POSWiz

Inventory Management System

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Getting Started

Upon starting POSWiz you will be prompted for a PIN (Fig 1.0), if you have just installed it, enter the administration override pin (OVR) and click OK.

Fig 1.0 – The Login Panel

This will then bring to the main screen (Fig 1.1).

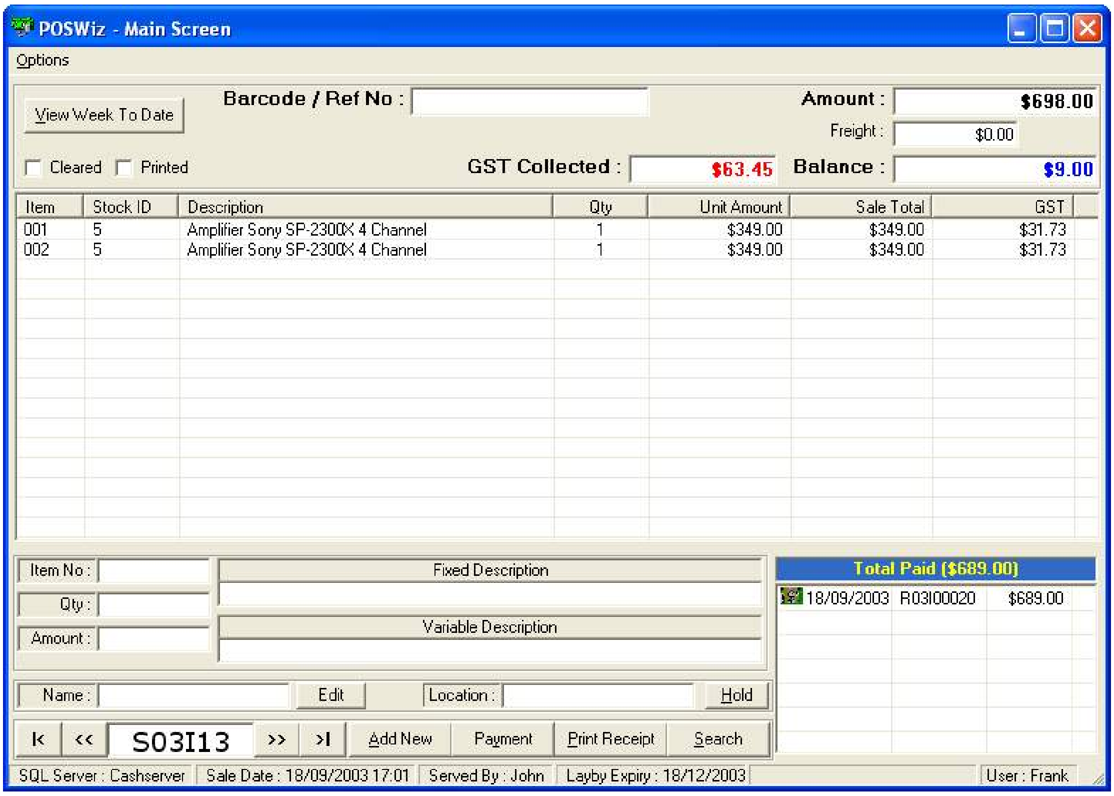

Fig 1.1 – POSWiz Main Screen

Creating a Sale

You will automatically be taken to the most recent sale. If this is the first run, there will be no data. You will need to add yourself as an employee on the system before continuing (see Employee PIN Security, pg 16). To add a sale, simply click the 'Add New' button, this will assign a new sale number for the deal and enter the sale details (time of sale, sale PIN etc). Next, scan the items barcode (or type in the items Stock ID and hit Enter) in the 'Barcode / Ref No' field; this will automatically add the relevant item to the current sale. Stock items are booked in using the Inventory Panel (See Inventory Management, pg 9)

Any altering of the price, quantity or item description can be achieved by clicking on the item you wish to edit and altering the corresponding fields at the bottom of the screen. To delete a sale item, simply right click on the item you wish to delete and choose 'Delete This Item' from the menu.

Completing a Sale

Once you are happy with the sale you have added, click the 'Payment' Button to proceed to the 'Point of Sale Payment Panel' (Fig 1.2).

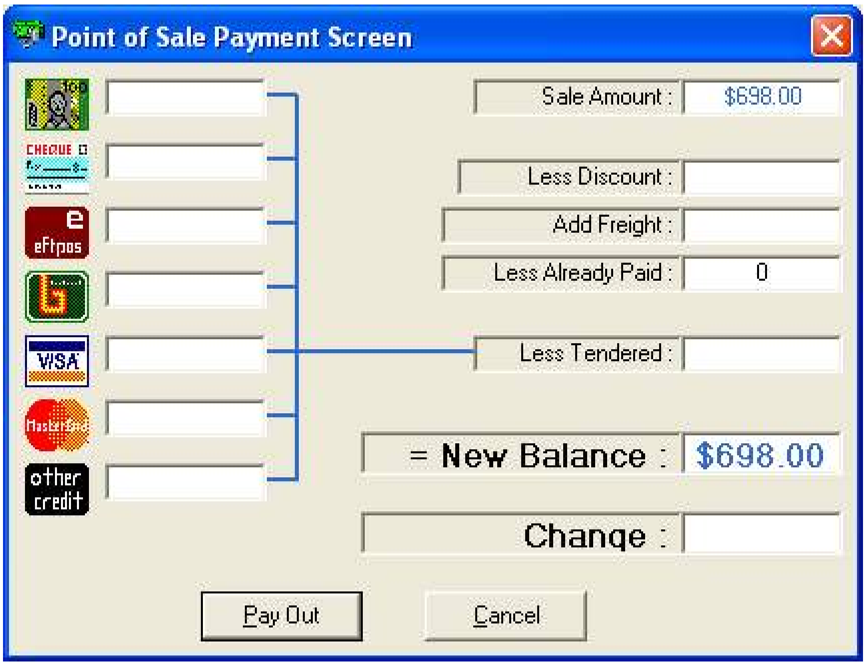

Fig 1.2 – The Point of Sale Payment Panel

Upon entering this screen you will see that the total amount of the sale is shown in the 'Sale Amount' field (top right). Simply enter the amount that you receive from the customer in the corresponding field (Cash, EFT, Visa etc) and the balance (if any) will be shown in the 'New Balance' field. The 'Change' field will show any change the customer is due (if applicable).

