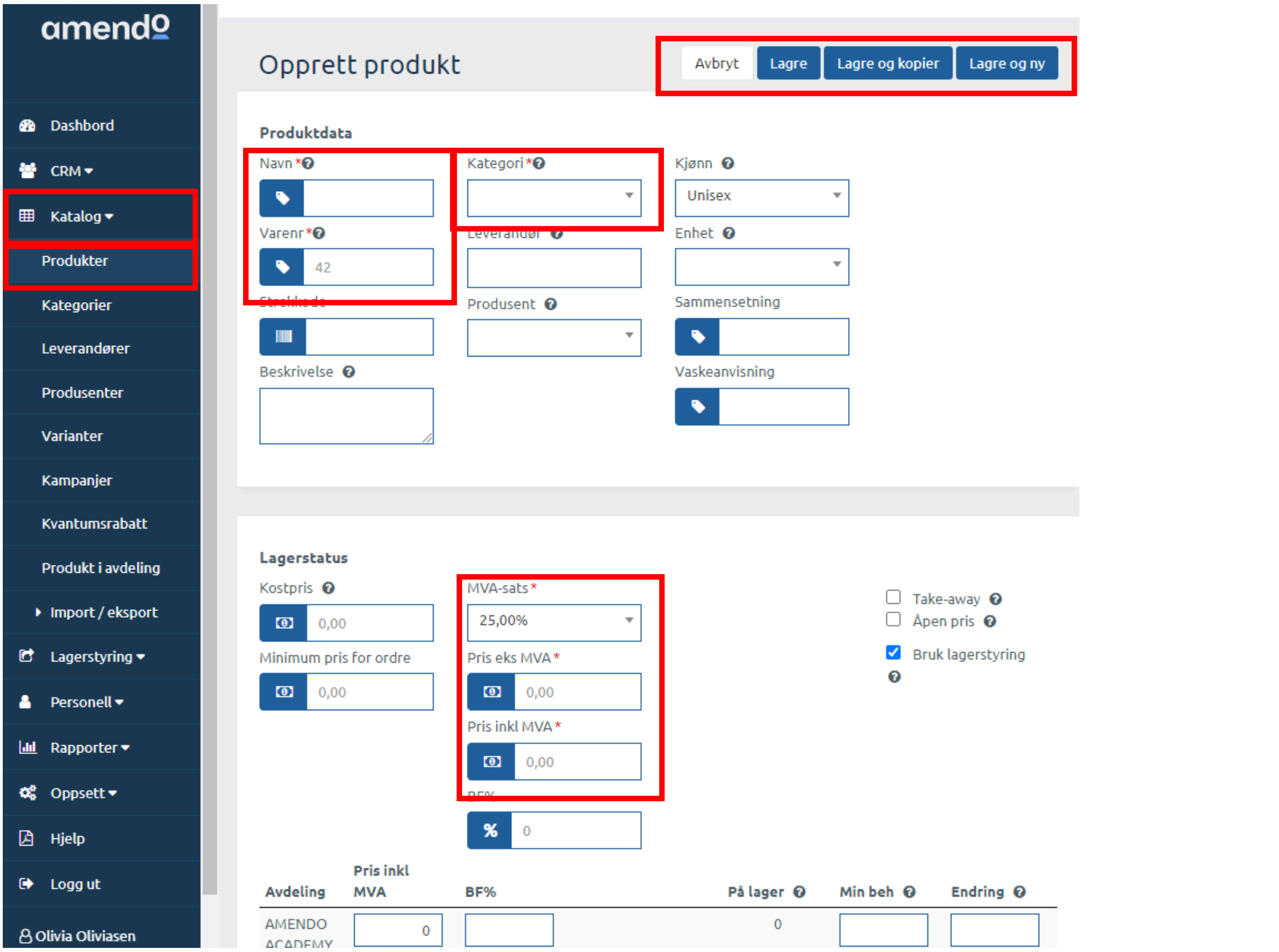
1.4 Product creation

To make a sale, one must have entered products.

Go to **bo.tellix.no > Catalogue > Products** – Here you can see already existing products. To create a new product, we click on "**Create product".**



Fill in the fields. The fields marked with a red asterisk are required to be filled in in order to save the product. These fields are **Name, Category, VAT rate and Price excl. or incl. VAT.** Once you've filled in the desired information, tap **Save**.

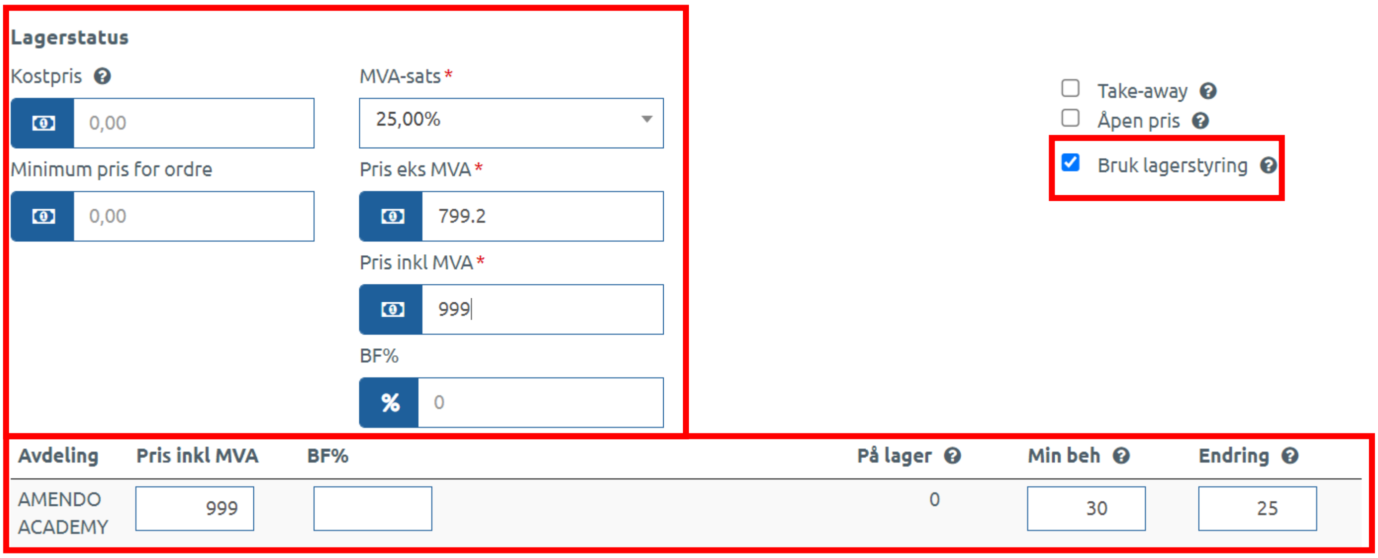


Three ways to store:

- Storage (regular storage)
- Store and copy (copies the same item, with the exception of item number)
- Save and new (resets form)

1.5 Creation of Products: Pricing and inventory management

Once you have created products and inventory, you can go in and change these at any time. There are a number of options here. Do you want to change the price? Do you want to change inventory? Do you want to put the desired number you should always have in stock? All this is in the menu under the product. At the bottom of the warehouse status field you will see "**Department"**. This shows the status of the specific product in the department.



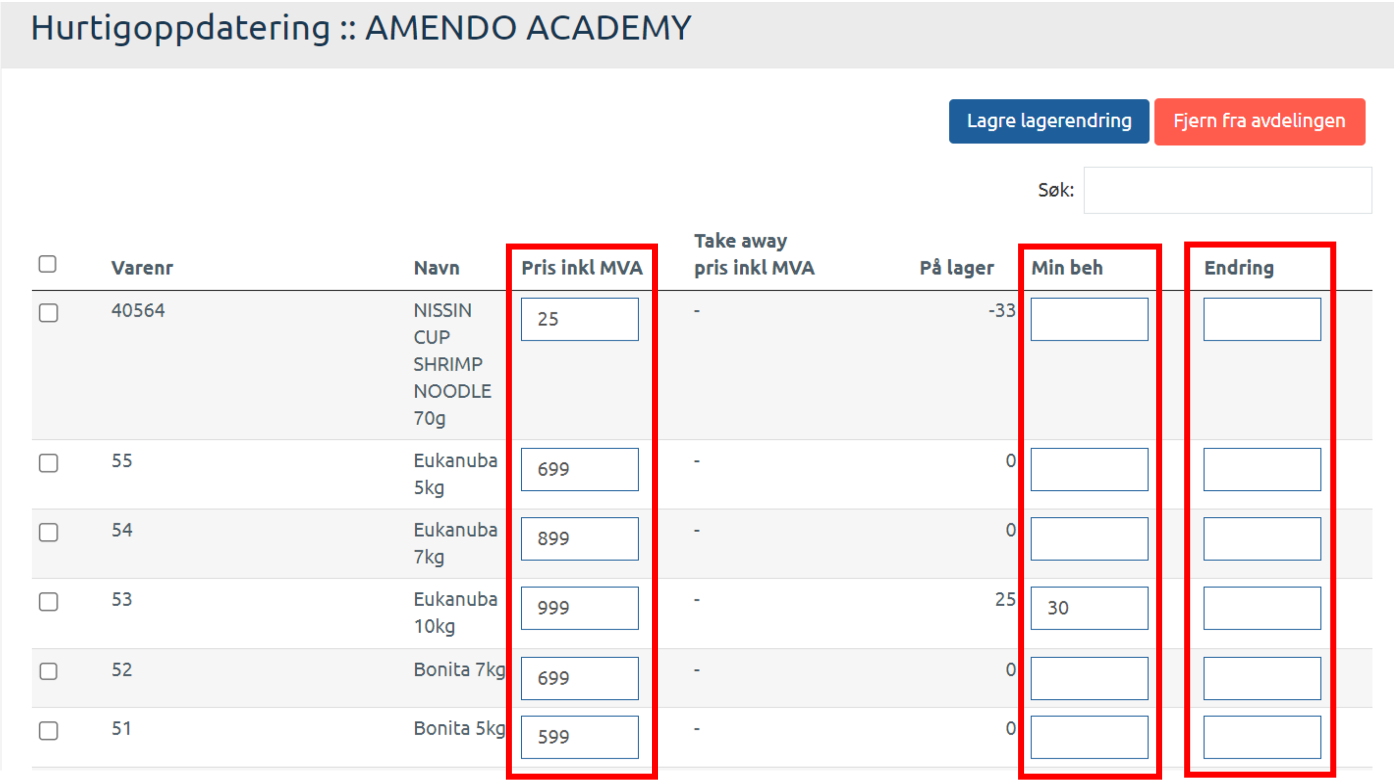
1.5.1 Quick Update

Inside the main product overview, there is a quick update option. **Quick update works** so that you select the department you want to update the inventory on, then get a list of all products in the department, with 3 fields you can change;

"Price incl. VAT" - Enters a change in the price of the product at departmental level. It will still be with the old price if you go into the specific product, but it will sell for departmental price. The department price will **always override** the product price, and if you go in and change the **product price manually, this will change the department price**.

"My beh" – Changes how much you want to have in stock of products at any given time.

"Change" – Changes the actual inventory. This is how much you actually have in stock.



Hurtigoppdatering :: AMENDO ACADEMY

Lagre lagerendring | Fjern fra avdelingen

Søk:

☐	Varenr	Navn	Pris inkl MVA	Take away pris inkl MVA	På lager	Min beh	Endring
☐	40564	NISSIN CUP SHRIMP NOODLE 70g	25	-	-33		
☐	55	Eukanuba 5kg	699	-	0		
☐	54	Eukanuba 7kg	899	-	0		
☐	53	Eukanuba 10kg	999	-	25	30	
☐	52	Bonita 7kg	699	-	0		
☐	51	Bonita 5kg	599	-	0		

Below is a picture to illustrate what it lookslike after posting changes.

Hurtigoppdatering :: AMENDO ACADEMY

Lagre lagerendring | Fjern fra avdelingen

Søk:

☐	Varenr	Navn	Pris inkl MVA	Take away pris inkl MVA	På lager	Min beh	Endring
☐	40564	NISSIN CUP SHRIMP NOODLE 70g	199	-	-3	30	
☐	55	Eukanuba 5kg	1099	-	45	45	
☐	54	Eukanuba 7kg	999	-	45	45	
☐	53	Eukanuba 10kg	1299	-	50	30	

Changes to price, inventory and change have been added here. Note the status in "**In stock**" and "**Price incl. VAT"**

1.6 Combo product and Variant product

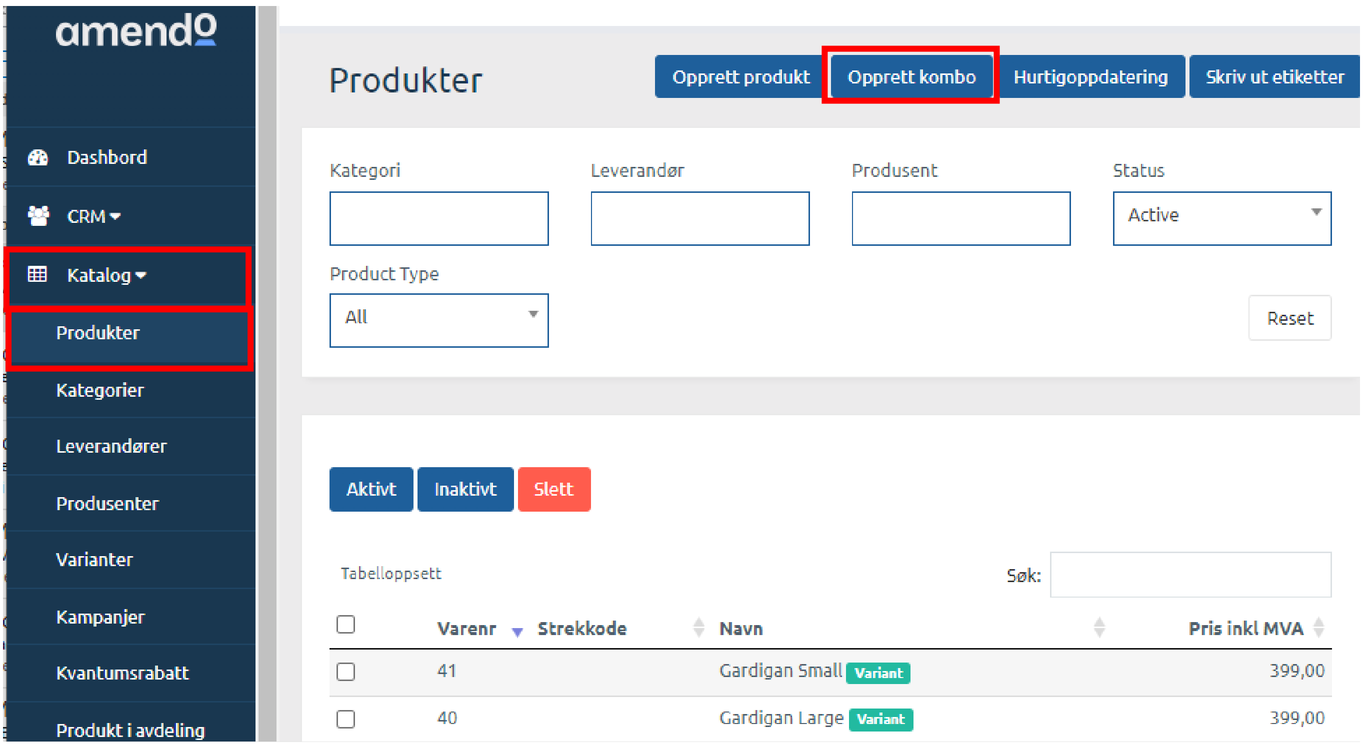
There are several choices when creating products.

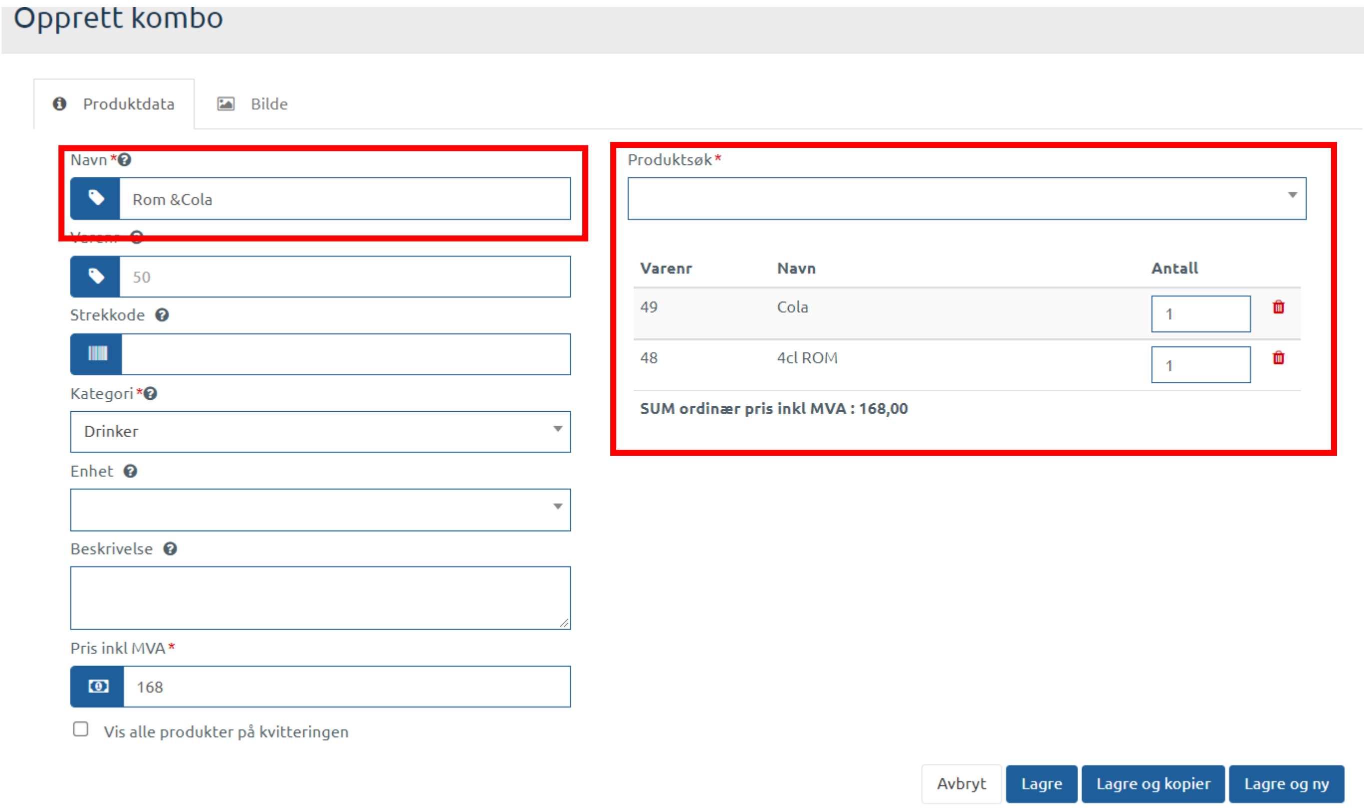
1.6.1 Creation of Products: Combo Product

Combo product is a product that in turn can consist of different products. Often used in conjunction with ingredients, wherever one wants

Example 1: Creating a drink consisting of 4cl Rum and 12cl Coke to get proper inventory management on sale where it will then subtract the components.

Example 2: Making a Pizza consisting of 200g dough, 50g meatballs, 80g cheese etc.
The components will then be deducted from stock upon sale.

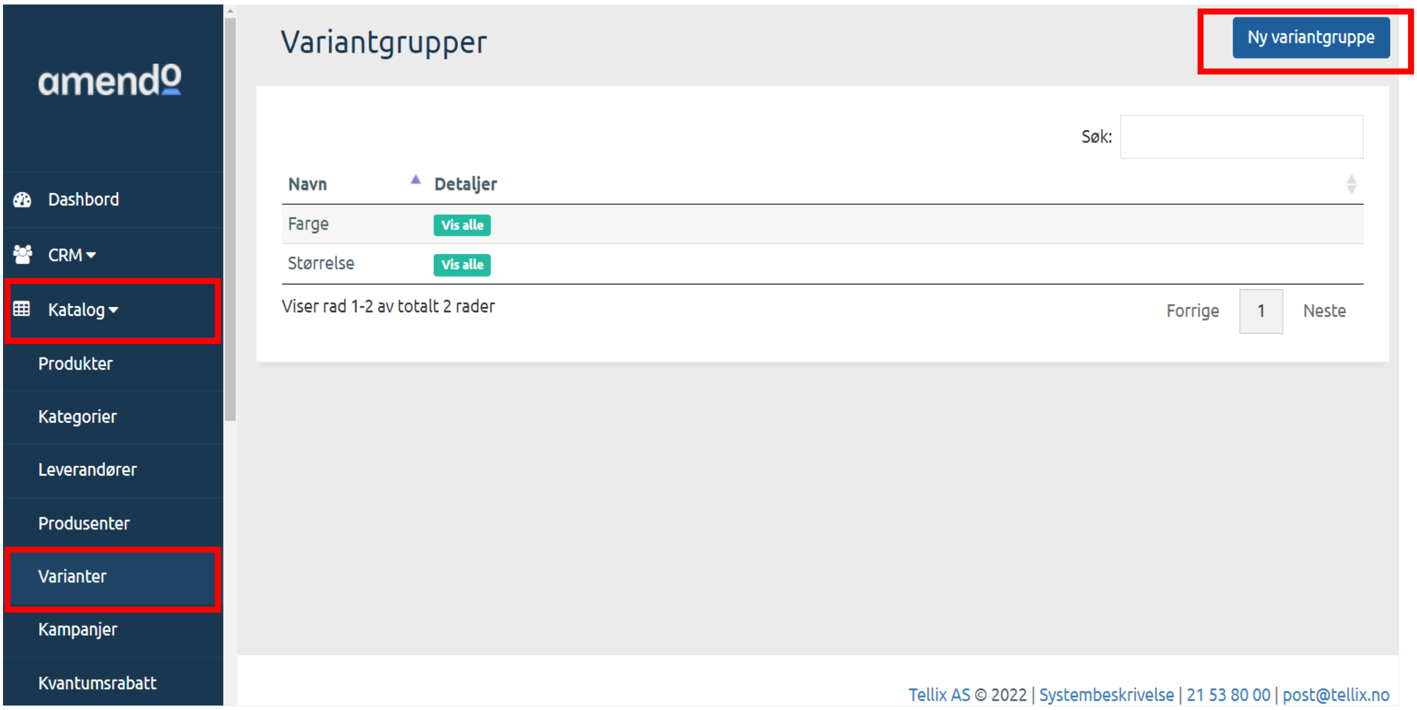




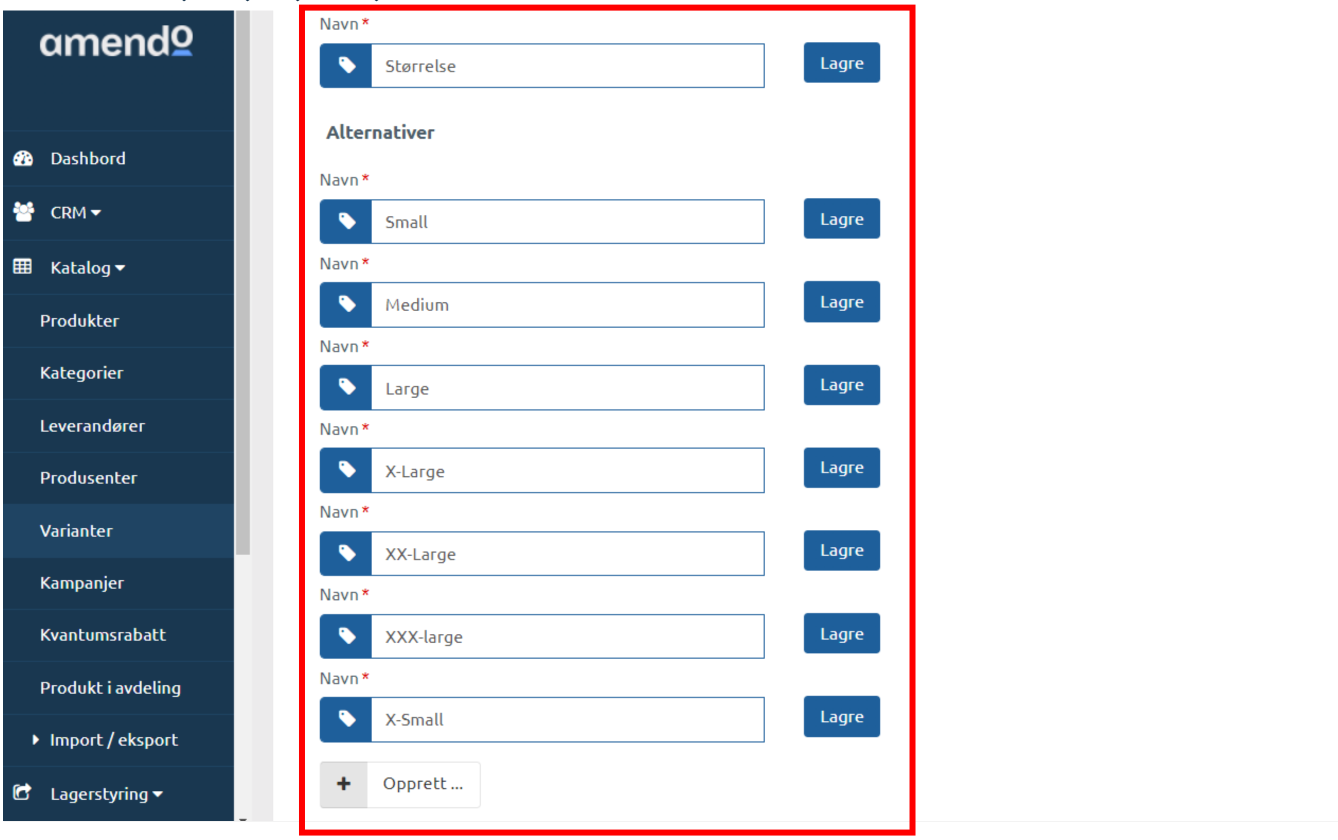
1.6.2 Creation of Products: VariantProducts

Variants: (Extremely important for online store customers)

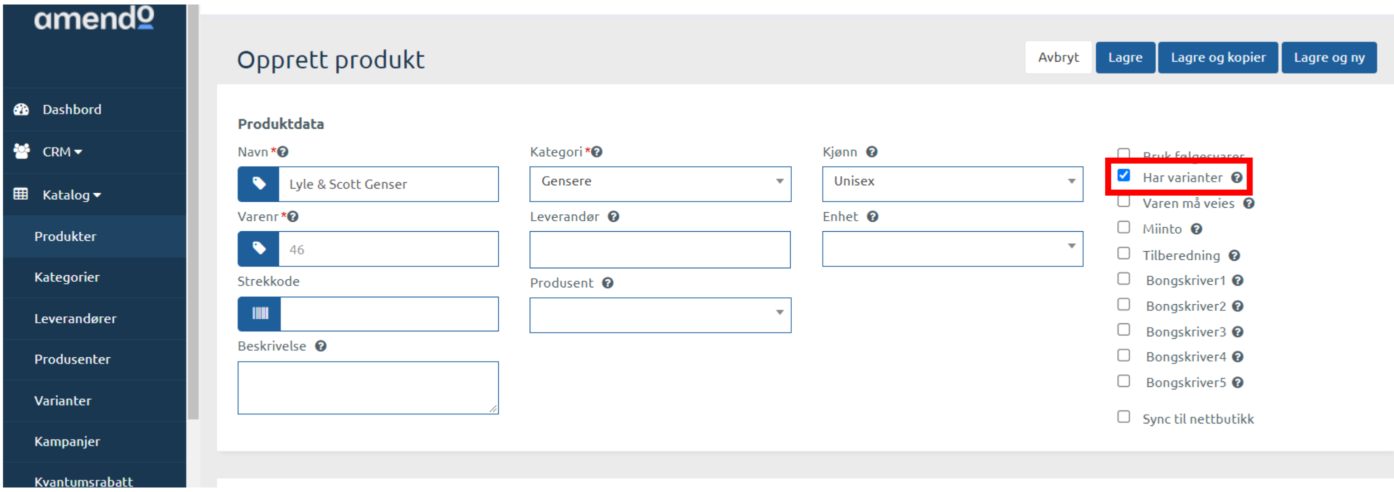
The first thing to do is generate variant groups under **Catalog > Variants.**



