



SMART POS GEN 2

USER MANUAL

Smart Business Solution Member

By United Technologies (INT'L) Ltd.



X-ANALYZE
SmartPOSGEN2
BY UNITED TECHNOLOGIES

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POS User Manual V1

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POS – SmartPOS Gen 2 Web App

Dear Customer,

Thank you for choosing SmartPOS Gen 2.

SmartPOS Gen 2 is an efficient and modernised Point of Sales Web App that simplifies the tedious tasks of making sales with a variety of features.

This manual will provide you with the necessary information to help you get started with the SmartPOS Gen 2.

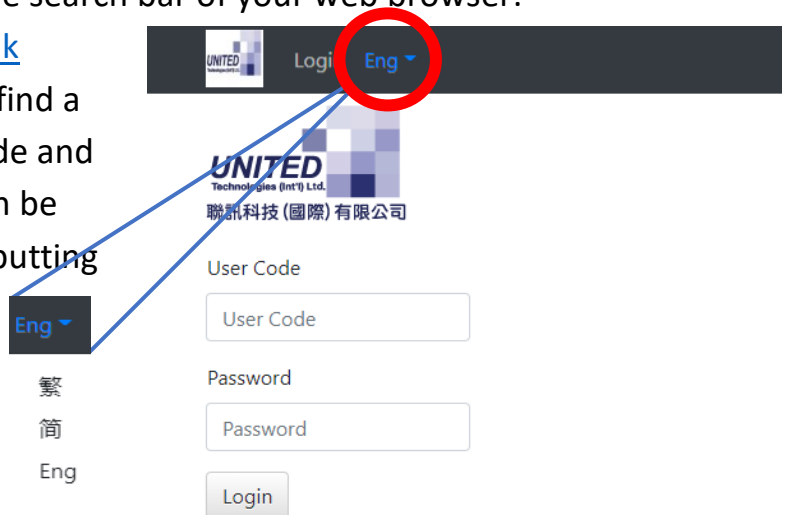
To use SmartPOS Gen 2:

1. Type the following URL into the search bar of your web browser:

<https://posgen2.united.com.hk>

2. Once the page loads, you will find a login page where the User Code and password for your account can be inputted. Press Login after inputting account details.

3. The Default Language is English, but can be changed at the top of the screen to suit your preference.



POS – SmartPOS Gen 2 Web App

Things to Note When Using SmartPOS

- Job Numbers must be in lowercase English or numbers (e.g. office, 101, shop01). Uppercase English is not supported
- Employee must be in all uppercase English (eg: ADMIN, PETER, MARY). Uppercase or lowercase letters are not supported
- After the new item data is created, it must be stocked with the location before the data can be sent to the POS from Kingdee
- It is recommended to configure a Windows 10 Pro or Windows 11 Pro (at least 8GB RAM) Office Desktop is recommended as a host computer since this computer will be on for a long time (monitor display can be closed), Kingdee will be installed on this machine and POS Gen2 database will also be stored on this machine
- During the training period, please make sure there are no customers with duplicated customer identification (even not in the same letter cases, such as GUEST and Guest) in Kingdee List. If the clients persist, please make one of the duplicated customers inactive.

SmartPOS Gen 2 Required Information for Operation

- When Coupon is the selected payment method, there is no refund
- Credit Card charges cannot be greater than invoice amount

Item's internal number is the item number in Kingdee

Item's external number is the supplier number in Kingdee

POS – Sales

Sales

Sales is a way that users can add points to a designated customer by name when scanning an item. Making Sales has never been easier with its friendly user interface which can keep track of products with item codes, Descriptions, Batch Number, Quantity, Serial Numbers, Price, Discount and Amount. Notes and Internal Notes can be written down for recurring customers.

Make Sales

ABSS Kingdee

Customer Points Price Level Phone No.

	Item Code	Description	Batch No.	Qty	SN	Price	Disc%	Amount
1								

Notes

Internal Notes

Roundings

Total

Searching Customer by Name

To search up a Customer by Name, type the customer's Name into the 'Customer' textbox and press enter.