Next click the 'Pay Out' button to continue. Depending on your settings, a receipt may be printed automatically or you may be prompted to print one. A receipt can be printed at any time by clicking the 'Print Receipt' button on the main form (See Fig 1.1).

You will be returned to the main screen and will notice that a new receipt entry will be shown in the 'Total Paid' section of the screen (bottom right) and the sale 'Cleared' box will be checked if the total amount of the sale has been paid.

Laybys

When a sale is done, be it a layby or not, it is possible to assign a customer to that sale, making it easier to find at a later date if they lose their receipt.

To add a customer to a layby, simply type their name in the 'Name' field on the main screen (use the format: Surname, Given Names) and then right-click on their name. A menu will appear with all the matches that you currently have on record. Note partial searches also work, for example: typing "S, Billy" would return all customers with the first name "Billy" and surname that begins with "S", so both "Smith, Billy" and "Simpson, Billy" would both be returned (see Fig 1.3).

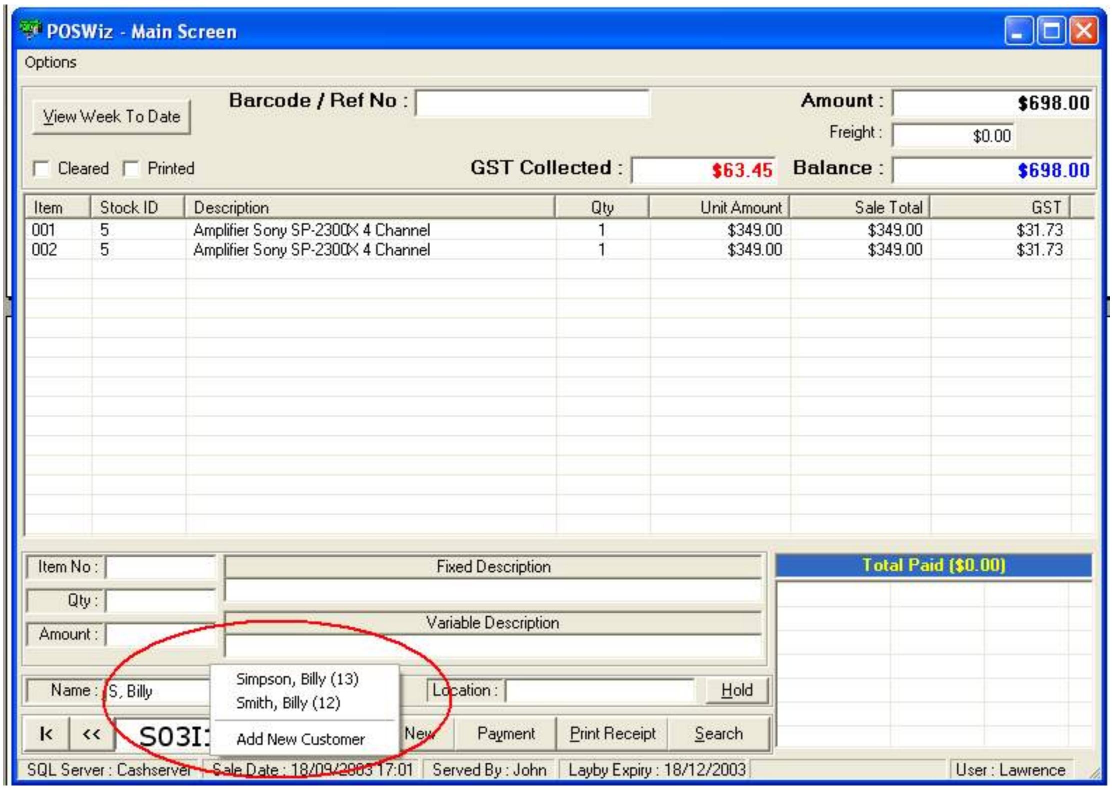

Fig 1.3 – Highlights Name Results with search criteria

If the desired customer name appears in the results then it is just a matter of clicking on their name, this automatically assigns the selected customer to the sale. If the customers name isn't there, and they don't exist on your system, choose the 'Add New Customer' option at the bottom of the menu.

Adding / Editing Customer Details

This will bring you to the 'Add New Layby Name Details' Panel (Fig 1.4).

Fig 1.4 – Layby Name Details

Once here, you fill in the customer's details and click the 'Add' button, this will add them to your customer database and attach them to the sale. This same screen can be reached to edit existing customer's details by clicking the 'Edit' button on the main screen, located next to the 'Name' field (See Fig 1.1).

Holds / Extensions

Putting a hold on a layby will stop it from becoming overdue. To achieve this, from the main screen, you simply choose the layby you want to put a hold on, and click the 'Hold' button. From here you will enter the 'Layby – Hold Info' Panel (Fig 1.5).

