# SMART POS GEN 2

# USER MANUAL

Smart Business Solution Member

*By United Technologies (INT'L) Ltd.*

# Table of Contents




POS User Manual V1

# POS – SmartPOS Gen 2 Web App

Dear Customer,

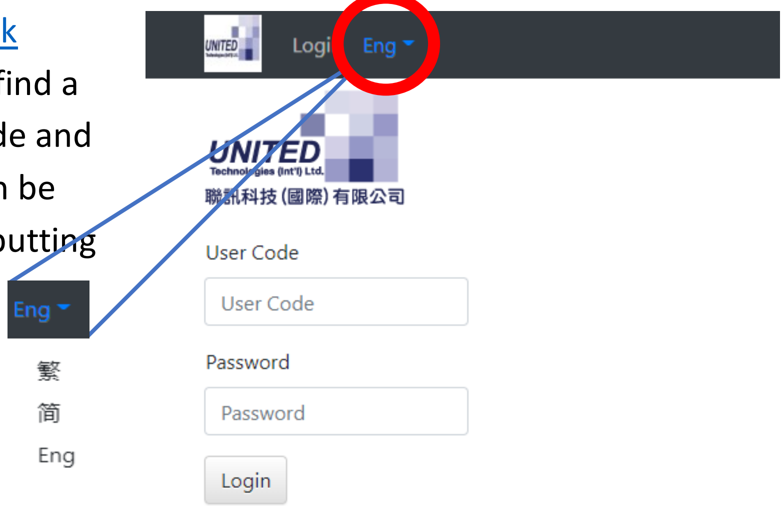
Thank you for choosing SmartPOS Gen 2.

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](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.



## 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

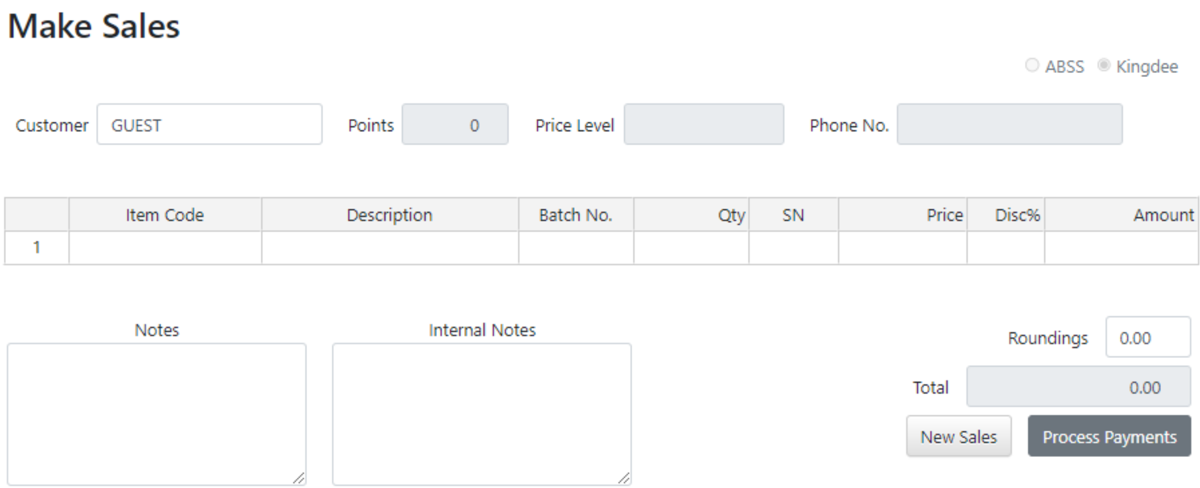
- When Coupon is the selected payment method, there is no refund
- Credit Card charges cannot be greater than invoice amount

Item's internal number is the item number in Kingdee

Item's external number is the supplier number in Kingdee

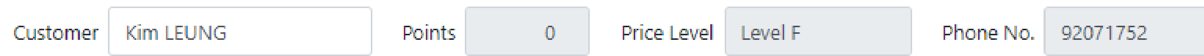
# Sales

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.

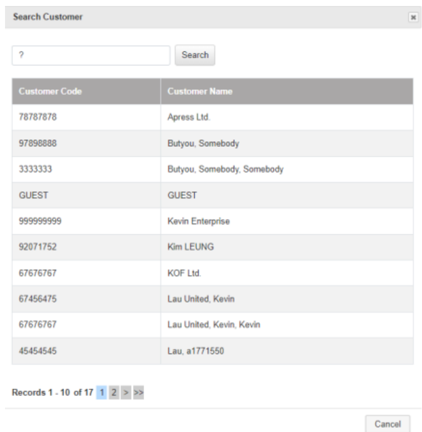



## Searching Customer by Name

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

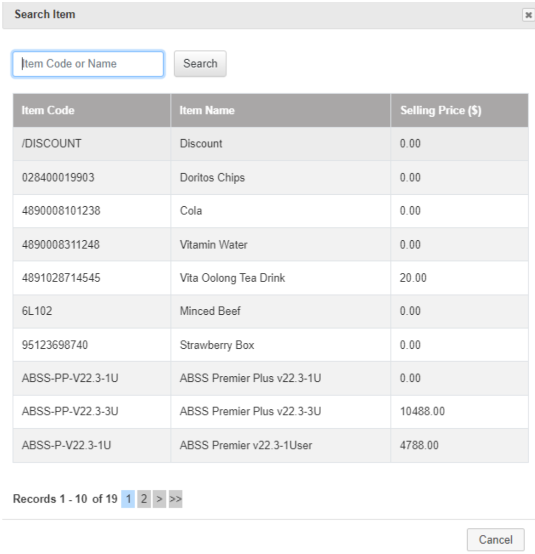



An alternative way of searching up a Customer would be to double click the textbox. A pop-out will appear with a table and a search bar to search through the Customer List. After choosing a customer, they're personal points or membership level and phone number will be displayed on the right hand side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