Customer Points Price Level Phone No.

An alternative way of searching up a Customer would be to double click the textbox. A pop-out will appear with a table and a search bar to search through the Customer List. After choosing a customer, they're personal points or membership level and phone number will be displayed on the right hand side of the Customer name.

Search Customer

Customer Code	Customer Name
78787878	Apress Ltd.
97898888	Butyou, Somebody
33333333	Butyou, Somebody, Somebody
GUEST	GUEST
99999999	Kevin Enterprise
92071752	Kim LEUNG
67676767	KOF Ltd.
67456475	Lau United, Kevin
67676767	Lau United, Kevin, Kevin
45454545	Lau, a1771550

Records 1 - 10 of 17

POS – Sales

Adding/Inputting items into Sales

There are 3 ways to add items into Sales. The first way would be to type the item code into the system manually. The second way would be to double click the item code textbox. A pop-out will appear displaying your company inventory. A search bar is there to help find items at a faster speed. The Final way would be to use a scanner to scan the items barcode for the item to automatically be registered in from the company inventory.

Item Code	Item Name	Selling Price (\$)
/DISCOUNT	Discount	0.00
028400019903	Doritos Chips	0.00
4890008101238	Cola	0.00
4890008311248	Vitamin Water	0.00
4891028714545	Vita Oolong Tea Drink	20.00
6L102	Minced Beef	0.00
95123698740	Strawberry Box	0.00
ABSS-PP-V22.3-1U	ABSS Premier Plus v22.3-1U	0.00
ABSS-PP-V22.3-3U	ABSS Premier Plus v22.3-3U	10488.00
ABSS-P-V22.3-1U	ABSS Premier v22.3-1User	4788.00

	Item Code	Description	Batch No.	Qty	SN	Price	Disc%	Amount
1	028400019903	Doritos Chips		1		0.00	0.00	0.00

After inputting in the item, all the details will be automatically filled out. Discounts, Batch Number, and Serial Numbers can all be added/changed to suit the customers needs. The total price will be added up and displayed at the 'Total' textbox. Notes and Internal Notes can be written with each purchase. To process payments for the selected items, click on **Process Payments**. A pop-out will appear asking for the payment details. After filling out the Customers details, click on OK to complete sales.

Payment Types	Amount
<input checked="" type="checkbox"/> Cash	0.00
<input type="checkbox"/> Coupon	0
<input type="checkbox"/> Visa Card	0
<input type="checkbox"/> Master Card	0

Making New Sales

Making new Sales will discard all current Sales. To start New Sales click on **New Sales**. A pop-out will appear to make sure everything can be discarded. To start new sales click on

OK If not, click on **Cancel**. This will refresh the page as well as all details that were previously inputted.

POS - Refunds

Refunds

POS allows Refunding to be significantly easier. As per usual, all customers require a receipt in order to refund items. All items connected to the same customer can be viewed simultaneously in our POS Web app. Notes can be left for each item refunded similar to that of Sales.

New Refund

Device Code Receipt No. Phone No.

Customer Points Price Level Phone No.

Sales History

Seq	Item Code	Qty	Price	Disc.%	Amt.	Sales Date	Ref. Qty.	Ref. Amt.	Ref. Date	Detail
-----	-----------	-----	-------	--------	------	------------	-----------	-----------	-----------	--------

Refunds

Item Code	Description	Ref. Qty.	Price	Disc.%	Qty	Ref. Amt.	Seq
-----------	-------------	-----------	-------	--------	-----	-----------	-----

Notes

Total

Searching for Item to Refund

As stated above, all customers who want to refund an object need to keep a receipt in order to refund it. Upon receiving the receipt, input the Device Code, Receipt No., and Phone No. into the POS. After inputting all details, click The Customer name and their corresponding points, price Levels, and phone number will appear. The customer's purchase history from your

Device Code Receipt No. Phone No.

Customer Points Price Level Phone No.

company will then be displayed in a table below where the chosen item to refund can be chosen.