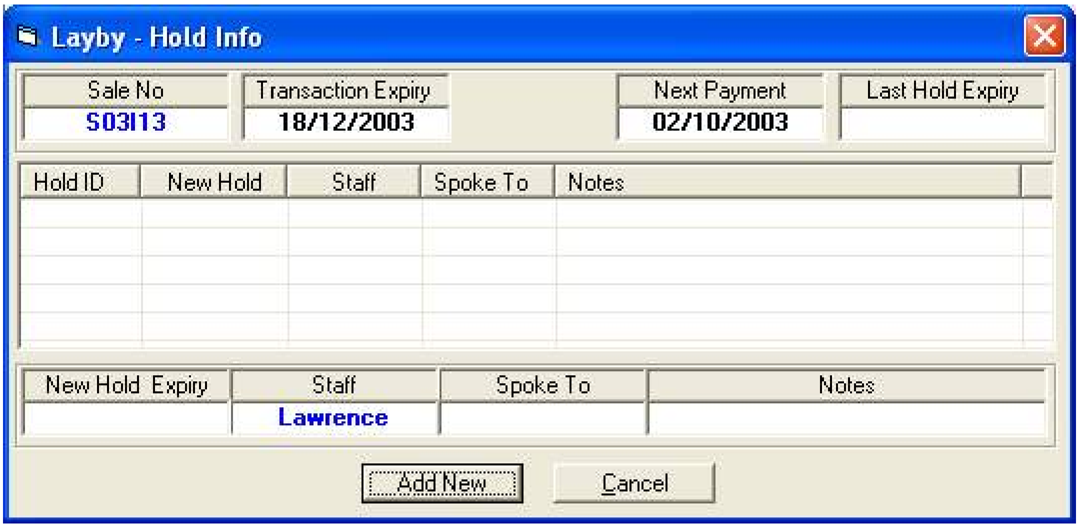

Fig 1.5 – The Hold Info Panel

Once here, click the 'Add New' Button. You will notice that the 'Add New' button has now changed to a 'Save' button. Today's date will automatically be inserted into the 'New Hold Expiry' field, as an indicator of the correct format. Change this to the required date, enter the name of the person who requested the hold, add any relevant notes and click the 'Save' button.

This will return you to the main screen, and you will notice that the Hold date is displayed at the top of the sale (See Fig 1.6).

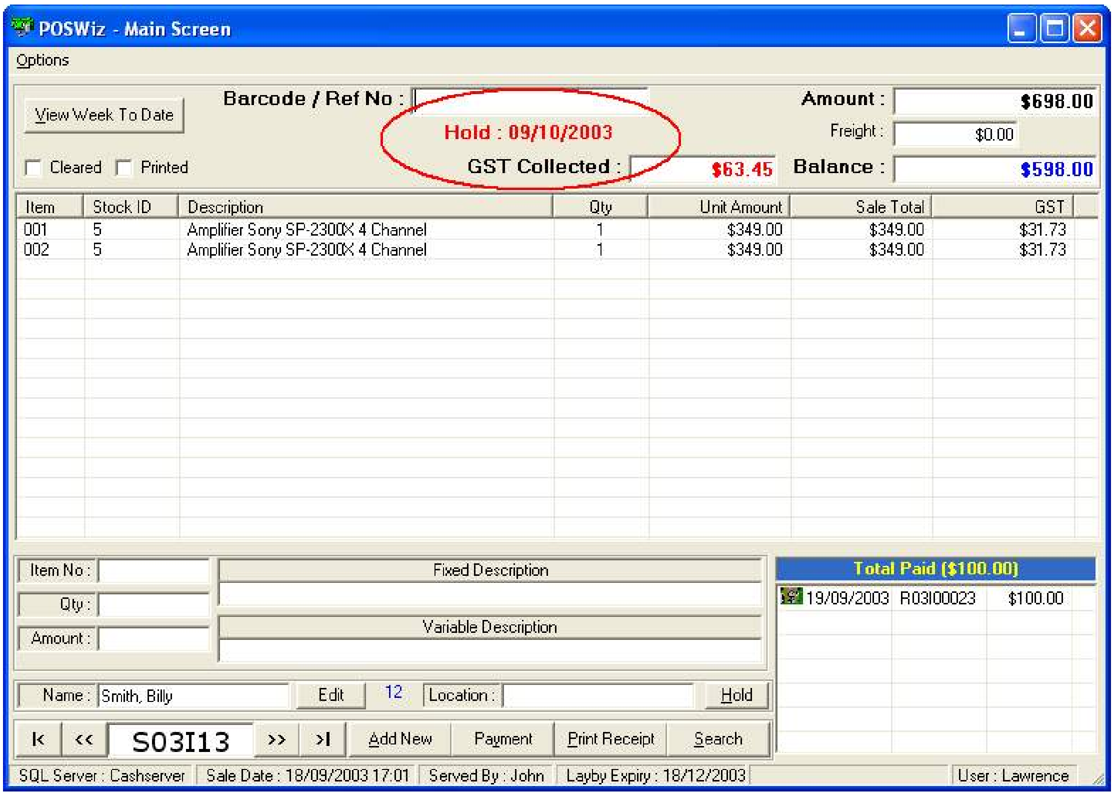

Fig 1.6 – The Hold date is displayed on the sale header

Inventory Management

From the main screen, click on the ‘Options’ menu and choose ‘Inventory’ (or press CTRL + I). You will then see the ‘Inventory’ Panel (Fig 1.7).