## Adding/Inputting items into Sales

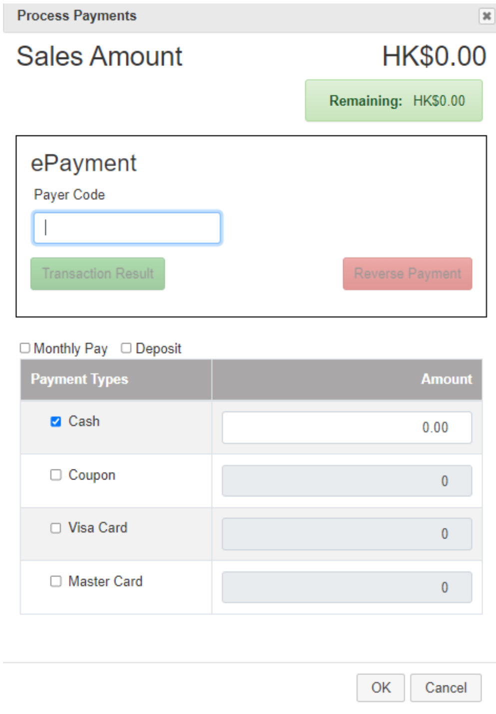
There are 3 ways to add items into Sales. The first way would be to type the item code into the system manually. The second way would be to double click the item code textbox. A pop-out will appear displaying your company inventory. A search bar is there to help find items at a faster speed. The Final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

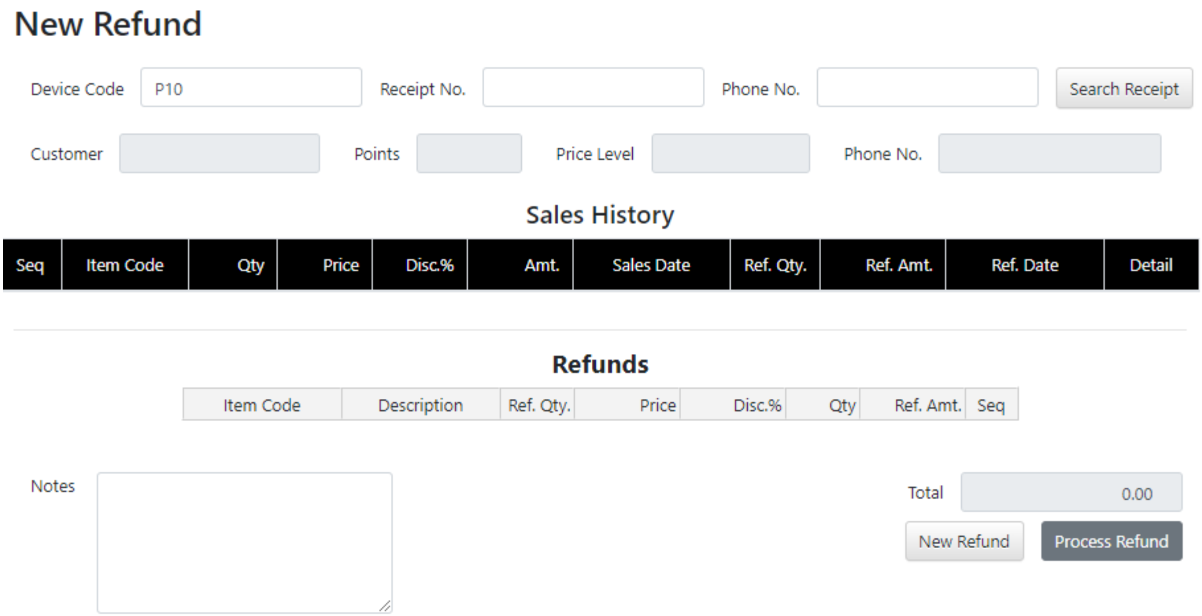



## Making New Sales

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.

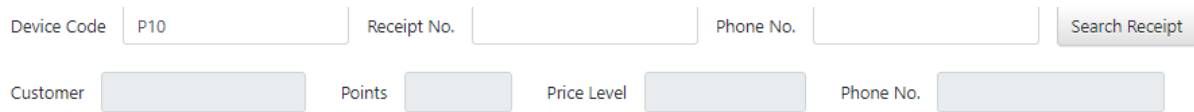
# Refunds

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 simultanoeusly in our POS Web app. Notes can be left for each item refunded similar to that of Sales.

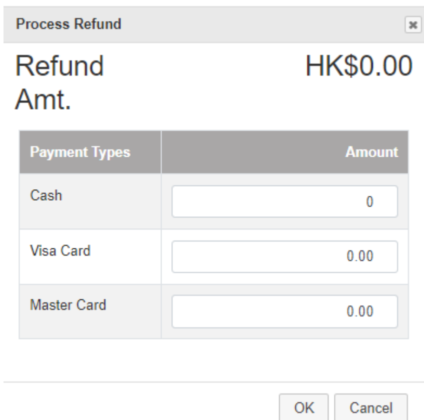



## Searching for Item to Refund

As stated above, all customers who want to refund an object need to keep a recipt in order to refund it. Upon receving the receipt, 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

