



POS Portal Training Reference



### Main Screen



Username Signed On →

Menu →

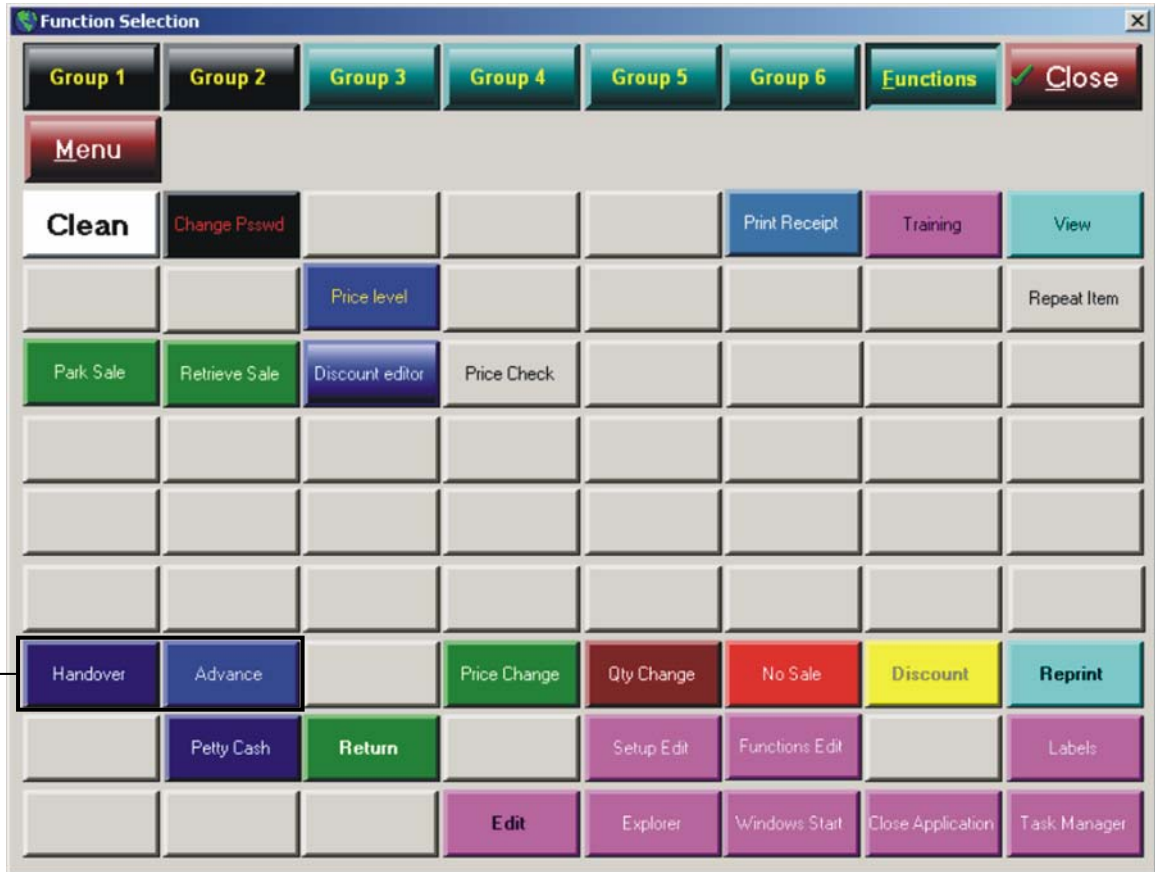
Sign On /Off →

### Sign On

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

### Sign Off

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

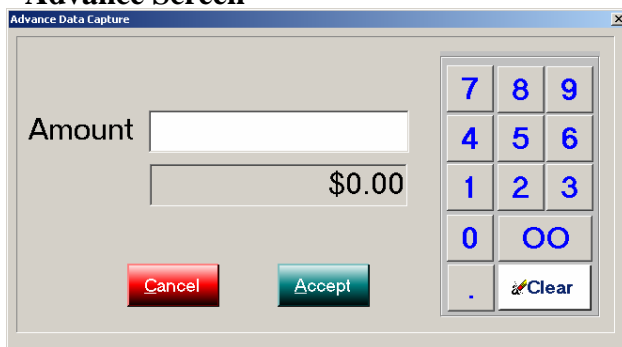


Handover / Advance buttons

### Advance

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

### Advance Screen

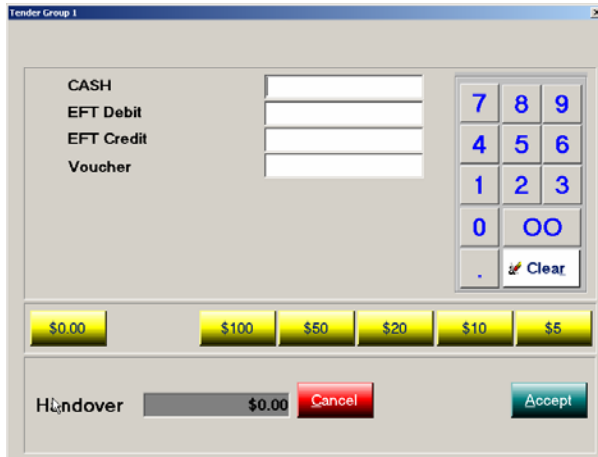


5. Enter the amount in the amount field
6. Hit Accept if its correct and you want to process the advance OR
7. Hit Cancel