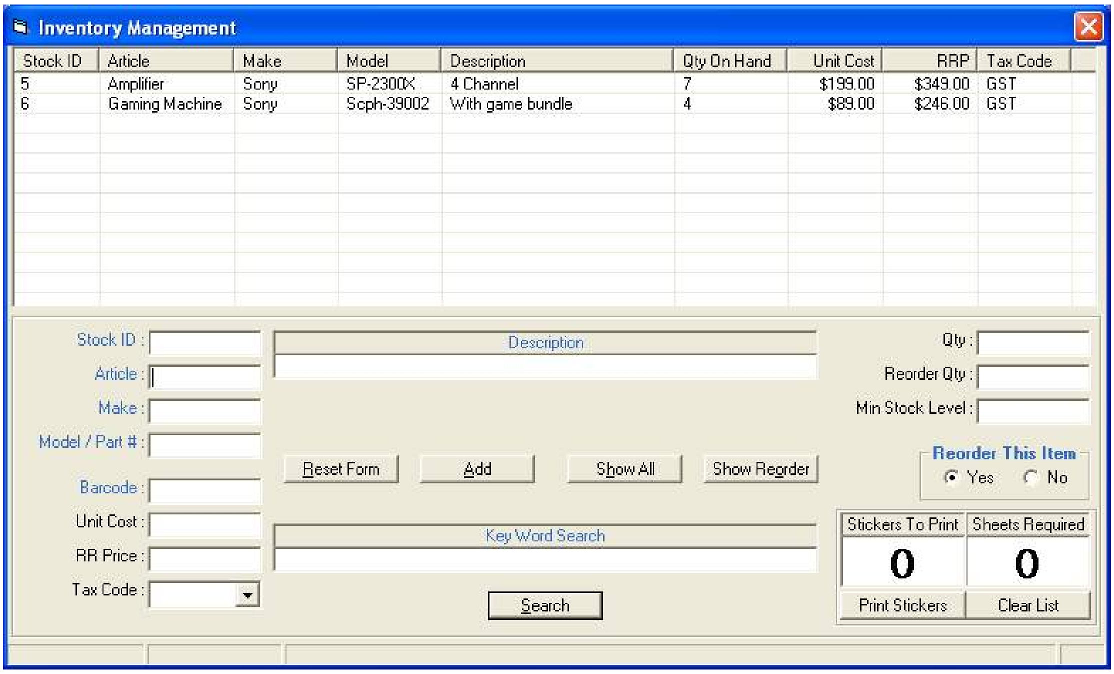

Fig 1.7 – The Inventory Management Panel

Booking Stock In

To add a new item that you haven’t stocked before, click the ‘Add’ Button. This will add a new stock entry and position the cursor in the ‘Article’ field ready to add your new stock item. As you type the article in, if you right-click in the article field, a menu will drop down with all previous stock articles that match your entry. Once you have filled in all the appropriate fields, clicking the ‘Show All’ Button, or selecting another stock item from the list will save your new entry. The ‘Minimum Stock Level’ field is used to gauge when you need to reorder a stock item.

Edit Stock Items

To edit an existing stock item, simply click on the item you wish to edit. This will put all the corresponding data into the panel below, and you are ready to edit.

Print Stock Stickers

To print stock stickers for a particular item, right-click on the stock item and choose ‘Print Stickers for the Item’ from the dropdown menu, you will then be prompted to enter the amount of stickers to print for that item. This queues the stickers to be printed, and keeps a tally in the bottom right-hand corner of the panel. When you are ready to print the stickers, place the amount of sticker sheets in the ‘Sheets Required’ field into your printer and click the ‘Print Stickers’ button. When the stickers have been successfully printed, the sticker tally text will turn grey. Clicking the ‘Clear List’ button will purge the tally of stickers to be printed.

View Stock that needs Re-Ordering

To view any stock that has a quantity lower than its minimum stock level, simply click the 'Show Reorder' button. This function is also available in report format from the Administration Panel.

The Inventory Management panel also doubles as a stock search. To use this enter your search criteria into any of the fields highlighted in blue, and click on the search button. Your search result will be displayed in the top grid.

Refunds

From the main screen, click on the 'Options' menu and choose 'Refunds' (or press CTRL + R). You will then see the 'Refunds' Panel (Fig 1.9).

Creating / Editing a Refund

To create a new refund, right-click on the sale item you wish to refund (on the main screen), and choose 'Refund This Item' from the dropdown menu (See Fig 1.8).

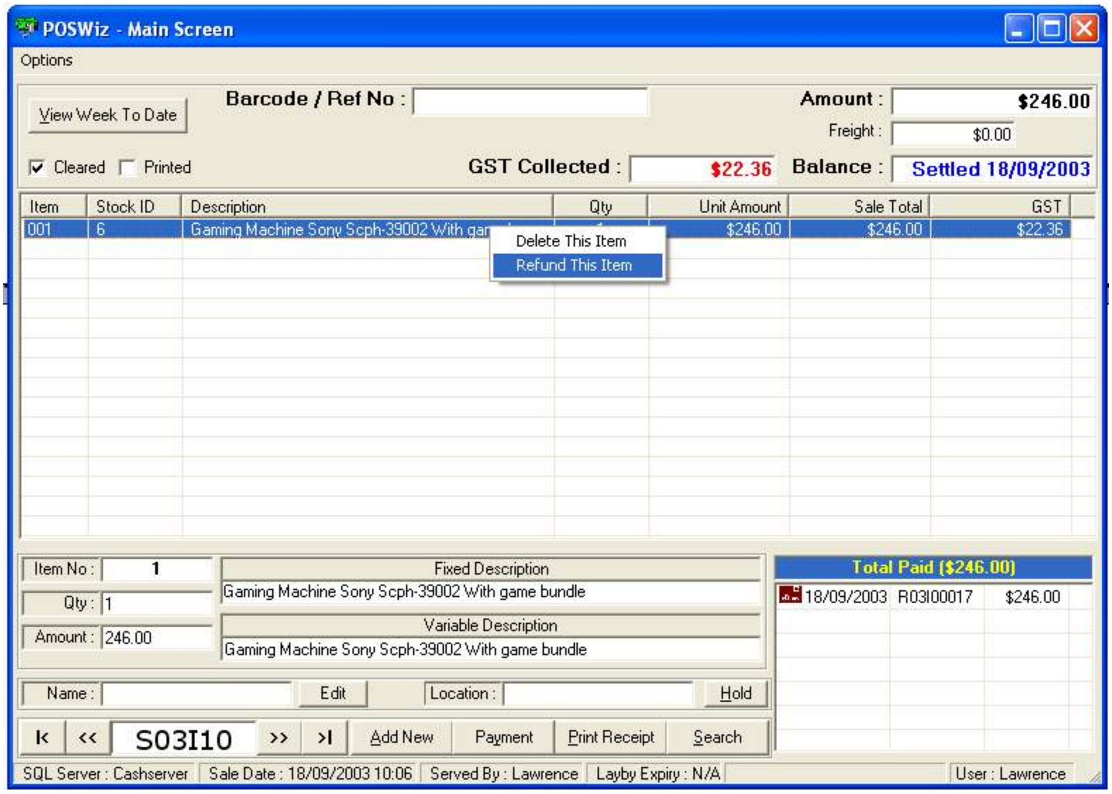

Fig 1.8 – Refunding a sale item

This will create a new refund and display the 'Refunds' panel (Fig 1.9).