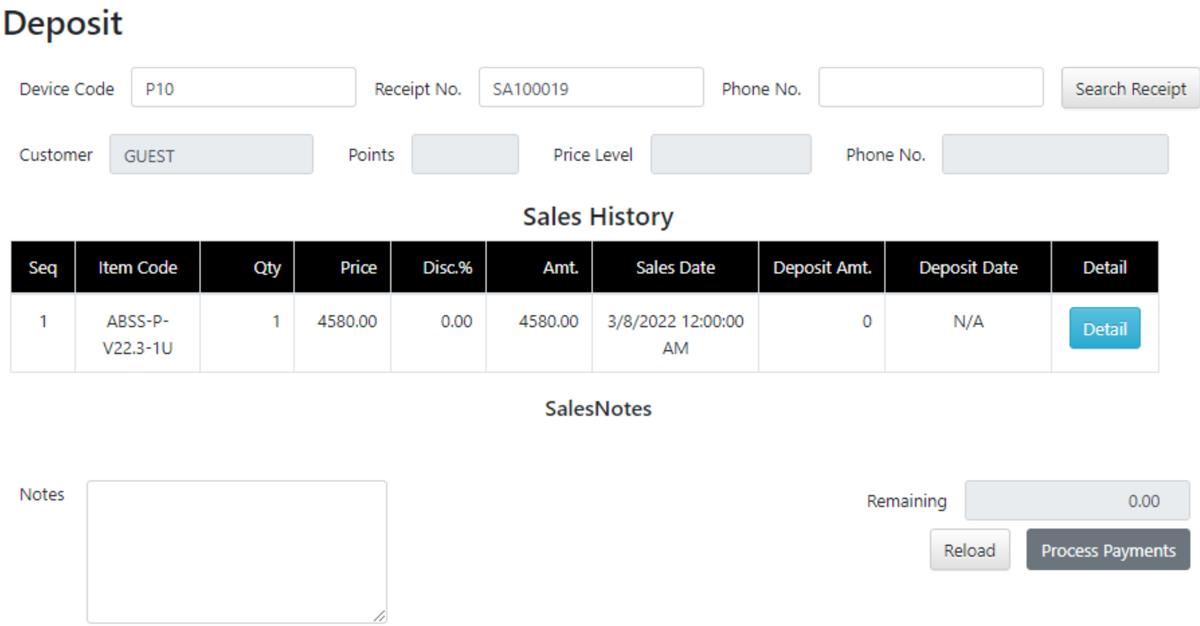



company will then be displayed in a table below where the chosen item to refund can be chosen. Once the item you wish to be refunded is selected, click on Process Refund A pop-out will appear asking how much you wish to refund to the customer. After filling out the details click on OK to complete the refund process.

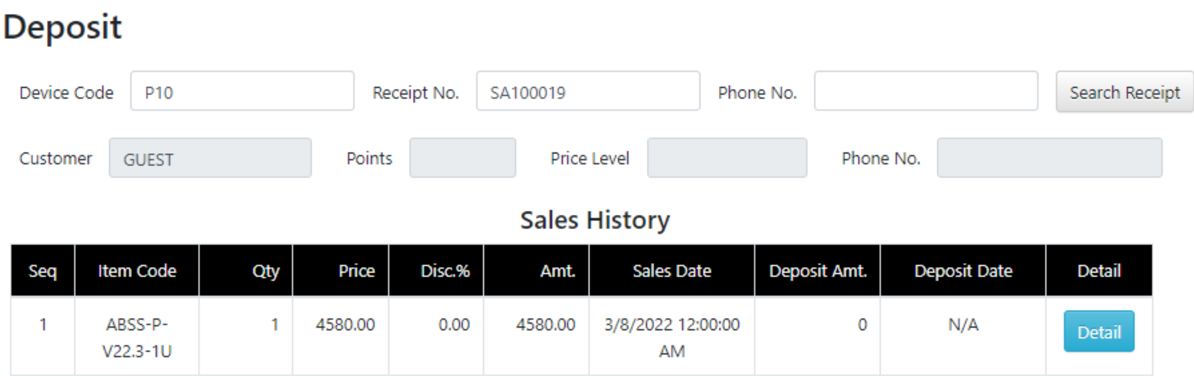


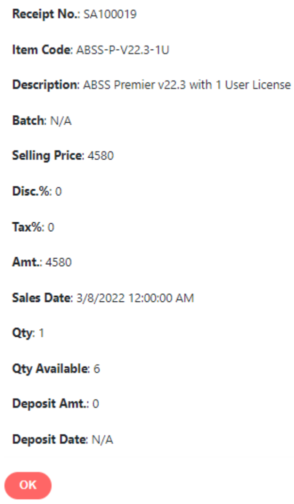
# Deposit

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.

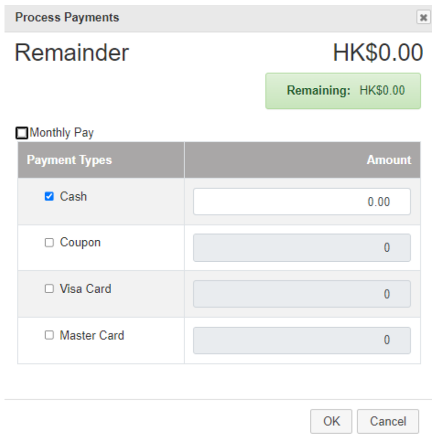


## Searching for Item to Deposit

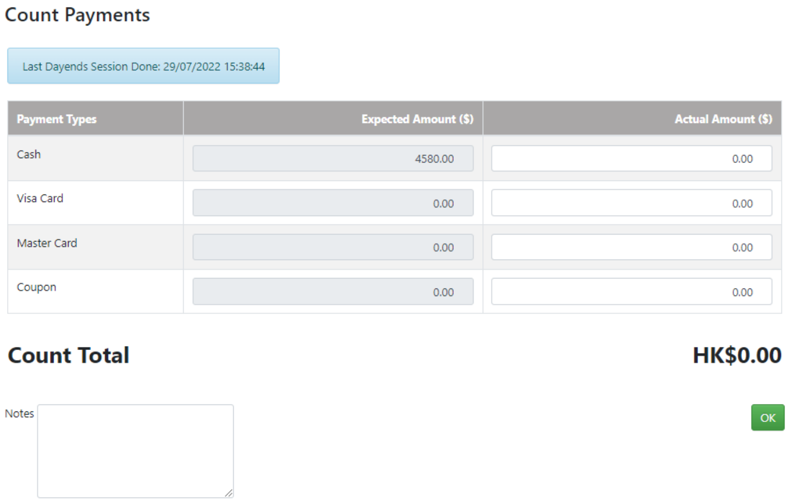


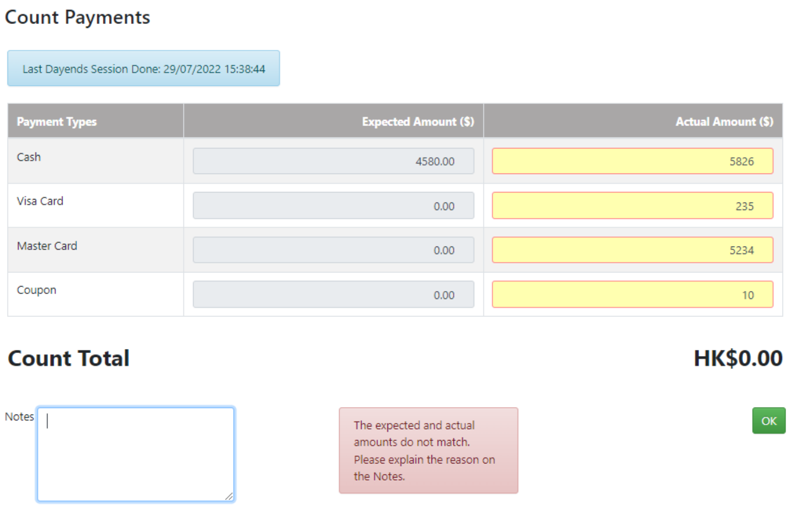

Upon receving the receipt for the deposit, input the Device Code, Receipt No., and Phone No. into the POS. After inputting all details, click Search Receipt The Customer name and their corresponding points, price Levels, and phone number will appear. The customer's purchase history from your company 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.