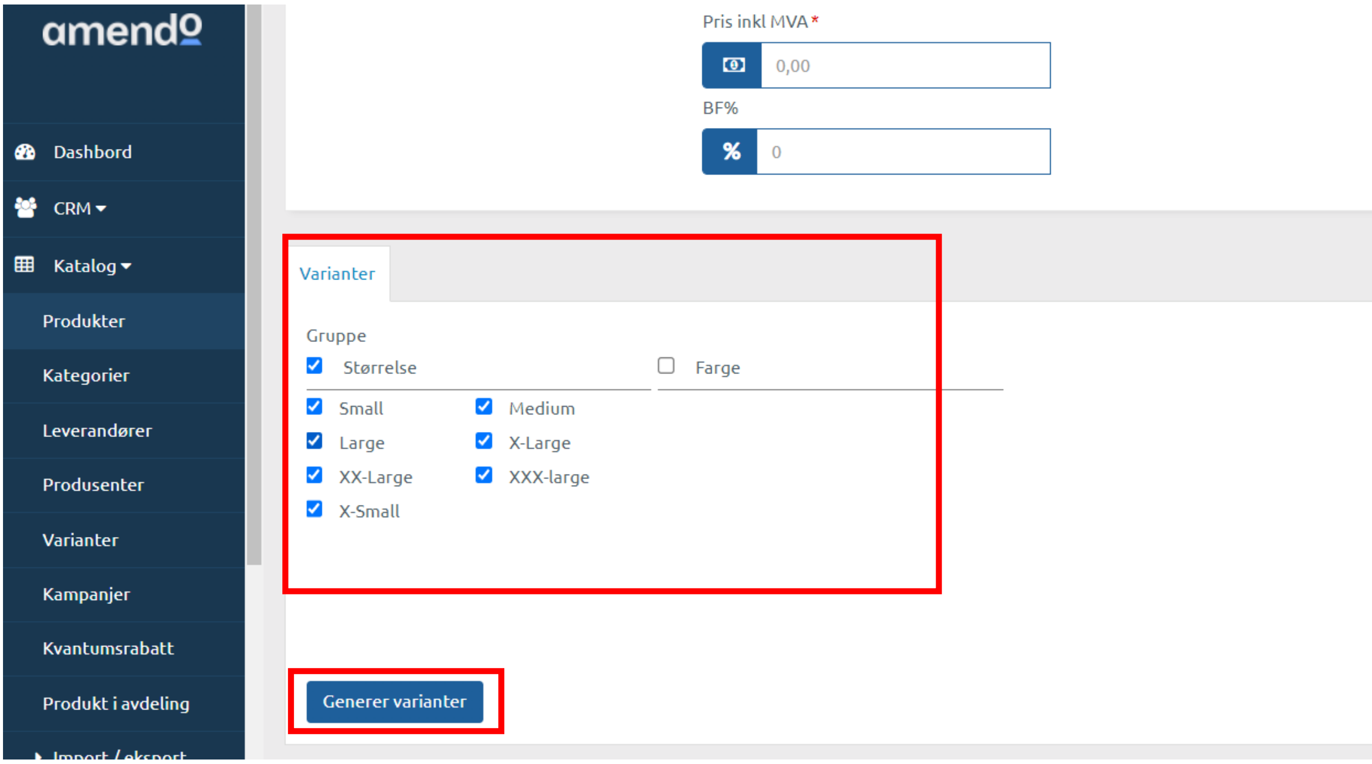
Here you can, for example, create the variant group **Size** with the values **S, M, L, XL, etc.**



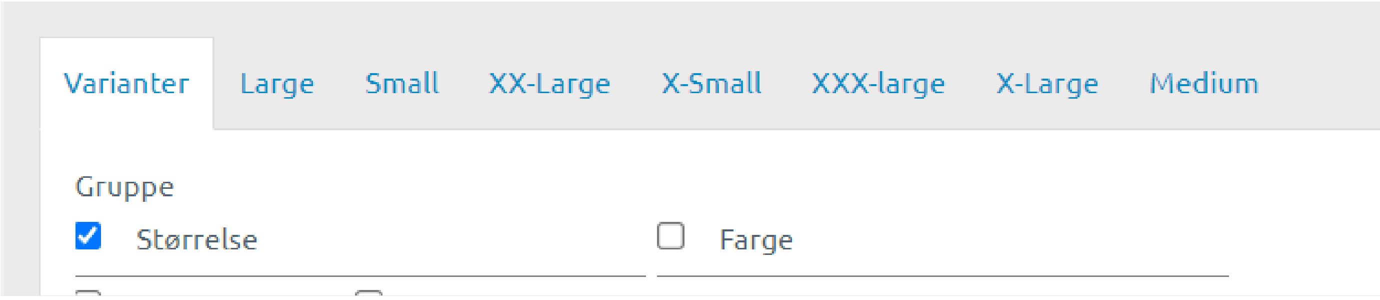
Call the product the one that best describes the product, e.g. "**Lyle & Scott sweater".** Then check "**Have Variants"** on the right.



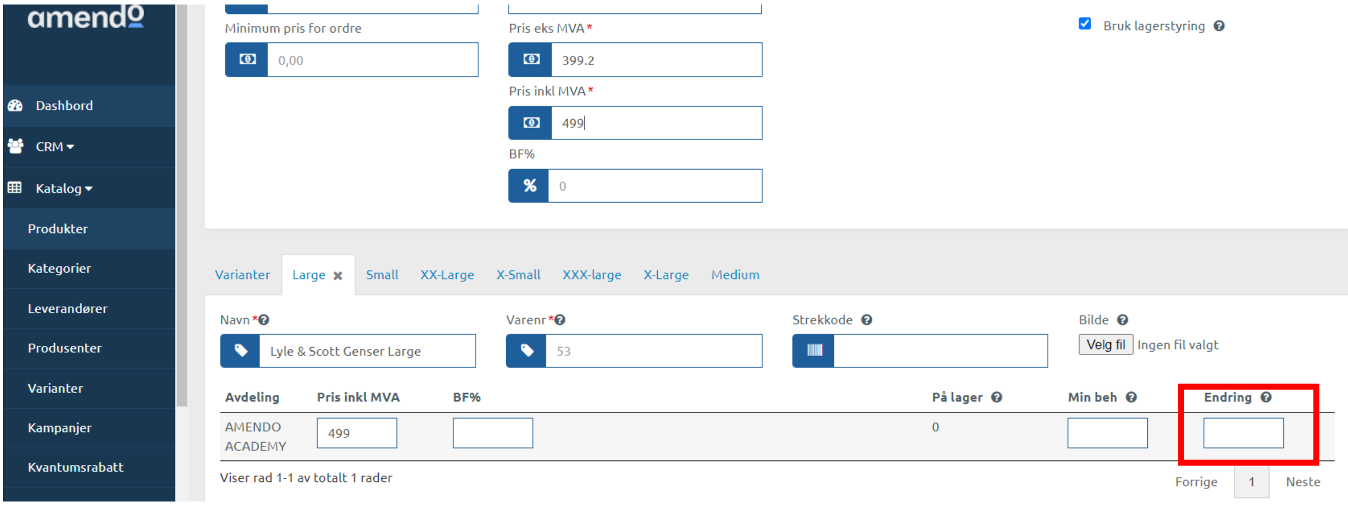
When you check the box for the product to have variants, a new field will appear under "**Stock status**" called "**Variants**".



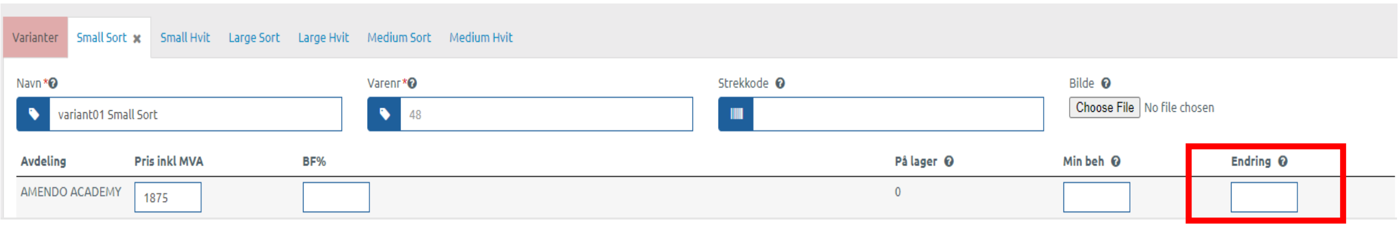
After you have checked the variants you want the product to have (you can have more variants than just size) you press **Generate Variants.** The variants have now been generated.



There you can see that the variants inherited **Product Name + Variant Name, and Price, as well as that item numbers have been generated.**
Select! You can set a separate item number on variant if desired. This must be done right away, as you will not get the chance to do so after the product is stored.



In the field called change , you can put the number of the different variants.
Further click on the different sizes to set the stock status of the different variants.

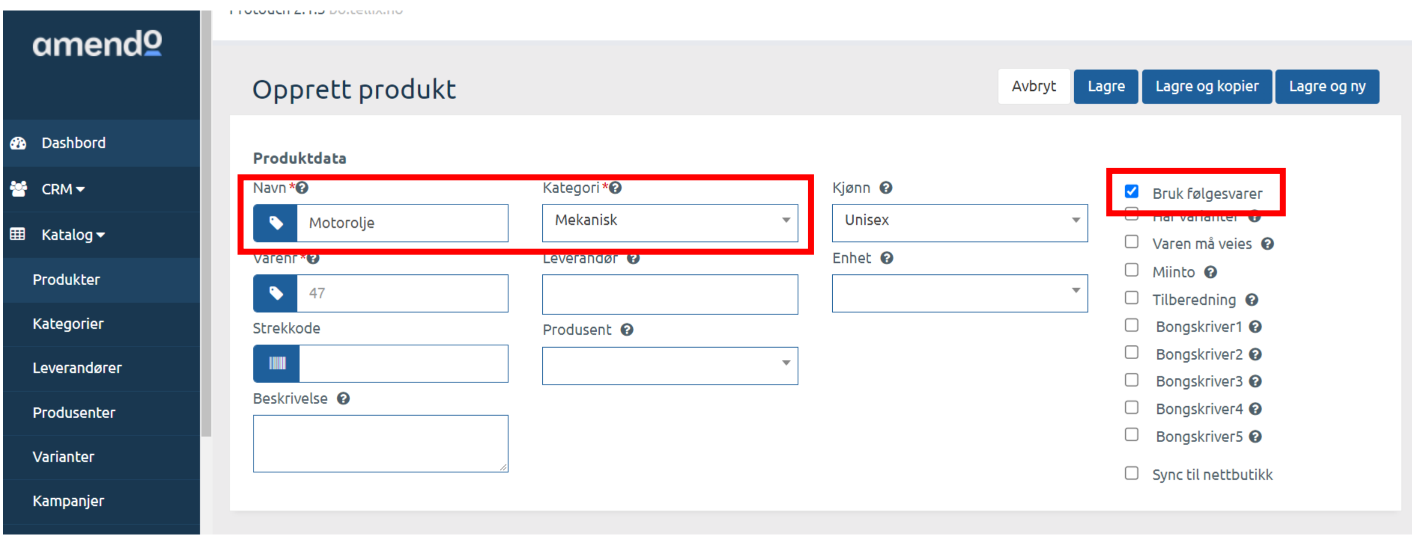


1.6.3 Creation of Products: Consequential Responses

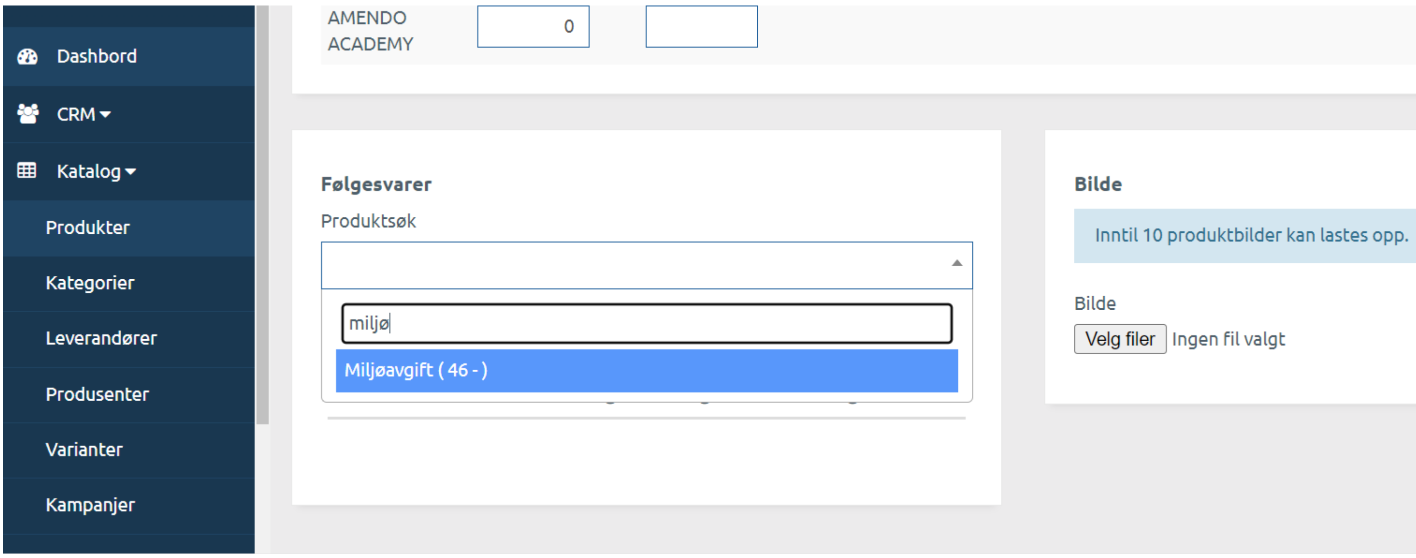
Consequential goods can be, for example, mortgages, environmental taxes, etc. We use "Environmental tax" as an example here.

To create a product with a companion item, make sure that you have categorized the companion item products. Create category for the companion response (**e.g. Consequential Goods**), create product within this category **(Environmental Tax)**.

Once this is done, you create the product you want to follow, for example here "**Engine oil"**.



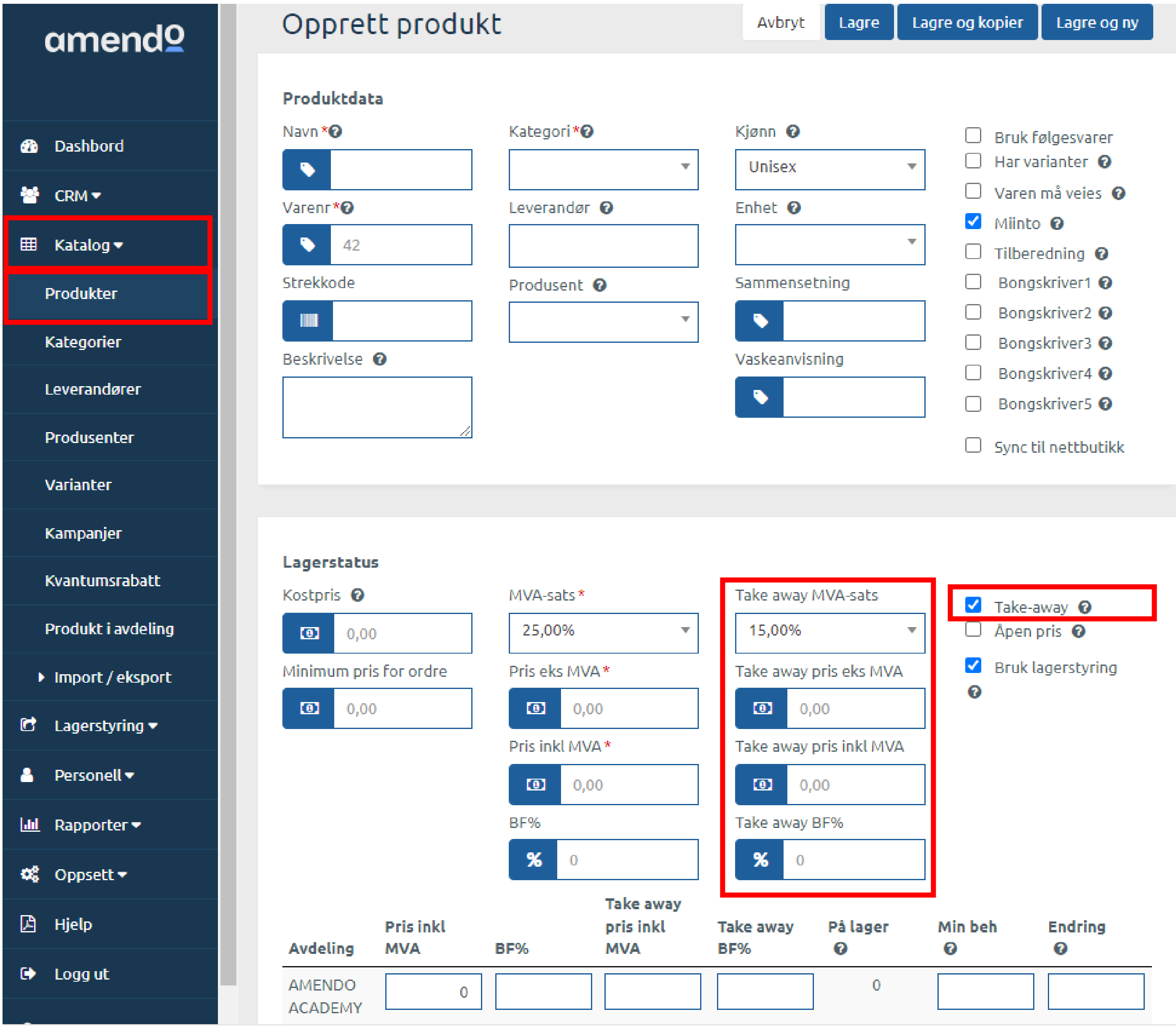
Once you have ticked "**Use packing responses**", a new field will appear under "**Inventory management**" called "**Accompanying Responses"**. Here you search for the product you want to follow. In this case, it is **Environmental Tax**.



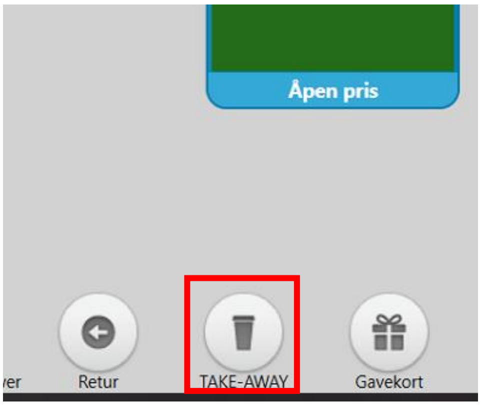
When you have added accompanying replies, press "**Save"**. The picture below illustrates what it looks like in ProTouch when you put **engine oil** in the box**.** The **Environmental Tax** product is now automatically included when entering **Engine Oil** for sale.

1.6.4 Creation of Products: Takeaway

If you are going to sell a product that can **be eaten inside** and have **Takeout** , you can tick Takeaway when creating a product. Here you will then have the opportunity to set a separate price for products to be sold with both VAT rates.

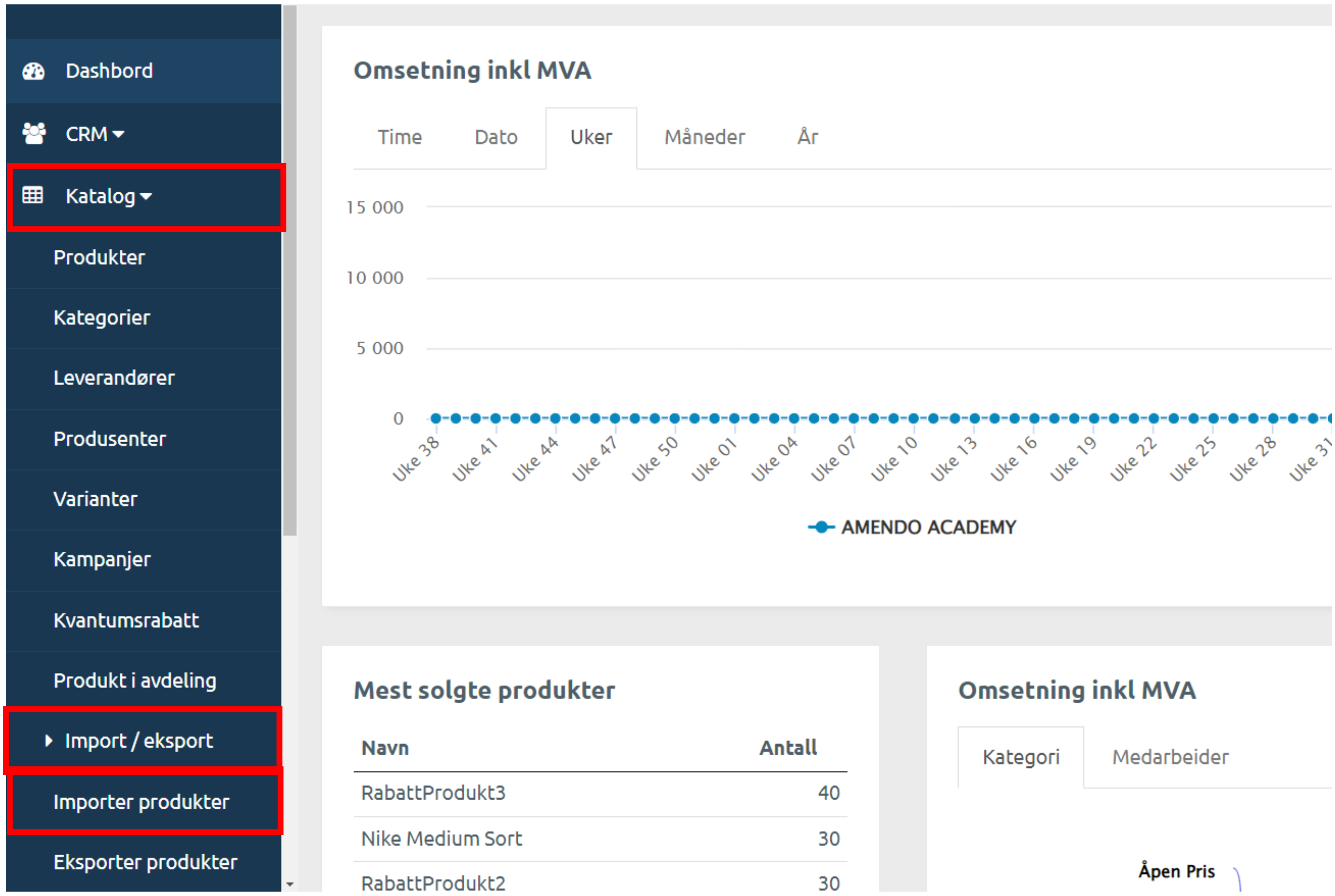


After saving the product as Takeaway, you can press the button called **Takeaway** in the cashier to switch between 25% and 15% VAT. The button is located below the product buttons as shown in the image below. When it is active, it will turn **blue** and you can see in the shopping cart that VAT changes.

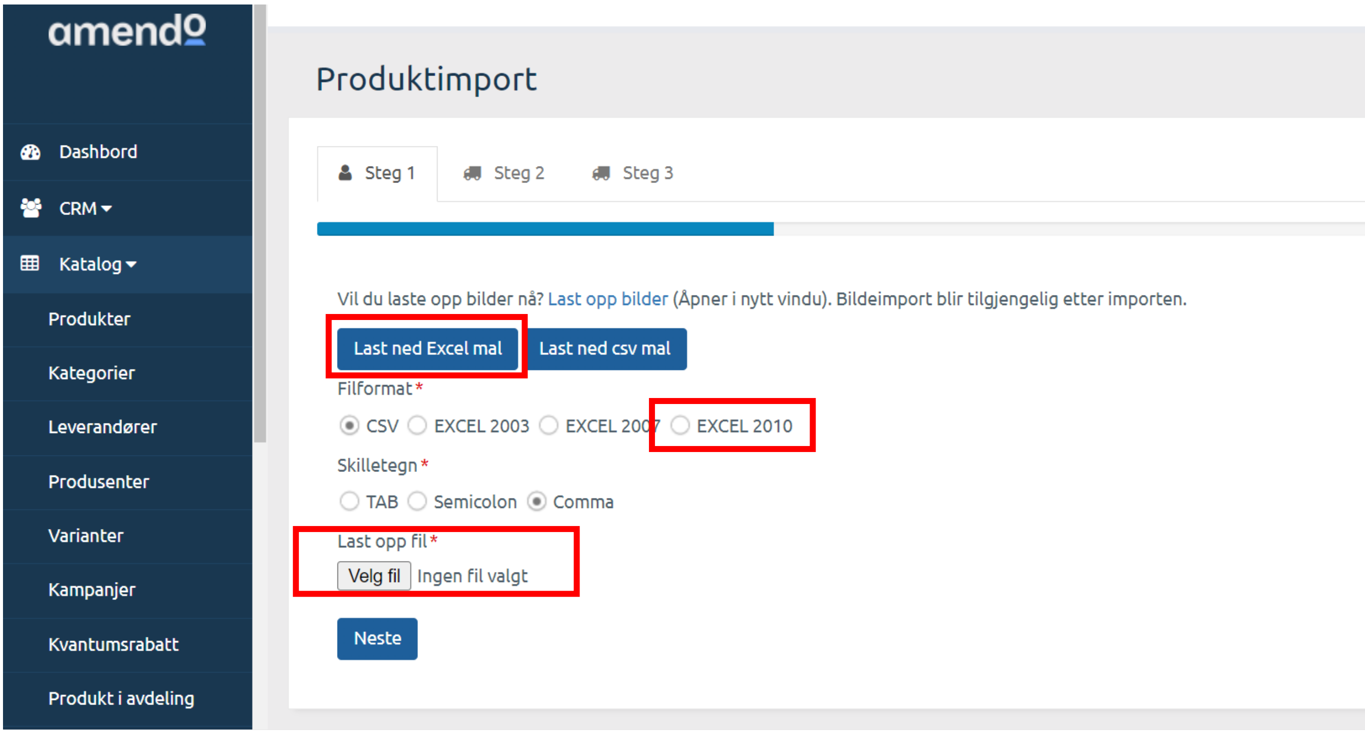


1.7 Import item list from Excel.

To import an entire product list to the BackOffice, you can go under **Catalog-Products-Import/Export.** Here you get two choices. Do you want to import or export products.