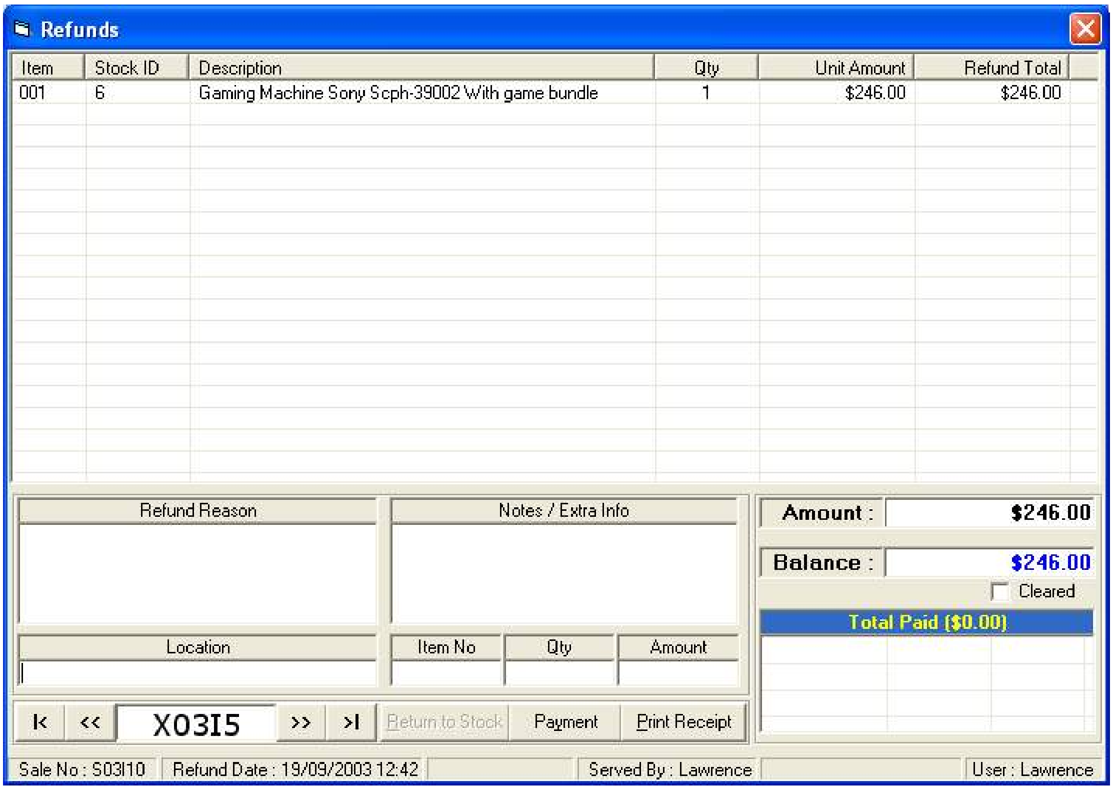

Fig 1.9 – The Refunds Panel showing latest Refund

Once here, you can enter a reason for the refund and the location of the refunded goods. Also if there are any notes or other info relevant to the refund they can be entered here.

Editing / Deleting Refund Items

Any altering of the price or quantity can be achieved by clicking on the item you wish to edit and altering the corresponding fields at the bottom of the screen. To delete a Refund item, simply right click on the item you wish to delete and choose 'Delete This Item' from the menu.

Completing a Refund

As with a sale, once you are happy with the refund you have added, click the 'Payment' Button to proceed to the 'Point of Sale Payment Panel' (Fig 1.2). (See "Completing a Sale" on page 3).

Licence Details

The Licence Details panel holds your entire program 'Personal Settings'. You can reach this panel from than main screen by clicking on the options menu and choosing 'Licence Details'. Once here, to edit the details, click the 'Unlock' Button (Fig 2.0). If you have an 'Admin Password' set then you will be prompted for it.