## Handover

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

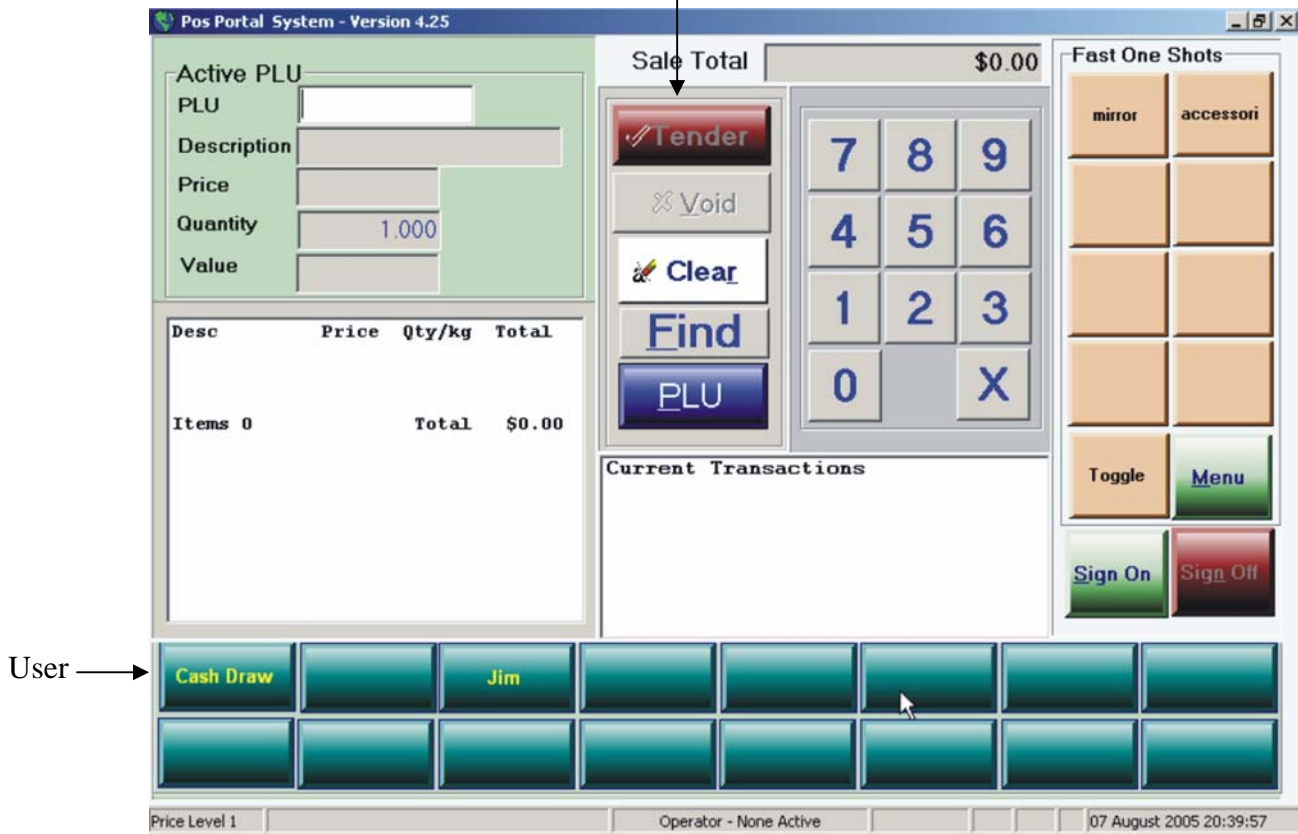
### Handover Screen



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

### Sale Process

Tender



User →

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

### Tender Screen



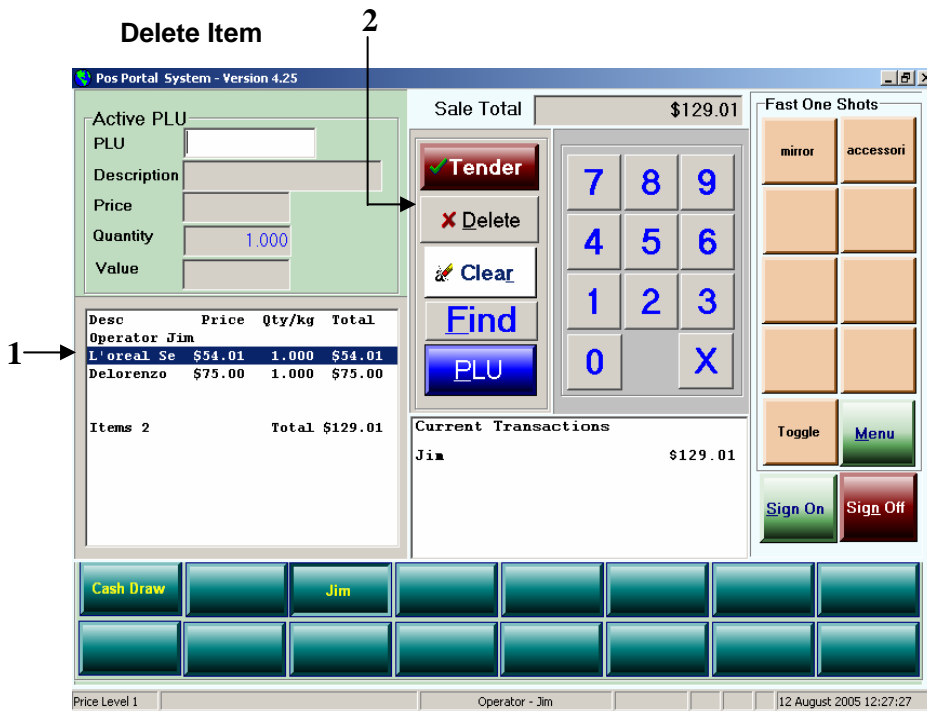
4. Select payment option
5. Enter money given
6. Hit Accept
7. Give customer change if any