Once the item you wish to be refunded is selected, click on A pop-out will appear asking how much you wish to refund to the customer. After filling out the details click on OK to complete the refund process.

Process Refund

Refund Amt.

Payment Types	Amount
Cash	<input type="text" value="0"/>
Visa Card	<input type="text" value="0.00"/>
Master Card	<input type="text" value="0.00"/>

POS – Deposit

Deposit

POS' Deposit function is very similar to that of the Refund options in terms of buttons to press. The addition of the Deposit function brings our users and their customers more depth and options when receiving payments. This creates a much more professional vibe. The Deposit function is mainly used for customers who are willing to pay for items which are no longer in stock. Customers can deposit a sum of money in advance to ensure that they are first in line for specific items once they are back in stock. Deposits can be paid as a full or partial amount depending on the users preference.

Deposit

Device Code Receipt No. Phone No.

Customer Points Price Level Phone No.

Sales History

Seq	Item Code	Qty	Price	Disc.%	Amt.	Sales Date	Deposit Amt.	Deposit Date	Detail
1	ABSS-P-V22,3-1U	1	4580.00	0.00	4580.00	3/8/2022 12:00:00 AM	0	N/A	<input type="button" value="Detail"/>

SalesNotes

Notes

Remaining

POS – Deposit

Searching for Item to Deposit

Deposit

Device Code Receipt No. Phone No.

Customer Points Price Level Phone No.

Sales History

Seq	Item Code	Qty	Price	Disc.%	Amt.	Sales Date	Deposit Amt.	Deposit Date	Detail
1	ABSS-P-V22.3-1U	1	4580.00	0.00	4580.00	3/8/2022 12:00:00 AM	0	N/A	Detail

Upon receiving the receipt for the deposit, input the Device Code, Receipt No., and Phone No. into the POS. After inputting all details, click [Search Receipt](#). The Customer name and their corresponding points, price Levels, and phone number will appear. The customer's purchase history from your company will then be displayed in a table below where the chosen item Details can be viewed by clicking [Detail](#). A pop-out will appear displaying all the details of the purchased item. To input the Deposited amount into the POS system, click on [Process Refund](#). A pop-out will appear asking how much you wish to deposit into the system. After filling out the details click on OK to complete the refund price.

Receipt No.: SA100019
Item Code: ABSS-P-V22.3-1U
Description: ABSS Premier v22.3 with 1 User License
Batch: N/A
Selling Price: 4580
Disc.%: 0
Tax%: 0
Amt.: 4580
Sales Date: 3/8/2022 12:00:00 AM
Qty: 1
Qty Available: 6
Deposit Amt.: 0
Deposit Date: N/A

[OK](#)

Process Payments

Remainder HK\$0.00

Remaining: HK\$0.00

Monthly Pay

Payment Types	Amount
<input checked="" type="checkbox"/> Cash	<input type="text" value="0.00"/>
<input type="checkbox"/> Coupon	<input type="text" value="0"/>
<input type="checkbox"/> Visa Card	<input type="text" value="0"/>
<input type="checkbox"/> Master Card	<input type="text" value="0"/>

[OK](#) [Cancel](#)

POS – Day-ends

Day-ends

At the end of everyday everybody wants to go home and rest up for the next day. With POS Day-ends, all sales inputted into POS throughout the day are automatically added up and are separated via payment methods. When counting the total amount of money received, an Expected amount is displayed as well as an Actual Amount. The Actual amount can be overwritten if it is not the same as the amounts displayed in the expected amount column. **The actual amount total will be summed up and put into the Count Total.** If the actual amount isn't the same as the Expected, users can input the actual amount into the column and click on **OK**. If the Actual is not equal to the Expected amount, the program will prompt you to write something into the Notes for a reason why they do not match. After inputting a reason, you will be prompted with a pop-out to double check if all the values inputted are correct.