Go to **Import products.** In here, there are 3 steps to complete an import from Excel file. If you do not have an Excel file to work with, you can press **Download Excel template**. Then a file will be downloaded on the computer where you can enter inventory.



When you have finished filling in the product list and have saved it, you can tick EXCEL 2010 and then press "Choose file" just below "Upload file". Select your item list and upload. Follow the instructions at steps 2 and 3. It will be notified if there has been any error in the upload.

1.8 Payment methods

Cash allows you to pay more than what is outstanding. The excess will be subtracted and indicated as changeable. The system will automatically perform ear rounding.

Integrated terminal will send amounts to the terminal and await response from the terminal. If the terminal approves the payment, the payment will be recorded. **[INTEGRATED TERMINAL REQUIRED]**

The manual terminal will be posted in the same way as the integrated terminal without awaiting a response from the terminal, but register the payment immediately. The system will automatically perform ear rounding.

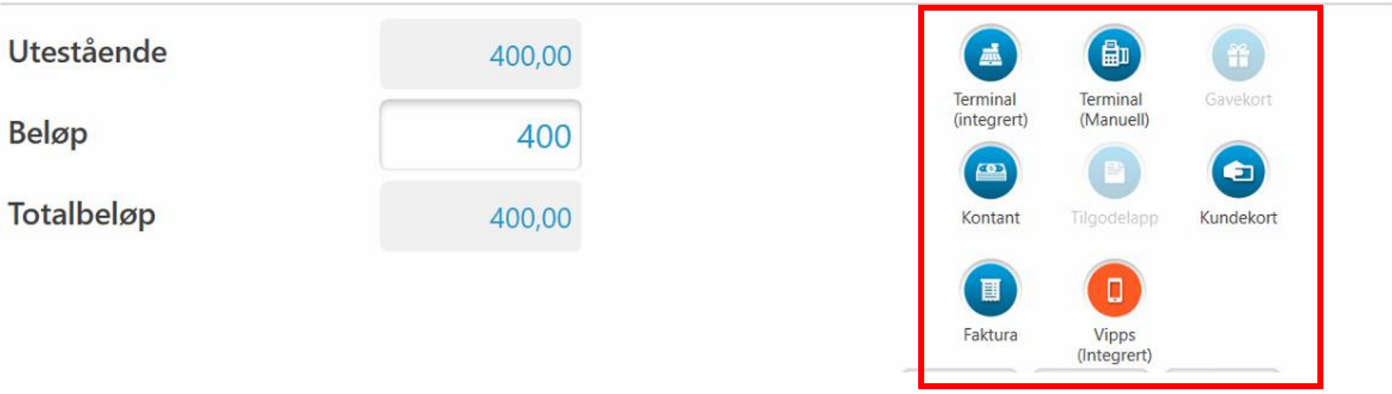
Invoices are sent via ProTouch or BackOffice, and are sent as an invoice to the customer.

Gift cards will automatically do ear rounding. Enter the gift card code and the amount to be deducted from the gift card. The amount cannot be more than the remaining value of the gift card. **[ADDITIONAL MODULE REQUIRED: Gift card]**

Store credit will automatically do ear rounding. Enter the value code and the amount to subtract from the value code. The amount cannot be above the remaining value of the value code.

Vipps (Integrated) will send push notifications to the customer's mobile (Vipps) asking them to pay. If this is approved, the payment will be registered.

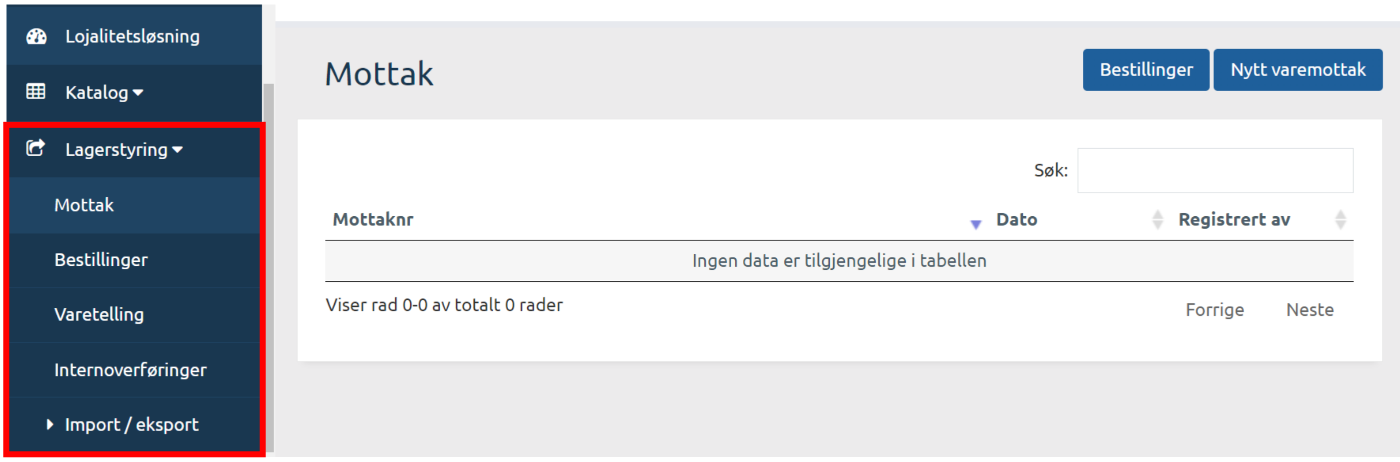
Custom payment methods are methods of payment that you can create yourself. For example, before Vipps was integrated into the checkout via collaboration, VIPPS was a custom payment method that could be created at checkout so that those who wanted to could charge with Vipps at checkout. **It is to register at checkout that a payment has been made and what source the payment has come from.**



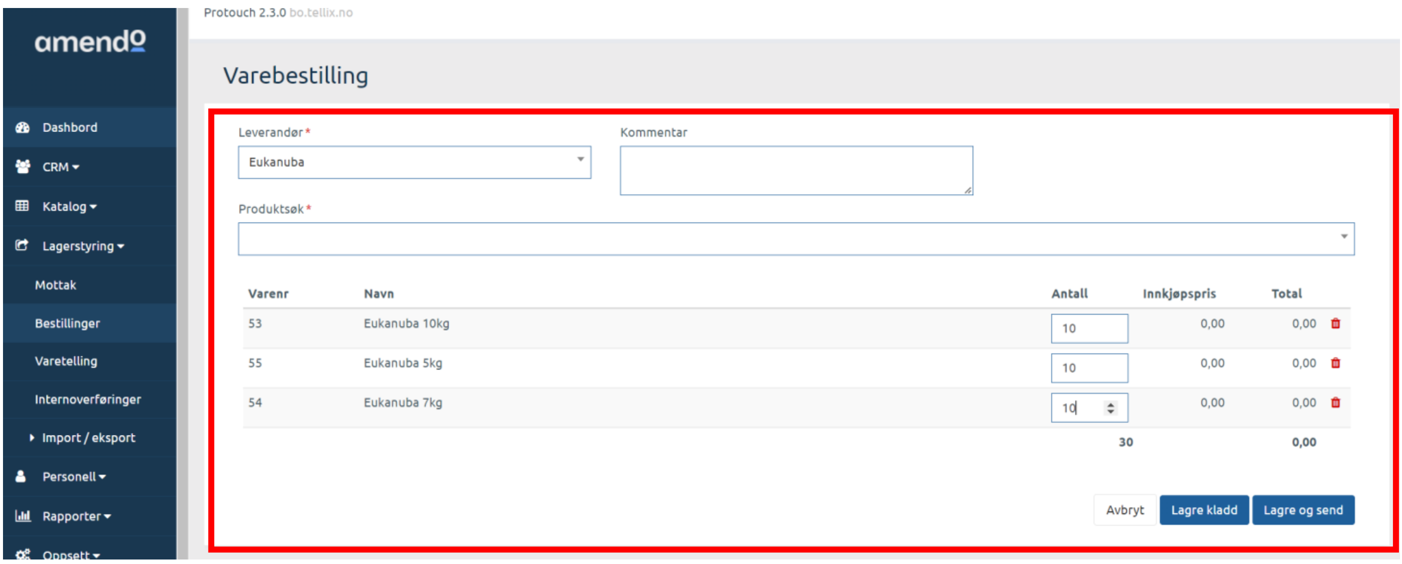
1.9 Inventory and inventory management

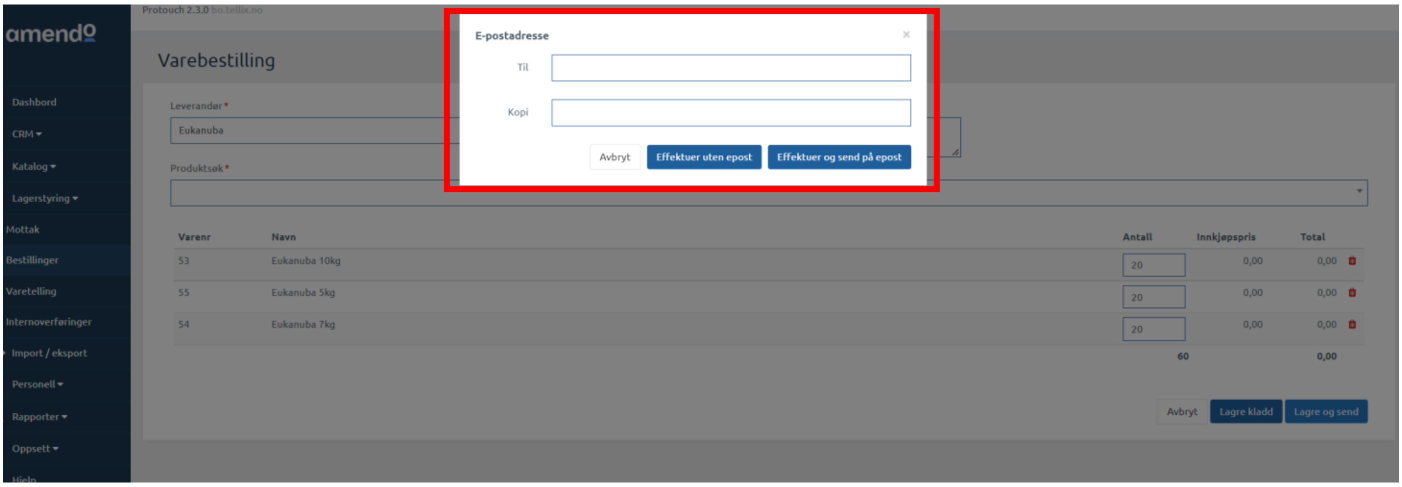
Under **"Inventory management"** in the menu on the left side of the Backoffice, there are a number of options. Below is a concise list of what these are and what they do;
"Orders" make it easier and more transparent to order products. Can be done directly to supplier or not.
"Reception" is goods reception. Here you register items you have received and also update inventory when you register correctly.
"Inventory counting" makes it easy to conduct inventory counting. Can either be done by uploading Excel or TXT sheets via "**Import/Export"**, or by entering manually.
"Internal transfers" exist to make it easier to transfer products and ship to other departments for those who have several of these.

Let's go through a little more in depth. One can use inventory management to keep control and manage inventory. You don't just have to use Backoffice's systems, but now for the record, let's do everything from Backoffice.



You have kept the stock status of all products and now see that there are some things that should be ordered. One goes to **Lagerstying -> Orders.** In order to create a Booking, you must have listed **Suppliers.** Tap New order, select the supplier and the products belonging to the specific supplier. Then choose how much to order of each item. When you have filled in the number and are ready, you can press Save **draft** or **Save and send**. When you press Lagre and send, you can send directly to an email or not. You can download a PDF that you can send to the supplier for ordering if you do not send e-mail directly.



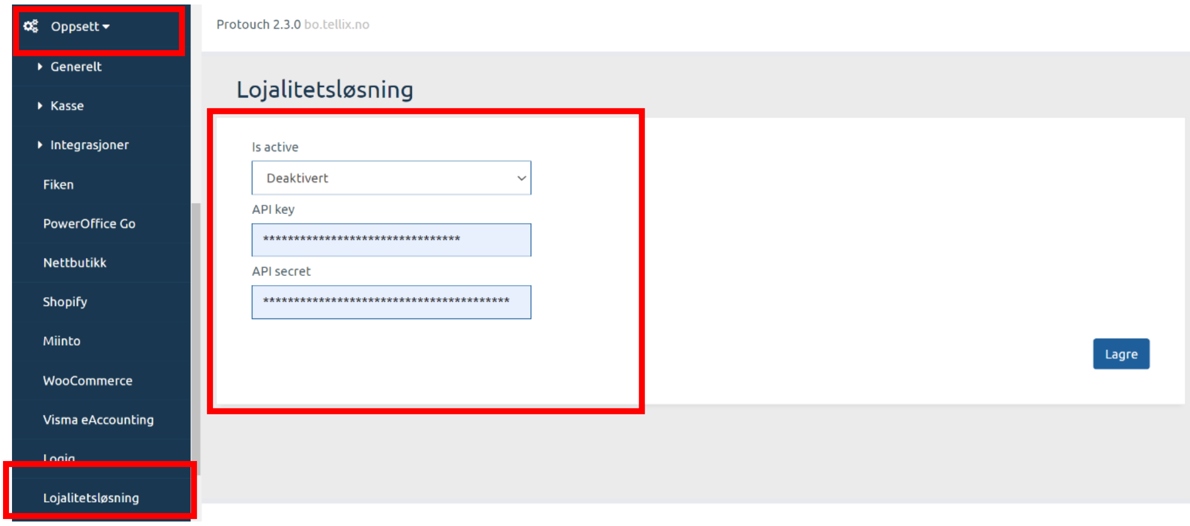


When you make receipt, you can easily go to Reception, and retrieve orders, register receipts and update inventory, and you can also if you want to print labels.

Inventory counting is done as follows. You create a "New Count", which you give an easily recognizable name. Once the list and name are saved, you then go to the specific list, where you enter the products to be counted. If this is the entire inventory, the entire inventory is selected. Otherwise, you choose the ones to count over. These are then imported into a list, where you can go over and enter "Counted number". You will also get information about the products here, such as **Item no, Barcode, Name, Unit, Quantity, Counted quantity, Difference.** Here, each individual count has to be entered manually, which may be a bit cumbersome if you have a lot of products. It is also possible to import counting, which for example is entered in EXCEL. Then you click on "Import count" and are told to upload the respective inventory lists you have saved.

1.10 Loyalty Solution

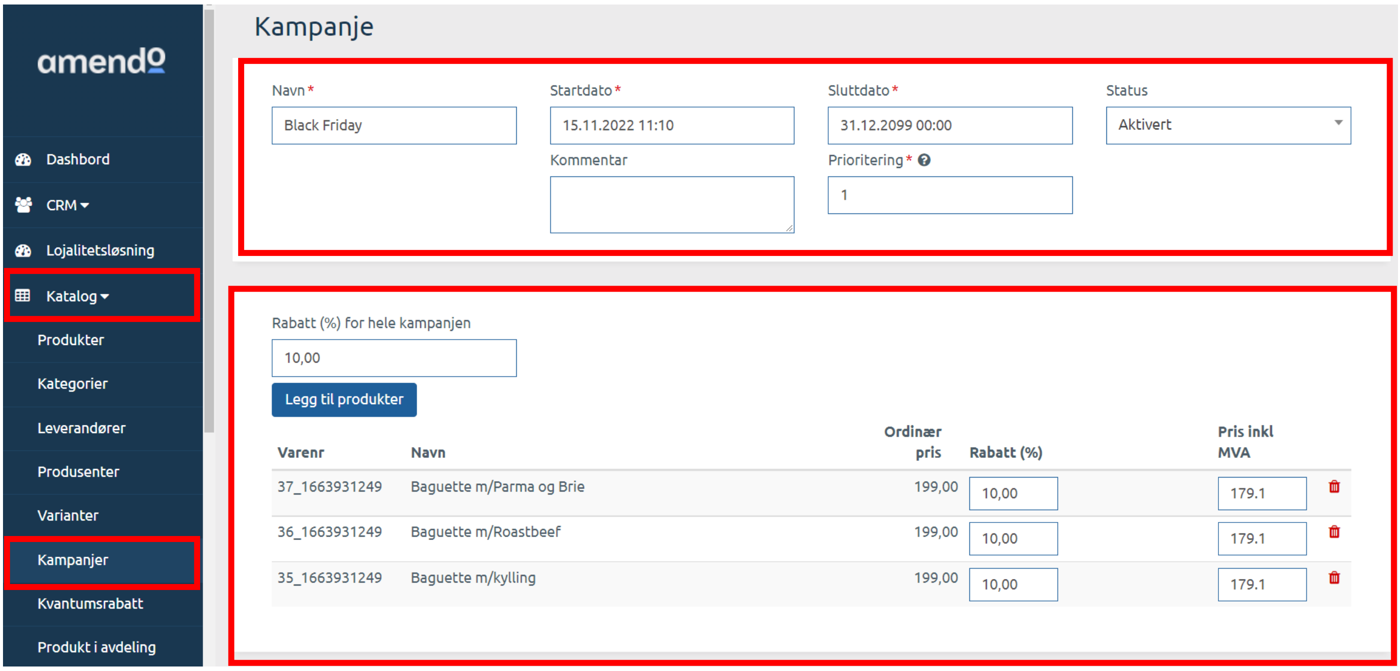
It must be set up in the Backoffice, and is a module that costs 299,- a month. When this is ordered, the module will be activated, and you can go into bo.tellix.no -> **Setup -> Integrations.** Here we will enter the API keys. It will look like this. API is created per department for those of you who have multiple departments. After this, it will be possible to register customers in the system.

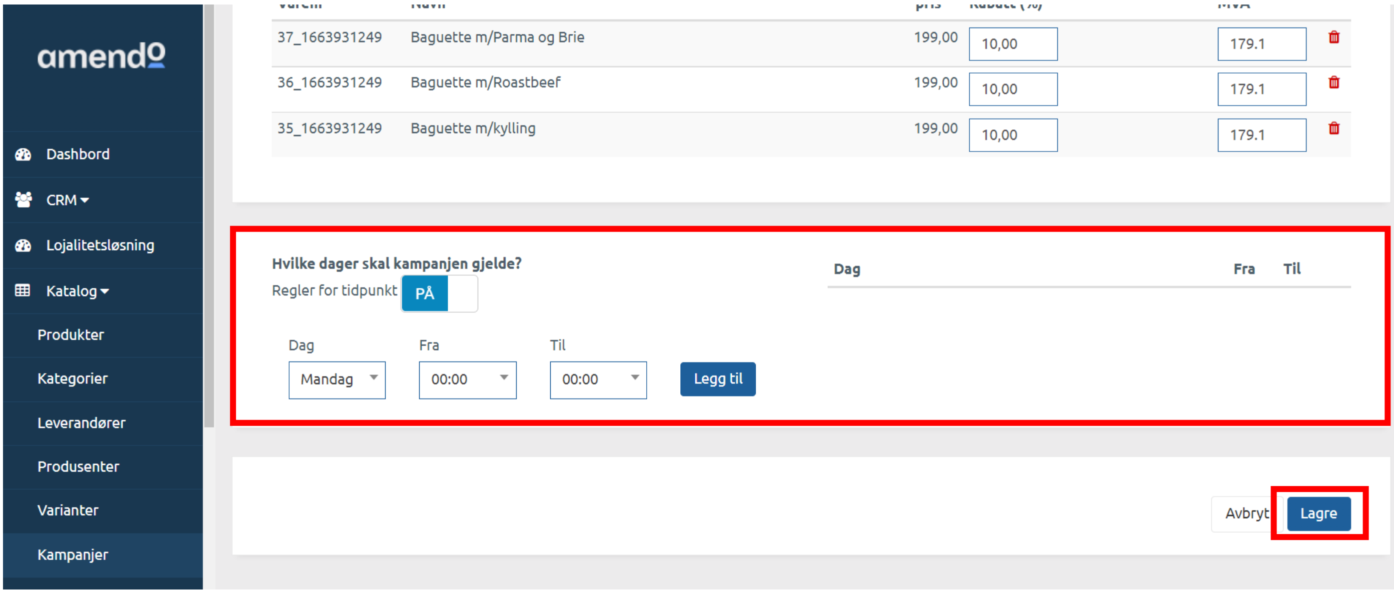


1.1 1 Promotions

To create campaigns, go to **bo.tellix.no > Catalogue > Campaigns.** In this case, we create a campaign for Black Friday, and the entire assortment should be rejected. Tap Create campaign, fill in all fields with red asterisks, these are required. These are the name of the campaign, start and end date and **priority**. Promotional discounts cannot be applied in combination; If more discounts occur, the discount with the **highest priority** (largest number) will be applied.

Then you can choose a discount for the entire promotion and then add products that will fall under the promotion. You can also choose which days the campaign will be valid and from times. Then save, and the campaign will be created.





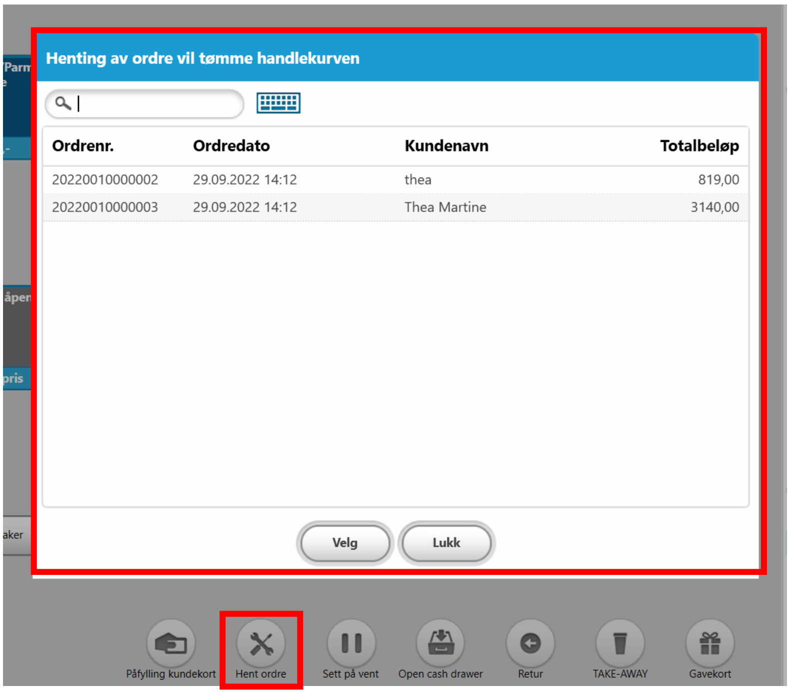
1.12 CRM | Invoice - Order - Receipts

In the Backoffice menu, there is a button called CRM. This includes an overview of "Orders", "**Online store orders**" (both of these are modular), "**Customers", "Receipts", and "Invoices".**

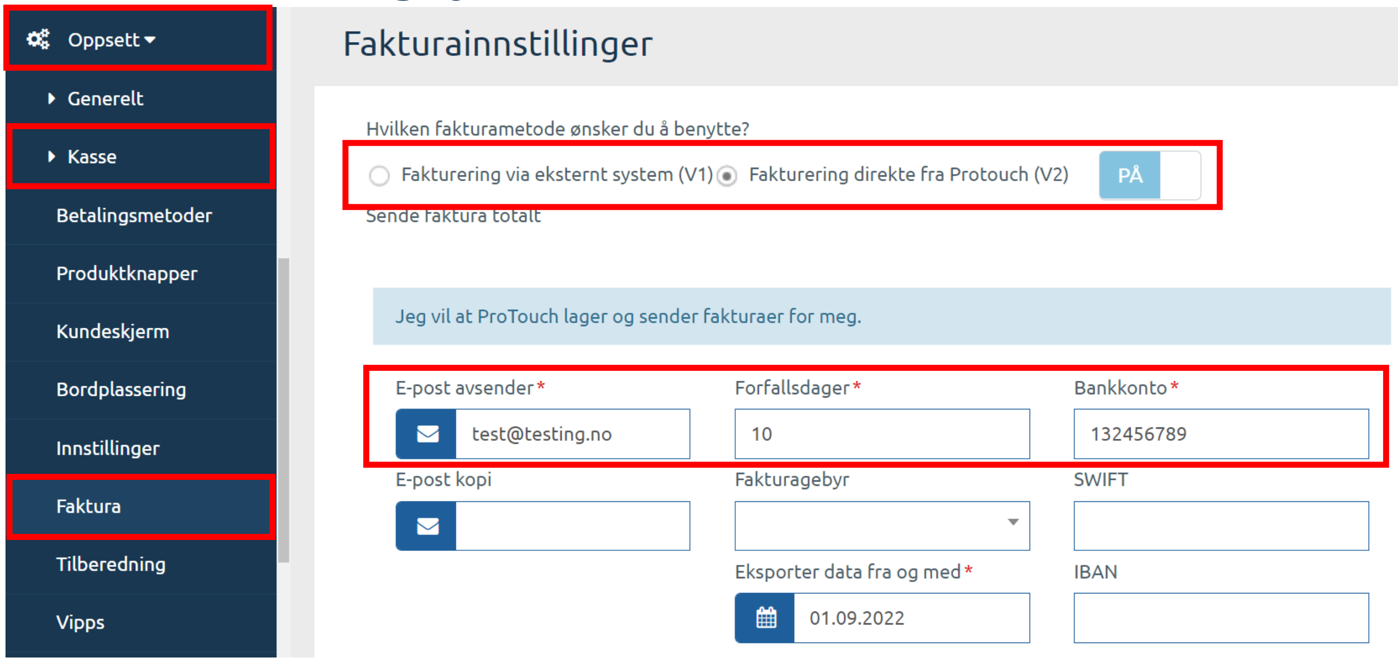
Orders (for those who have this module activated) is an overview of all orders that exist in the system, in all phases. For treatment, treatment and completed. Once you have created an order in the Backoffice, you can send out confirmation to the customer, and retrieve the order was ProTouch and charge.

Order creation is easy by pressing Create order under **CRM -> Order.** Here you place the order on the customer, select the status, add products, and press save. Then orders will be added as "**For processing".** You can then go to the order, and send confirmation or offer of order, send SMS notification, and change to set the status to "**Completed"** when the customer has paid.

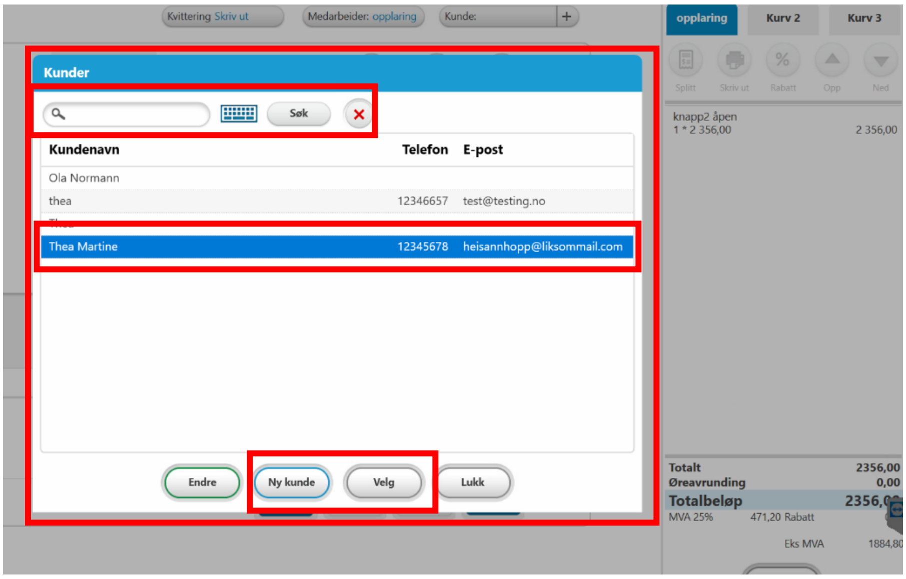
You can also choose to collect the order in ProTouch and charge from there. Then you click on Pick up order on the line at the bottom and select the order you are going to charge for, and then follow normal payment routines in the payment window.