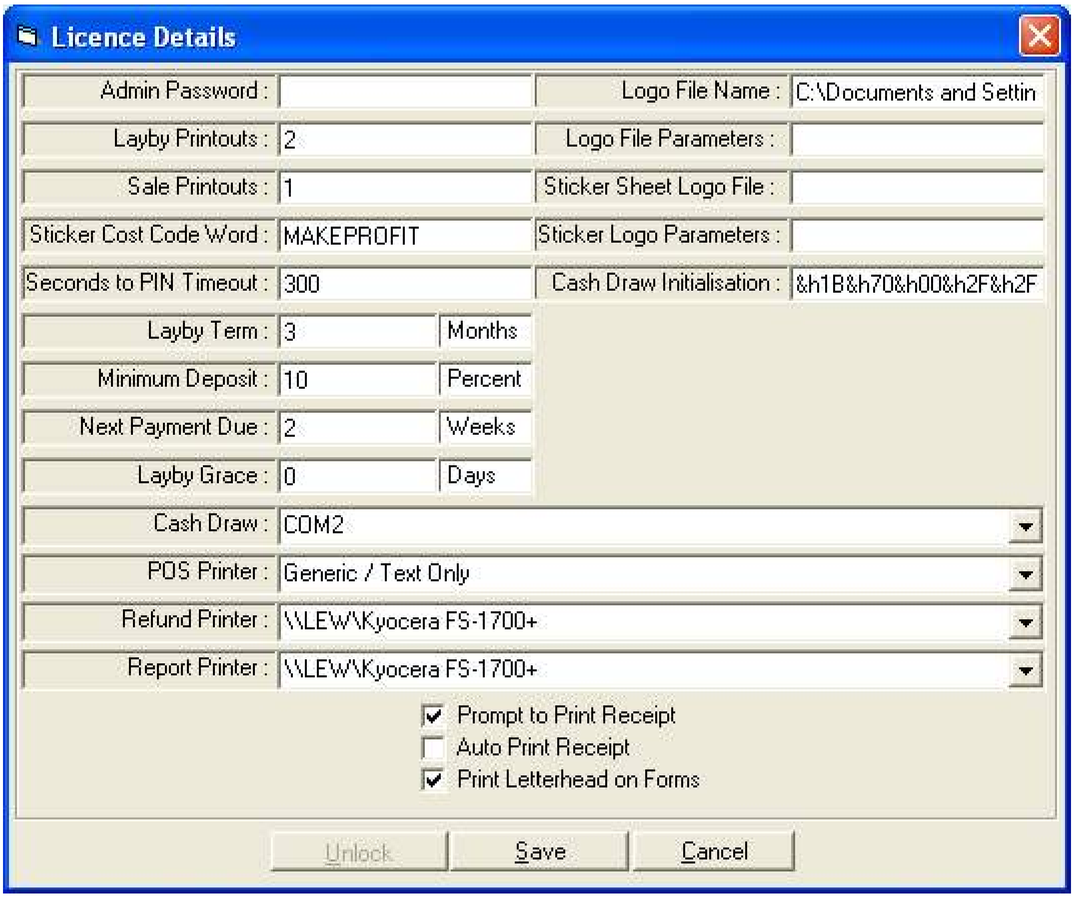

Fig 2.0 – The Licence Details Panel

The Licence Details panel includes the following fields:

- Admin Password – The admin password (if set) will be requested whenever someone tries to enter the administration panel, or unlock the licence details panel.
- Layby Printouts – The Number of Receipts to print for a layby
- Sale Printouts – The Number of Receipts to print for a sale
- Sticker Cost Code Word – A secret codeword to be printed on the sticker to represent the cost of that item (ie using the above example, if an items cost was $150, then MPT would be printed on the stock sticker)
- Seconds To PIN Timeout – The number of seconds that the program can be idle before the Screen Saver is displayed
- Layby Term – The length of time (in months) that a layby can last
- Minimum Deposit – The percentage of the sale total that must be provided for a layby

- Next Payment Due – The Maximum length of time (in weeks) that a layby can go without a payment made

- Layby Grace – The amount of days overdue a layby can be before it is returned to stock

- Logo File Name – The path to the logo file that is to be used in your letterhead

- Logo File Parameters – The X, Y, Scale X and Scale Y figures for changing the letterhead logo position

- Sticker Sheet Logo File – The path to the logo file that is to be used on your stock stickers

- Sticker Logo Parameters - The X, Y, Scale X and Scale Y figures for changing the sticker logo position

- Cash Draw Initialisation – The initialisation string needed for your cash draw.

- Cash Draw – The network (or local) connection for your cash draw

- POS Printer – The network (or local) connection for your POS Printer

- Refund Printer – The network (or local) connection for your Refund Printer

- Report Printer - The network (or local) connection for your Report Printer

- Prompt to Print Receipt – If checked, the user will be prompted to print a receipt whenever a payment is made.

- Auto Print Receipt – A receipt will be automatically printed whenever a payment is made

- Print Letterhead on Forms – If checked, your company letterhead will be printed on all forms

Administration Panel

YTD Figures

Upon entering the 'Administration' Panel, your Year to Date Figures are automatically calculated and displayed at the top of the screen (see Fig 2.1)

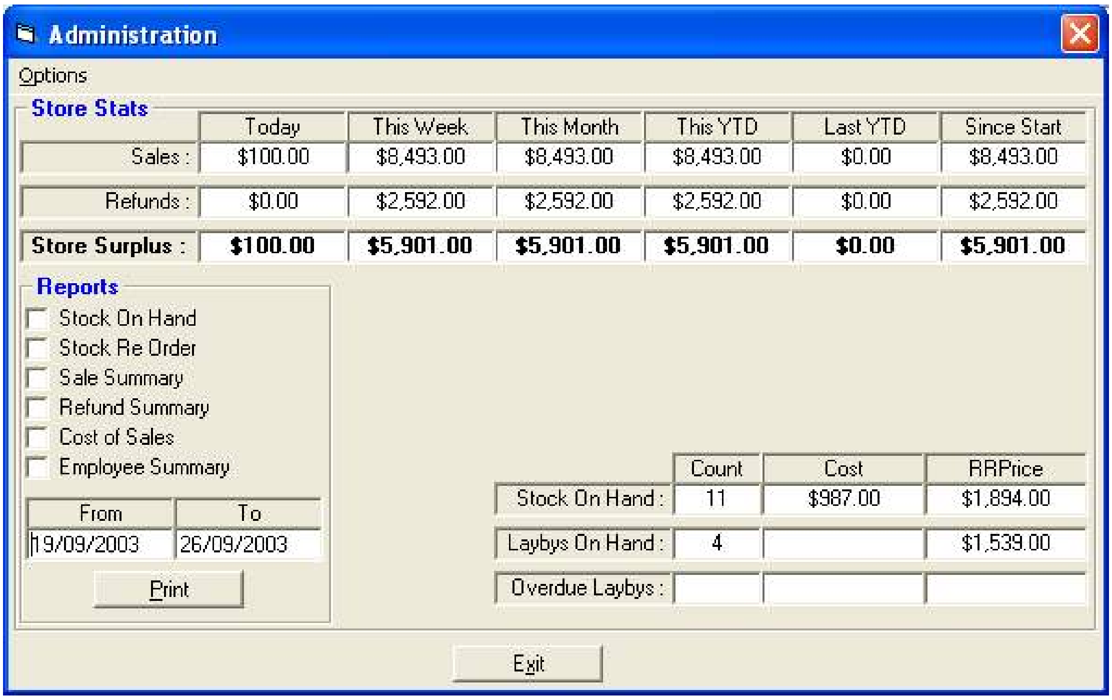

Fig 2.1 – The Administration Panel

Your Stock Figures are also calculated and displayed in the bottom right-hand corner of the panel.