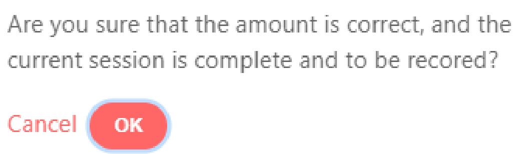


## Day-ends




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 seperated 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.



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

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

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

| 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 |

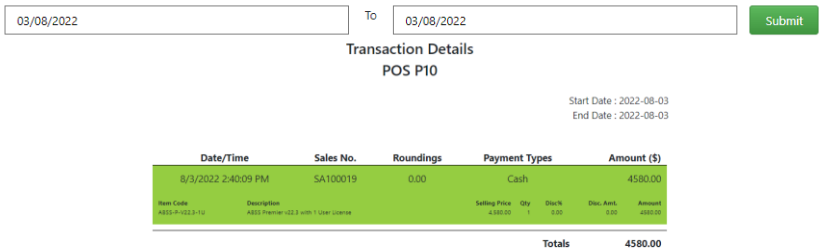
| Transaction Summary | |
|---|---|
| Total Sales Amount ($) | 0 |
| Monthly Pay ($) | 0 |
| Total Refund Amount ($) | 0 |

| Payments Summary |
|---|

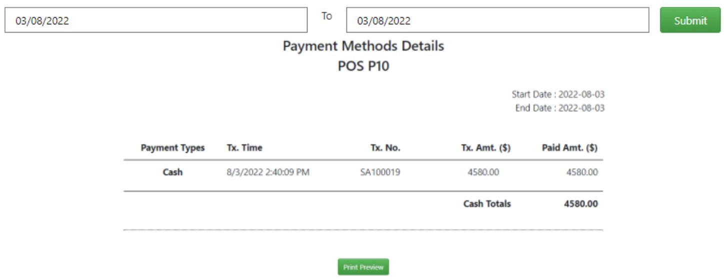
Print Preview

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.

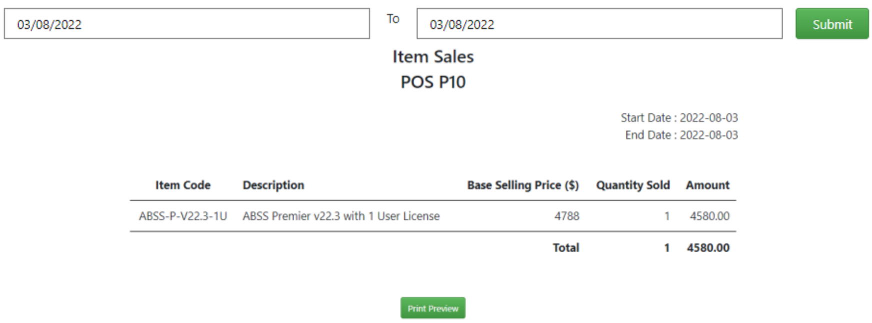
Transaction Details




Payment Methods Details




Item Sales



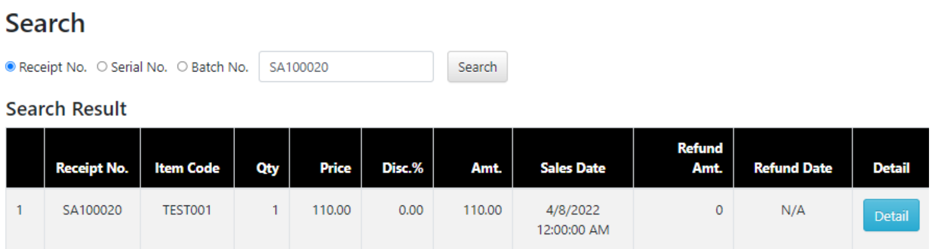

## Microsoft Power BI (Optional)

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.

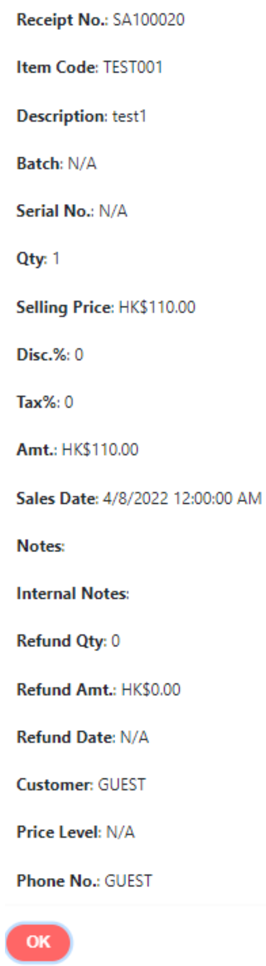
Another feature would be that with Power BI PRO, users can share reports and dashboards with their teams to reduce the tedious tasks of working as a one-man army. This would improve your overall user experience as it can help bridge the gap between data and decision-making.

# POS – Search

The POS Search function accommadates 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 Search After a search appears, further details can be viewed by clicking on Detail A pop-out will appear displaying all the details of the chosen transaction.