Invoices show an overview of the history. In order to use the invoicing system, you need to go to Setup > Checkout > Invoice and fill in the required fields. There are two options for billing, **V1 (via external billing system and V2 (via ProTouch)**.



To use V2, it is required to fill the marked boxes. Email copy you may want to put to accountant. Once you have set up, you can use invoice as a payment method in ProTouch. A window pops up where you have to pick up or create a customer, who in turn receives an invoice and pays there.

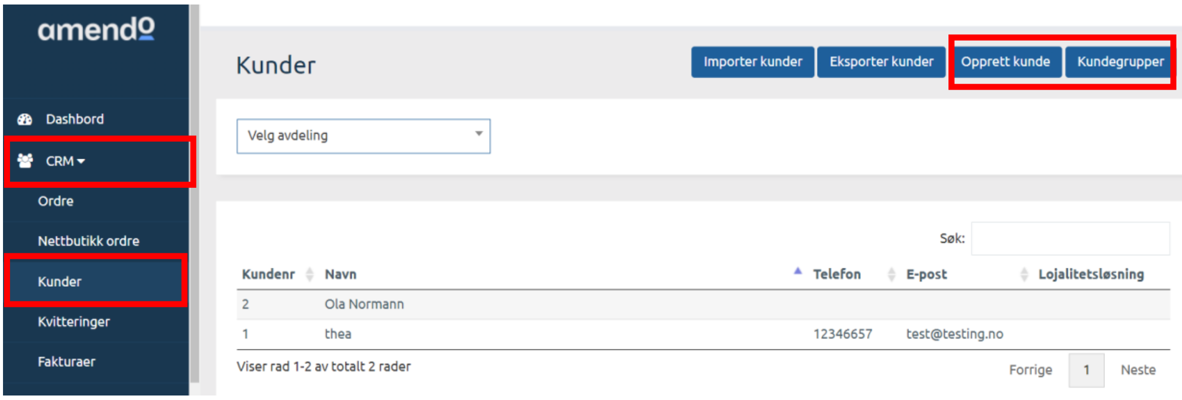


Once the invoice has been sent, you can go into the back office and find the invoice in the invoice history.

Receipts are a history of all receipts generated from the system. Here you can go in to print a receipt to customers afterwards. Select! This only applies as a copy of the sales receipt.

1.13 Register or change customer in Backoffice

To create customers or modify existing customers in the back office, go to **CRM > Customers.** This is where the option arises to change existing customers, or to click on "**Create Customer".** You can also create "**Customer groups"** in here.



1.14 Customer screen

For those who have a customer screen, this is something that can be personalized. It is possible to upload images, or text that appears next to the shopping cart, for customers to see. This is changed by going to **bo.tellix.no > Setup -> Checkout > Customer screen.** Here you can upload "One image" or "Two images". If you select one image, one image will be displayed at a time (Up to 10). You can choose how frequently the images are displayed.

If you select Two images, the images will split the screen, one on the upper part and one image on the lower part. Here you choose which two images should be displayed at a time, how many in total (Up to 10) and how many seconds each image should be on the customer screen. 5-6 seconds is recommended in order to record what is written or displayed.

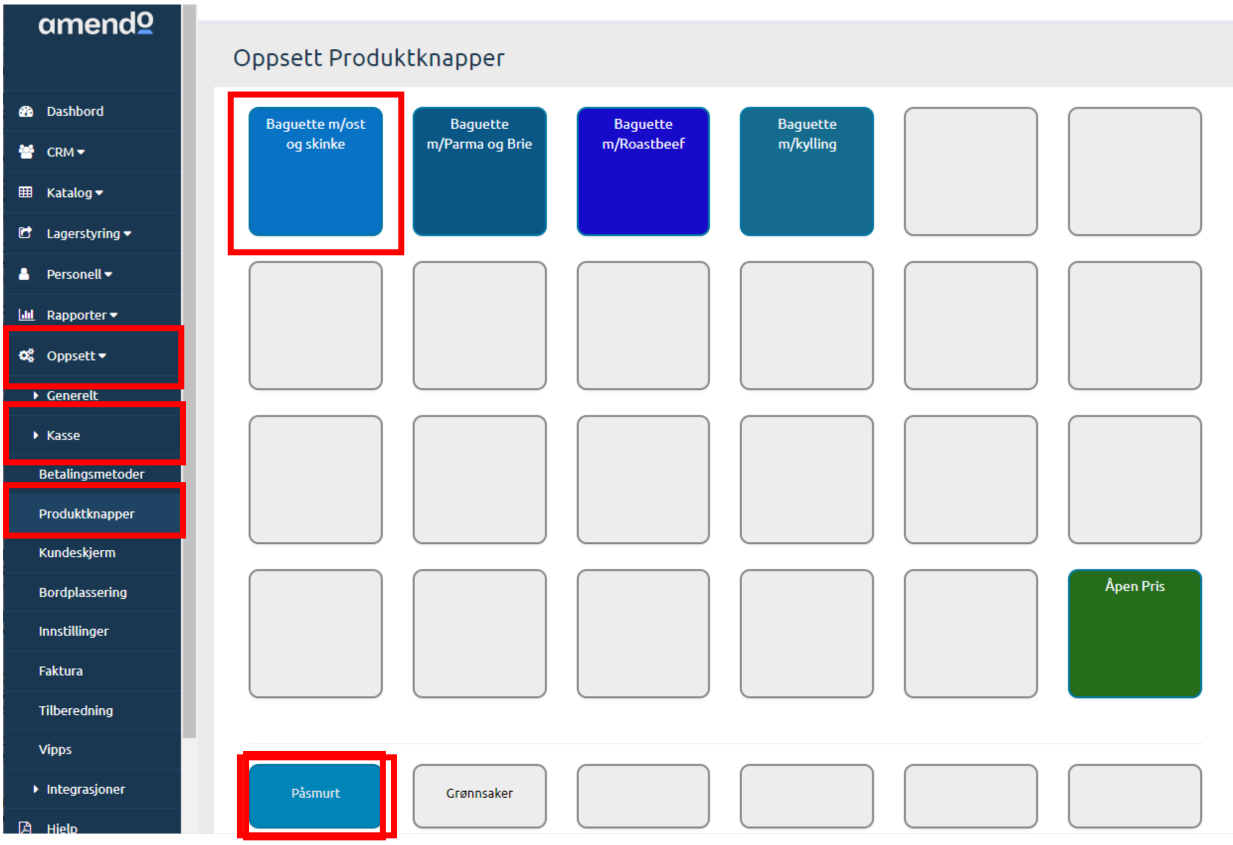
You can then click " **Preview"** to see what it will look like on the customer screen.

1.15 Creation of Product Buttons

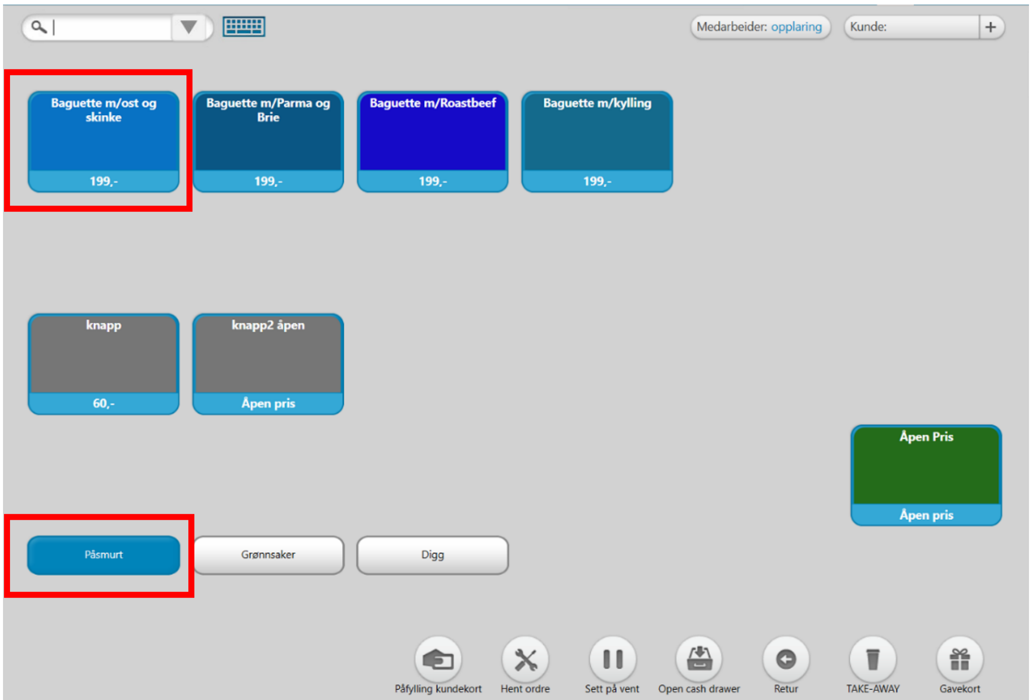
Product buttons can contain one or more items that are added to the sales image when clicked. Product buttons can also be a folder that contains multiple products or subfolders.

To create a button menu in the POS system

Go to **bo.tellix.no > Setup > Checkout >** Product buttons – Here you create **Product** buttons and **Group buttons** as you wish. They can be created with color codes or images, you choose this yourself. It is easily done by pressing the empty buttons. **The larger** buttons are product buttons and the **smaller** ones at the bottom are group/category buttons.



What you create in **the BackOffice (above)** will be reflected in ProTouch **(below)**.



Start by creating a group/category button at the bottom. Simply press one of the empty buttons, on the edit icon (pencil). Then you write your name and check whether the folder should be the main folder or not. It is not required, only preference. Then the sales image will always open with this folder.

Pressing the group button takes you into the group/category and can add or edit the product buttons that belong here. By tapping on the pencil, one can change the group's name. If you click on the trash can, the group is deleted, with all the content.

To create a product , you press an empty product button. There a list of products will come up. Here you can either select a product from the list, search / filter out products in the list or scan a product. If you click outside the list, it is minimized.

Product button type - Choose between product button or folder (to create another folder level)
Text on the Product button – This is automatically filled in with the product's name when selecting the product from the list, but you can also enter yourself if you wish, for example, to shorten the product button's display name.
Background – choose between Color or Image. If you choose Image, you must press
Select File.
Color – by pressing the blue button you can freely choose the color based on the RGB spectrum with the eyedropper or choose a standard color.
After you select a product, tap **Save** to create the product button.

1.16 Reports

Inside the Backoffice are a number of reports you can retrieve.

Sales are the most advanced report. With the help of one or more parameters, one can get sales figures and gross profit for an optional period.

Tips is an overview of tips received on the cash register system from date to date

The center is designed specifically for customers located in shopping centers. The report contains the key figures most people need when regularly reporting to shopping centres.

Customer card (add-on module)

Customer card transactions (add-on module)

Products provide a quick and easy overview of how much you sell of each product. In addition, the report shows what you have sold a product for on average. All amounts are VAT-free.

Discount shows all sales for which a discount has been given. Can be filtered on co-workers.

Gift cards show all gift cards sold, and their residual value.

Global Gift Cards show sales made on global gift cards and on which departments.

The credit card shows how many vouchers have been issued within the period of application. Shows the day and the value of the credit note.

Inventory shows the value of your inventory. The report can be used as an attachment to the accounts.

Accounts contain debit and credit accumulated from all cash registers during the period. Most accountants will make accounting far faster by using this accumulated report.

Daily settlements show logged and executed daily settlements made at the cash register. Here it is possible to go in afterwards and apply incorrectly if there should be deviations on specific days.

Reconciliation contains an overview of all terminal reconciliations recorded. **Select!** Only reconciliations made using the integrated terminal will appear here.

Cash Withdrawals/Deposits shows all cash withdrawals and deposits in the Cashier. The report does not show sales paid/repaid with cash.

The timesheet report is made with the purpose of covering requirements for keeping staff registers. Section 3a of the Bookkeeping Act. The enumeration shows all employees who have been stamped in. The stamping can be done from the Backoffice or from a checkout point. Time zone GMT+1 and supports daylight saving time.

Waste shows products marked as wastage/defective at checkout.

Journal is a complete overview of what has happened at checkout. All actions performed on the checkout will **be logged in the Journal.**
Activity shows all activity done in the Backoffice. (?)

Integration log (modular) is an overview of transfers made between Backoffice and Accounting Integrations. Here you can incorrectly apply if something should not have been transferred.

Online store sales (modular) shows an overview of sales made from the online store.

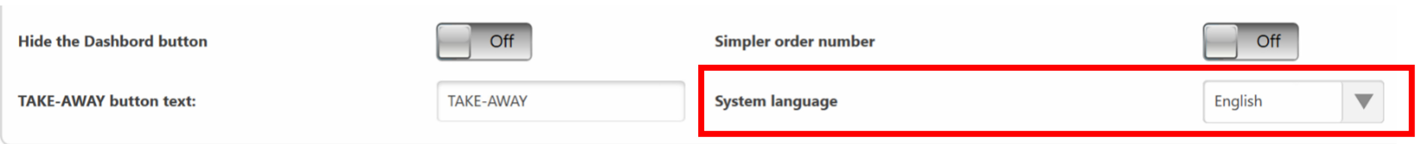
2. Protouch (POS system)

2.1 The sales process (Use of checkout)

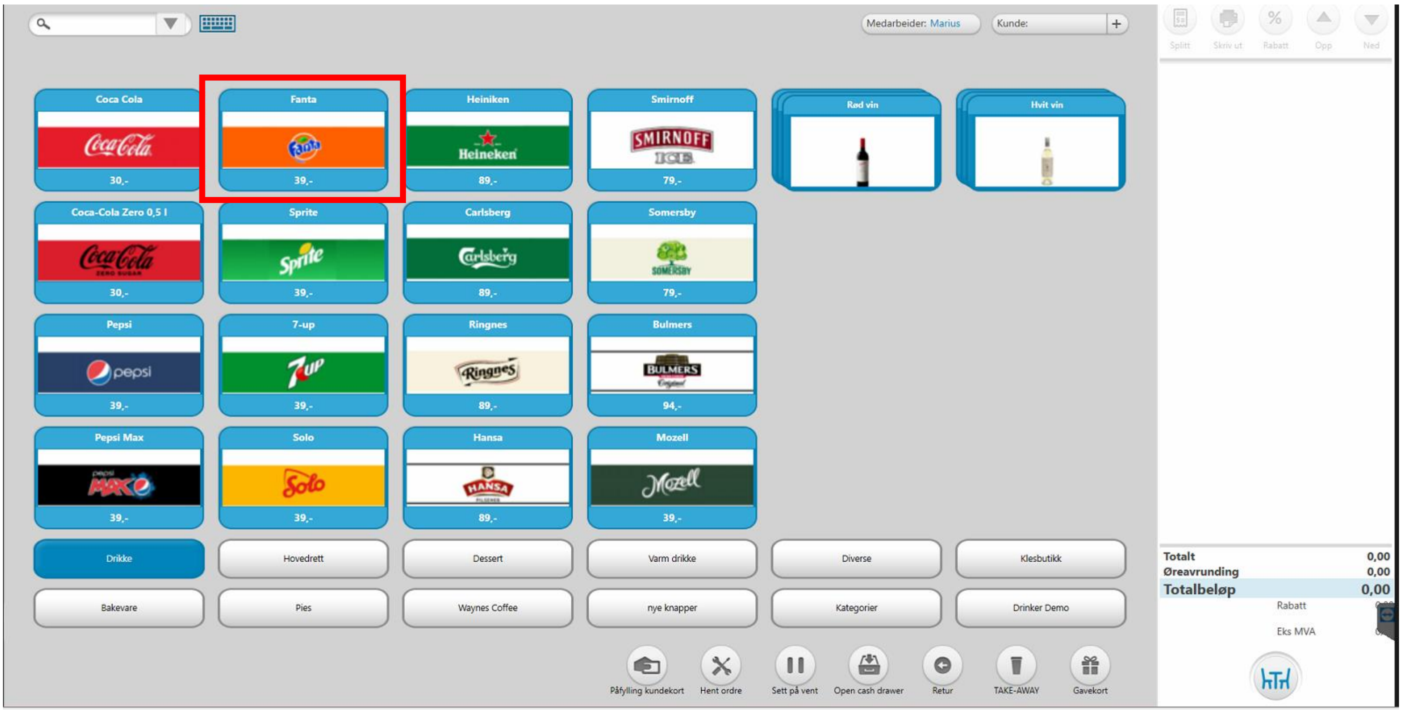
2.1.1 Registering a sale

To get to the sales image in ProTouch, you need to click on "**checkout**" in the main menu.

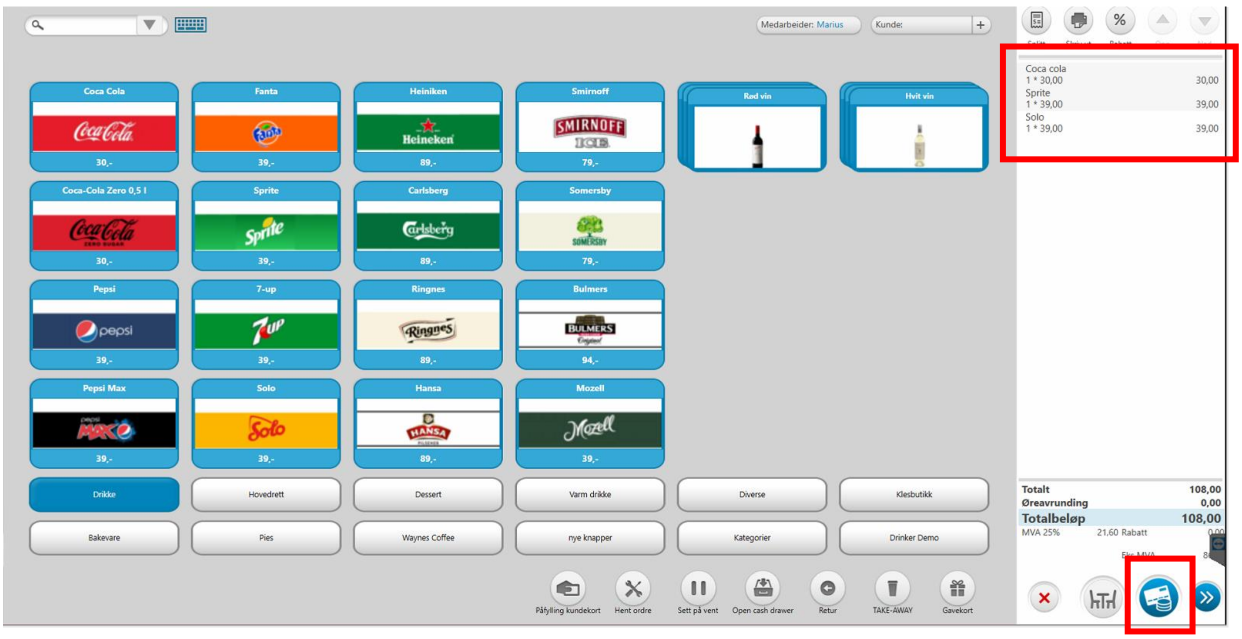
If you want to change the language to English, go into "Settings" > "**Normal" > scroll down** to the bottom and switch the language to English under "**System Language".**



Turn in items either by selecting directly on the product **button**, use the **search function in the upper** left corner to look up the desired item or **scan the product** if you use a barcode.

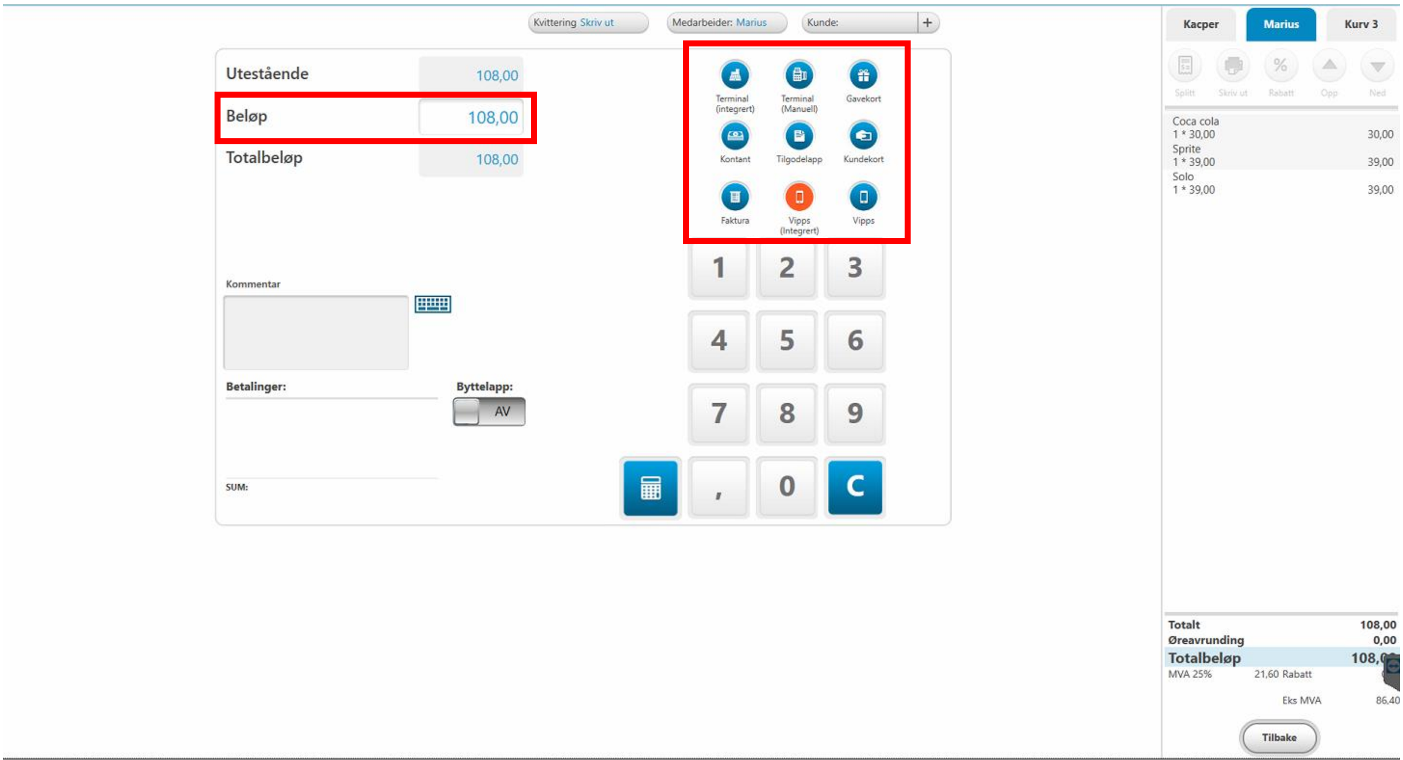


The products will then be added to the overview on the right side and you can see the total price below. To charge, press the blue button in the bottom right corner.

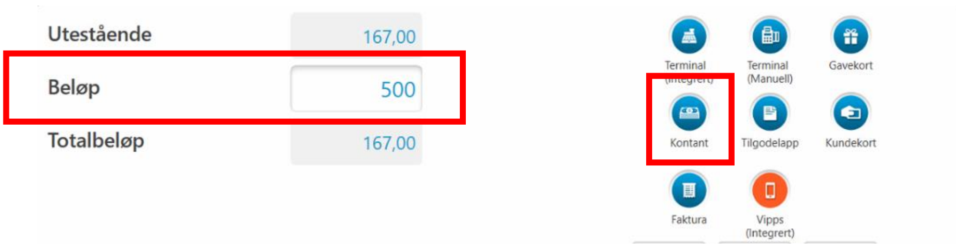


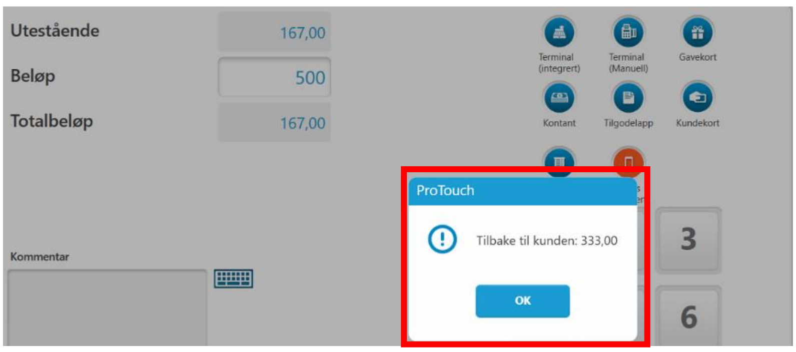
Inside the payment picture, the total amount is on the left side.

To make payment, click on the desired payment form on the right side, or the **Back** button to return to the sales picture.



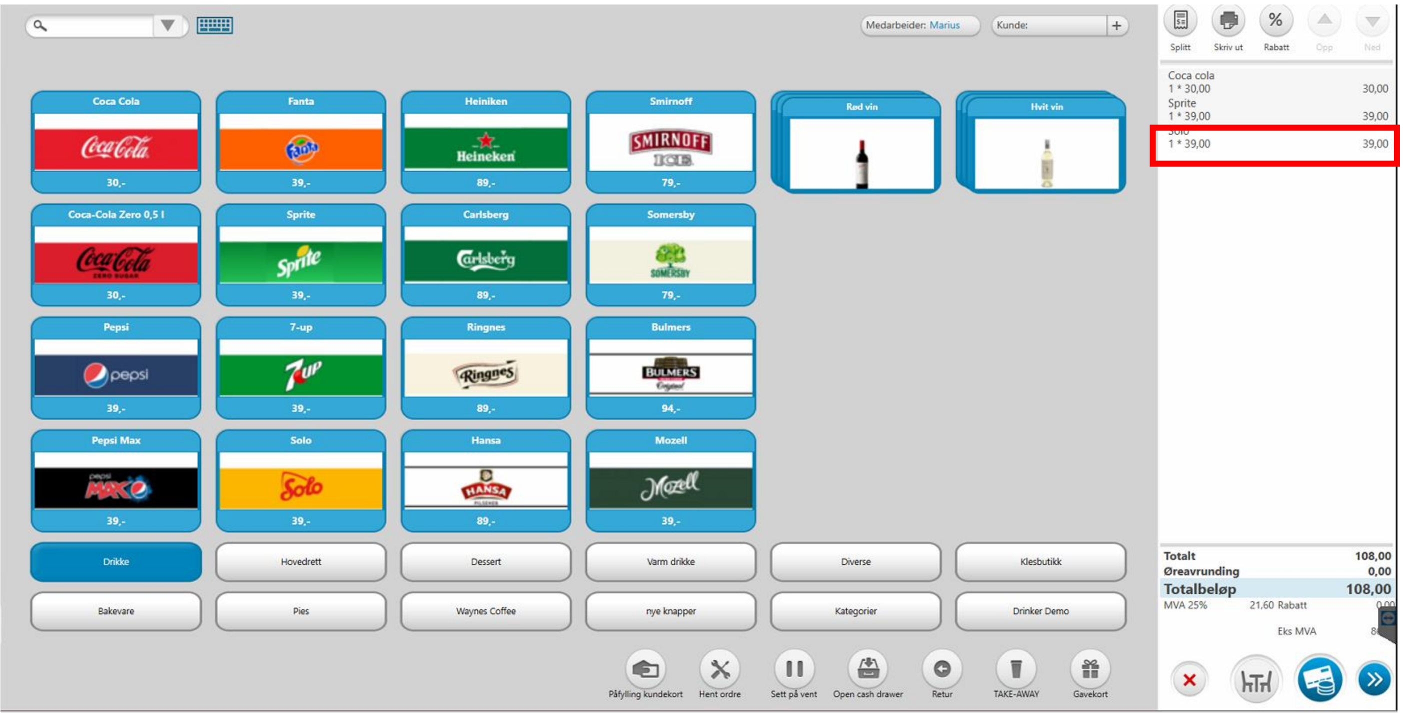
If you charge with cash, it will be changing the amount in the payment image that triggers the change on the screen. Then a rubric will appear stating what the customer should have in exchange.