Count Payments

Last Dayends Session Done: 29/07/2022 15:38:44

Payment Types	Expected Amount (\$)	Actual Amount (\$)
Cash	4580.00	0.00
Visa Card	0.00	0.00
Master Card	0.00	0.00
Coupon	0.00	0.00

Count Total

HK\$0.00

Notes

OK

Count Payments

Last Dayends Session Done: 29/07/2022 15:38:44

Payment Types	Expected Amount (\$)	Actual Amount (\$)
Cash	4580.00	5826
Visa Card	0.00	235
Master Card	0.00	5234
Coupon	0.00	10

Count Total

HK\$0.00

Notes

The expected and actual amounts do not match. Please explain the reason on the Notes.

OK

Are you sure that the amount is correct, and the current session is complete and to be recored?

Cancel **OK**

POS – Day-ends

After inputting the Day-ends payments, 3 new sections will appear under Day-ends called **Count Payments Summary**, **Count Payments Detail**, and **Session Item Sales**. All 3 sections cannot be edited however can be printed by clicking on [Print Preview](#)

Count Payments Summary POS P10

Transaction Summary	
Total Sales Amount (\$)	0
Monthly Pay (\$)	0
Total Refund Amount (\$)	0

Start Time : 8/3/2022 4:20:16 PM
End Time : 8/3/2022 4:36:48 PM

Payment Types	Expected Amount (\$)	Actual Amount (\$)	Difference (\$)
Totals	0.00	0.00	0.00

[Print Preview](#)

Session Item Sales POS P10

Start Time : 8/3/2022 4:20:16 PM
End Time : 8/3/2022 4:36:48 PM

Item Code	Description	Quantity Sold	Amount (\$)
Total		0	0

[Print Preview](#)

Count Payments Detail POS P10

Start Time : 8/3/2022 4:20:16 PM
End Time : 8/3/2022 4:36:48 PM

Date/Time	Sales No.	Staff	Payment Types	Amount (\$)
Totals				0

Transaction Summary	
Total Sales Amount (\$)	0
Monthly Pay (\$)	0
Total Refund Amount (\$)	0

Payments Summary

[Print Preview](#)

POS – Search

Report is a fast and efficient way to create a report whether it be **Transaction Details**, **Payment Method Details** or even **Item Sales**. By simply inputting a date range into the two textboxes, a print preview will be displayed as well as an option to print the details of your corresponding reports.

Transaction Details

03/08/2022 To 03/08/2022

Transaction Details
POS P10

Start Date : 2022-08-03
End Date : 2022-08-03

Date/Time	Sales No.	Roundings	Payment Types	Amount (\$)
8/3/2022 2:40:09 PM	SA100019	0.00	Cash	4580.00
<small>Item Code</small> ABSS-P-V22.3-1U	<small>Description</small> ABSS Premier v22.3 with 1 User License	<small>Selling Price</small> 4788.00	<small>Qty</small> 1	<small>Disc Amt</small> 0.00
Totals				4580.00

Payment Methods Details

03/08/2022 To 03/08/2022

Payment Methods Details
POS P10

Start Date : 2022-08-03
End Date : 2022-08-03

Payment Types	Tx. Time	Tx. No.	Tx. Amt. (\$)	Paid Amt. (\$)
Cash	8/3/2022 2:40:09 PM	SA100019	4580.00	4580.00
Cash Totals				4580.00

Item Sales

03/08/2022 To 03/08/2022

Item Sales
POS P10

Start Date : 2022-08-03
End Date : 2022-08-03

Item Code	Description	Base Selling Price (\$)	Quantity Sold	Amount
ABSS-P-V22.3-1U	ABSS Premier v22.3 with 1 User License	4788	1	4580.00
Total			1	4580.00

Microsoft Power BI (Optional)



If you have previously subscribed to Power BI, you may use it to read the data from SmartPOS or SmartCRM as they both make use of Microsoft’s SQL database. One of the most user-friendly features is that the dashboard is fully customizable to suit your needs whether it be to look more modern and professional or whether it be to be more compact. Having a responsive UI can be all the difference instead of waiting to load a new page every single click, with Power BI, the UI is instantaneously responsive.