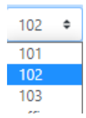

| | Receipt No. | Item Code | Qty | Price | Disc.% | Amt. | Sales Date | Refund Amt. | Refund Date | Detail |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | SA100020 | TEST001 | 1 | 110.00 | 0.00 | 110.00 | 4/8/2022 12:00:00 AM | 0 | N/A | Detail |



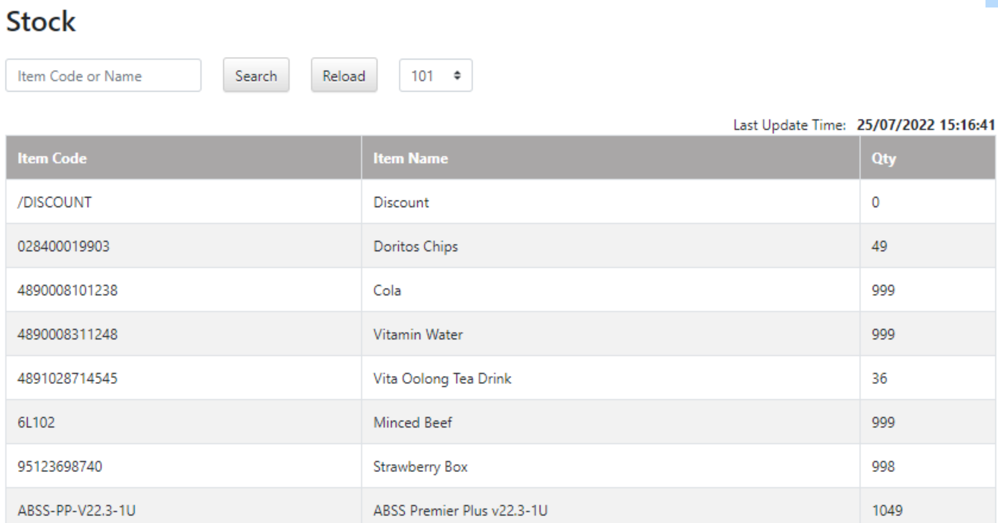
Item gives the user an overview of the quantity of items if they are in or out of stock. Item also allows the user to add in a new item via POS, however to add it officially into the Stock list, the new item must be uploaded to Kingdee Galaxy Cloud and downloaded back to the POS.

## 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.



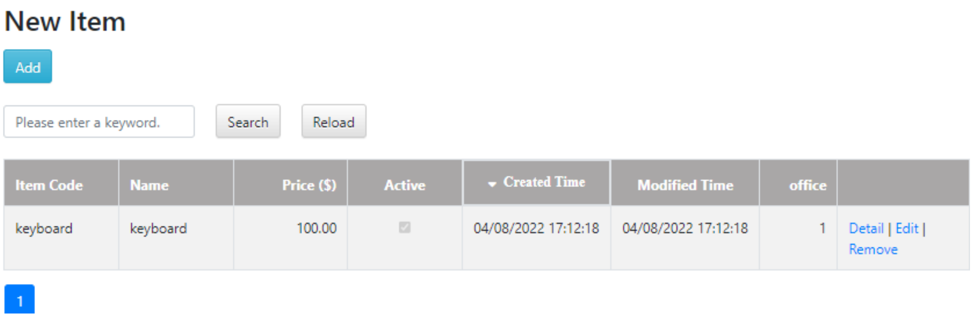




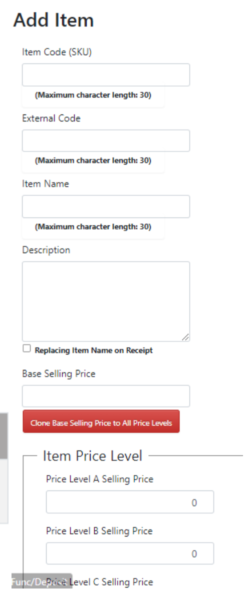

| Item Code | Item Name | Qty |
|---|---|---|
| /DISCOUNT | Discount | 0 |
| 028400019903 | Doritos Chips | 49 |
| 4890008101238 | Cola | 999 |
| 4890008311248 | Vitamin Water | 999 |
| 4891028714545 | Vita Oolong Tea Drink | 36 |
| 6L102 | Minced Beef | 999 |
| 95123698740 | Strawberry Box | 998 |
|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

## New Item

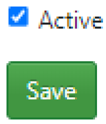
In order to create a new item, click on Add A new page will open asking you to fill out all the details of the new item.




| Item Code | Name | Price ($) | Active | Created Time | Modified Time | office | |
|---|---|---|---|---|---|---|---|
| keyboard | keyboard | 100.00 | | 04/08/2022 17:12:18 | 04/08/2022 17:12:18 | 1 | Detail \| Edit \| Remove |

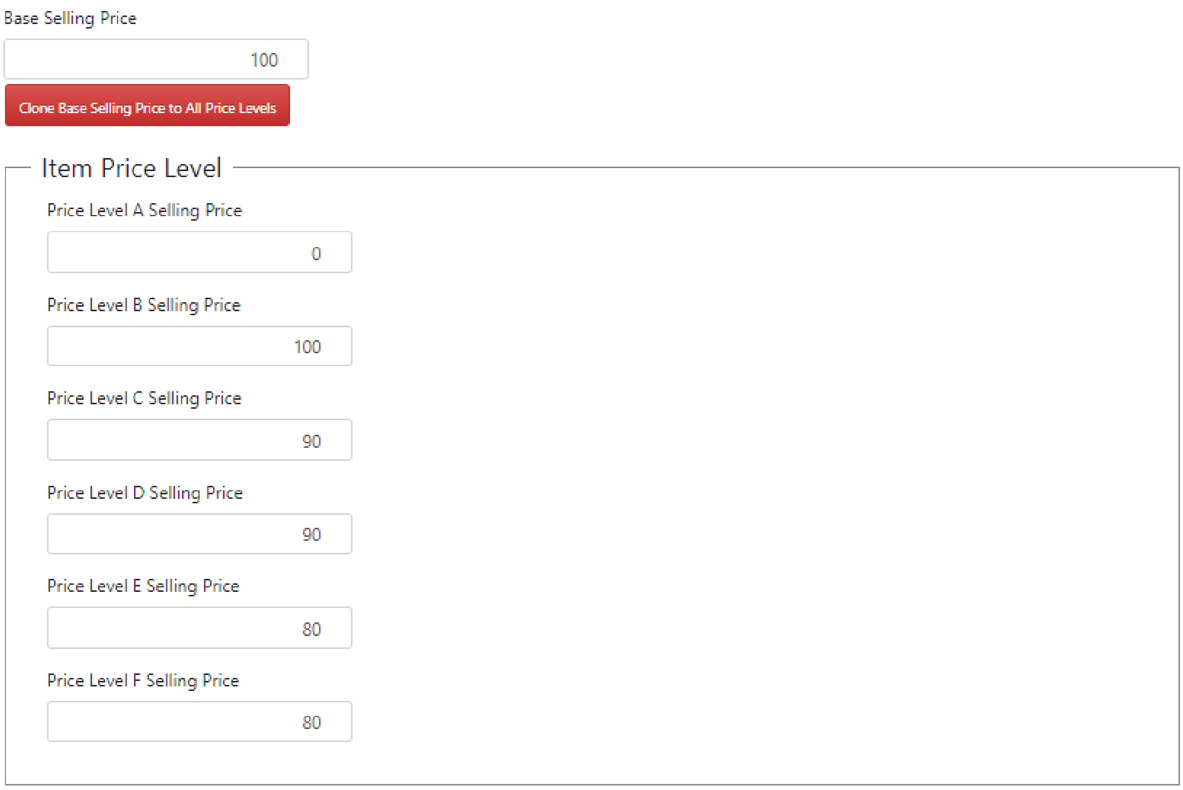


After creating a new item, check the 'Active' checkbox if you want the item to be added to the stock list. Then click on 'Save' to save all changes made.