### Void Sale

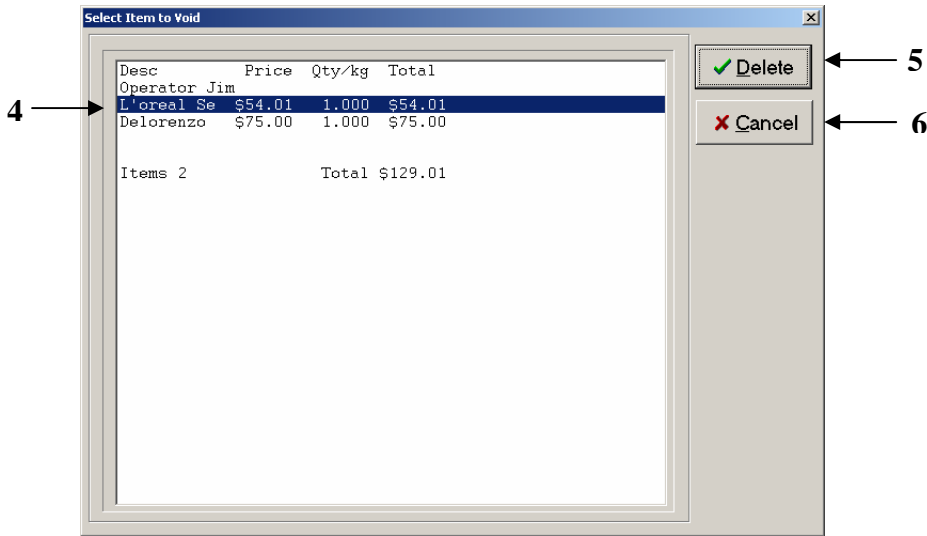


1. Hit the Void button
2. There should now be no items listed

### Delete Item



1. Select an Item as shown above
2. Hit the Delete button
3. The Void an item screen will then be displayed

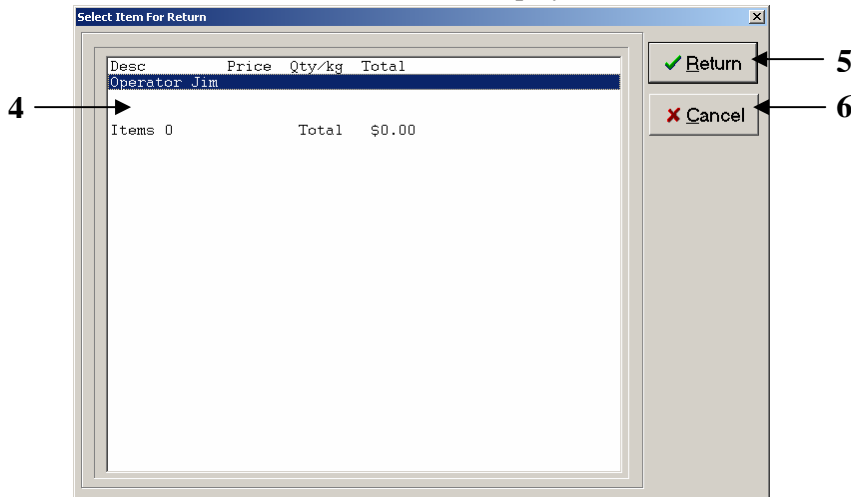


4. Select the item you want to Delete
5. Hit the Delete button OR
6. Hit Cancel to close the screen

The item should now be removed from the transaction

### Return an Item/s

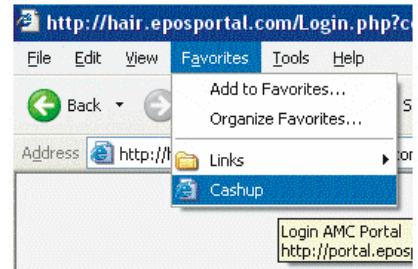
1. Scan Item/s
2. Hit the Menu button (Main Screen)
3. Hit the Return button on the Menu Screen
4. The return screen will then be displayed



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

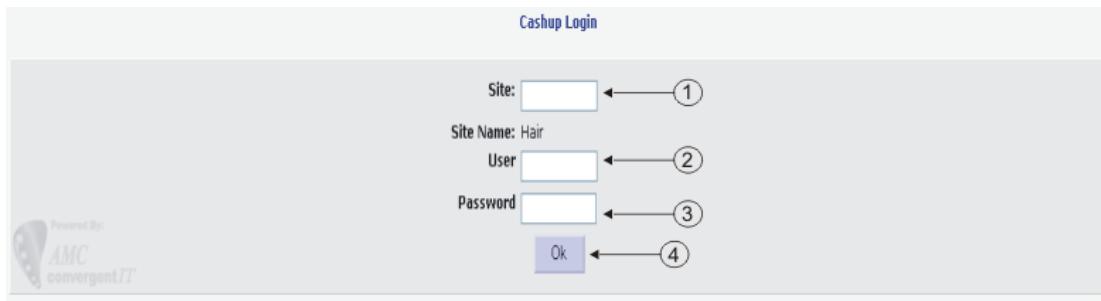
## Cash Up

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



or type <http://portal.eposportal.com:443/Hair/PosCashupLogin.php?site=> here  
place your site code number in the address bar

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



Cashup Login

Site:  ← ①

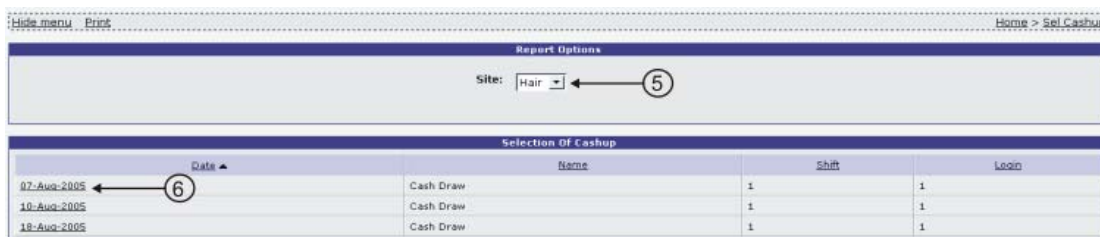
Site Name: Hair

User:  ← ②

Password:  ← ③

Ok ← ④

1. Enter your site code in the site field if it is blank or incorrect
2. Enter your User. This user should be 1
3. Enter the password you have given to user 1
4. If all the details are correct press the Ok button to proceed