Another feature would be that with Power BI PRO, users can share reports and dashboards with their teams to reduce the tedious tasks of working as a one-man army. This would improve your overall user experience as it can help bridge the gap between data and decision-making.

POS – Search

The POS Search function Receipt No. Serial No. Batch No.

accommodates to 3

different filter searches, via Receipt Number, Serial Number, and Batch Number. After typing in the respective field into the search box, click on

After a search appears, further details can be viewed by clicking on

A pop-out will appear displaying all the details of the chosen transaction.

Search

Receipt No. Serial No. Batch No.

Search Result

	Receipt No.	Item Code	Qty	Price	Disc.%	Amt.	Sales Date	Refund Amt.	Refund Date	Detail
1	SA100020	TEST001	1	110.00	0.00	110.00	4/8/2022 12:00:00 AM	0	N/A	<input type="button" value="Detail"/>

Receipt No.: SA100020

Item Code: TEST001

Description: test1

Batch: N/A

Serial No.: N/A

Qty: 1

Selling Price: HK\$110.00

Disc.%: 0

Tax%: 0

Amt.: HK\$110.00

Sales Date: 4/8/2022 12:00:00 AM

Notes:

Internal Notes:

Refund Qty: 0

Refund Amt.: HK\$0.00

Refund Date: N/A

Customer: GUEST

Price Level: N/A

Phone No.: GUEST

POS – Item

Item gives the user an overview of the quantity of items if they are in or out of stock. Item also allows the user to add in a new item via POS, however to add it officially into the Stock list, the new item must be uploaded to Kingdee Galaxy Cloud and downloaded back to the POS.

Stock

Stock gives the user an insight to the companys inventory with the quantity of every item. To search for an item, type in an Item Code or item Name into the Search box and click on **Search** To Reload the list, click on **Reload** to choose a specific company location. For example in the office or a warehouse, click on the drop down list to the right of the **Reload** button to see the stock of specific locations. To view the next page, click on the page number or arrow keys to browse through the inventory.

Stock

101 ▾

Records 1 - 10 of 19

1
2
>
>>

Last Update Time: 25/07/2022 15:16:41

Item Code	Item Name	Qty
/DISCOUNT	Discount	0
028400019903	Doritos Chips	49
4890008101238	Cola	999
4890008311248	Vitamin Water	999
4891028714545	Vita Oolong Tea Drink	36
6L102	Minced Beef	999
95123698740	Strawberry Box	998
ABSS-PP-V22.3-1U	ABSS Premier Plus v22.3-1U	1049

New Item

In order to create a new item, click on **Add** A new page will open asking you to fill out all the details of the new item.

New Item

Add Item

Item Code (SKU)

(Maximum character length: 30)

External Code

(Maximum character length: 30)

Item Name

(Maximum character length: 30)

Description

Replacing Item Name on Receipt

Base Selling Price

Clone Base Selling Price to All Price Levels

Item Price Level

Price Level A Selling Price

Price Level B Selling Price

Price Level C Selling Price

Item Code	Name	Price (\$)	Active	Created Time	Modified Time	office	
keyboard	keyboard	100.00	<input checked="" type="checkbox"/>	04/08/2022 17:12:18	04/08/2022 17:12:18	1	Detail Edit Remove

1

POS – Item

After creating a new item, check the 'Active' checkbox if you want the item to be added to the stock list. Then click on 'Save' to save all changes made.

Active

Save

Item Price Level

The Item Price Levels are dependent on selected based on your customers point level. If they are at a higher Level, tiered discounts can be applied to keep recurring customers.

Base Selling Price

100

Clone Base Selling Price to All Price Levels

Item Price Level

Price Level A Selling Price

0

Price Level B Selling Price

100

Price Level C Selling Price

90

Price Level D Selling Price

90

Price Level E Selling Price

80

Price Level F Selling Price

80

Out-of-Stock Items

Keeping track of Out of Stock Items can be monitored via the Out-of-Stock Items tab which displays all out of stock items in a table.