Reports

The Administration reports cover all aspects of the retail business. Simply choose which report to print, choose the dates that you want to see, and click print.

Sale, Layby, and Refund Wording

From the Administration panel you can access the Wording Panel. Choose Options and the wording you wish to edit (Sale, Layby or Refund). This wording will appear on your Receipts. Once you have edited the wording to your satisfaction, click OK, it's that simple.

Employee PIN Security

The Employee PIN Security panel (Fig 2.2) is where you Add, Delete and modify employee details.

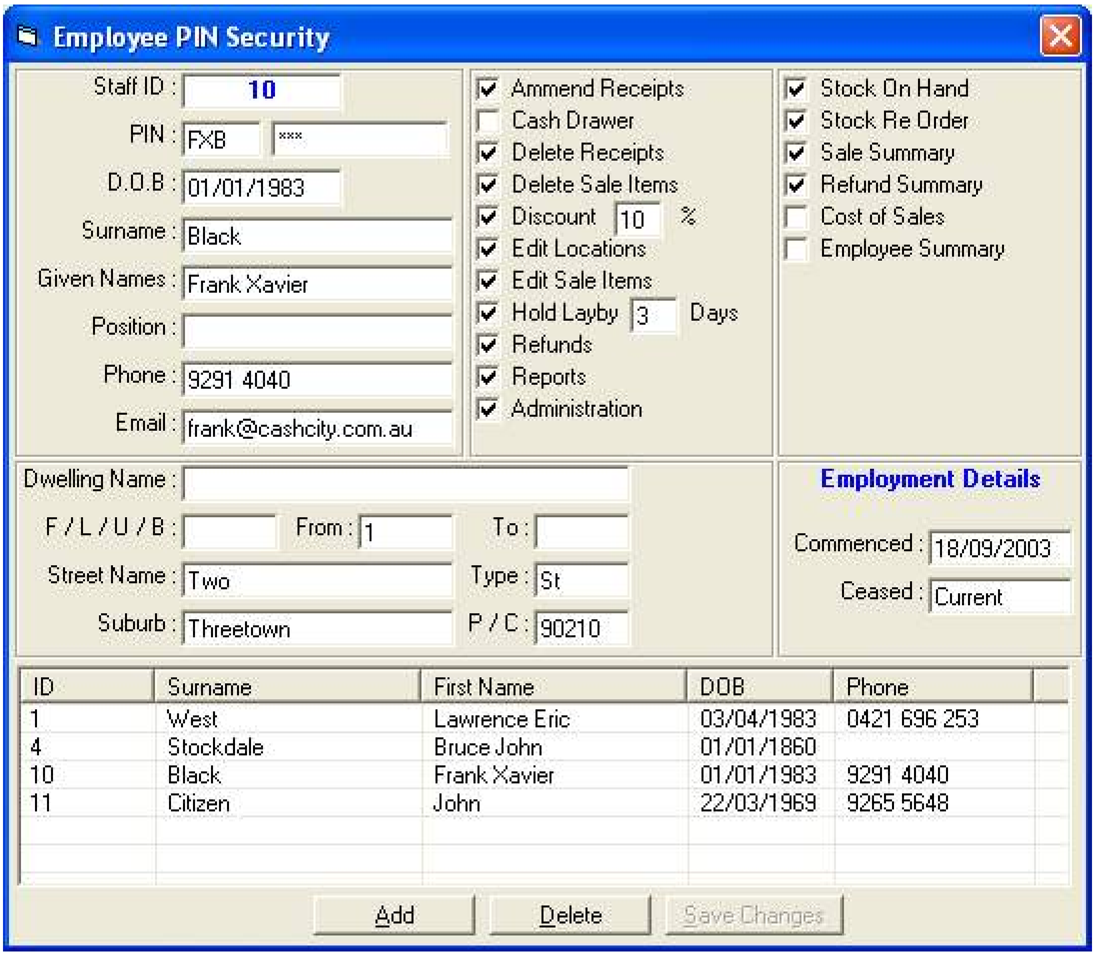

Fig 2.2 – The Employee PIN Security Panel

Add / Edit an Employee

To add an employee, simply click the 'Add' button, you will be prompted to enter the new employee's surname. Once you have done that, you will be prompted to enter a PIN for them.

Then you will see their name appear in the grid at the bottom of the panel. To enter the rest of their details, simply select them in the grid. Their details will now be available for editing in the fields at the top of the form.

Their security rights will also be displayed on the right hand side of the form, initially, they will have no rights at all. Assign them the rights that are applicable to what they will be doing and either click the 'Save Changes' Button or select another employee to save the changes.

Deleting an Employee

To delete an employee, simply select their name in the grid and click the delete button. When an employee is deleted, their 'Ceased Employment' field will be set to the date they were deleted.

Layby Search / Stock Lookup

You can reach the search panel by clicking the 'Search' button on the main form (see Fig 1.1). The Search panel has 2 search modes available, Layby Search, and Stock Lookup. Upon entering the search panel will be in Layby Search mode (Fig 2.3).