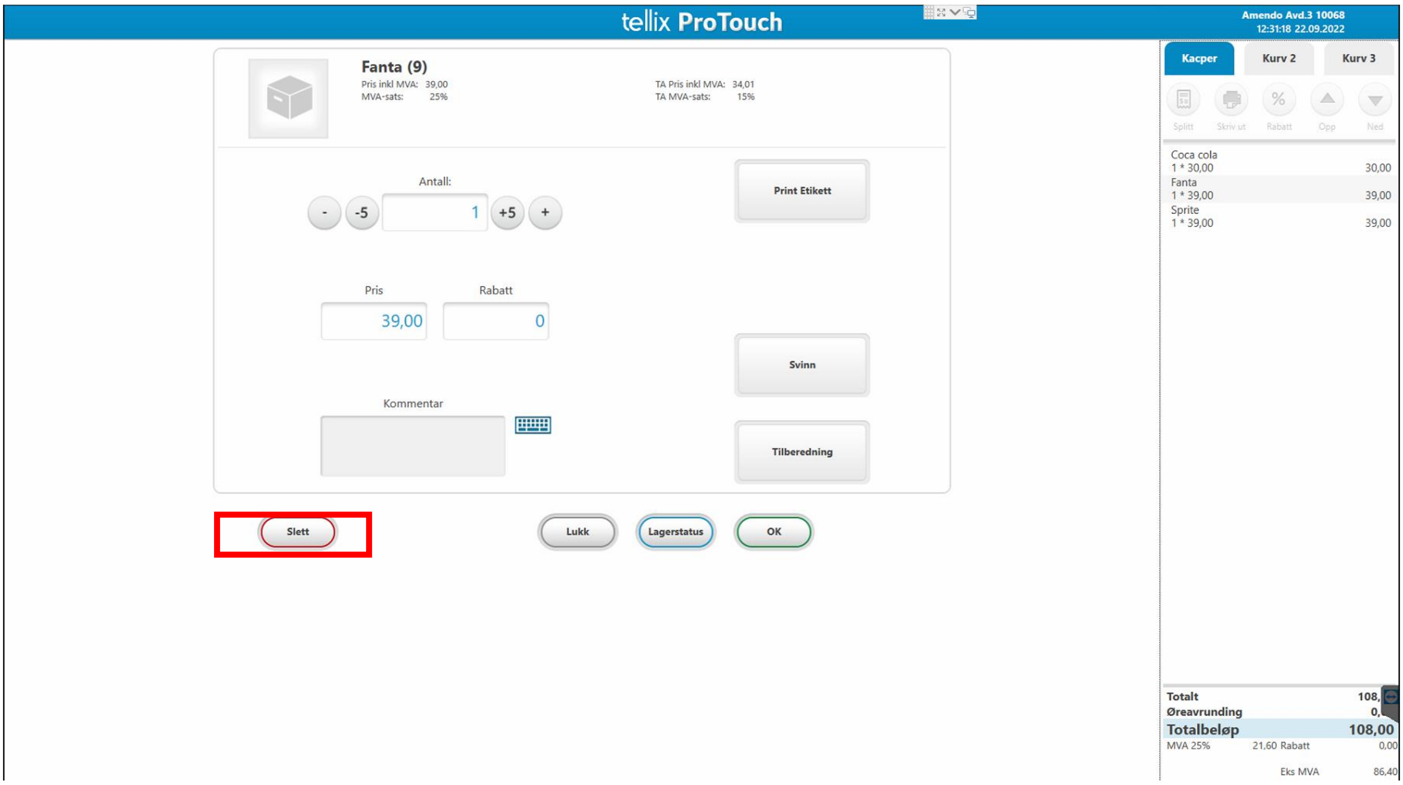




2.1.2Delete an item line

Click on the item you want to delete in the shopping cart.

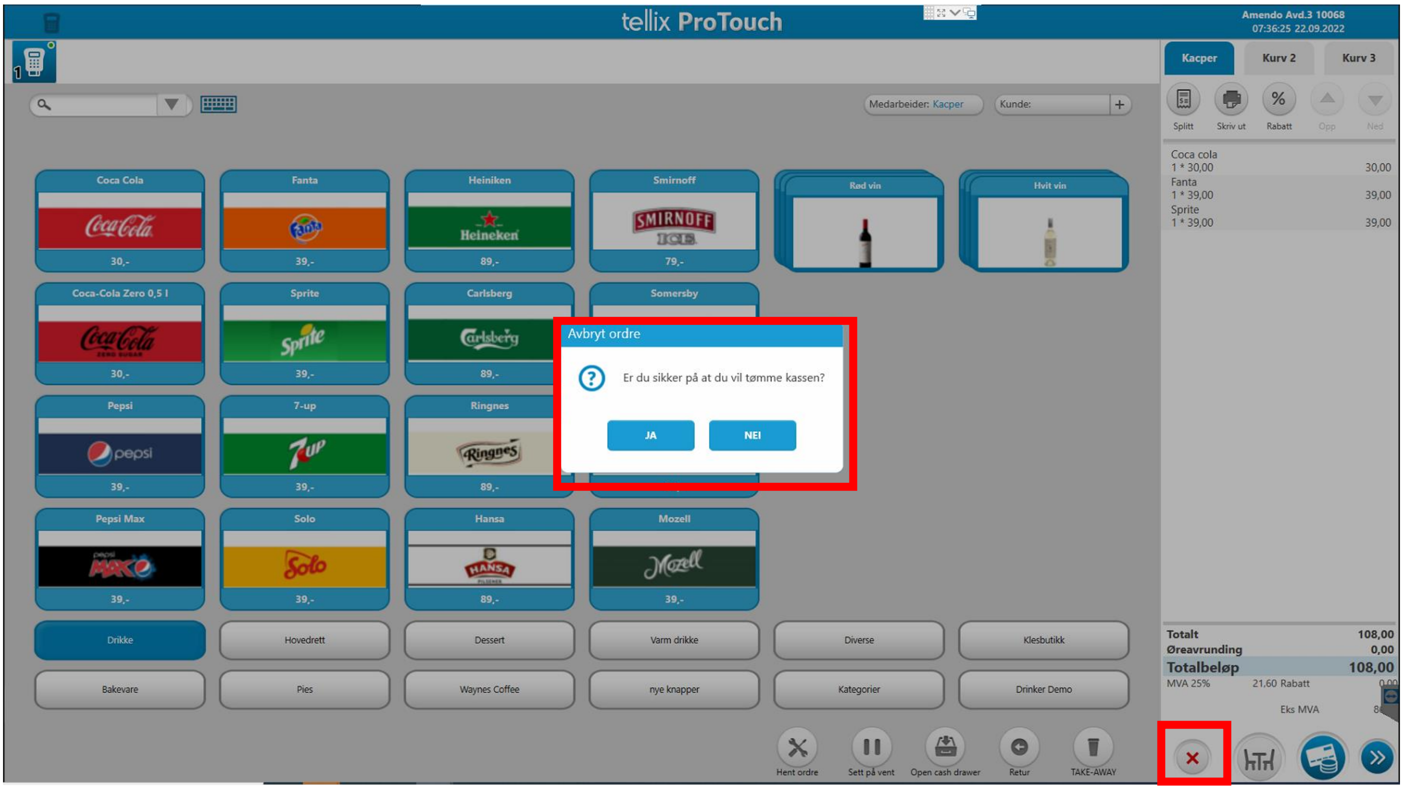




2.1.3 Empty the box | Terminate sales

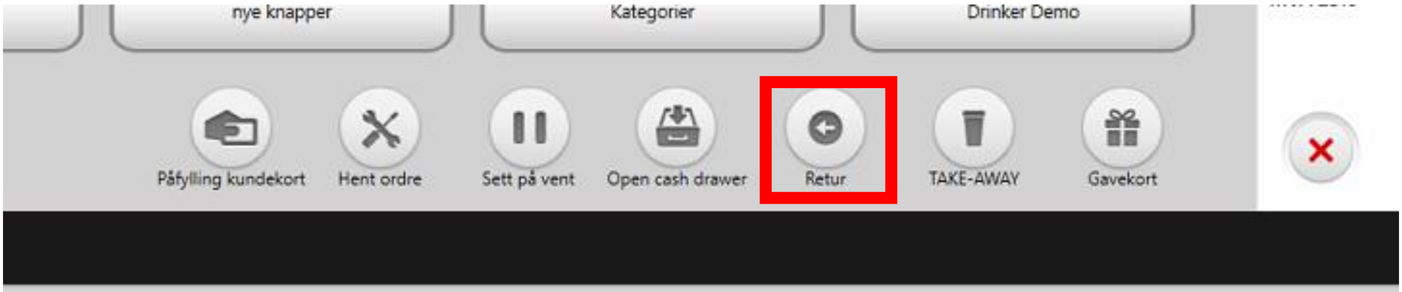
Sales that have been fully or partially paid cannot be terminated.

Products that are entered in the sales image are removed individually until the first payment is made. You can also click to **terminate** the full sales image.



2.1.4 Registering returns

Tap the "Return" icon at the bottom of the sales image.

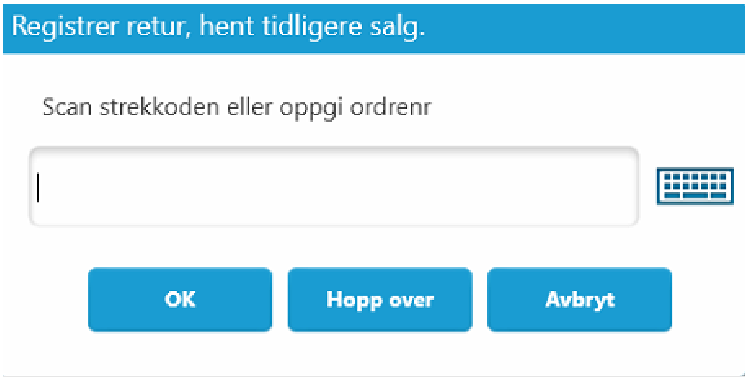


When set to return mode, do one of the following:

-Scan original sales receipt.

-The order number can also be retrieved from the BackOffice under CRM > Receipts or CRM > Orders

-Select "Skip" and enter the products manually.



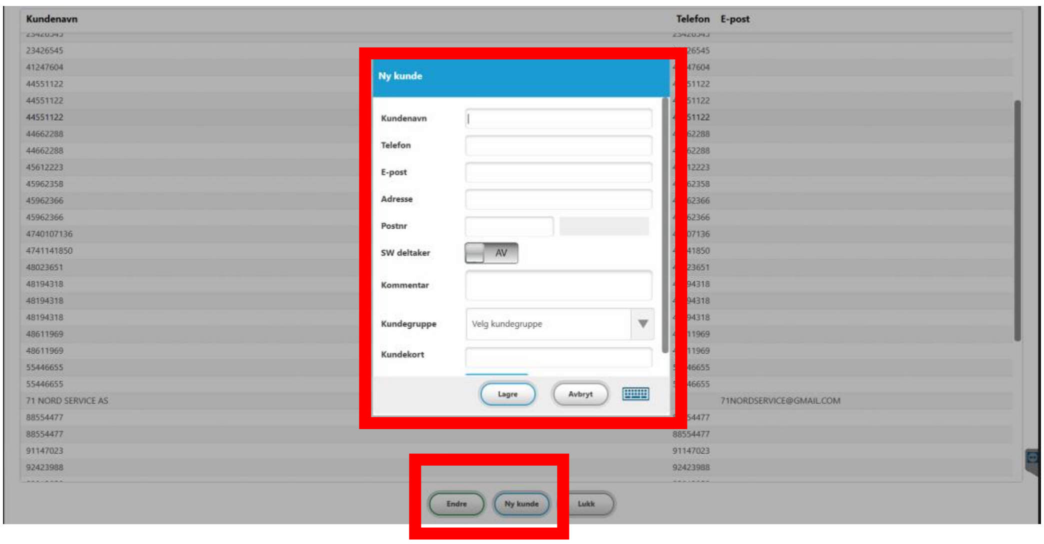
Then you choose the desired way of chargeback with the payment button, the blue button in the lower right corner. You can "Give **cash", "Give credit card**", or choose "**Bank transfer**"

If the original sale is paid by terminal, ProTouch will ask if you want to "**return on card"**. **Select!** The amount must match the original sale. You cannot return part of the sale or add anything in addition to the return.

If you do not have an integrated terminal, ProTouch will suggest returning to Terminal (manual), but state that the return of money must be done manually. ***For return to BankAxept**, please contact your bank.

2.2Register or change customer at checkout

For creating a new customer in Protouch, go to Customers and press "New customer". To change customer **information:** select customer and press change.



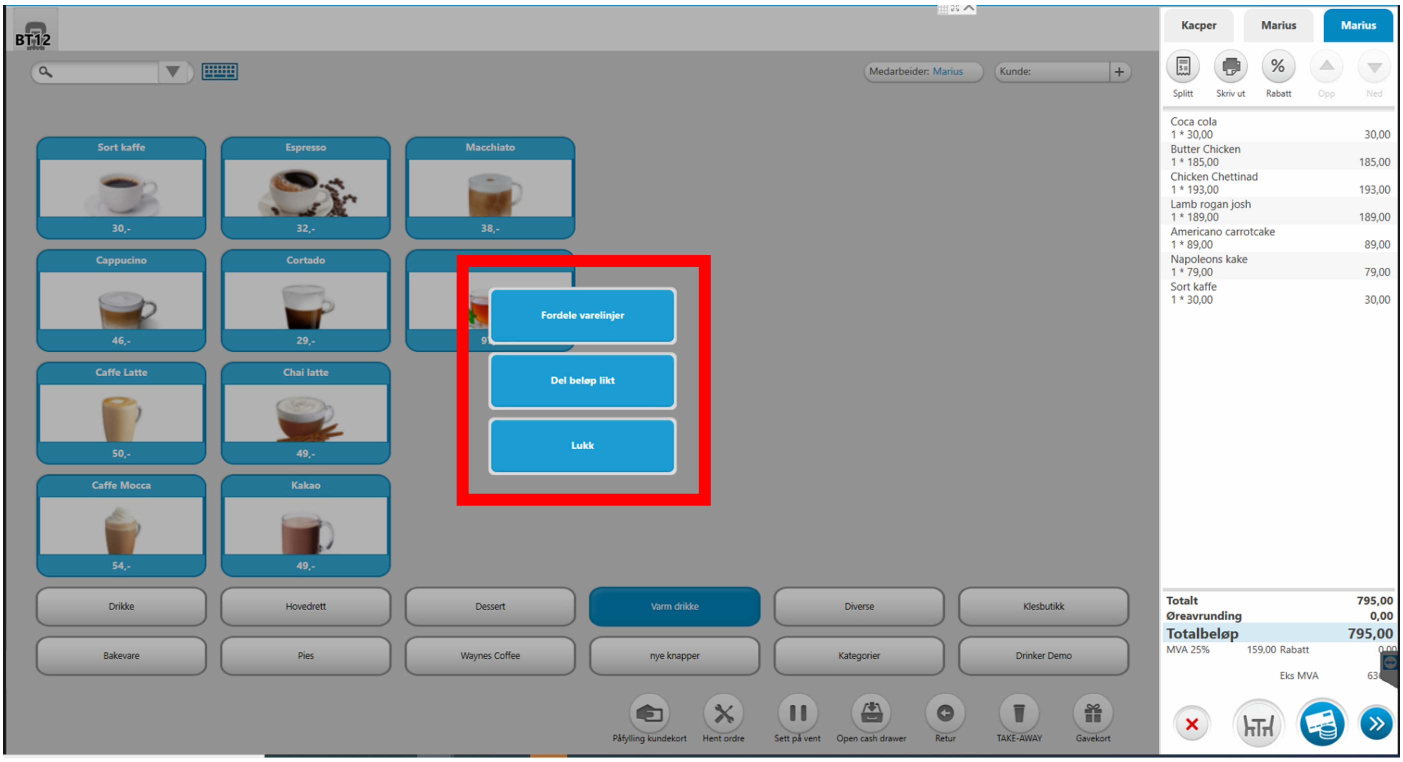
Customer groups are created in **the Backoffice – CRM > CUSTOMERS**>

2.3Features in the checkout image

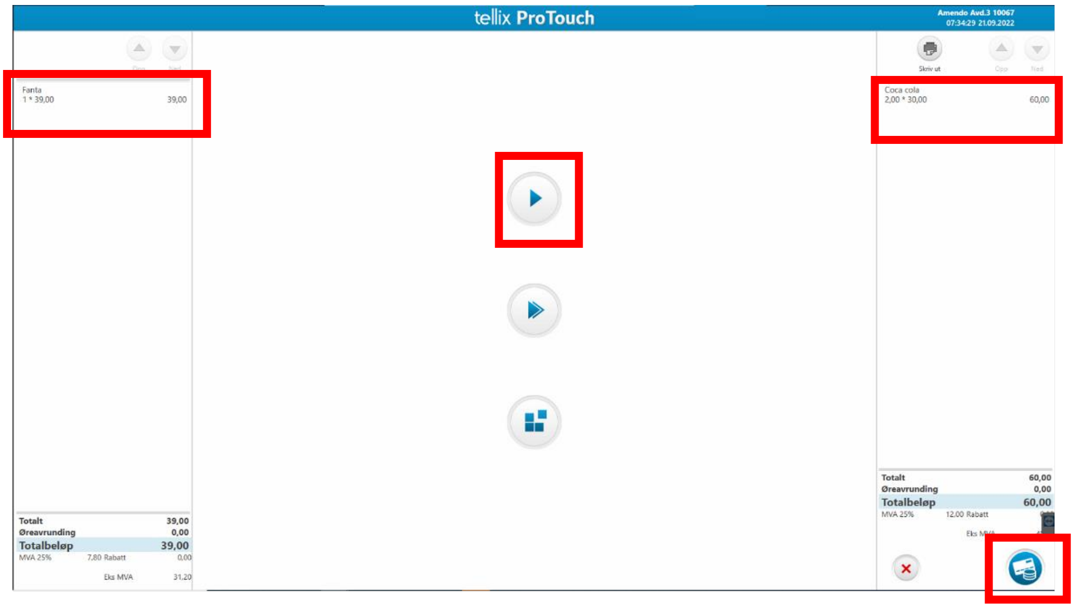
Here you can see an explanation of all the buttons you find in the box office itself. **Note** that some of the buttons may differentiate (some functions are modular). If you cannot find these in the checkout image, contact us to activate additional modules.

2.3.1Split bill

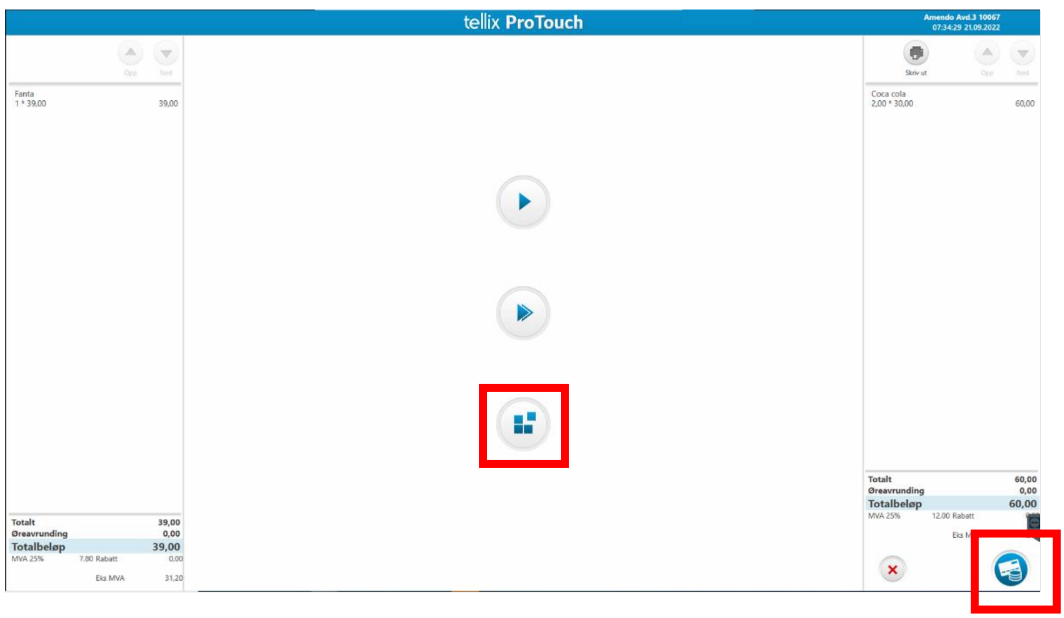
To split the payment, click . You can choose to distribute the products among several people, or divide the total amount equally by the number of people. ProTouch will create a sales registration per person you share, and if you divide the total amount equally, the number will be adjusted.



Method 1 – Distribute product lines/products Here you spread items over from the left side, to the shopping cart on the right side. **The top** button leads over a line item, the **button below** the driver above all.

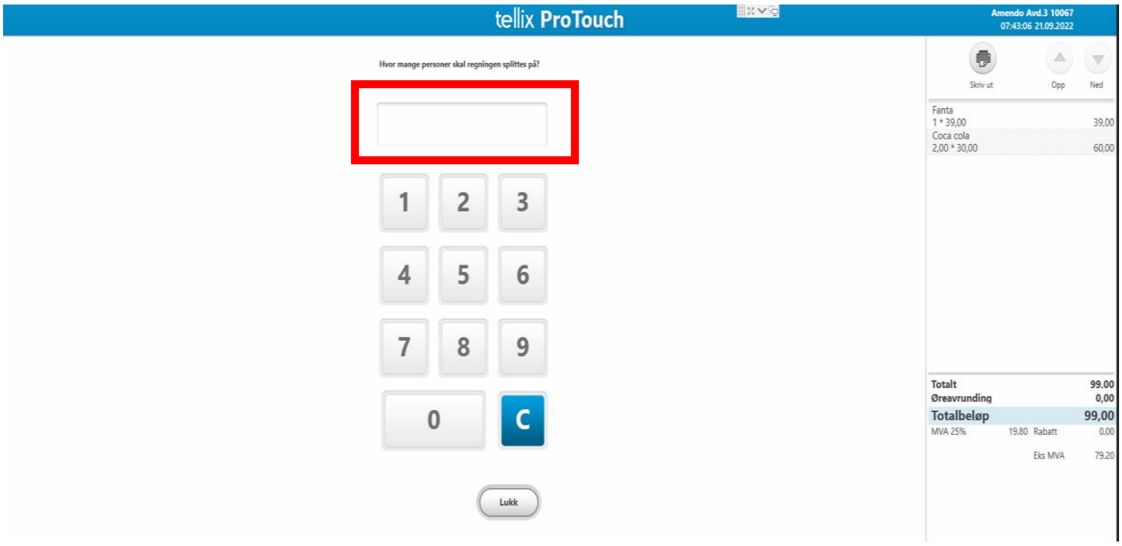


The bottom button leads across parts of a line item (e.g. if someone is going to share a bottle of wine). If you want the line to be divided by 2 people, you must enter 0.5 (i.e. half) when asked to enter the quantity.

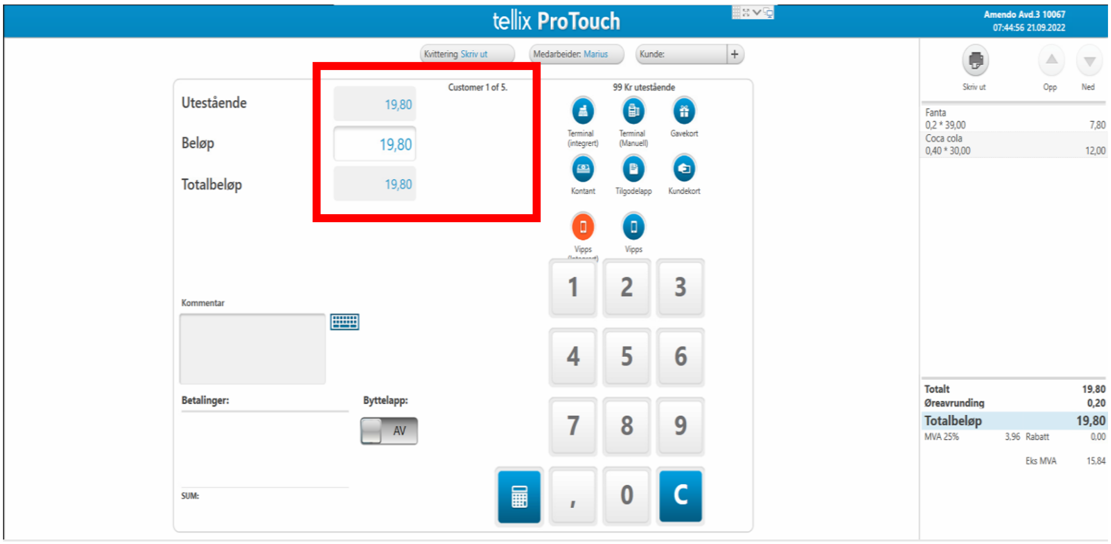


When you have transferred the correct product lines to the right, you press the blue payment button in the bottom right corner to make payment.

Method 2 - Split on the number of people you choose split by number, and you will get a picture where you have to choose how many the bill should be split on.