POS – Customer

List

To keep track of recurring customers or members, the Customers List helps to keep track of everyone’s spending amounts and habits as well as their contact information.

Customer

Name	Email	Pending for Upload	
香港销售公司	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
測試客戶41	test41@united.com.hk	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
測試客戶40	test40@united.com.hk	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
深圳门店	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
泰鼎有限公司 (信用)	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
明日科技 (美元)	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
手机事业部	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
平板事业部	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
大字科技	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
同益科技 (寄售)	N/A	No	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Searching Customer by Keyword

To search up a customer by a keyword, type the keyword into the search bar and click on To refresh the table of customers, click on

Adding a Customer to the List

To add a customer to the list click on and fill out all the required fields. Click on to save the new customer to the list.

Add Customer

Fields marked with asterisk (*) are mandatory.

Name*

Currency*

Email

Phone

Mobile

Fax

Address1

POS – Customer

Editing a Customer

To edit a customer click on **Edit**. A new page will open where the details of the customer can be edited. Click on **Save** to save all edits made to the customer.

Removing a Customer

To Remove a customer click on **Remove**. A pop-out will appear to double check if you wish to remove the selected customer.

Edit Customer

Fields marked with asterisk (*) are mandatory.

Name*

Currency*

Email

Phone

Mobile

Fax

Address1

Customer Points Price Level

To choose the Price level code for a customer depending on how many accumulated points they have. It is recommended to add a Base selling Price for customers with 0 points.

Customer Points	Price Level Code	Price Level Description		
0	BSP	Base Selling Price	Edit	Remove
500	PLA	Level A	Edit	Remove
1000	PLB	Level B	Edit	Remove
1500	PLC	Level C	Edit	Remove
2000	PLD	Level D	Edit	Remove
2500	PLE	Level E	Edit	Remove
3000	PLF	Level F	Edit	Remove

Adding a new Price Level

To add a new price level click on **Add**. A pop-out will appear to input details for the new Price Level. Click on **Save** to add the new Price Level.

Price Level **Add**

Customer Points

Price Level Code

Price Level Description

Save **Cancel**

Editing a Price Level

To edit an existing price level, click on **Edit**. A pop-out will appear that is the same as when adding a new price level. Click on **Save** to save all edits made to the price level.

Removing a Price Level

To remove a Price Level, click on **Remove**. A pop-out will appear to confirm your actions. Click on OK to proceed.

Are you sure to remove the item?

Cancel **OK**

Staff and Access Rights

Staff and Access Rights is self explanatory. It is to choose what each staff account can do as well as check their Activity Status.

Access Rights

Staff Code	Docket Name	Status	
sales02	Roy	Active	<input type="button" value="Edit"/>
sales01	Sammie	Active	<input type="button" value="Edit"/>

Editing a Staff Access Rights

To edit a Staffs Access Rights, click on . A new page will open for you to choose what Access Rights the user can have as well as change their account's Username or Password. After editing the Access Rights, click on to keep the changes made.

Edit Access Rights

User Code

User Name

Change Password

Access Rights

Active Inactive

Make Sales Make Refunds Search Count Payments Deposit Customer Points

[Back To List](#)

POS – Data Integration

Import Data From Kingdee

To Import Data from Kingdee, simply click on the button on what you wish to import to the POS web app. All imports are done automatically without having to choose files. Make sure that the file you wish to import the file to in Kingdee is open on your device. After clicking the option you wish to import, a pop-out will appear confirming the import. Click on OK to proceed.

Import Data From Kingdee

ABSS Kingdee

POS To Kingdee

To export POS to Kingdee, type in the date range you wish to export in the textboxes. If you wish to include Uploaded Invoices, the checkbox should be ticked. After choosing the date range you wish to export, click on

A pop-out will appear asking to confirm actions. Click on OK to proceed the export.

Are you sure you want to Export Data?

Cancel

POS To Kingdee

Please select a date range for exporting data: To

ABSS Kingdee
 Include Uploaded Invoices

POS – Setup

Email Settings

Email settings are let the POS know which email addresses to use and where your company server is located etc. To get your POS started, please fill out the details so that POS can work with your email address smoothly and completely integrated.