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.

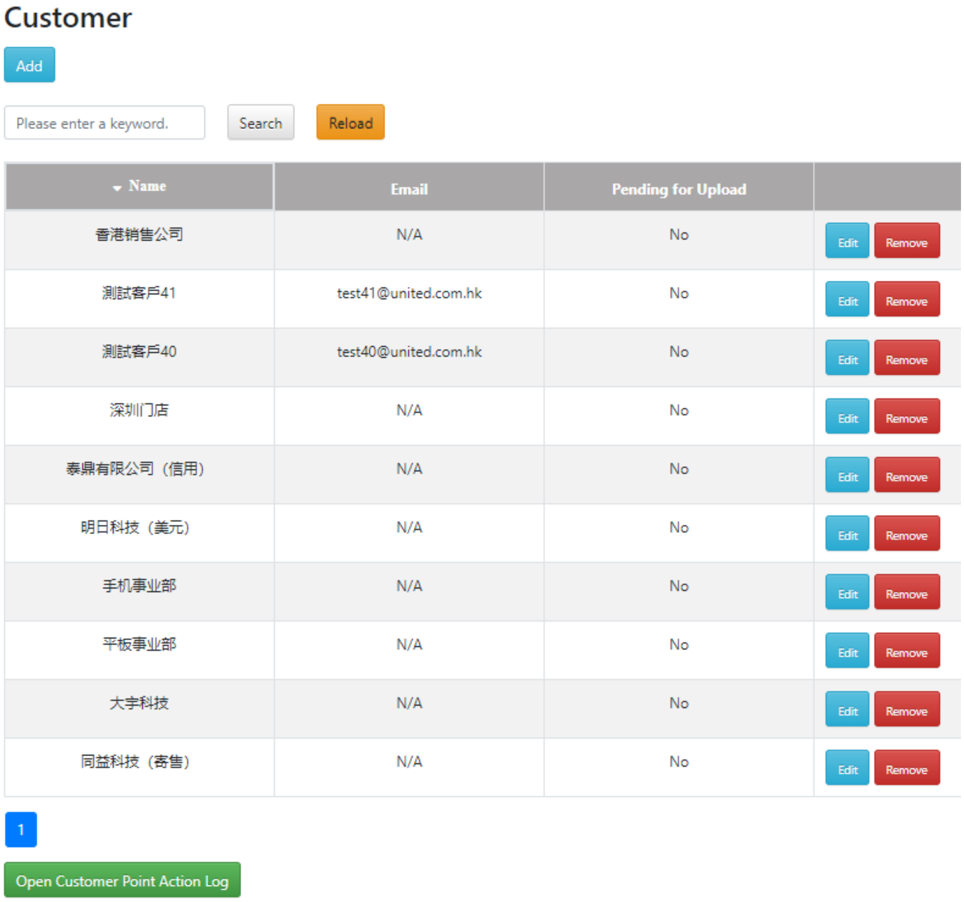



## Out-of-Stock Items

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.

# 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.

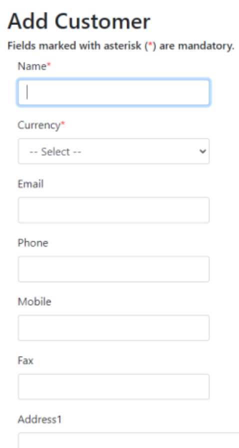



| Name | Email | Pending for Upload | |
|---|---|---|---|
| 香港销售公司 | N/A | No | Edit Remove |
| 測試客戶41 | test41@united.com.hk | No | Edit Remove |
| 測試客戶40 | test40@united.com.hk | No | Edit Remove |
| 深圳门店 | N/A | No | Edit Remove |
| 泰鼎有限公司（信用） | N/A | No | Edit Remove |
| 明日科技（美元） | N/A | No | Edit Remove |
| 手机事业部 | N/A | No | Edit Remove |
| 平板事业部 | N/A | No | Edit Remove |
| 大宇科技 | N/A | No | Edit Remove |
| 同益科技（寄售） | N/A | No | Edit Remove |

## Searching Customer by Keyword

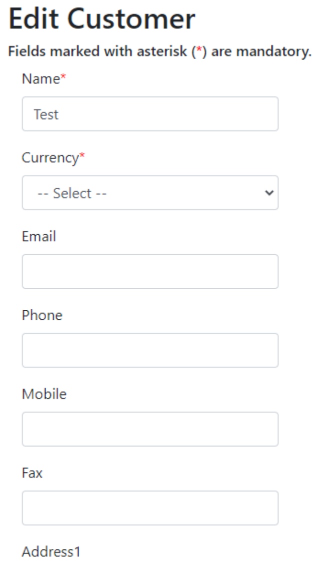

To search up a customer by a keyword, type the keyword into the search bar and click on Search To refresh the table of customers, click on Reload

## Adding a Customer to the List




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

## Editing a Customer

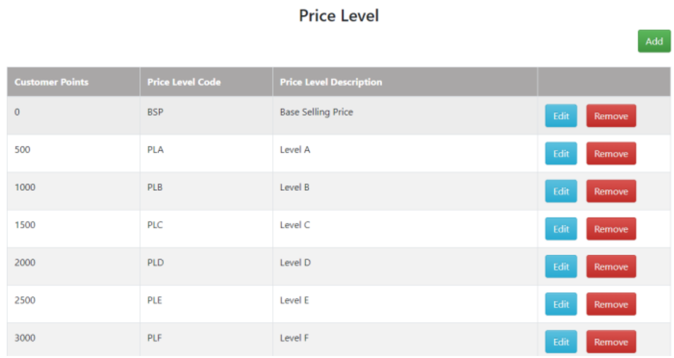



To edit a customer click on Edit A new page will open where the details of the customer can be edited. Click on Save to save all edits made to the customer.