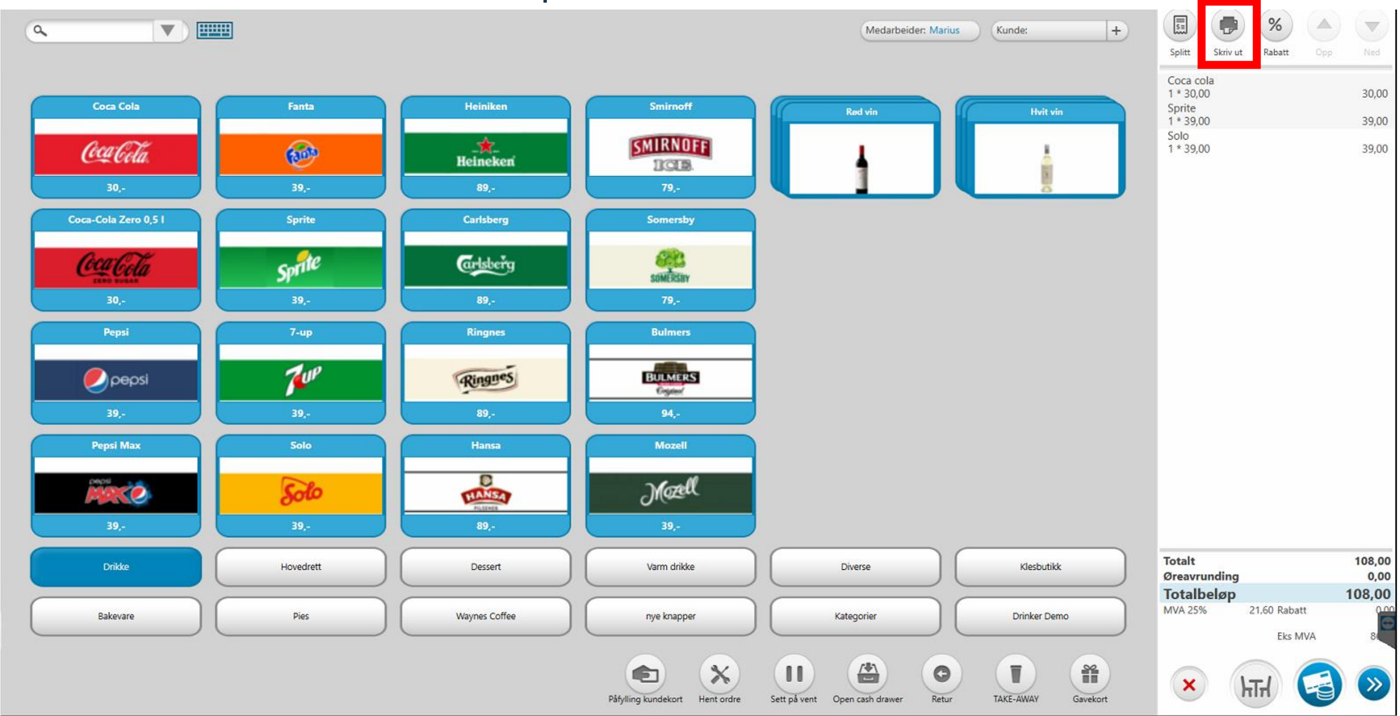


Then you are sent to the payment picture, where you have to make payment for 5 people. Look at the picture below how this is clarified in the payment picture.



2.3.2 Print temporary receipt (Intermediate bill)

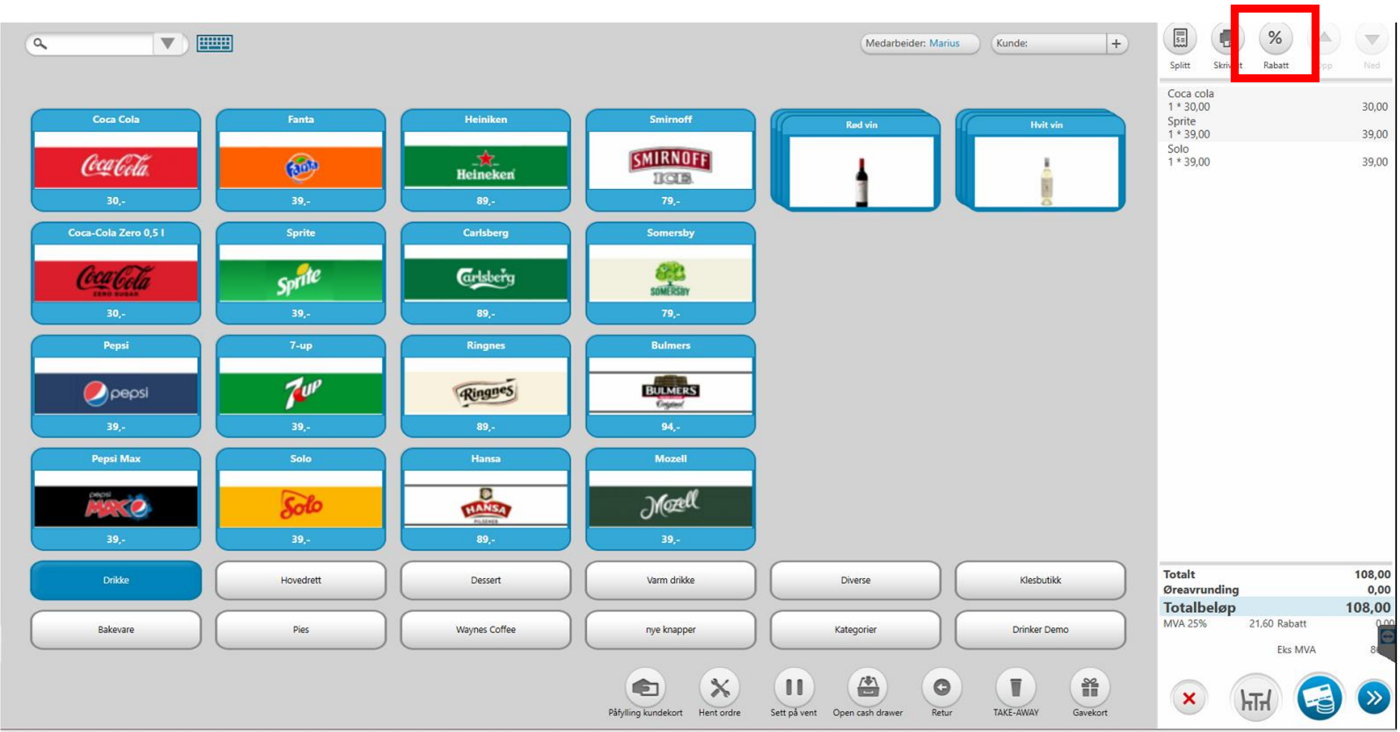
Above the shopping cart on the right side you have the opportunity to print a temporary receipt. This is often used by restaurants etc, who will present bill to their customers.



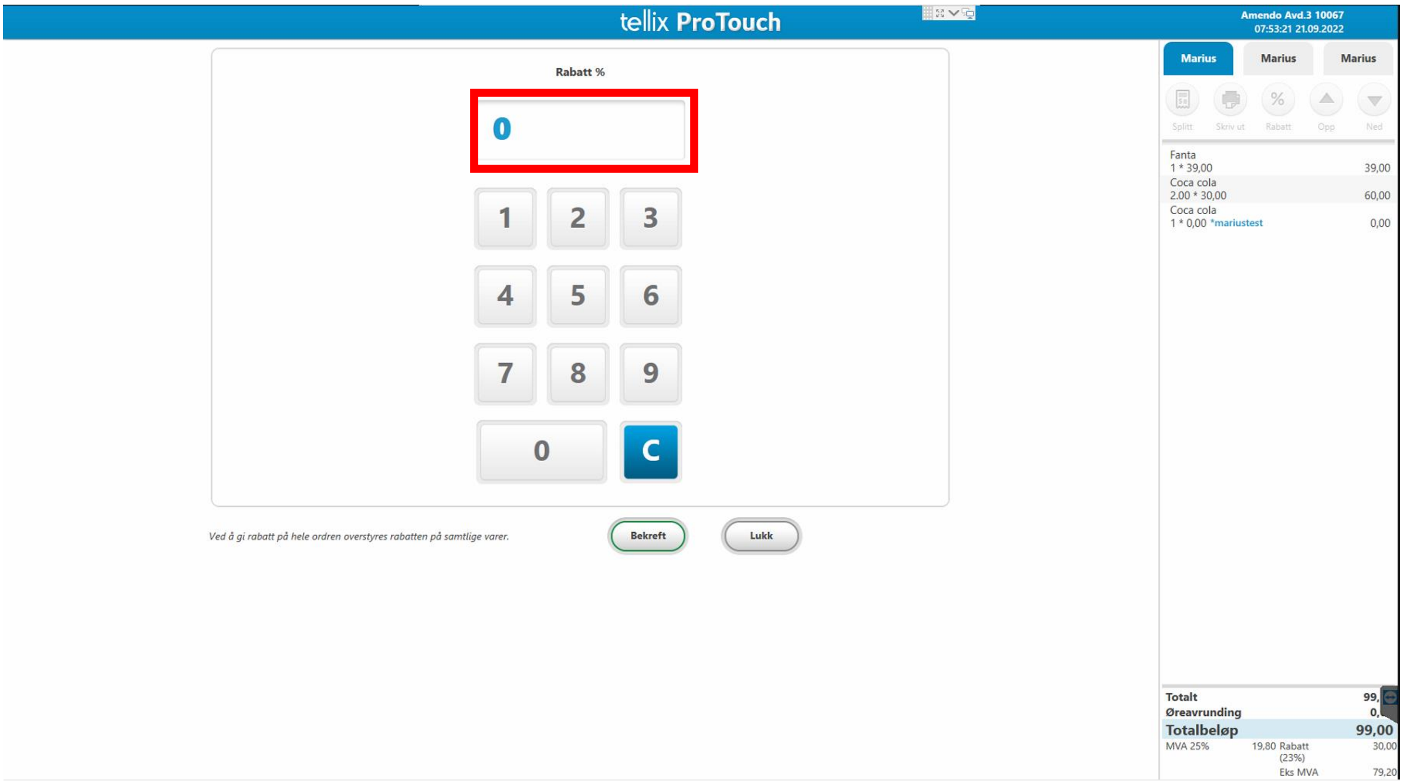
2.2.3 Discount on sale

-Discount for the entire shopping cart

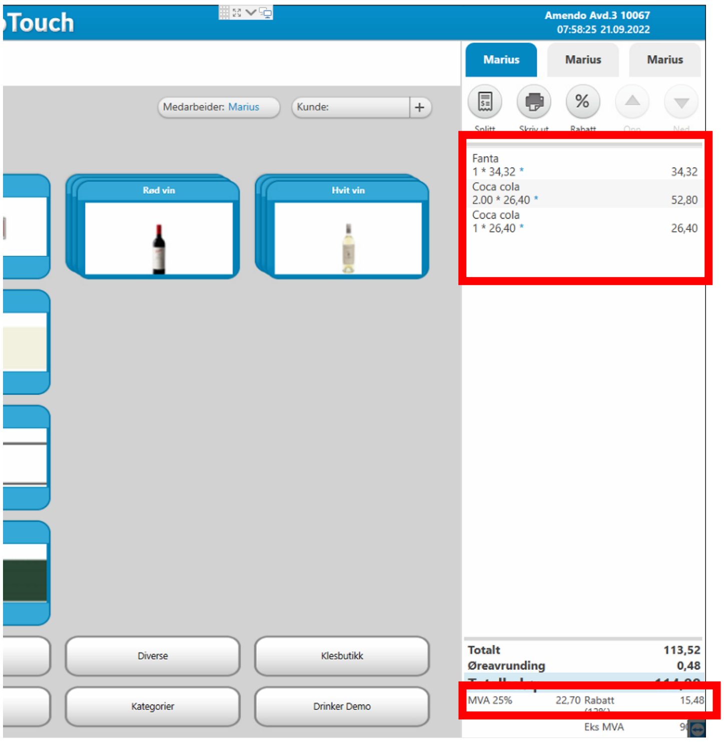
Select the Discount button above the shopping cart itself. **If you want to give a discount on** one product – you have to click on the product itself in the overview. **If you want to give a discount on the entire order**, you select the discount button in the overview. To proceed to payment, press the blue button in the lower right corner.



The discount (%) granted here will override all other discounts.

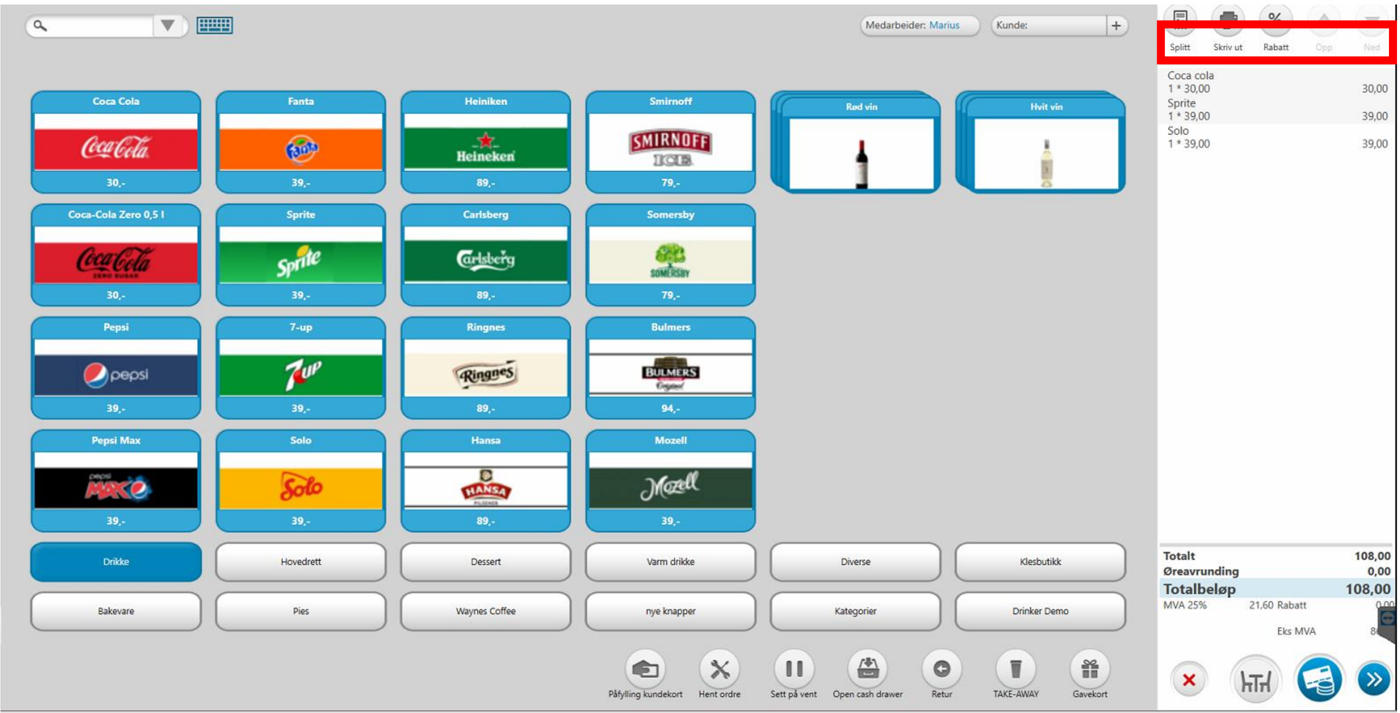


You will see that the product lines will be marked with a blue star when a discount has been entered, and at the very bottom it will say specified discount.

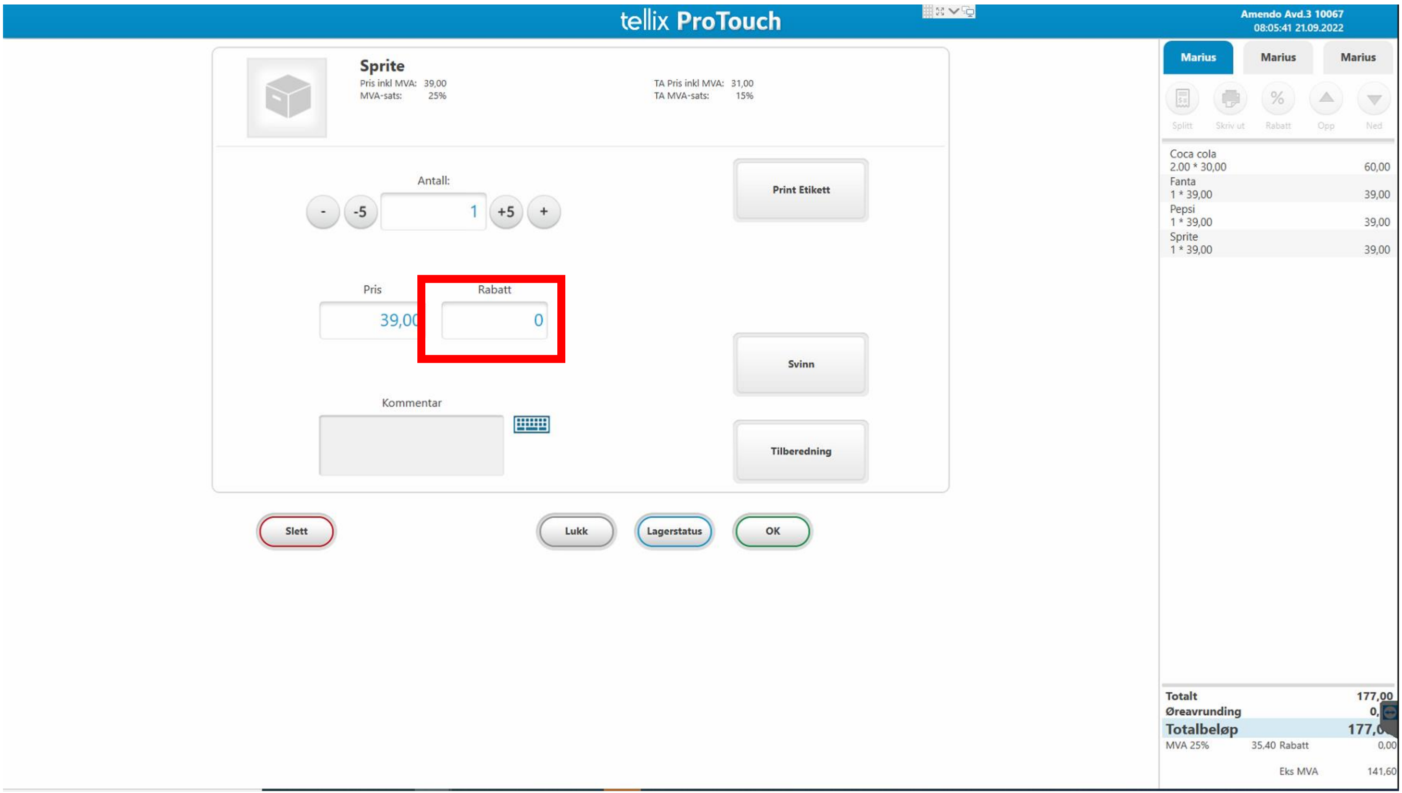


-Discount per line item

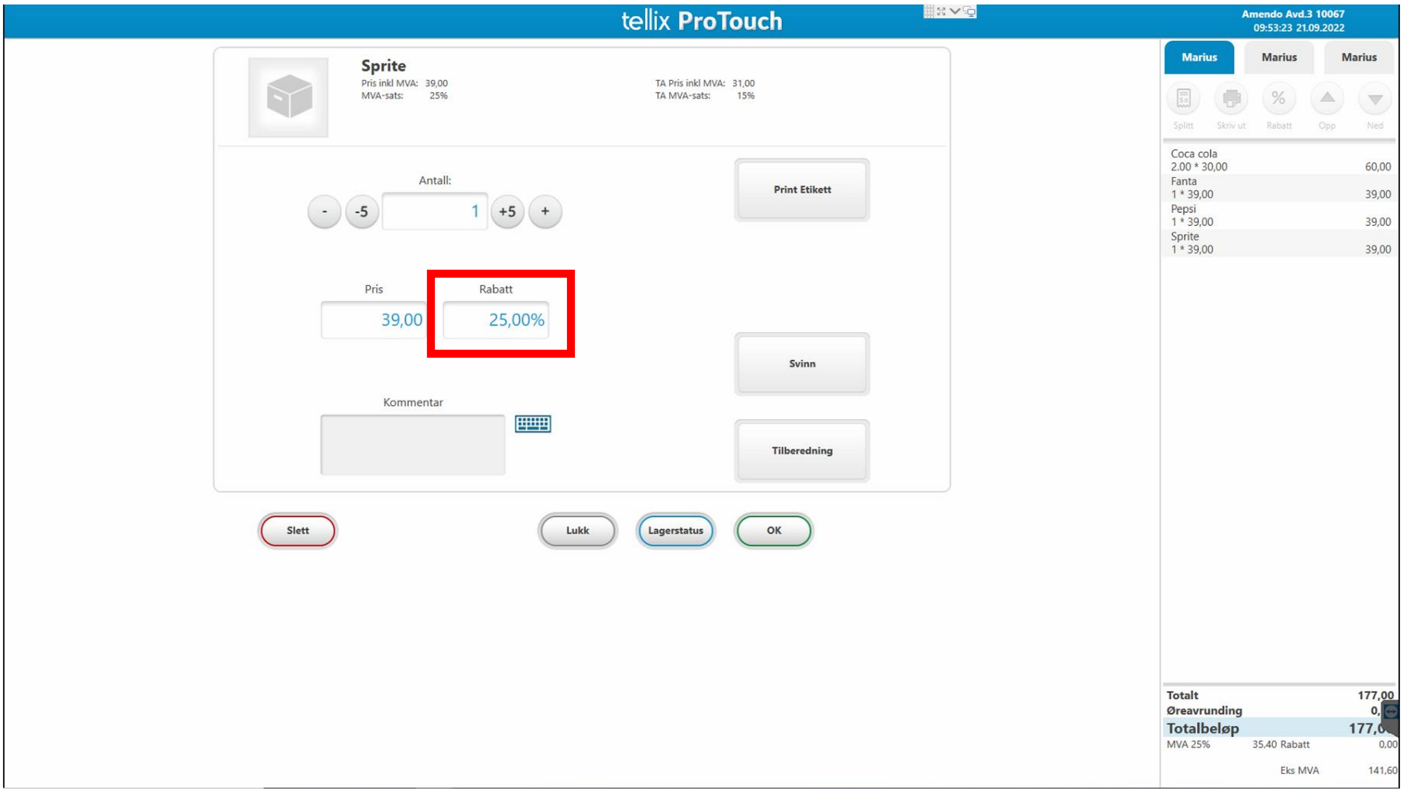
Click on the line item you want to give discount as in the picture below.



Tap the discount field.



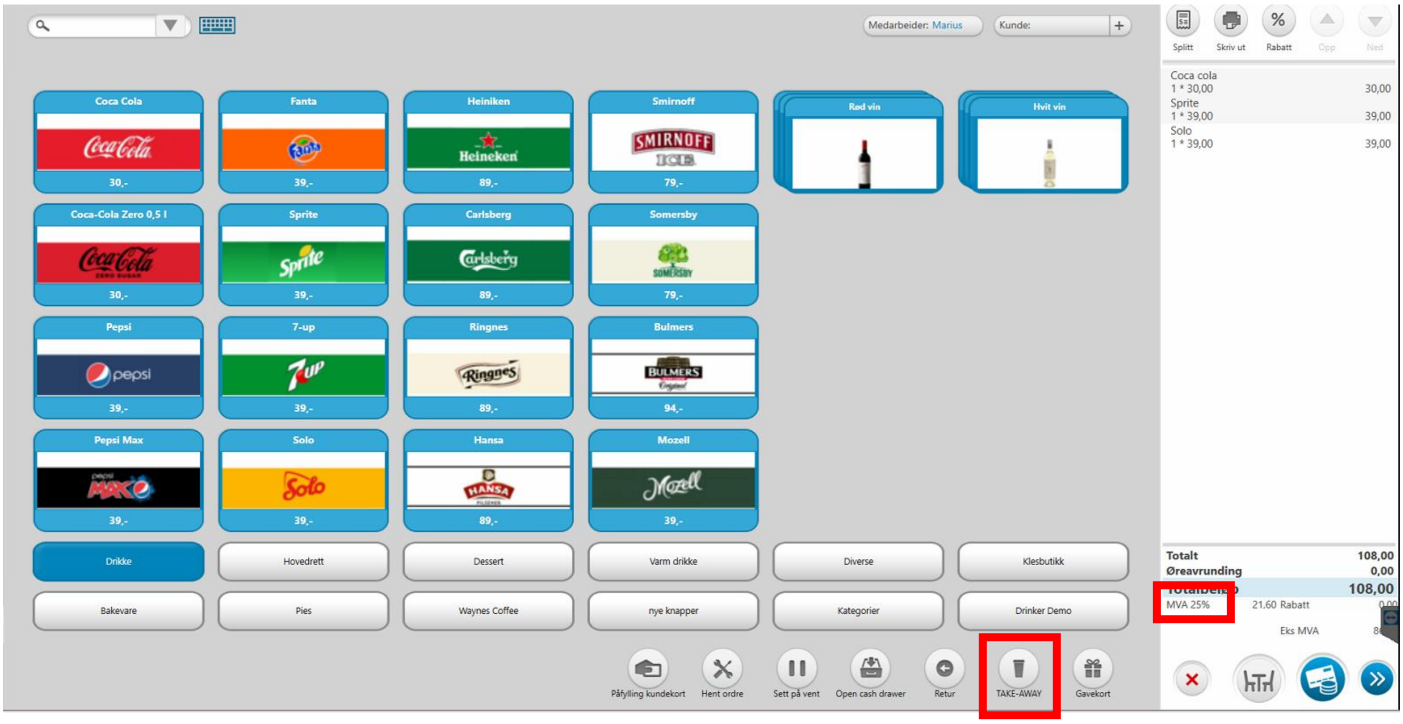
Enter the desired discount and confirm with OK.



2.2.4 Takeaway (Requires separate module: Serving module)

NB! For this module to work, you must have registered products with takeout when creating in the Backoffice.

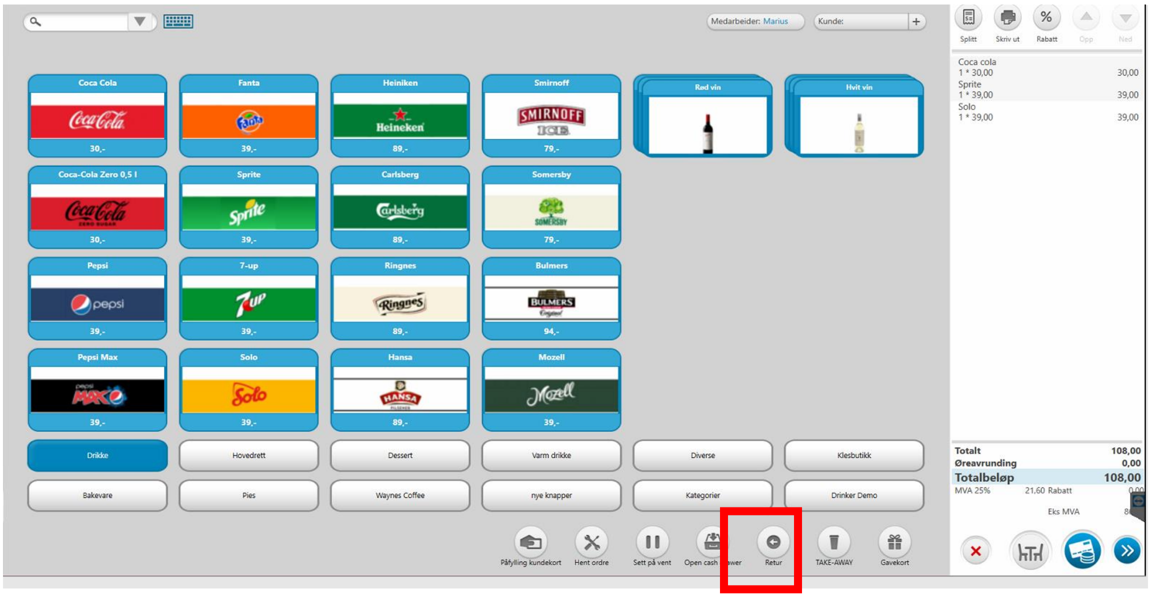
STEP 1: Turn in products and press the Takeaway button at the bottom of the image.