Report Options

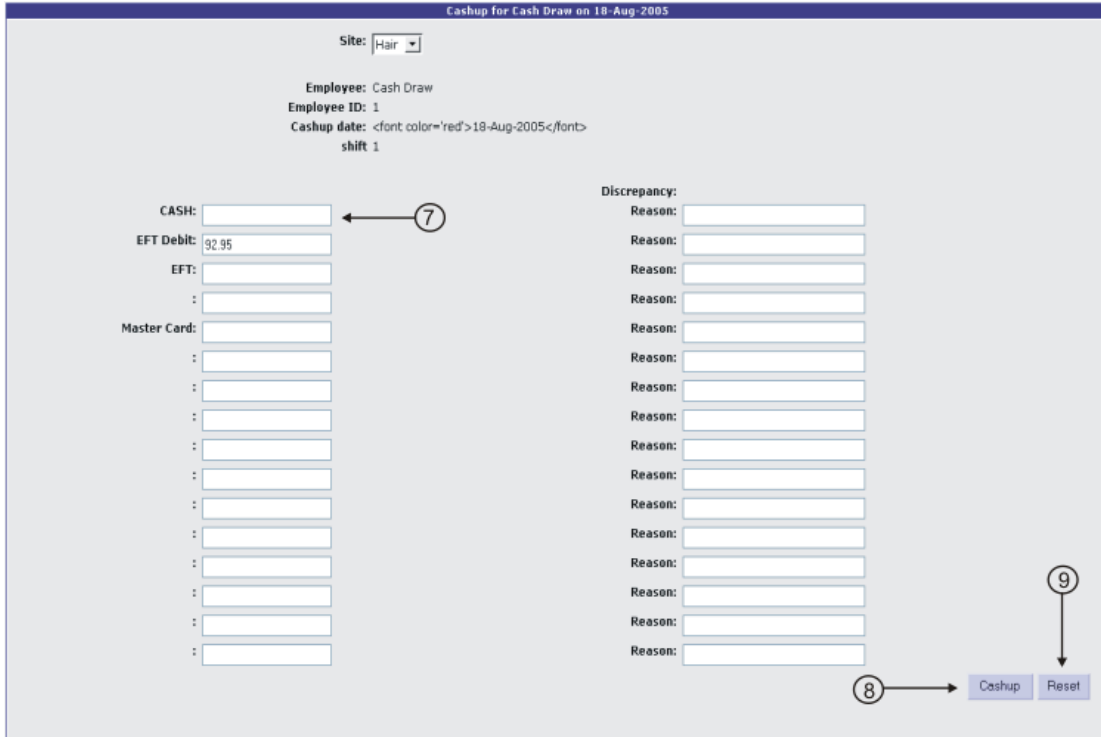
Site: Hair ← ⑤

Selection Of Cashup

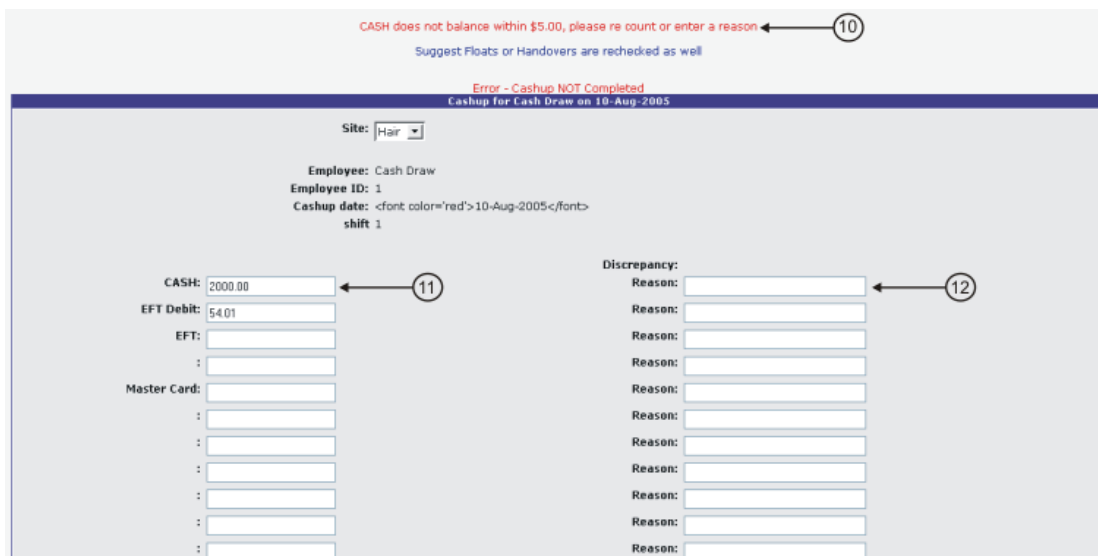
Date	Name	Shift	Login
07-Aug-2005 ← ⑥	Cash Draw	1	1
10-Aug-2005	Cash Draw	1	1
18-Aug-2005	Cash Draw	1	1

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

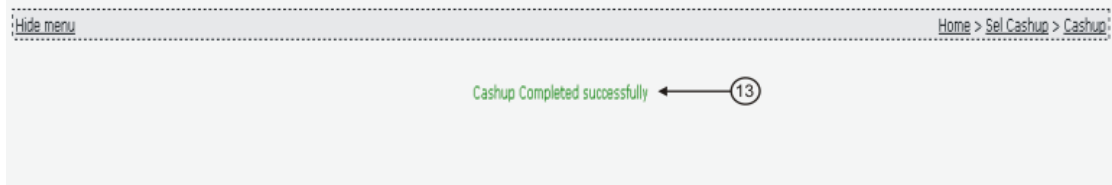




7. Enter the amount you are declaring in each tender e.g. Cash, EFT
8. If the amounts are correct press the Cashup button
9. If you would like to reset all the fields on the page to blank press the Reset button



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

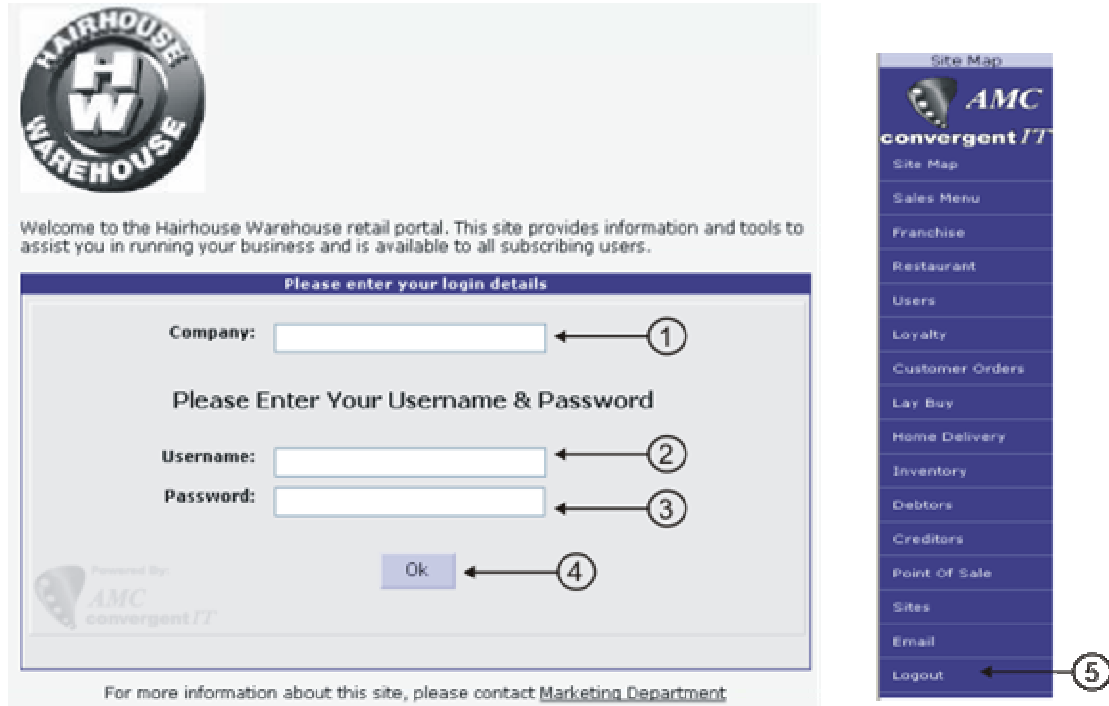


13. If the tender amounts were correct within  $\pm 5$  or you left a reason next to the incorrect tender/s you should see the above screen with message **“Cashup completed successfully”**