Email Settings

Fields marked with asterisk (*) are mandatory.

Office 365*

Display Name*

Email

SMTP Server*

Other Settings

Other Settings consist of the Receipt format settings and what is shown on the receipt. Users can choose what can be edittable on the receipt. Click on **Save** to save all changes made.

Other Settings

Remarks: All settings changed will be effective on the next login.

Receipt Logo

Editable RRP Disc%

Account No.

Date Format UK US

Count Payments Show Reporting Buttons

Default Customer Sales Refunds

Default Sales Notes

Enable Serial Number Tax Cash Drawer Amount Minus Stock On Refund Adhere User To Device Allow Displaying Logo In Docket Receipt Check if dayend session is done upon logout

Save

Enabling Serial Number & other options

To enable Serial Numbers or Tax or other options for your custom receipt, tick the corresponding checkboxes.

Changing Receipt

Logo

Receipt Logo

選擇徽標

Upload Logo

Close

To change the receipt logo, tick the Receipt logo checkbox. A pop-out box will appear. To choose a logo from your PC, click on 選擇徽標 to browse your PC. After choosing your company logo, click on **Upload Logo** to confirm it.

Payment Types

Payment types allows the user to choose what kind of payment methods are displayed and selectable in the POS web app.

Payment Types

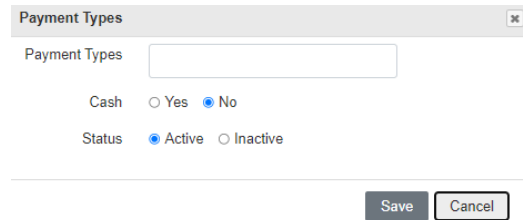
Add

Payment Types	Cash	Status	
Cash	Yes	Active	Edit Remove
Visa Card	No	Active	Edit Remove
Master Card	No	Active	Edit Remove
Coupon	No	Active	Edit Remove
Alipay	No	Inactive	Edit Remove
Wechat	No	Inactive	Edit Remove
UniconPay	No	Inactive	Edit Remove

POS – Setup

Adding a new Payment Type

To add a new Payment Type, click on **Add**. A pop-out will appear asking you to fill out the Payment Details. Such as the Payment type name, if it is by cash and whether it is an active form of payment or not. Click on Save to add it to the list of Payment Types.



The screenshot shows a 'Payment Types' dialog box. It has a title bar with a close button. Below the title bar is a text input field labeled 'Payment Types'. Underneath the input field are two rows of radio buttons. The first row is labeled 'Cash' and has two options: 'Yes' and 'No', with 'No' selected. The second row is labeled 'Status' and has two options: 'Active' and 'Inactive', with 'Active' selected. At the bottom right of the dialog are two buttons: 'Save' and 'Cancel'.

Editing a Payment Type

To edit a Payment Type, click on **Edit**. A pop-out will appear similar to that when adding a new Payment Type. After editing the details, click on Save to confirm changes made.

Removing a Payment Type

To remove a Payment Type, click on **Remove**. A pop-out will appear to confirm your actions. Click on OK to proceed the removal of the Payment Type.

Are you sure to remove the item?

Cancel **OK**

POS – Setup

Receipt

Receipt Settings are to input and edit the default base format of all receipts to be sent out via the POS. Click on **Save** to save all changes made to the Receipt settings.