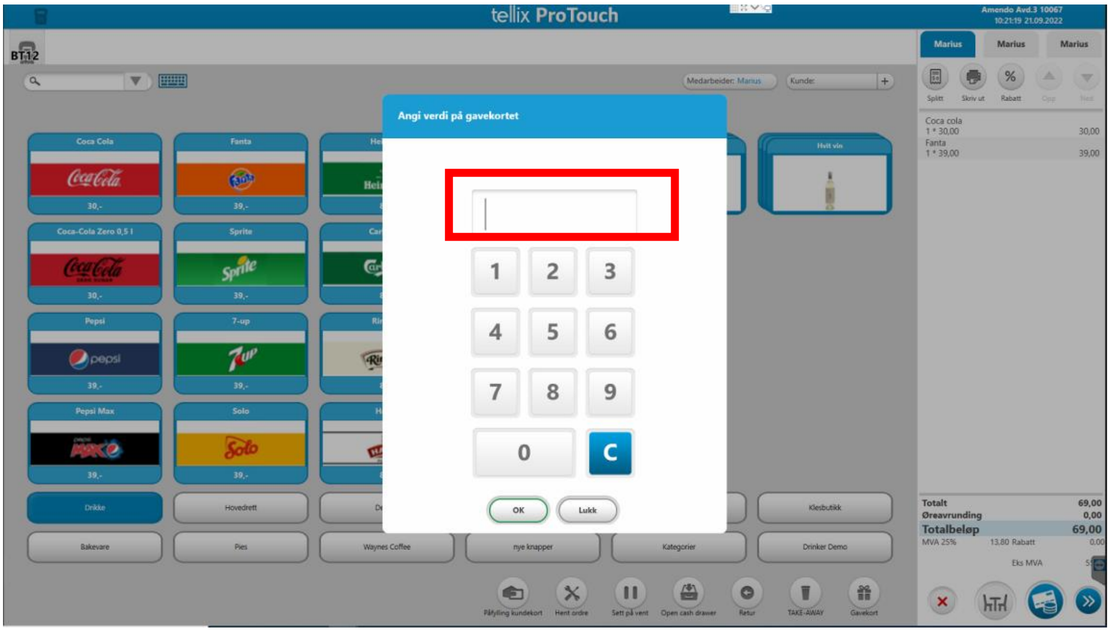
Once you have activated the Takeaway button, the VAT rate changes to the desired (usually 15%) VAT rate. This can also be seen at the bottom of the summary.

2.2.5 Selling Gift Cards

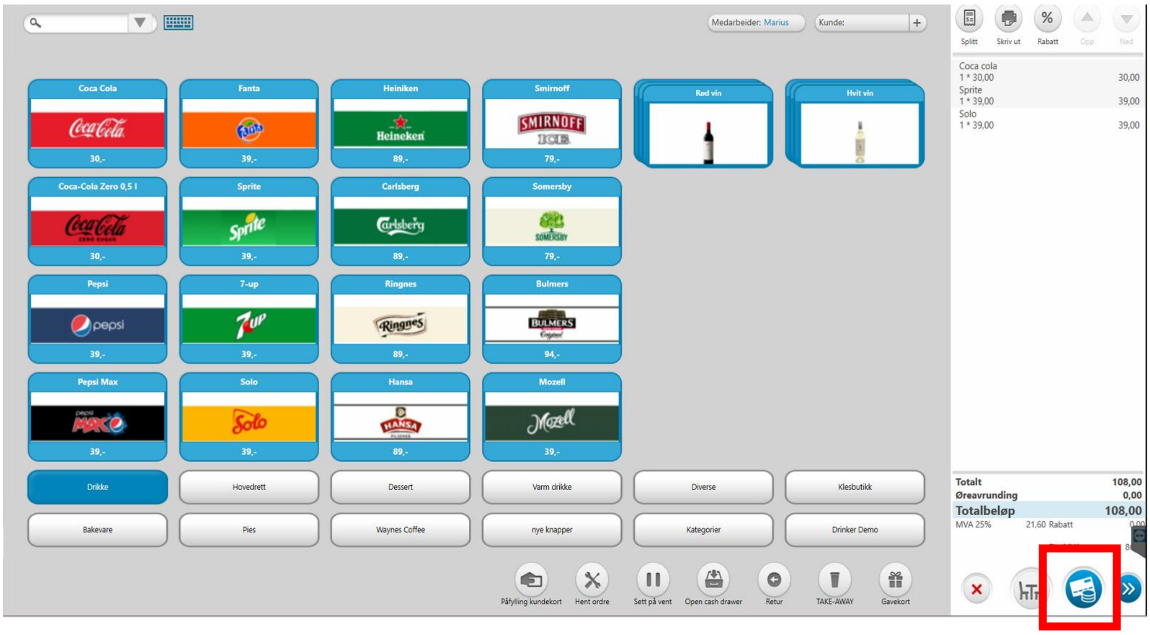
Select the "Gift card" button at the bottom of the checkout image.



Then choose the amount you are going to sell for.



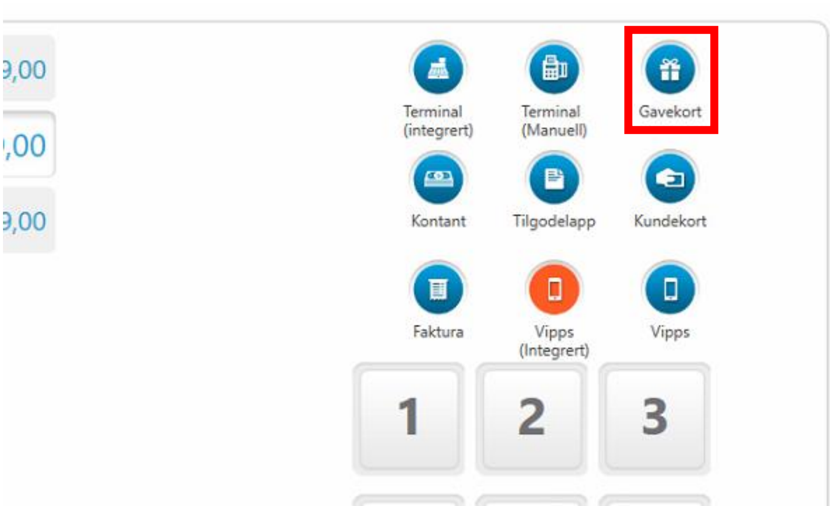
The gift card then adds itself as a regular line item, and you can complete the sale in the usual way by pressing the blue payment button.



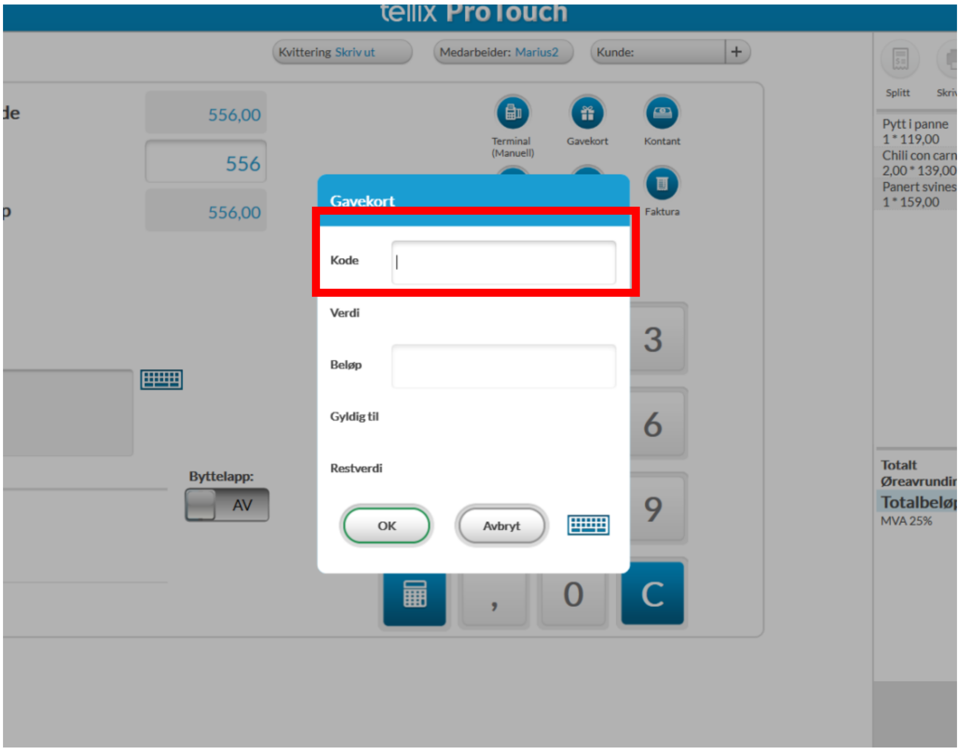
A gift card note will be printed along with a receipt. Many people today choose to staple the gift card tag on an envelope, business card, etc.

2.2.6 Paying by Gift Card

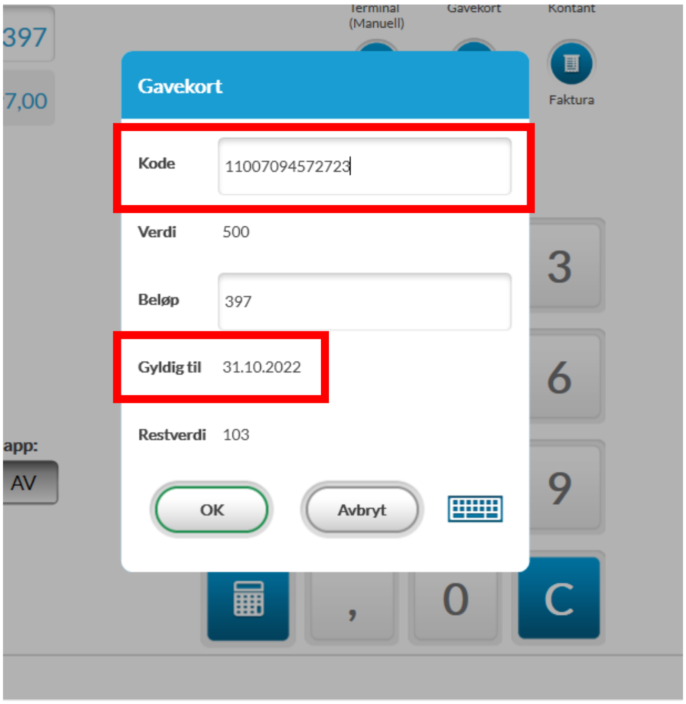
When customers have to **pay with gift cards**, you enter goods in the usual way. In the payment image (picture below) you will see the button **Gift card** that you should then select.



Proceed to scan the gift card or enter the code on the gift card.

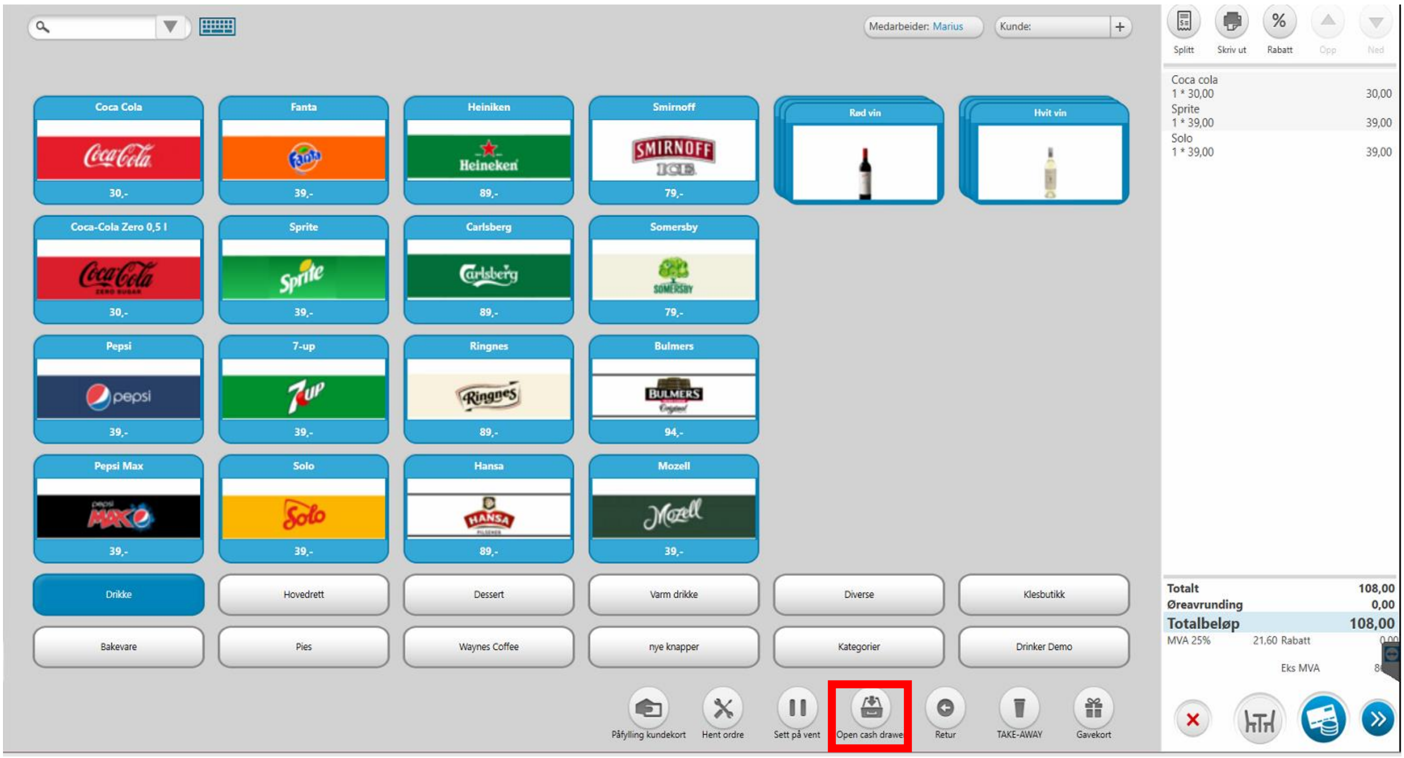


Then you will get all the information automatically as long as the gift card is valid. Here you can also choose what amount the customer wants to use of the gift card. If there is a remaining amount on the gift card after purchase, a new gift card will be printed to the customer that will have a new shelf life.


Terminal (Manuell)
Gavekort
Kontant
Faktura
397
7,00
Gavekort
Kode
11007094572723
Verdi
500
Beløp
397
Gyldig til
31.10.2022
Restverdi
103
OK
Avbryt
app:
AV
3
6
9
,
0
C

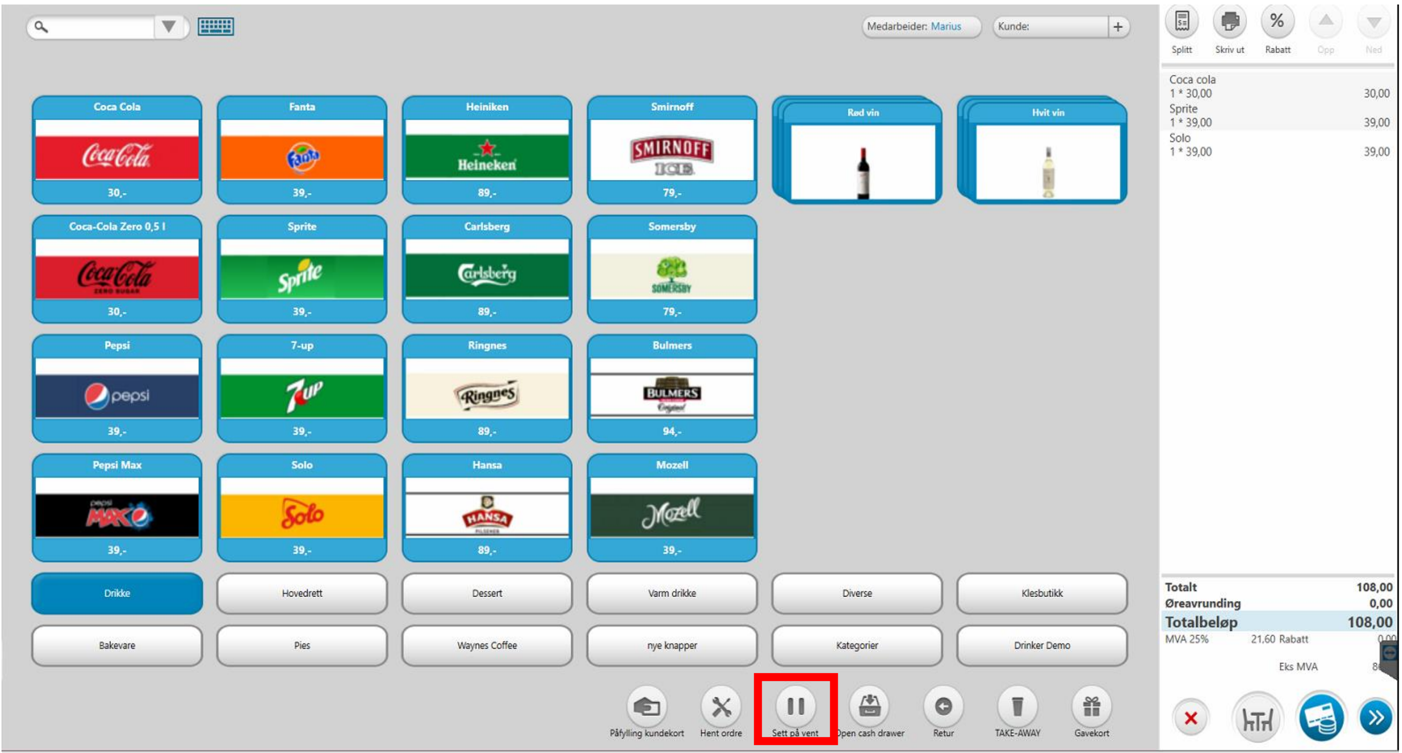
2.2.6 Open cash drawer

If you are going to open the cash drawer, you must press the **"Open cash drawer"** button in the cash register. The box will then be "locked" for other uses, until the cash drawer is closed again. This is statutory functionality - as long as there is a cashier that should receive cash.

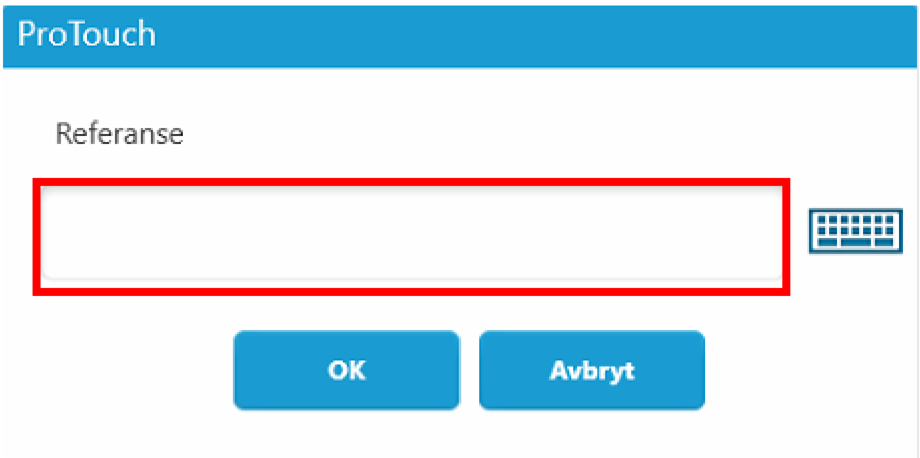


2.2.7 PUTTING SALES ON HOLD

Select the "Hold" button to put what you have in your shopping cart on hold.



Add a reference to easily find sales back up.



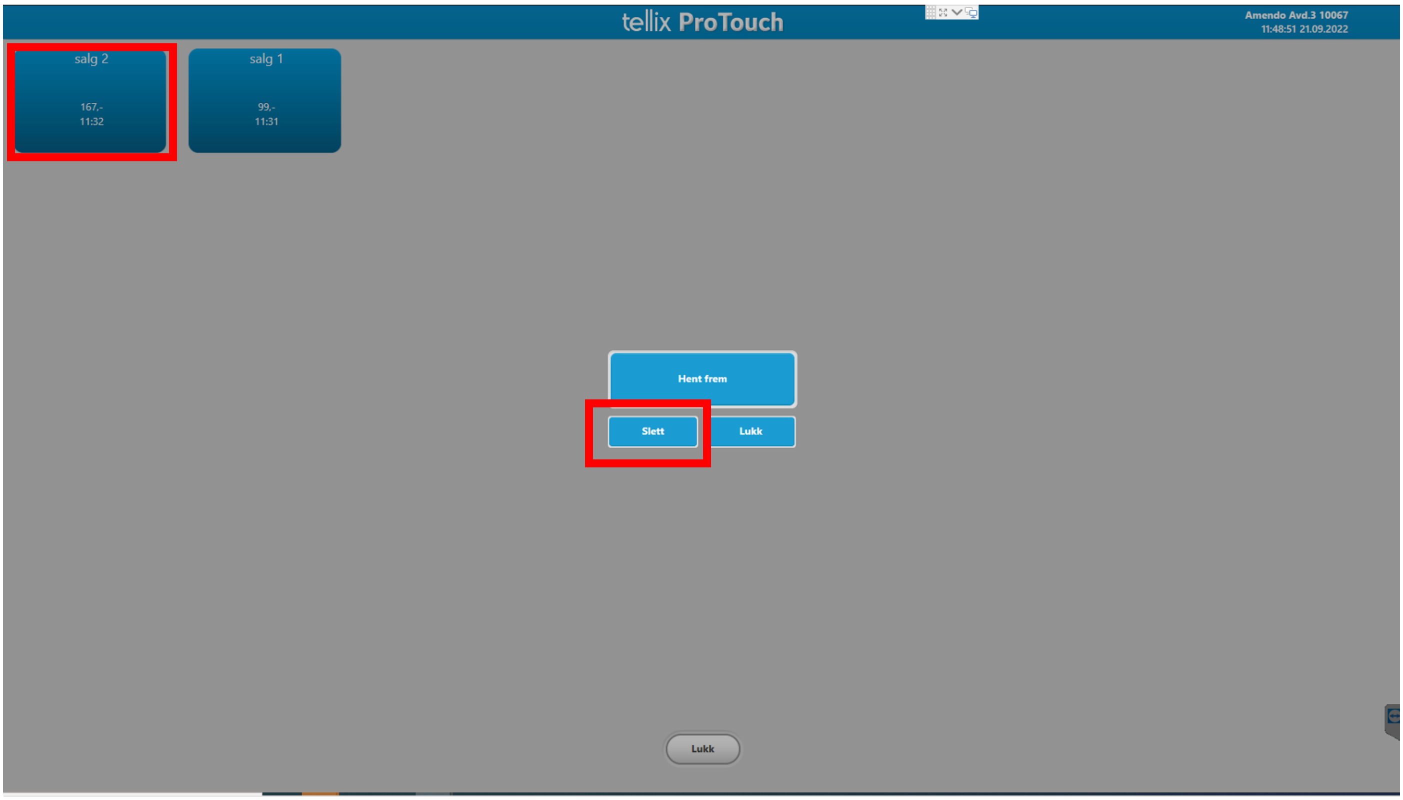
A new button option on the menu will appear to bring up/delete previous sales that have been put on hold.

2.2.8 RETRIEVING SALES ON HOLD | DELETE

Select the " **Pending"** button to pull up sales you've previously put on hold.

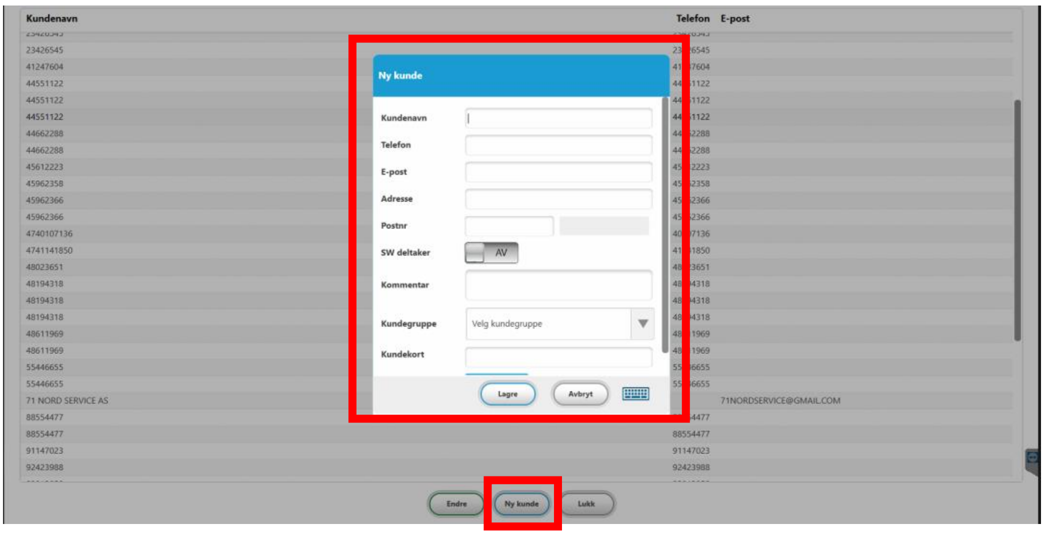
The number shown on the "pending" button refers to how many sales have been put on hold. If you press the "**Pending" button,** you will enter a new window that shows the sales that have been put on hold with respective references. Tap the sales you want to bring up in your shopping list.

To delete a sale , you must right-click on the sale "put on hold" that wanted to be deleted.