# PORTAL

## Login / Logout

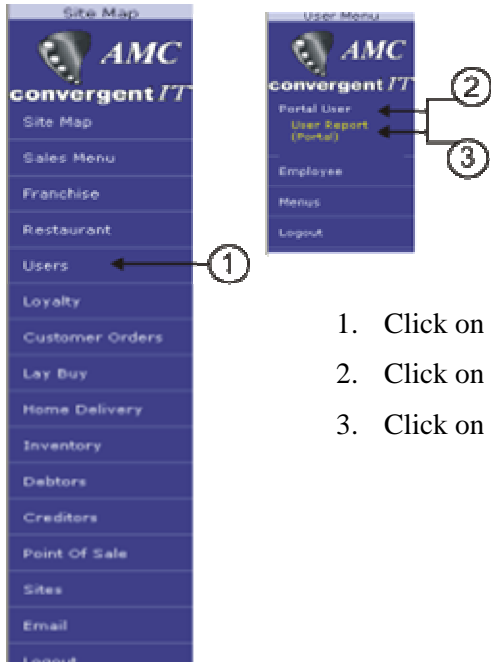
Portal URL address: <http://hair.eposportal.com/Login.php?company=> \_\_\_\_\_ Write your company number



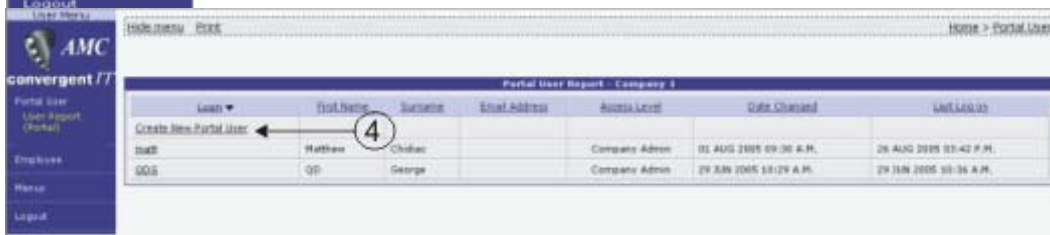
1. Type the name company and your company number in the company field. E.g. company 1. Please note if you have entered the URL address as shown above with the correct company number you will not have to perform this step.
2. Type your user name \_\_\_\_\_
3. Type your password
4. Click the Ok button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

# Users

## Portal User

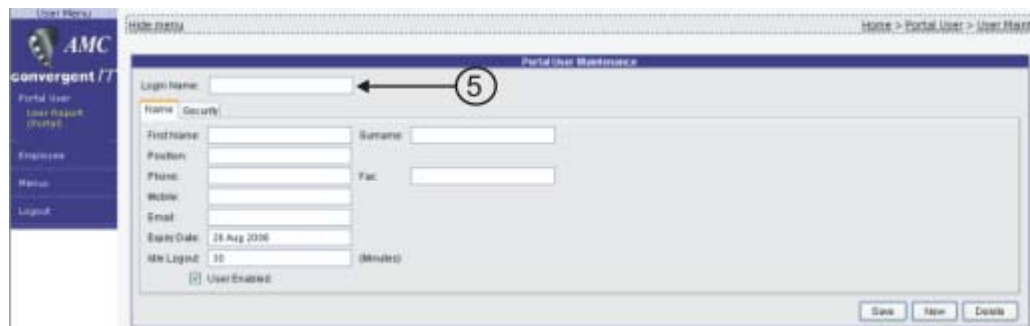


1. Click on Users on the side Menu
2. Click on Portal User
3. Click on User Report (Portal)

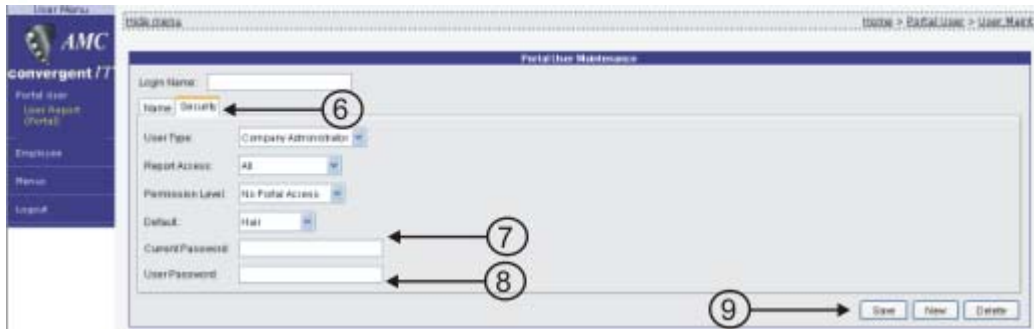


This report allows you to create a new portal user, view and edit existing portal users

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



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

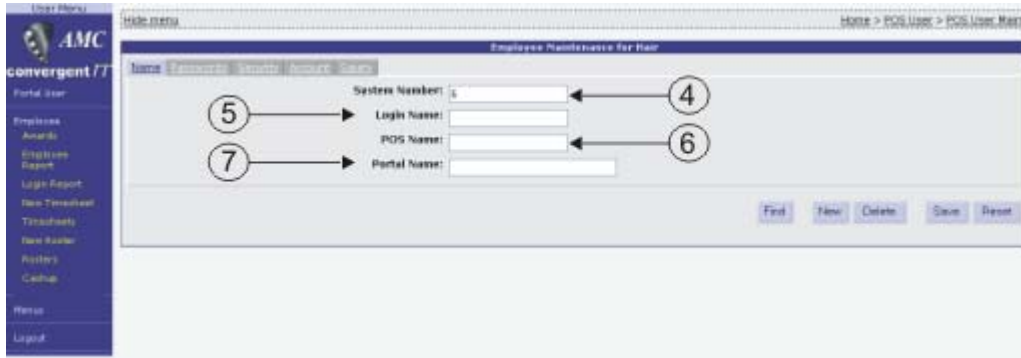


6. Click on the security Tab. This page allows you to set the rights the user will have on the portal.
7. After you have set the rights. Click on the Current Password field and enter YOUR PASSWORD
8. Then click on the User Password field and type a password for the user
9. Click Save. You will now be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