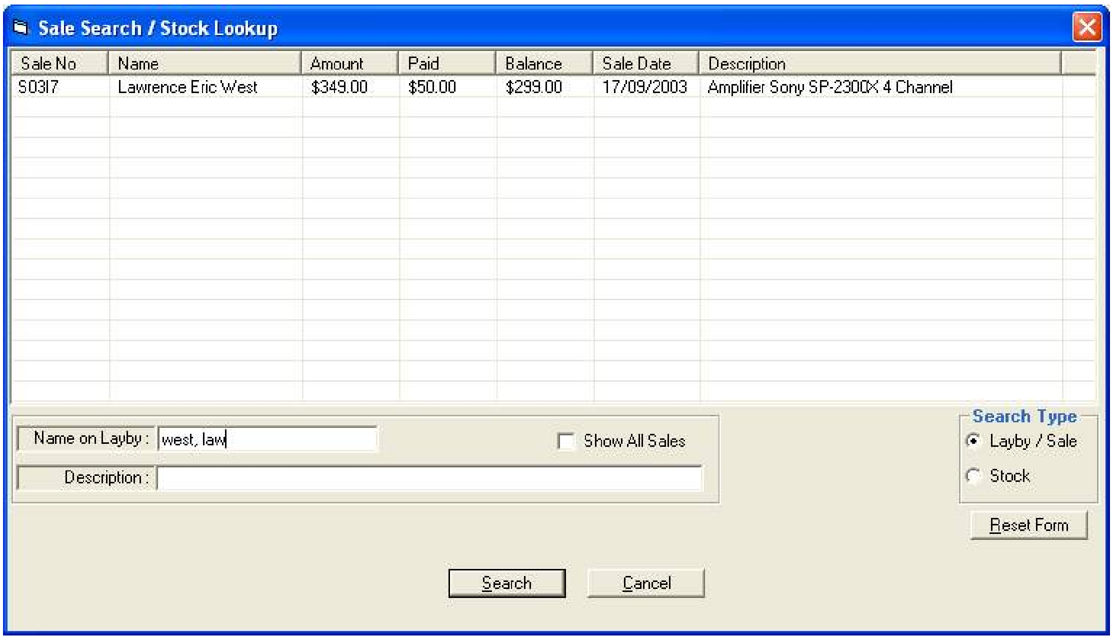

Fig 2.3 – The Search Panel (Layby Search Mode)

Layby Search Mode

When in layby search mode, you are able to search in two different ways.

1) You can search on the customer's name (in the format: Surname, Given Names). This will search all current laybys in the system for that customer. Again partial name searches are fine. The results of that search will be displayed in the grid at the top of the panel. If you wish to show all the sales in a customers name (both sales and laybys), simply check the 'Show All Sales' checkbox before you search.
2) You can search on a description of the goods sold in the layby, this is particularly useful if the customer has lost his/her receipt and the layby wasn't put in his/her name.

Once you have found the sale / layby that you are looking for, double-click it in the grid and you will be taken to the selected sale.

Stock Lookup Mode

To toggle Stock Lookup Mode, click the 'Stock' Option in the Search Type box, located at the bottom right-hand side of the panel (See Fig 2.4)

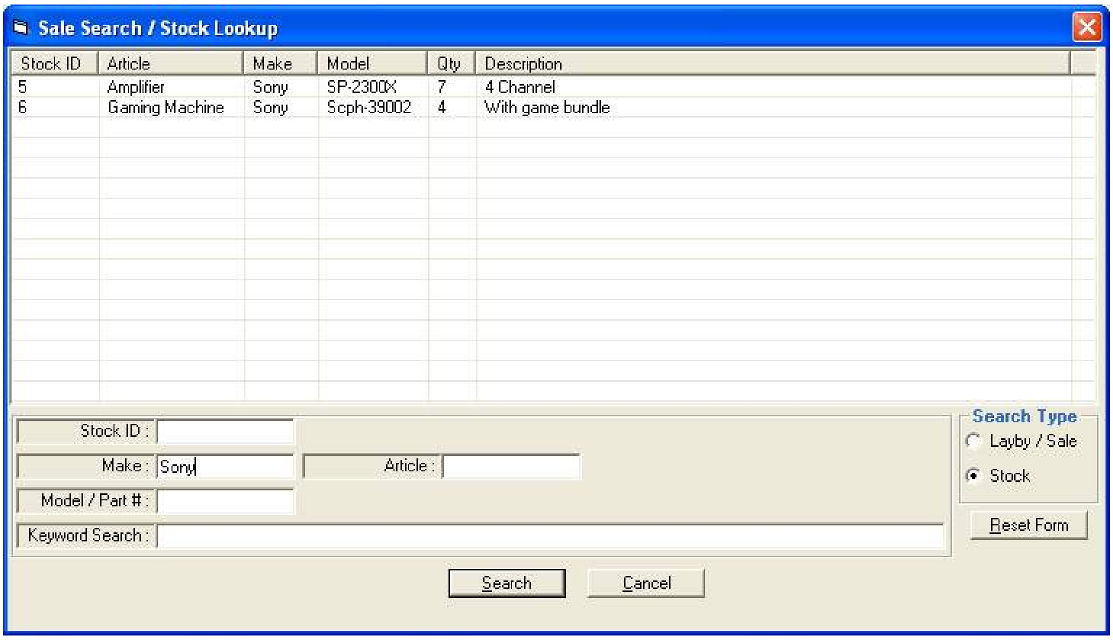

Fig 2.4 – The Search Panel (Stock Lookup Mode)

Once you have toggled Stock Lookup Mode, you will now be searching in your stock on hand. The 'Keyword Search' Feature searches the article, make, model and description fields for keywords. The results are displayed in the grid above. To add any of the search results to a sale simply double-click on the item you wish to add. You will automatically be taken to the main screen with your selection loaded as a sale item. Clicking the 'Reset Form' button will set the search panel back to Layby Search Mode.

Hopefully this manual has helped you getting started with POSWiz. If you have any further questions, comments or suggestions, please don't hesitate to contact us.

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Thank you for your ongoing support.

The ComWiz 32Bit Development Team.