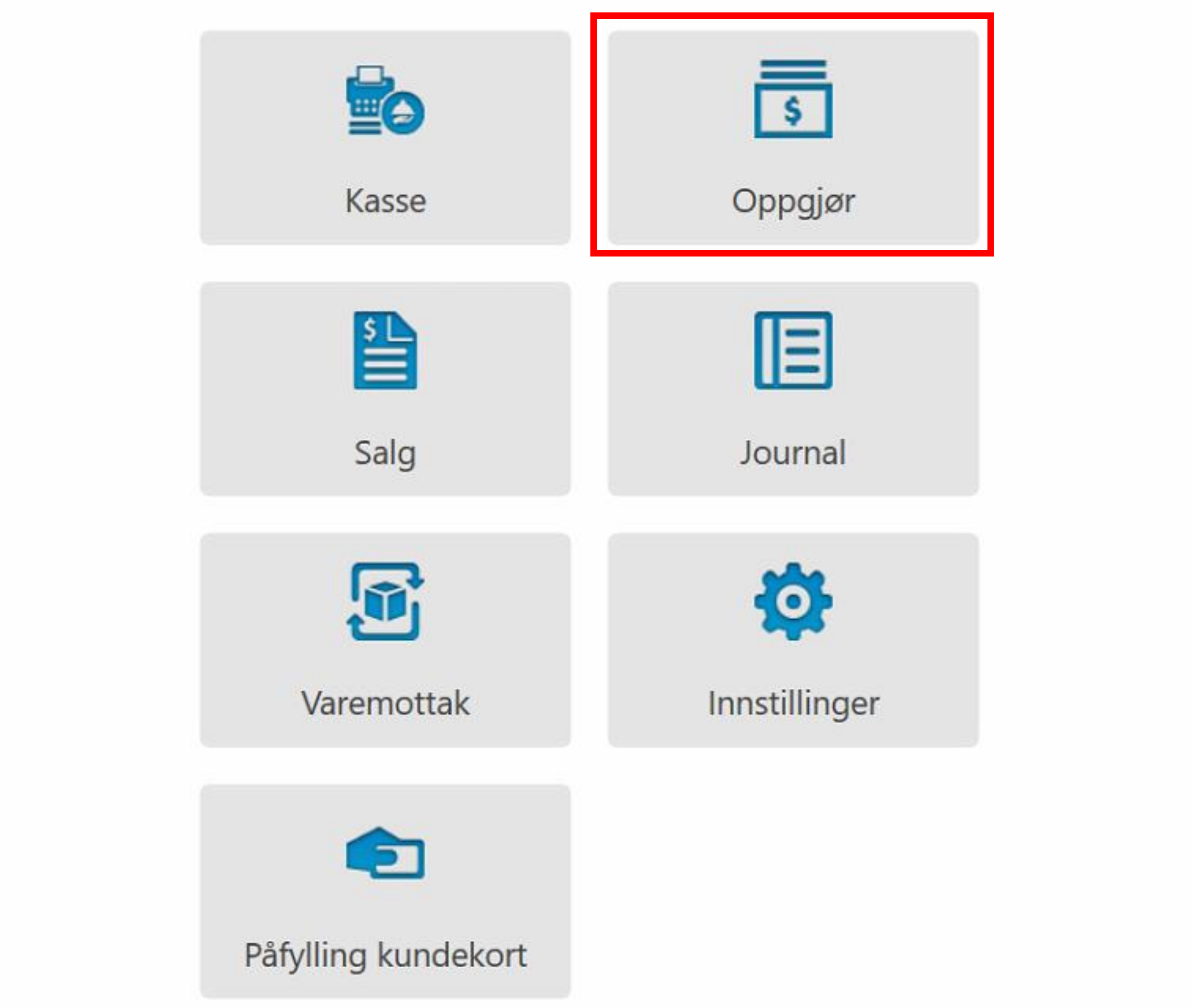
2.4 How to register | Change customer at checkout

For the creation of a new customer in Protouch, man goes to Customers and presses "New customer". To change customer information, highlight customer and tap change.

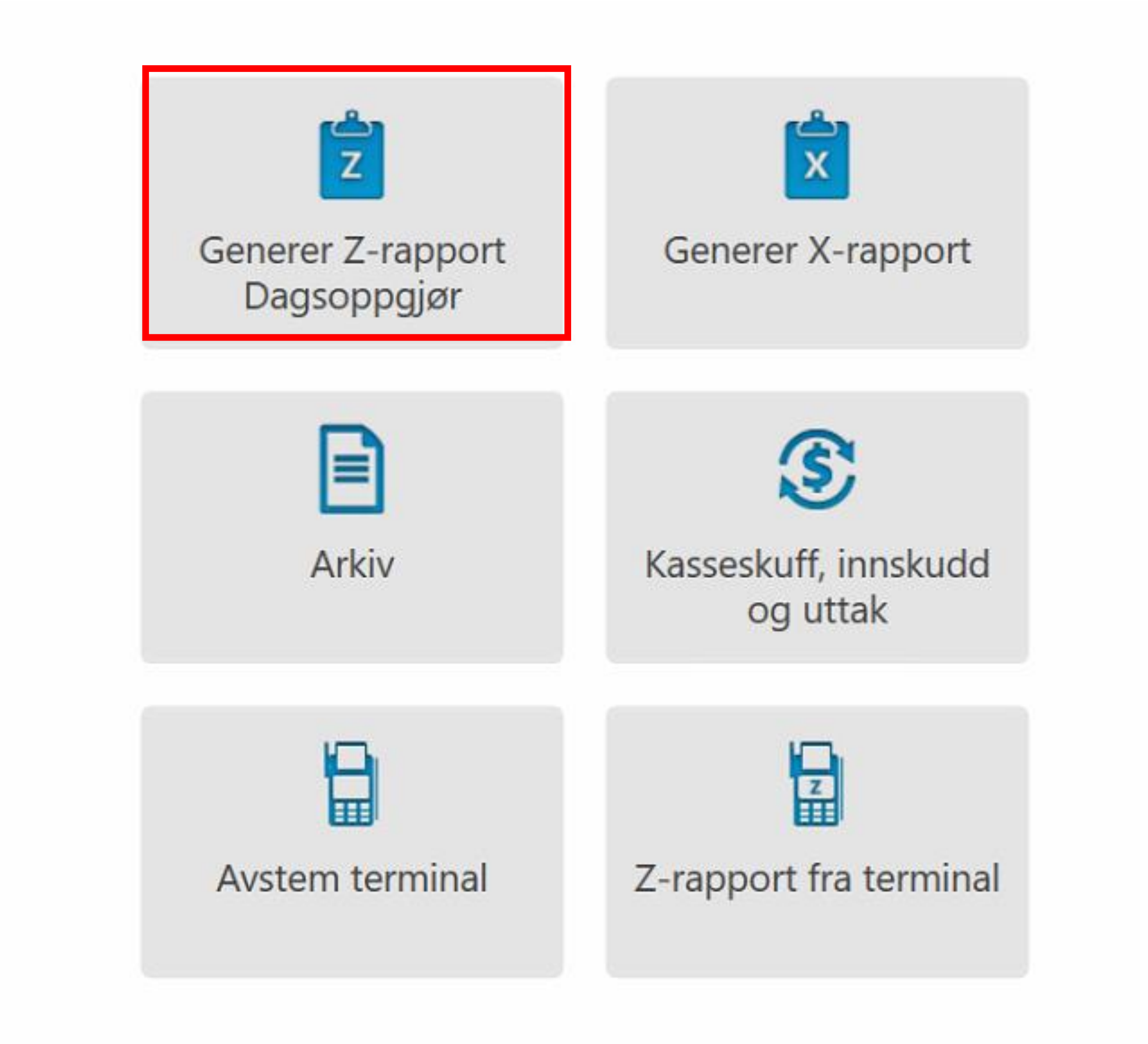


2.5 Conduct daily settlements

It is recommended to conduct settlement every day. In the menu in ProTouch there is a " **Settlement"** button.



If you click here, several new choices appear, which do different things.



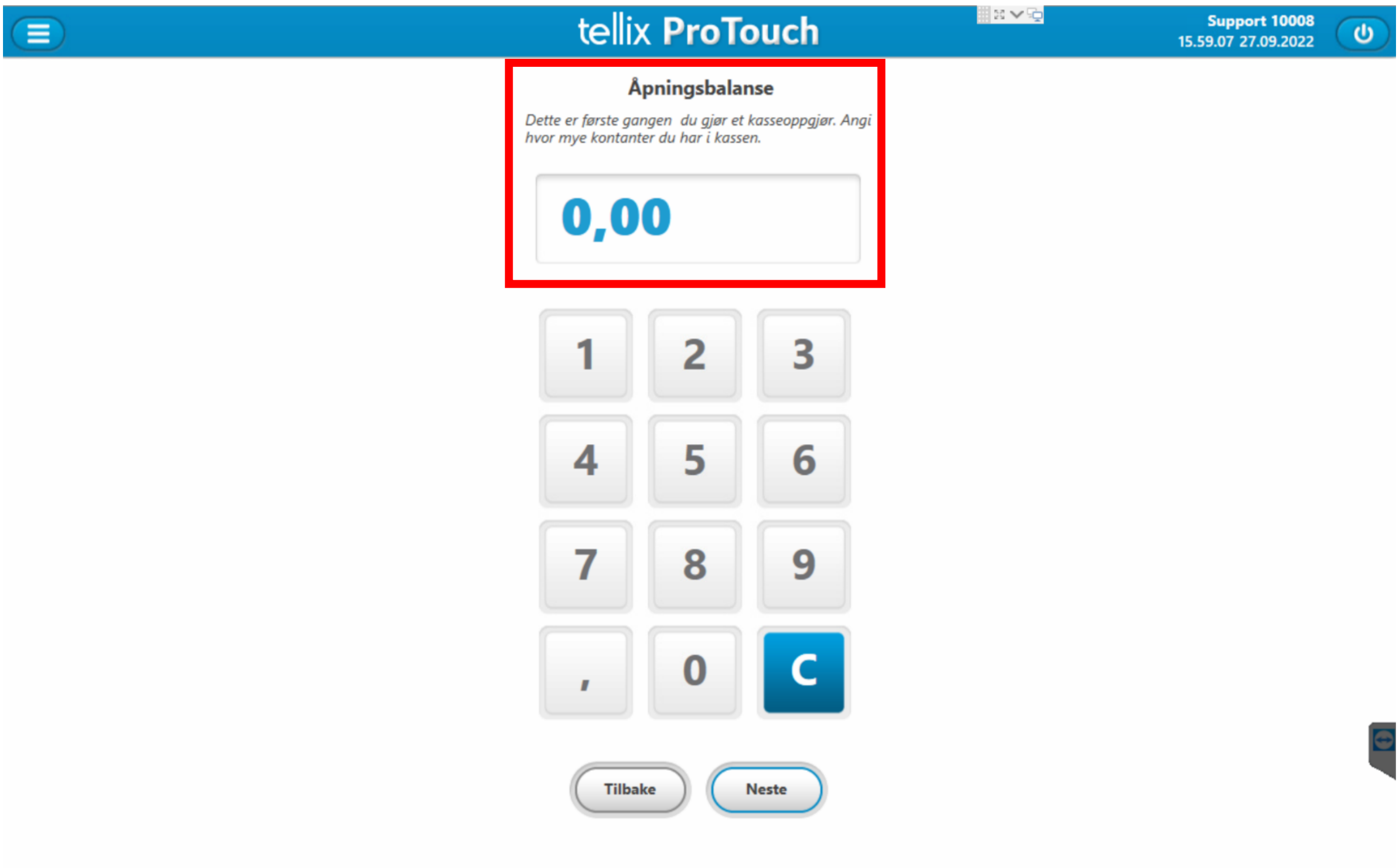
Generate z-report. At the end of the day, a daily settlement must be generated that provides an overview of cash flow for the day. This is called a z-report. This report provides an overview of what payments have been received for all payment methods as well as the ability to record counted cash balance, amounts you take out of the checkout and comment on any discrepancies.

In ProTouch, the z-report is digitally signed and stored digitally. When the z-report is generated, the system will ask to reconcile the terminal. This does not affect the report, but serves as a reminder. Reconciliation is a function of sending settlements from the terminal to the bank. Settlement must be sent to bank to get money into bank account.

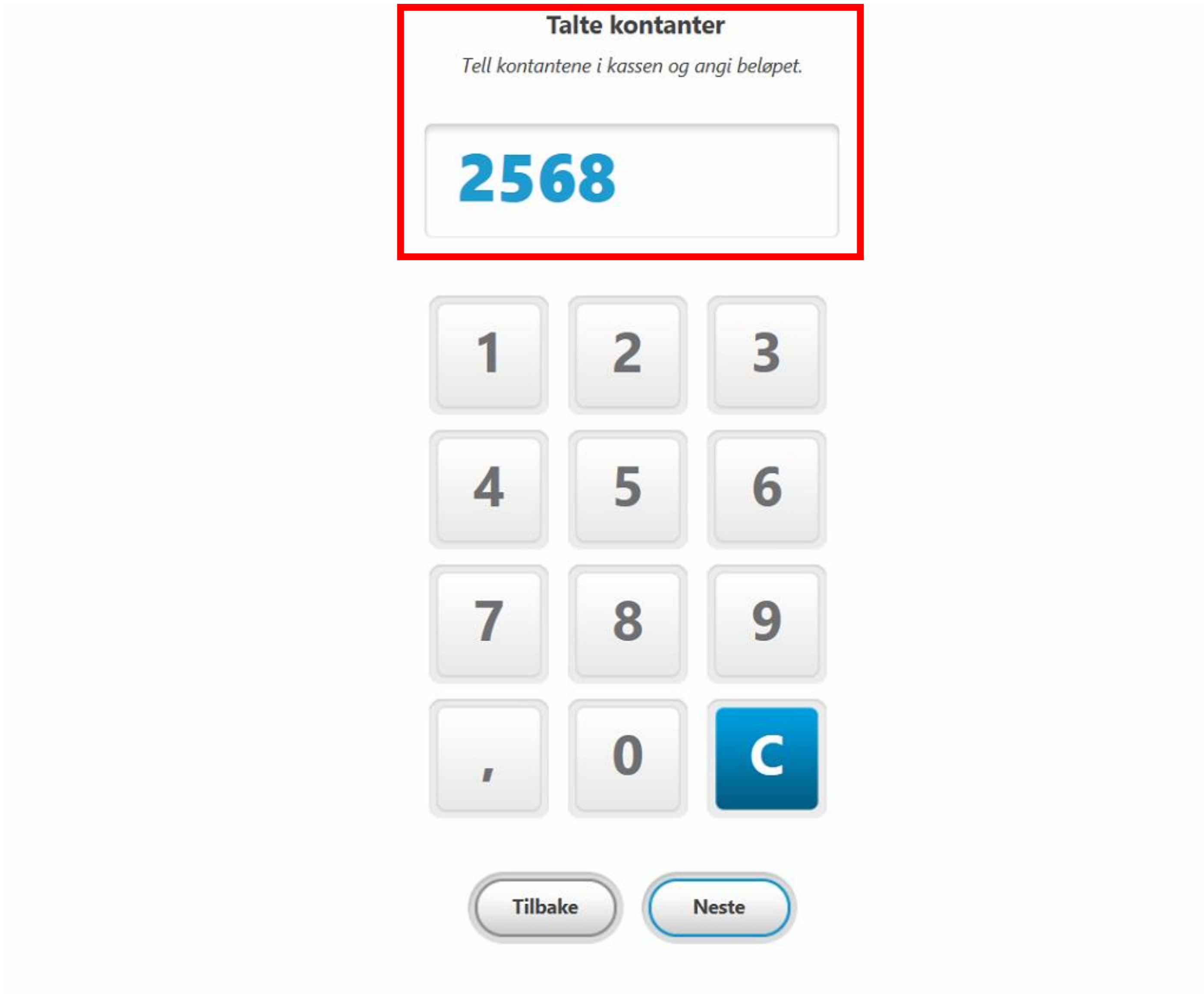
If you use table placement , all orders parked on tables must be completed in order to carry out a daily settlement.

Select "**Generate Z-report Daily Settlement".**

Opening balance is a step in the settlement that **only** appears the first time the settlement is carried out. How many cash is in the cash drawer the first time you settle.

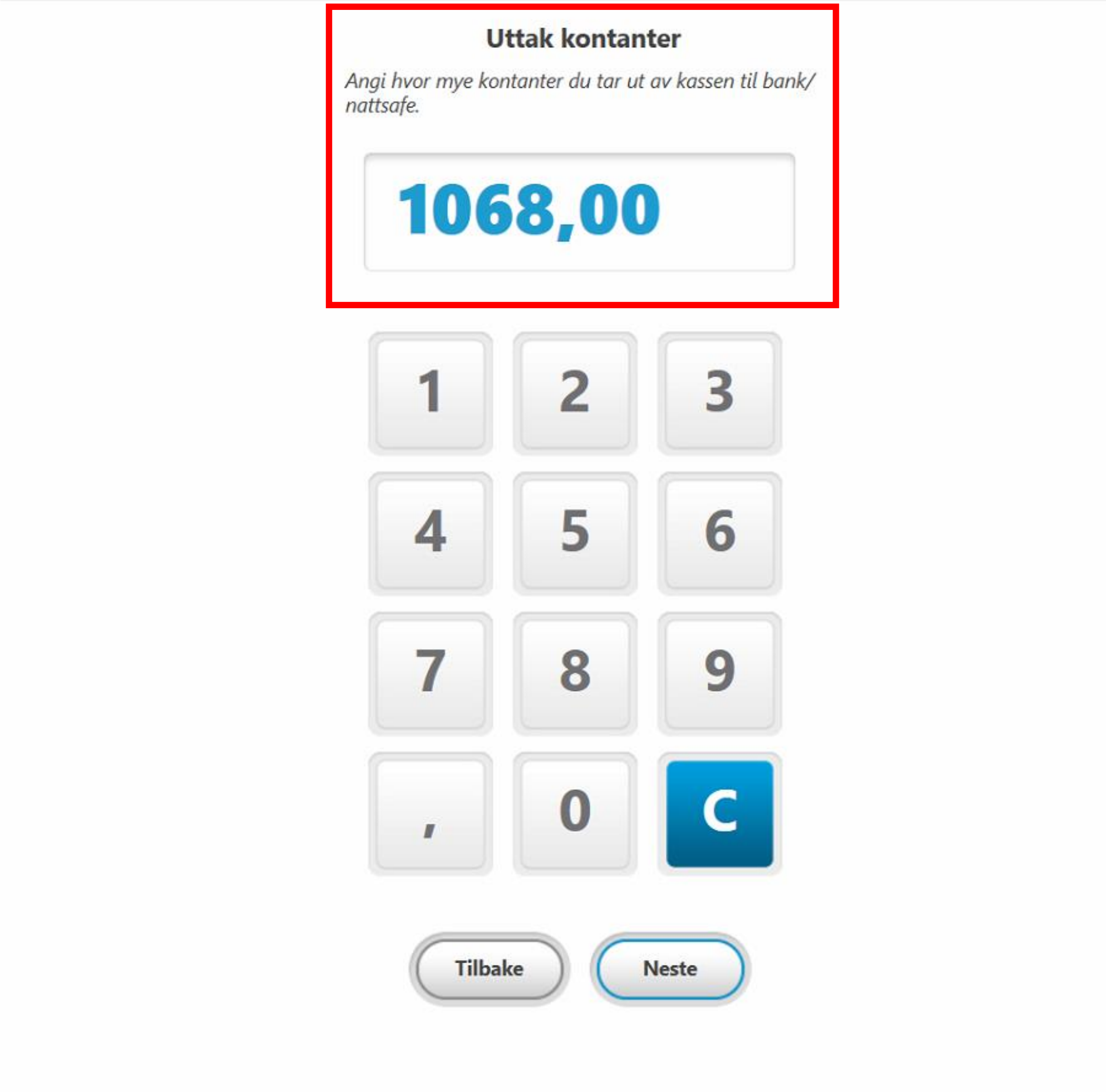


Spoken cash is for recording how many cash is in the cash drawer.



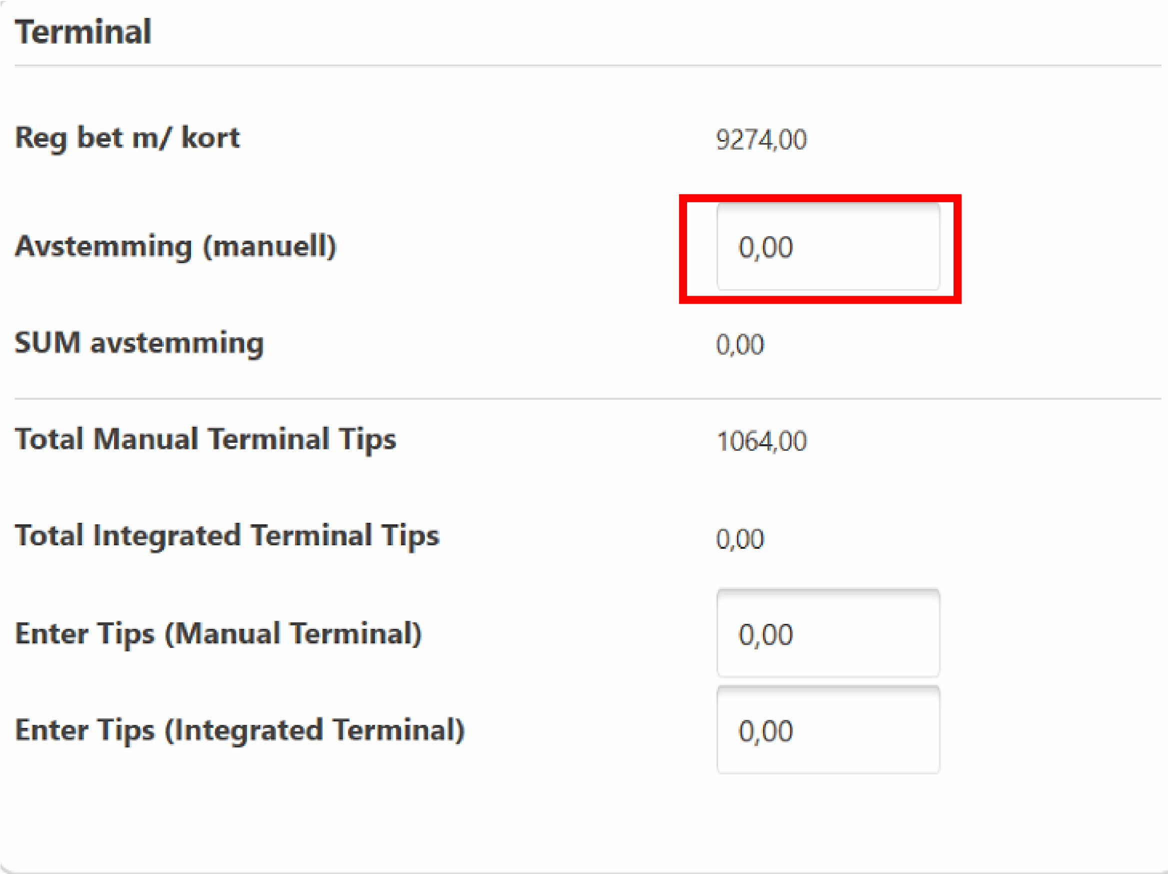
Withdrawing cash is an overview of how much cash you withdraw, according to what you want to be the opening balance for the next day.

If in this case you want 1500, - as the opening balance for the next day, you must withdraw 1068, -



PS: Reconcile bank terminal, if dialog box appears.

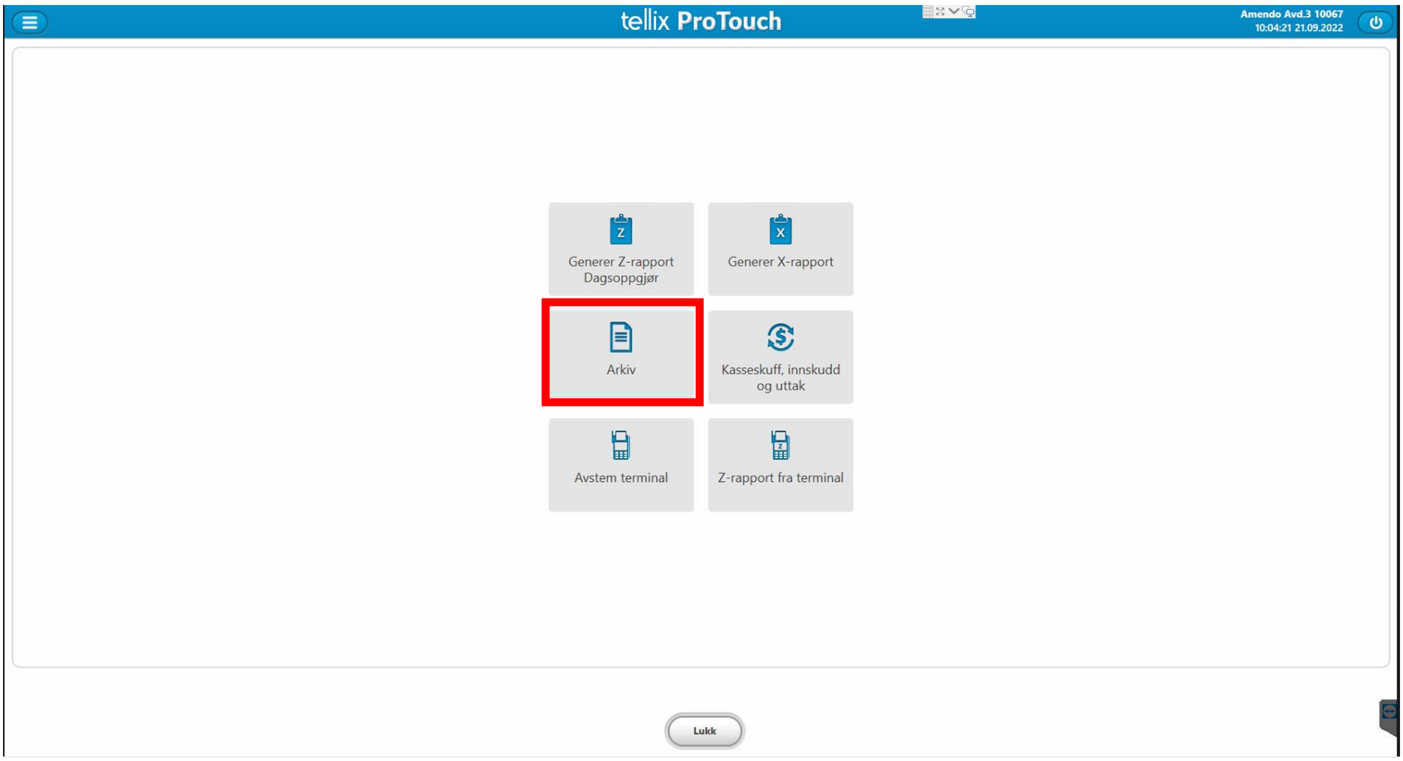
If you have a manual bank terminal, enter the amount in the "Reconciliation (manual)" field. Then tap **Sign.**



You can find all daily settlements registered under "**Archive**". **Generate x** report contains totals for all payment methods since the last Z report was generated. It doesn't reset the counters the way the z-report does.

Archive lists all previously generated z-reports on this client. Settlement can be reprinted or opened as PDF. **Tip:** Settlement is automatically synced to the back office and backup is stored in the cloud. **[INTERNET REQUIRED]**

Here you will find all daily settlements that are registered and a printout of the desired daily settlement can be taken in PDF format



Dato	Type	Medarbeider		
15.09.2022 12:08	Z-rapport	Kacper	PDF	
14.09.2022 15:48	Z-rapport fra terminal	Kacper	PDF	
07.09.2022 00:04	Z-rapport	Kacper	PDF	

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2.6 Synchronization

Syncing is done from the main screen in ProTouch, and there are three different ways to sync.

1. **Everything at checkout** – Brings all changes from the BackOffice down to ProTouch
2. **Products only** – Gets changes made in the BackOffice only on products or adds new ones.

3. **Turn ProTouch off with the** button in the upper right corner – Sends data instantly from ProTouch up to the BackOffice (sales data, daily settlement etc.)

2.6.1 ProTouch synchronizes with BackOffice at fixed intervals.

Data Description	Interval	Full Sync
Client/Department details	No	Yes
POS details	No	Yes
Payment types	No	Yes
POS modules	No	Yes
Zip codes	No	Yes
Users & permissions	No	Yes
Products:- categories, variant groups, variant group values, vat rates, suppliers, supplier contact persons, brands, brand suppliers, product units, products, product variants, product suppliers, connected products, campaign discounts, price rules, condiments	30 minutes	Yes
Products stock	5/15/30/60 minutes	Yes
Tiles	No	Yes
Rooms & tables	No	Yes
Campaign discount	30 minutes	Yes

Price rules	30 minutes	Yes
Super admin settings	No	Yes
Dual screen 10" and 15"	No	Yes
Customer groups	120 minutes	Yes