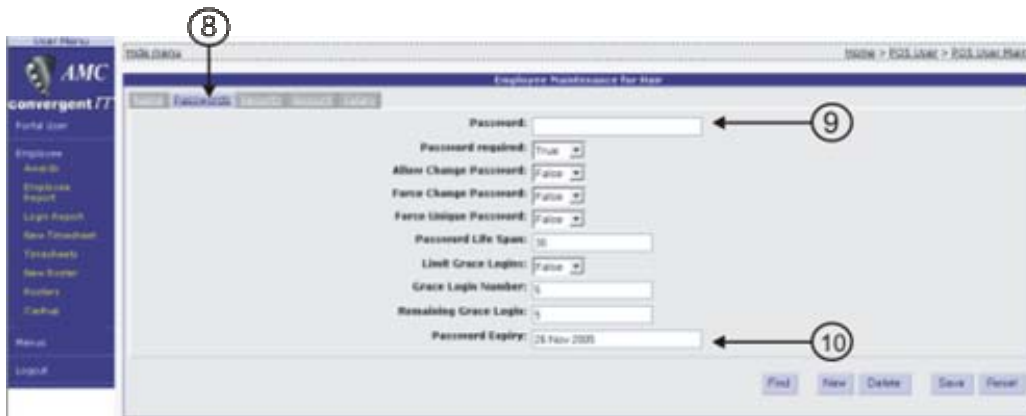
**Employee**



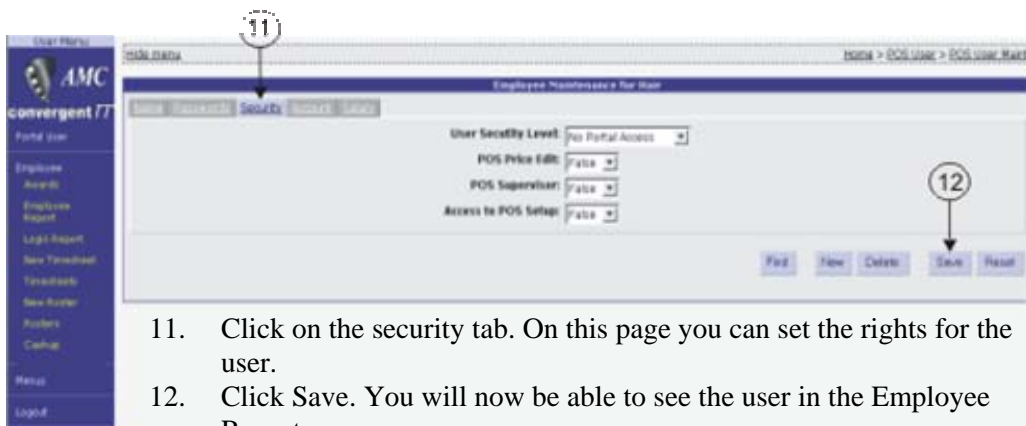
1. Click on Employee on the side Menu
2. Click on Employee Report  
This report allows you to create a new employee, view and edit existing employees. These users are for the point of sale.
3. To create a new employee click on Create New Employee



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




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



11. Click on the security tab. On this page you can set the rights for the user.
12. Click Save. You will now be able to see the user in the Employee Report.

# Inventory



1. Click on Menus
2. Click on Inventory
3. Click on Item Maintenance
4. Click on Edit Item
5. This page allows you to search in alphabetical order or you can perform a Custom search by entering a Description or an Item code or Barcode.
6. If you perform a custom search click on the search button once you have entered the details on the page



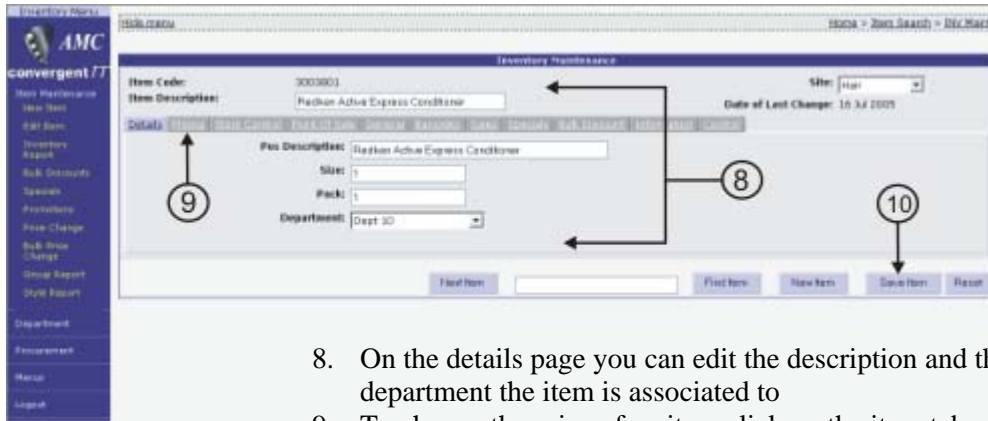
Items containing 'RedBee'

RedBee Active Shampoos Conditioner (3003801)	RedBee Framewerk 311am (3005117)
RedBee Active Shampoos Shampoo (3003802)	RedBee Fresh Curls Conditioner (3003821)
RedBee Artiste 311am (3003101)	RedBee Fresh Curls Shampoo (3003820)
RedBee Aftershave (3003921)	RedBee Fresh Curls Spray Control (3003855)
RedBee Aftershave Conditioner (3003811)	RedBee Full Cream 240gms (3005294)
RedBee Aftershave Lotion (3003812)	RedBee Glass 120ml (3005511)
RedBee Aftershave Cream (3003814)	RedBee Glass 60ml (3005510)