Receipt Settings

Company Name	<input type="text" value="United Technologies (Int'l) Ltd."/>
Address	<input type="text" value="Rm1501, FL15, No.20 Westlands Rd,"/> <input type="text"/>
Phone	<input type="text" value="29453945"/>
Website	<input type="text" value="https://united.com.hk"/>
Header Message	<input type="text" value="Welcome"/> <input type="text"/>

POS – CRM

CRM is a Customer Relationship Manager program which is fully integrated in the POS with Kingdee. If you wish to learn more about how to use the CRM Web App, please read through the CRM User Manual

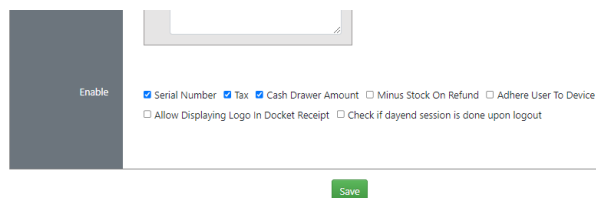
POS – Serial Numbers & Batch Numbers

Serial Numbers

Serial Numbers are a simple way to uniquely mark items to identify and distinguish them from others. The good feature about using SmartPOS with Kingdee is that SmartPOS provides the option of using a serial number whereas Kingdee does not have the option to add a serial number. For example if I have multiple of the same items, the best way to distinguish them would be to add a unique tag to each and every one of them. This is especially useful when trying to include a warranty per item. The POS will detect whether serial numbers are duplicated, if they are duplicated, the system will prompt you to change the serial number. Serial Numbers are also a deterrent to theft or counterfeit products. It also allows you to track whether the warranty duration is up for individual items.

Setting up Serial Numbers for Receipts

To set enable Serial Numbers for receipts, go to Setup -> Other Settings. After that tick the Serial number checkbox at the bottom of the settings page. After the checkbox is ticked, POS will automatically generate a serial number for each and every receipt whenever an item is sold.

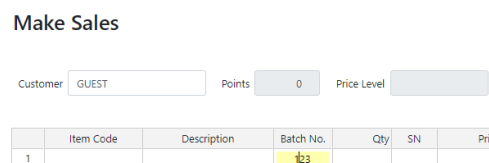


Batch Number

Batch Numbers are a way to designate a group of products that were made on the same manufacturing run. One of the benefits of making use of Batch Numbers is that all products made from the same batch can be recalled all at once in case the product sold may have some problems. This is especially useful in the Pharmaceutical Industry when a batch of product needs to be recalled.

Adding a Batch Number

To add a Batch Number to an item, go to Sales and choose the item you would like to add a Batch Number onto. After selecting the item, type in the Batch Number you wish to add to the product into the 'Batch No.' Column.



POS – Functions & System Requirements

Functions

A few functions that SmartPOS Gen 2 is fully compatible with are the 2D BarCode Scanner, Thermal Receipt Printer, and Cash Drawer.

2D BarCode Scanner – The 2D BarCode Scanner is completely compatible. When making Sales with POS scanning barcodes eradicates the tedious task of having to type the serial number manually.

Thermal Receipt Printer – The Thermal Receipt Printer is completely compatible. To speed up the task of making sales, printing receipts of any size are fully supported with SmartPOS Gen 2 so that you don't have to manually transfer all the details to a third party application.

Cash Drawer – The Cash Drawer is fully compatible to simplify the process of making sales.

System Requirements

	<u>Requirement</u>
Server Computer Configuration	<ul style="list-style-type: none">• Intel i5 Processor (or equivalent)• 8 GB RAM (16GB recommended)• Fast hard drive (SSD) with 250 GB free space• 1600x900 pixel display (or better), 32-bit colour• Windows 10 Pro (64-bit) or above, with IIS-ready• Internet connection with Fixed IP, 10 Mb per second upload and download• VPN Router (e.g. FortiNet FortiGate)• SQL Server 2019 Express (or above)
Client Computer Configuration	<ul style="list-style-type: none">• Intel i3 Processor (or equivalent)• 8GB RAM• Fast hard drive with 200 GB free space• 1600x900 pixel display (or better), 32-bit colour• Windows 10 Pro (64-bit) or above• Internet connection, 10 Mb per second upload and download• Microsoft Office 2017 (Business version) or above• (Optional) Barcode scanner

POS – Updates

Upon Purchasing SmartPOS Gen 2, each customer shall receive a warranty. To update SmartPOS Gen 2, please contact United Technologies (INT'L) Limited to receive our support to update the application.