## 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.

# Customer Points Price Level

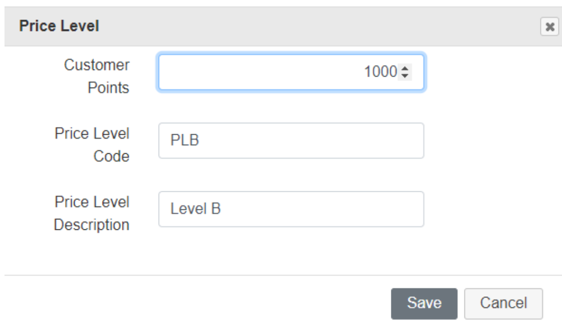

Price Level

Add

| 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 |

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

## Adding a new Price Level



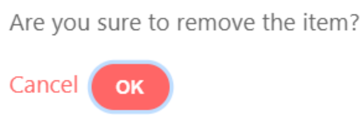

To add a new price level click on Add A pop-out will appear to input details for the new Price Level. Click on Save to add the new Price Level.

## 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.



# Staff and Access Rights

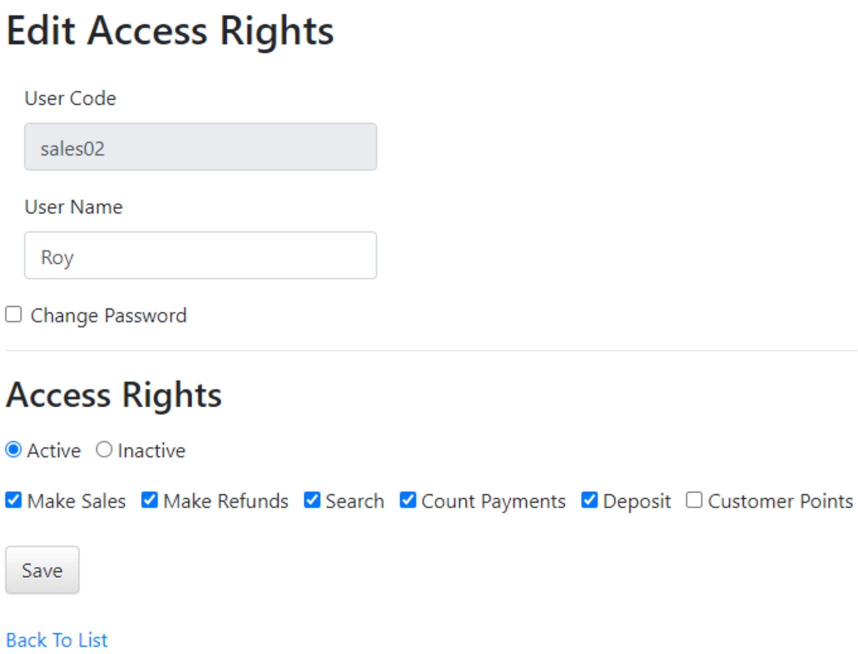
Staff and Access Rights is self explanatory. It is to choose what each staff account can do as well as check their Activity Status.

### Access Rights

| Staff Code | Docket Name | Status | |
|---|---|---|---|
| sales02 | Roy | Active | Edit |
| sales01 | Sammie | Active | Edit |

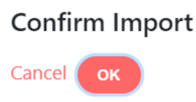
## Editing a Staff Access Rights

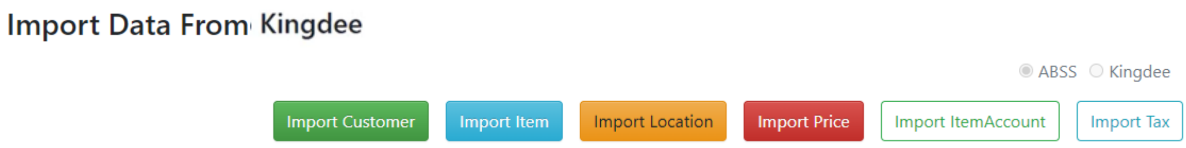
To edit a Staffs Access Rights, click on Edit A new page will open for you to choose what Access Rights the user can have as well as change their account's Username of Password. After editing the Access Rights, click on Save to keep the changes made.



## 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 tha t 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.

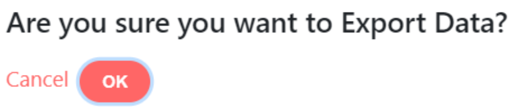


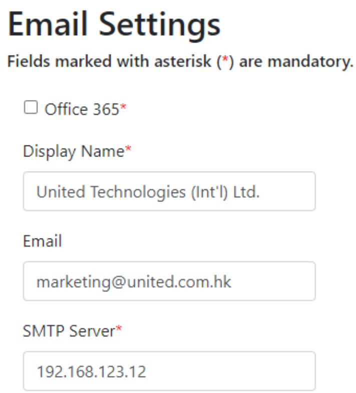

## POS To Kingdee

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.

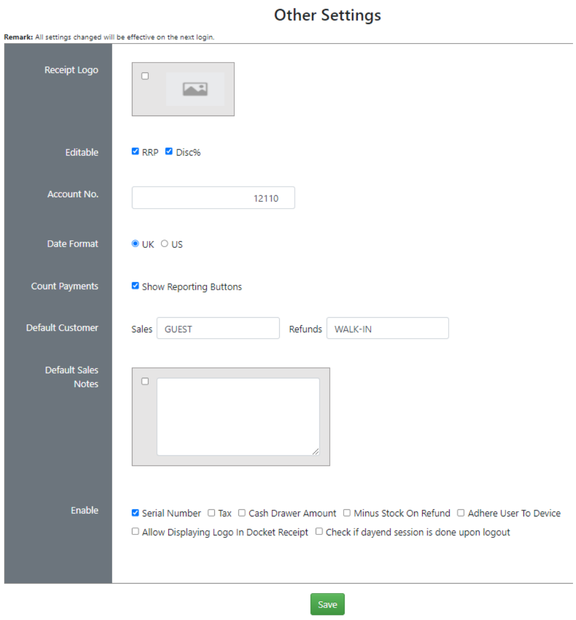



## Email Settings




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.