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

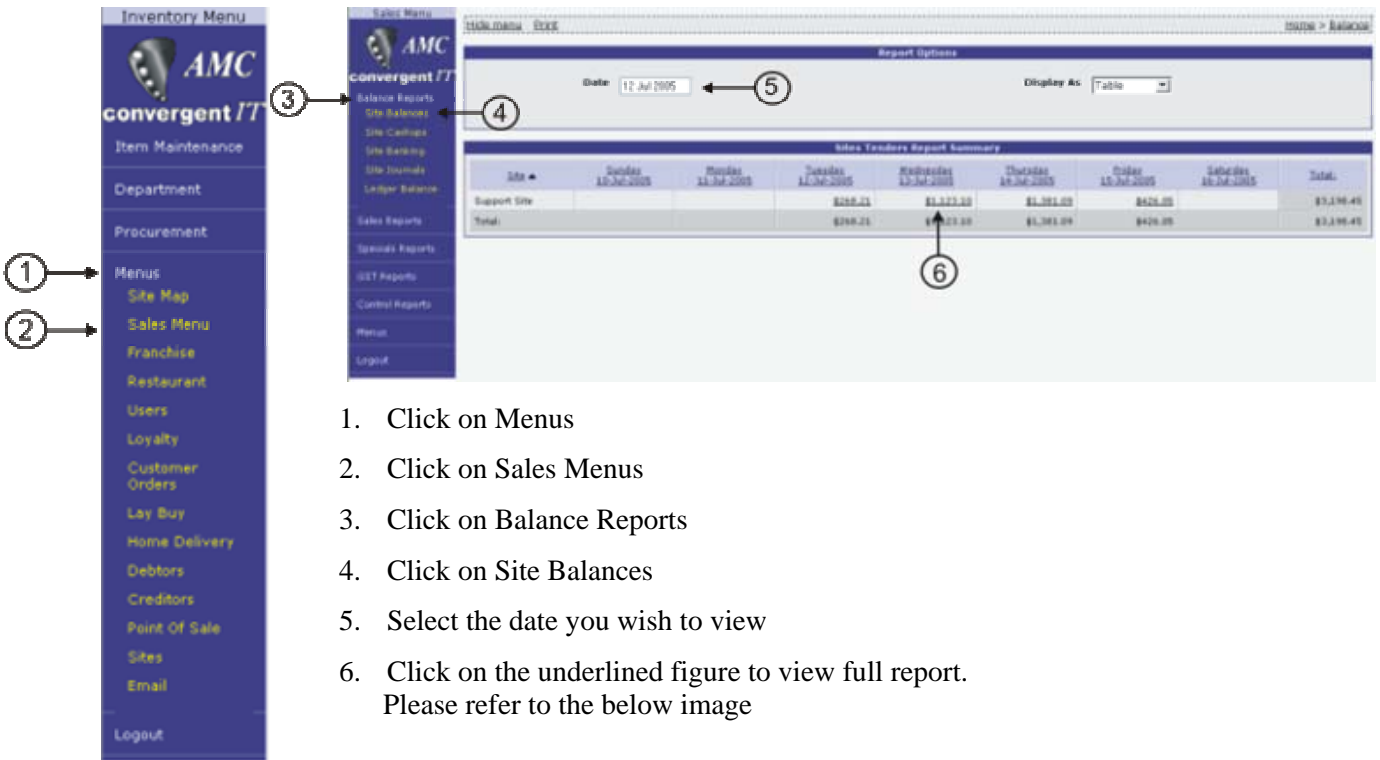
7. Click on the item you wish to edit





8. On the details page you can edit the description and the department the item is associated to
9. To change the price of an item click on the item tab and change the Retail Price
10. Once you have finished editing the item Click the Save Item button.

## Balance Reports

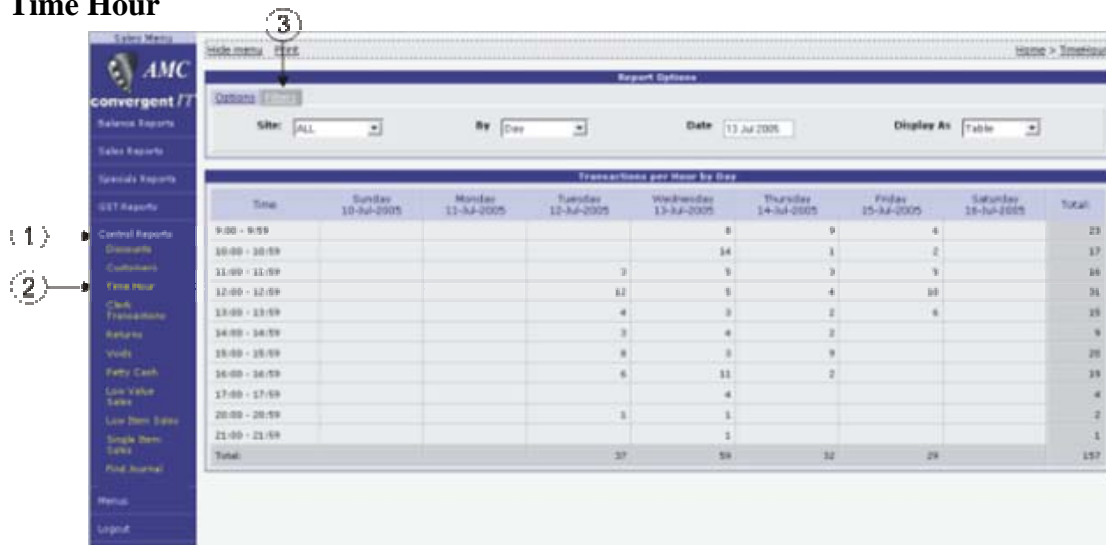


1. Click on Menus
2. Click on Sales Menus
3. Click on Balance Reports
4. Click on Site Balances
5. Select the date you wish to view
6. Click on the underlined figure to view full report. Please refer to the below image



# Control Reports

## Time Hour



Time	Sunday 10-Jul-2005	Monday 11-Jul-2005	Tuesday 12-Jul-2005	Wednesday 13-Jul-2005	Thursday 14-Jul-2005	Friday 15-Jul-2005	Saturday 16-Jul-2005	Total
9:00 - 9:59				0	9	4		23
10:00 - 10:59				14	3	2		17
11:00 - 11:59			3	9	3	3		18
12:00 - 12:59			12	5	4	10		31
13:00 - 13:59			4	3	2	6		15
14:00 - 14:59			3	4	2			9
15:00 - 15:59			8	0	9			17
16:00 - 16:59			6	11	2			19
17:00 - 17:59				4				4
18:00 - 18:59			1	1				2
19:00 - 19:59				1				1
Total			37	58	32	28		157

\*\*Please note we are still in Sales Menu

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



Time	Sunday 10-Jul-2005	Monday 11-Jul-2005	Tuesday 12-Jul-2005	Wednesday 13-Jul-2005	Thursday 14-Jul-2005	Friday 15-Jul-2005	Saturday 16-Jul-2005	Total
9:00 - 9:59				-\$250.18	\$299.00	\$127.00		\$175.82
10:00 - 10:59				\$246.87	\$45.00	\$112.49		\$404.36
11:00 - 11:59			\$54.73	\$7.00	\$65.00	\$112.75		\$339.48
12:00 - 12:59			\$92.76	\$48.00	-\$29.00	\$203.04		\$414.80
13:00 - 13:59			\$92.25	\$94.00	\$501.74	\$49.85		\$777.84
14:00 - 14:59			\$115.76	\$177.00	\$142.00			\$434.76
15:00 - 15:59			\$192.00	\$69.00	\$199.20			\$460.20
16:00 - 16:59			\$7.00	\$300.00	\$19.76			\$326.76
17:00 - 17:59				\$127.00				\$127.00
18:00 - 18:59			\$16.00	\$10.00				\$26.00
19:00 - 19:59				\$44.00				\$44.00
Total			\$577.51	\$1,376.81	\$1,392.44	\$524.93		\$4,132.79

Note: Menu values include non item-related sales or transactions

4. Click on the Type drop down menu and select Sales  
The sales will then be displayed between each hour as shown above.