## Other Settings

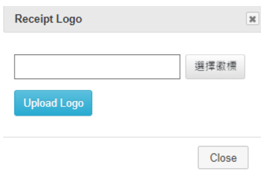



Other Settings consist of the Receipt format settings and what is shown on the recepit. Users can choose what can be edittable on the receipt. Click on Save to save all changes made.

### Enabling Serial Number & other options

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

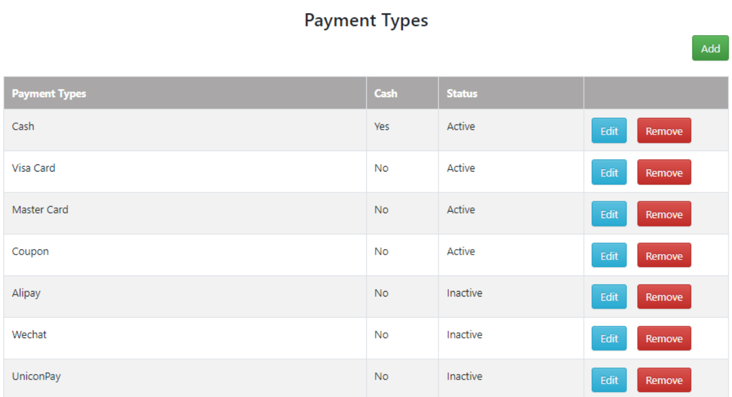
### Changing Receipt Logo




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.

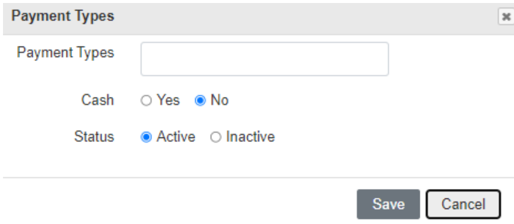
## Payment Types

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



## Adding a new Payment Type

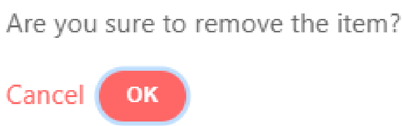
To add a new Payment Type, click on Add A pop-out will appear asking you to fill out the Payment Details. Such as the Payement type name, if it is by cash and whether it is an active form of payment or not. Click on Save to add it to the list of Payment Types.




## 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.

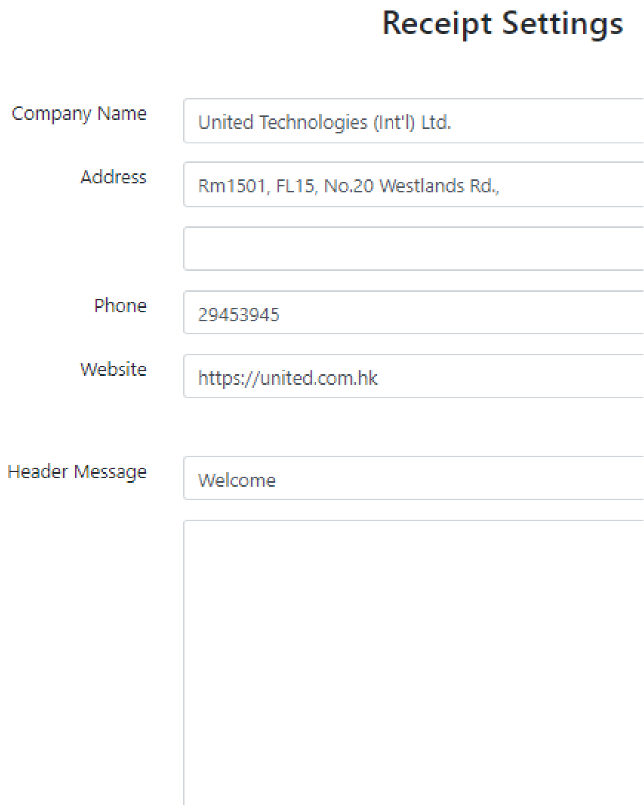
## Removing a Payment Type




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.

## 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.



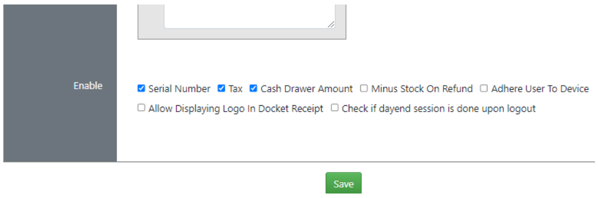
---

**<u>CRM is a Customer Releationship 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</u>**

# 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 exmaple 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

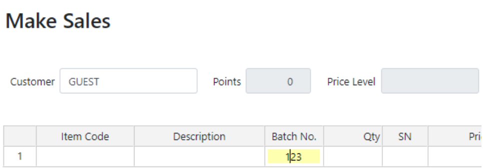



To set enable Serial Numbers for receipts, go to Setup -> Other Settings. After that tick the Serial number checkbox at the bottom of the settings page. After the checkbox is ticked, POS will automatically generate a serial number for each and every receipt whenever an item is sold.

# 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 Pharmecutical 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.

# 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 barcaodes 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 tranfer 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

| | Requirement |
|---|---|
| Server Computer Configuration | • Intel i5 Processor (or equivalent)<br>• 8 GB RAM (16GB recommended)<br>• Fast hard drive (SSD) with 250 GB free space<br>• 1600x900 pixel display (or better), 32-bit colour<br>• Windows 10 Pro (64-bit) or above, with IIS-ready<br>• Internet connection with Fixed IP, 10 Mb per second upload and download<br>• VPN Router (e.g. FortiNet FortiGate)<br>• SQL Server 2019 Express (or above) |
| Client Computer Configuration | • Inte i3 Processor (or equivalent)<br>• 8GB RAM<br>• Fast hard drive with 200 GB free space<br>• 1600x900 pixel display (or better), 32-bit colour<br>• Windows 10 Pro (64-bit) or above<br>• Internet connection, 10 Mb per second upload and download<br>• Microsoft Office 2017 (Business version) or above<br>• (Optional) Barcode scanner |

**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.**