### Clerk Transactions / Users

1. Click on Clerk Transactions

2. Click on the employee you wish to view

Once you have clicked on the employee a report will load as shown below listing each transaction.

3. To view the transaction Click on a journal number

Journal	Sunday 10-Jul-2005	Monday 11-Jul-2005	Tuesday 12-Jul-2005	Wednesday 13-Jul-2005	Thursday 14-Jul-2005	Friday 15-Jul-2005	Saturday 16-Jul-2005	Total
1			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
2			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
3			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
4			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
5			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
6			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
7			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
8			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
9			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
10			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
11			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
12			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
13			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
14			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
15			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
16			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
17			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
18			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
19			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
20			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
21			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
22			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
23			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
24			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
25			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
26			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
27			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
28			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
29			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
30			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
31			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
32			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
33			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
34			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
35			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
36			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
37			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
38			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
39			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
40			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
41			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
42			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
43			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
44			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
45			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
46			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
47			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
48			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
49			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
50			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
51			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
52			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
53			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
54			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
55			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
56			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
57			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
58			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
59			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
60			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
61			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
62			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
63			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
64			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
65			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
66			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
67			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
68			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
69			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
70			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
71			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
72			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
73			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
74			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
75			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
76			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
77			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
78			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
79			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
80			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
81			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
82			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
83			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
84			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
85			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
86			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
87			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
88			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
89			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
90			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
91			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
92			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
93			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
94			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
95			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
96			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
97			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
98			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
99			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74
100			\$15.74	\$75.00	-\$19.00	\$20.00		\$81.74

### Voids

1. Click on Voids

2. The void report will then be displayed outlining the total voids by each employee

## Sales Reports



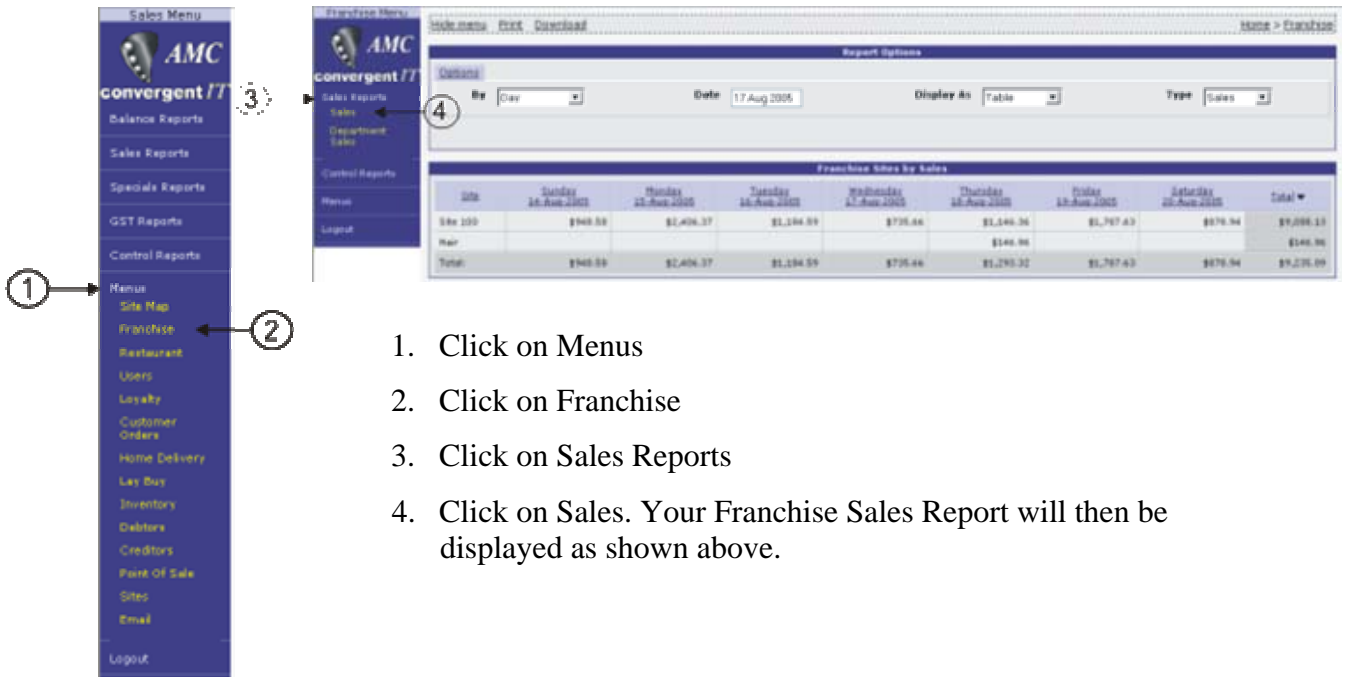
1. Click on Sales Reports

2. Click on Department Sales. This will display the total sales for each department.

Department	Sunday 14-Aug-2005	Monday 15-Aug-2005	Tuesday 16-Aug-2005	Wednesday 17-Aug-2005	Thursday 18-Aug-2005	Friday 19-Aug-2005	Saturday 20-Aug-2005	Total
Dept.12					\$108.00			\$108.00
Dept.22					\$10.94			\$10.94
<b>Total</b>					<b>\$118.94</b>			<b>\$118.94</b>

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

## Franchise Report



1. Click on Menus

2. Click on Franchise

3. Click on Sales Reports

4. Click on Sales. Your Franchise Sales Report will then be displayed as shown above.

Site	Sunday 14-Aug-2005	Monday 15-Aug-2005	Tuesday 16-Aug-2005	Wednesday 17-Aug-2005	Thursday 18-Aug-2005	Friday 19-Aug-2005	Saturday 20-Aug-2005	Total
Site 200	\$940.55	\$1,406.37	\$1,194.55	\$735.44	\$1,246.36	\$1,707.43	\$876.94	\$9,006.13
Hair					\$144.94			\$144.94
<b>Total</b>	<b>\$940.55</b>	<b>\$1,406.37</b>	<b>\$1,194.55</b>	<b>\$735.44</b>	<b>\$1,291.32</b>	<b>\$1,707.43</b>	<b>\$876.94</b>	<b>\$9,235.09</b>

